Add a New Candidate

Refers to:
People (Top menu)

To add a new candidate to IQX:

- Click on the People icon on the toolbar to open the selector.
- Click on the **New** button.
- This will take you to the first screen of the Person Details wizard which you need to complete. There are some fields that you must fill and others that are optional.
- Click on the **+** button to expand a section and enter the candidate's personal details.

Keystroke	Use
Tab or Return	Moves you through the questions, expanding each level
Up and Down arrows	Moves you through the questions without expanding levels.
Left and Right arrows	Collapses or expands a level, unless it is a text field
Space Bar	Ticks or Clears a check box (tick box)
Alt + Down arrow	Opens a drop down selection. Enter Selects
Alt + Up arrow	Goes to top of questionnaire
Ctrl + character	In a long list, this takes you to the next word that starts with that character

Note: You cannot edit the lines that are in grey, as they are generated from items entered in the expanded group of fields.

The information that you are asked for depends on what has been requested by your company, but should include some or all of the following:

Name	This will generated from the names that you enter in the Surname and Forenames fields.
Surname	The candidate's surname.
Forenames	The candidate's forenames.
Full Name	This is generated from the names that you enter.
Salutation	This is generated from the names that you enter.It is used for letters and e-mails, i.e. Dear <Salutation>, not the candidate's title.
Keyname	This is generated from the names that you enter.You can edit this to reflect the way that the company works, e.g. put in spaces.
State	Select an item from the drop down list.The default is Current, and you should not normally need to change this.
Consultant	You can change this by selecting another name from the drop down list.
Registered	This is set to today's date.
Number	This is the candidate's number that is generated by IQX. Initially it is empty. **(2.16.4+)** Candidate record registration numbers can be made read only and will be displayed in grey.

Date	This is set to today's date.
Personal	This is generated from the options you choose in the expanded fields.
Gender	Select Male or Female from the drop down list.
Date of Birth	The candidate's date of birth.
Home Phone	The candidate's home phone number.
Mobile Phone	The candidate's mobile phone number. (2.20.2+) This field can be made a required field.
E-mail	The candidate's e-mail address. (2.20.2+) This field can be made a required field.
Address	This is generated from the entries you make in the expanded fields.
Address	First line of candidate's address. (2.20.2+) This field and Town can be made required fields.
Town	Name of town.
County	Name of county.
Country	Name of country.
Postcode	Postcode. You must enter this. (2.20.2+) This field can be made a required field.
Last Updated	The date that this candidate's details were last updated. When you first add a new candidate this field remains empty.

When you have entered all the information, click on the **Next** button.
You now need to complete the General Questionnaire. Click on the **+** button to expand a section and enter the relevant details. The information that you are asked for depends on what has been requested by your agency. For example, you may be asked for information on language skills, driving ability, nationality, visa expiry date, education and professional qualifications. When you have entered all the information, click on the **Next** button.

Note: The departments listed are those that have been set up for your agency. On this screen, select the relevant department for the candidate, and then click on the **Next** button.

Click on the **Permanent** or **Temp** box to indicate the type of work that the candidate requires, and then click on the **Next** button. **Caution:** You must tick at least one of these boxes. If you leave them both blank, then the candidate is not registered with the department. You can **register the candidate** with one or more Temp Desks by ticking the boxes in the Pool column. When you have selected the relevant Temp Desks, click on the **Next** button.

You now need to complete the department questionnaire. The questions that you see depend on the department that you chose. If the majority of the questions are not relevant for your candidate, you may have selected the wrong department. You can use the **Back** button to go back and change the department.

To **complete the questionnaire**:

- Click on the **+** or click in the row and press the right arrow key or Return to expand the questions. Press the left arrow key to contract the question.
- Click on the relevant boxes to give details of the candidate's previous work. Press the Spacebar to toggle the tick on and off in a tick box.
- When you have finished, click on the Finish button.

You should then see a screen that displays the candidate’s details.

At the top of this screen there are some buttons that you use as follows:

Button	Function
Reports	Run any of the person selector reports for the current candidate.
Register	Open the wizard to register or update the candidate with departments. You can only register a candidate with a department using the Register button.
Search	Open the wizard to look for a suitable vacancy for the current candidate.
Delete	Delete a record if there are no links such as Contact Events or Progress. To effectively remove a person but retain them for history, you should change their state to Deleted/Archived.
Help	Open the help page with guidance on the fields on this screen.

You can view different information by clicking on an option on the left side of the screen.

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