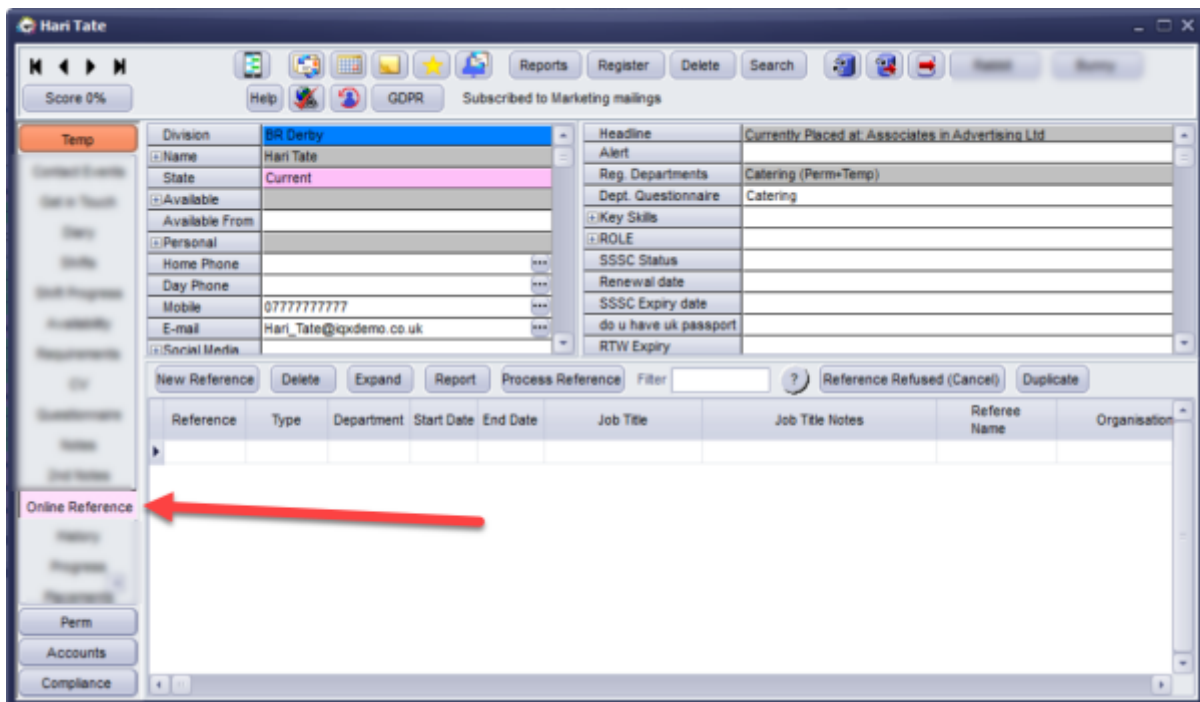




## WORK IN PROGRESS

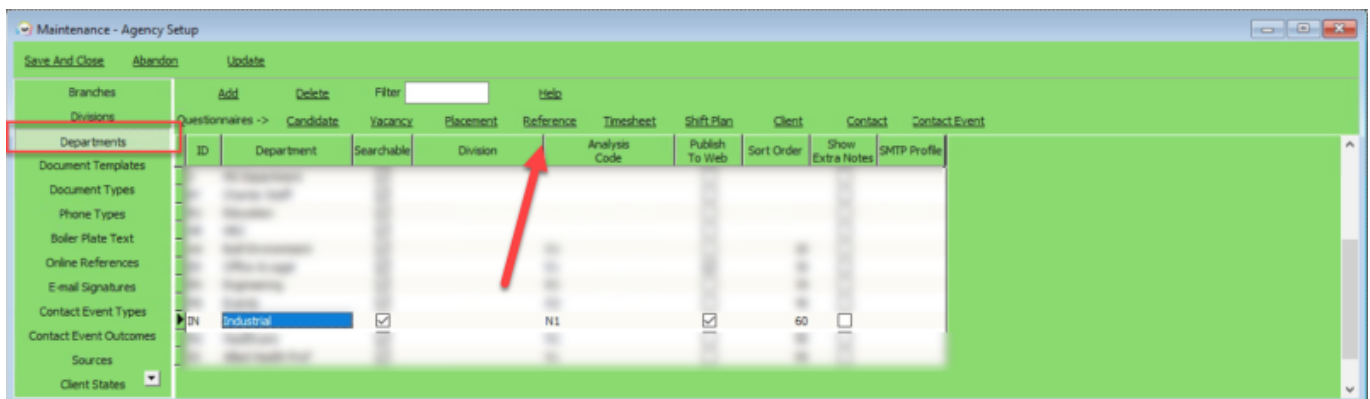
### How to Configure Online Web Reference

1) To turn on the view in the Candidate Record: Go to General Settings > **Show Person On-line Reference View** > Set this to **Y** and ensure **Person Reference Request** is set to **N**. you will now see this on the Candidate Record



The screenshot shows the 'Hari Tate' candidate record form. The left sidebar contains various options, with 'Online Reference' highlighted in pink and pointed to by a red arrow. The main form area displays personal details, contact information, and a table for references. The 'Online Reference' option is currently set to 'N'.

2) You will need to set up Questions so when the form is sent to the Referee they can answer the Questions. Questions for References are Departmental therefore are found in Maintenance > Agency Setup > Departments > Questionnaire - Reference



The screenshot shows the 'Maintenance - Agency Setup' window. The 'Departments' tab is selected in the left sidebar. The main table displays a list of departments, with the 'Reference' column highlighted by a red arrow. The table has columns for ID, Department, Searchable, Division, Analysis Code, Publish To Web, Sort Order, Show Extra Notes, and SMTP Profile.

The Questions are grouped so you can have specific Questions for each type of reference and options on who can see it.



- 0** Everyone to see
- 1** For Personal Reference - Candidate Answers
- 2** For Professional Reference - Candidate Answers
- 3** For Other Reference - Candidate Answers
- 100** For Personal Reference - Referee Answers
- 200** For Professional Reference - Referee Answers
- 300** For Other Reference - Referee Answers

Make sure for Candidate and Referee Questions Publish to Web is ticked

Order	Question ID	Question Description	Type	Min Step Size	Units	Required	Group	Audit	Web Publish	Web View	Search Hide	Heading Collapse	Heading Answers	Ex La
10	CON	Did the candidate work at your company?	Single Selection			<input type="checkbox"/>	200	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
20	DC	Are the worked dated provided above correct?	Single Selection			<input type="checkbox"/>	200	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
30	REC	Do you have any comments to add?	Text			<input type="checkbox"/>	200	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
40	RE2	What job title is your referee?	Text			<input type="checkbox"/>	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
50	PR1	Please describe your relationship to the candidate	Text			<input type="checkbox"/>	100	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
60	PR2	Would you describe the candidate as dependable?	Single Selection			<input type="checkbox"/>	100	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
70	PR3	What relation is this person to you?	Text			<input type="checkbox"/>	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
80	DR1	Do they accept feedback without getting defensive	Single Selection			<input type="checkbox"/>	300	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Order	Choice ID	Choice Description	Autofill search words (comma separated)	Value	Web Hide	Analysis	Readonly	Lo
10	Y	Yes			<input type="checkbox"/>		<input type="checkbox"/>	
20	N	No			<input type="checkbox"/>		<input type="checkbox"/>	

3) To send the Reference to the Referee you need the job *IQXWeb Web Referencing (Send References).xml*

This will pick up all the references which have not been sent and 'Approve to Send' within the Reference has been ticked

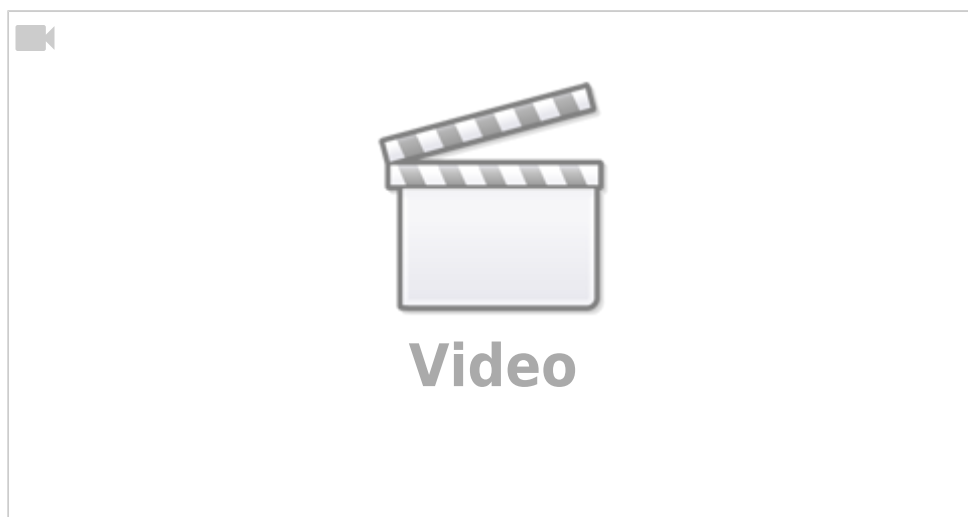


Department	Catering
Reference Type	Professional
Referee Name	John Adams
Organisation	IQX Limited
Referee Job Title	Managing Director
Address	
Contact Details	Email: support@iqx.co.uk
Job Title	Support Consultant
Job Title Notes	
Consultant	CATHERINE
Created	28/11/23 11:46
Approved to Send	<input checked="" type="checkbox"/>
Ask Candidate Before Send	<input type="checkbox"/>
Sent to Referee	<input type="checkbox"/>
Reminder Blocked	<input type="checkbox"/>
Last Reminder	
Completed by Referee	
Process Completed	
Reference Refused	

4) For the Email Body this is set up in Maintenance > Agency Setup > Email Signatures > the email signature **MUST** be called **WEBREF** and your body is written in HTML code with the below code required within the code for the Referee to access the Reference Form

```
<p><br></p>
<p><a href="{yourURL}/webReference/{URLRequestCode}" style="display: inline-block; color: #ffffff; background-color: #3498db; border: solid 1px #3498db; border-radius: 5px; box-sizing: border-box; cursor: pointer; text-decoration: none; font-size: 14px; font-weight: bold; margin: 0; padding: 12px 25px; text-transform: capitalize; border-color: #3498db;" target="_blank">Access Reference Request</a>&nbsp;</p>
<p><br></p>
```

How to create references can be found below [References](#)





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