

IQX Web Referencing User Guide

V1.01

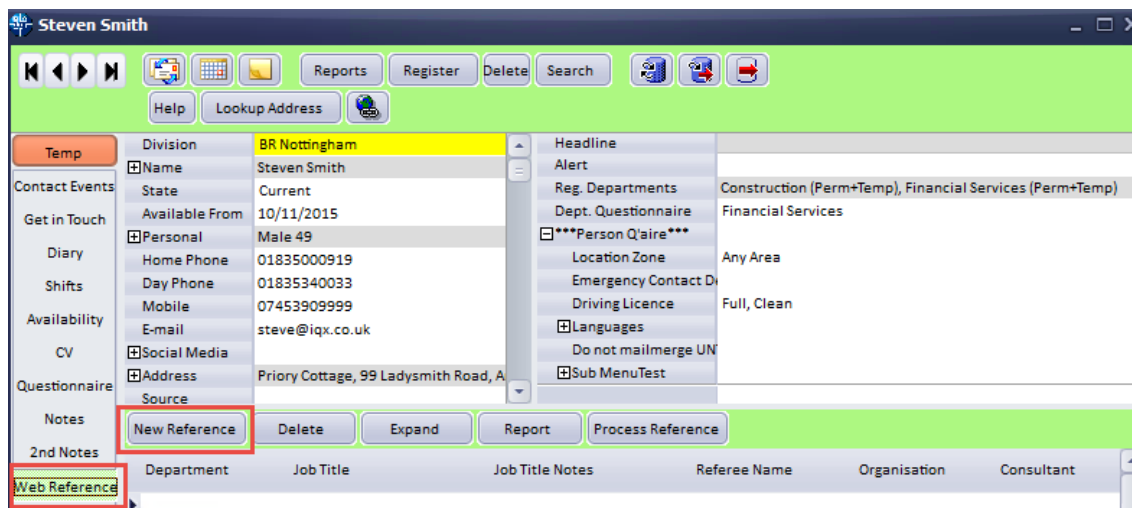
Gareth Johnstone and Ivan Baldwin

Web Referencing User Guide

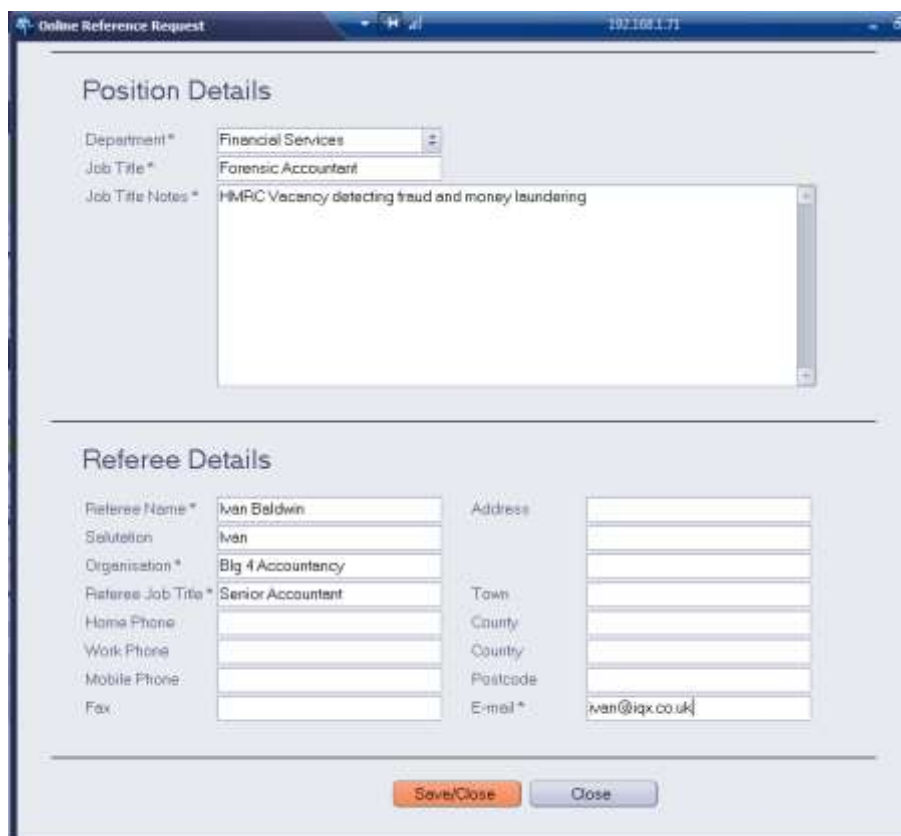
Users can now send reference requests and receive references from within IQX via the web. Referees will be able to log onto a temporary website to complete the reference which will automatically update the IQX database. This functionality requires System Administrator set up in addition to the existence of IQXWeb/Hub.

Using Web Referencing

Open the record of the candidate whom you need a reference for. Select Web Reference – New Reference.

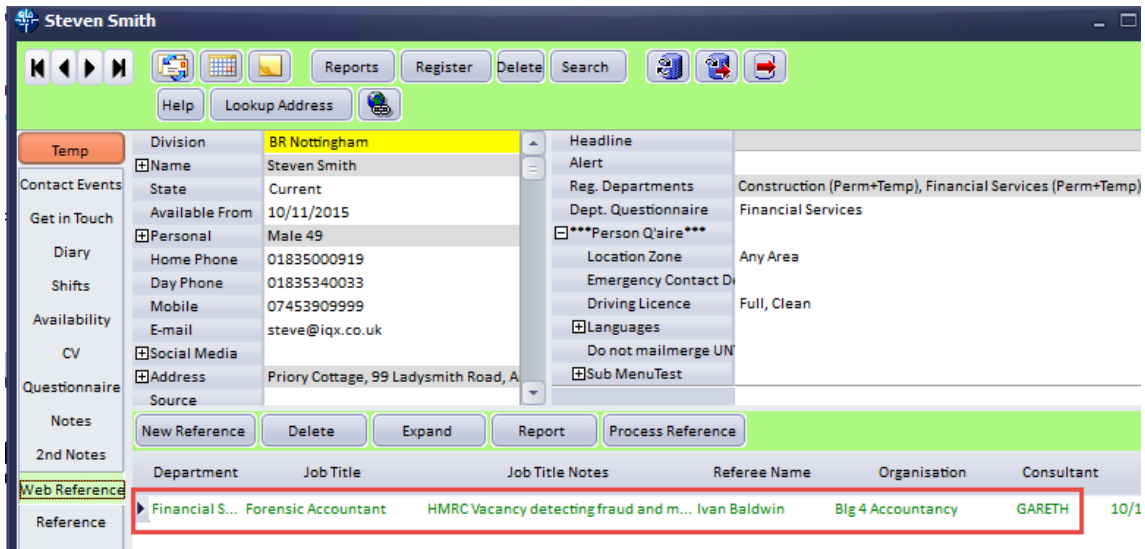


Complete the reference details in the next window. Save and close.



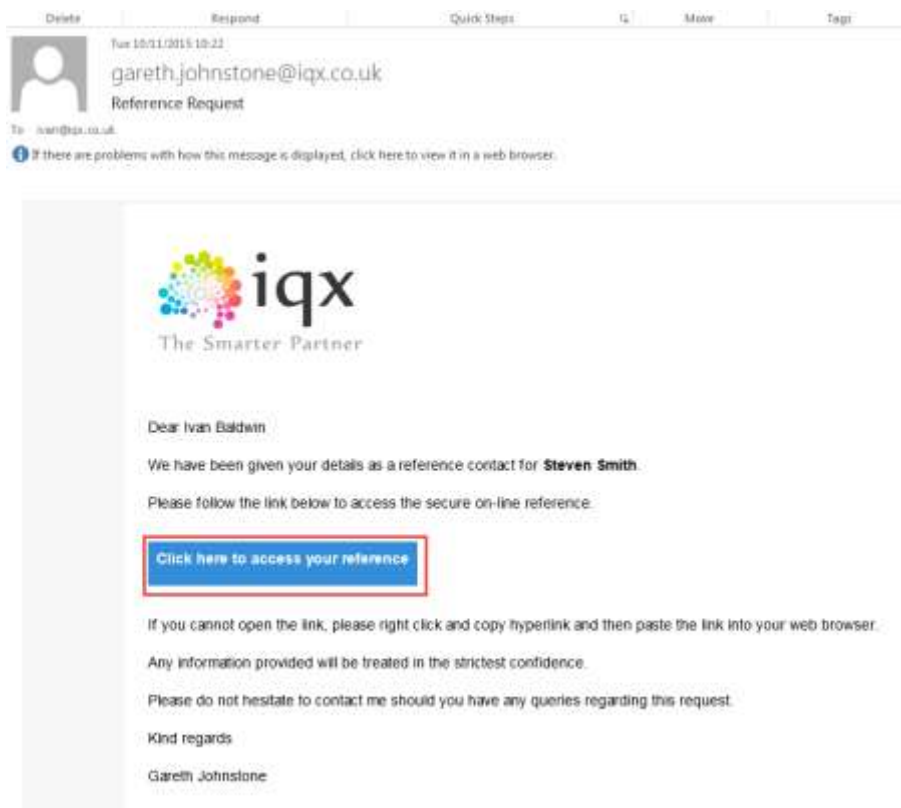
The screenshot shows the 'Online Reference Request' form. The form is divided into two sections: 'Position Details' and 'Referee Details'. The 'Position Details' section includes fields for Department (Financial Services), Job Title (Forensic Accountant), and Job Title Notes (HMPC Vacancy detecting fraud and money laundering). The 'Referee Details' section includes fields for Referee Name (Ivan Baldwin), Organisation (Blg 4 Accountancy), Referee Job Title (Senior Accountant), Home Phone, Work Phone, Mobile Phone, Fax, Address, Town, County, Postcode, and E-mail (ivan@iqx.co.uk). The 'Save/Close' button is highlighted.

On returning to the Person Record the new reference will be recorded with a green font. This indicates the reference has been created but not sent yet.



Reference requests to referees will be sent out periodically, as set up by your System Administrator.

Below is an example of the email a referee will receive. To complete the reference they will need to click 'Click here to access your reference'. The text of the letter can be set up using Boiler Plate text and is accessed through our Branding feature.



On clicking this button they will be taken to a temporary website containing the reference questions.

Referees can complete the reference in one sitting then click Save and Send or they can Save the reference and return to complete it at a later date. Note – the website is only available for 7 days.

Once the reference has been completed The Web Reference record will change font colour to black.

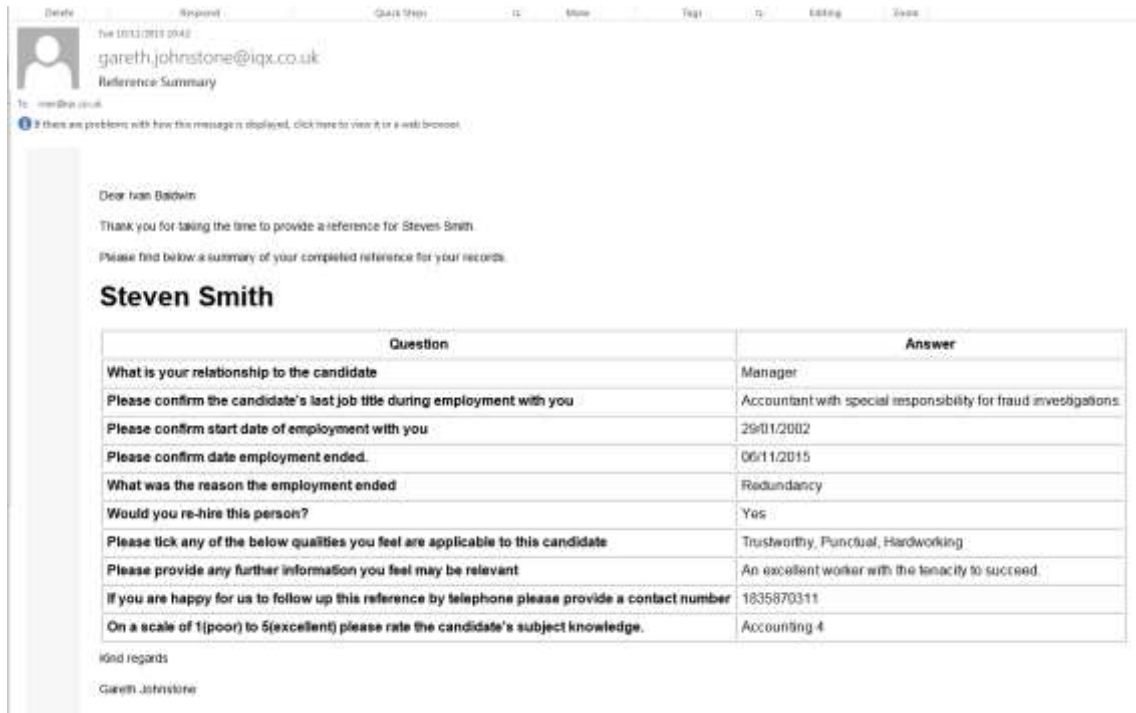
2nd Notes	Department	Job Title	Job Title Notes	Referee Name	Organisation	Consultant	
Web Reference	Financial S...	Forensic Accountant	HMRC Vacancy detecting fraud and m...	Ivan Baldwin	Blg 4 Accountancy	GARETH	10/1

Double clicking on the Web Reference record will open it. It will show the referee's response along with some audit information.

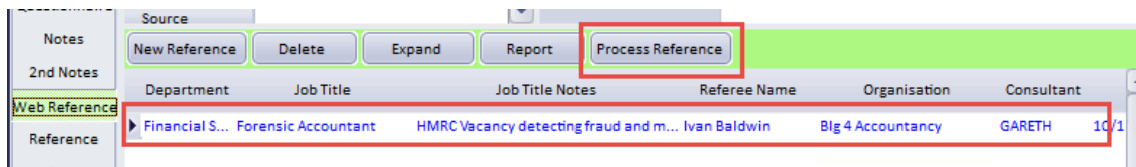
Reference Request for Steven Smith from Ivan Baldwin at Blg 4 Accountancy	
Department	Financial Services
Referee Name	Ivan Baldwin (Ivan)
Organisation	Blg 4 Accountancy
Referee Job Title	Senior Accountant
Contact Details	Email: ivan@iqx.co.uk
Job Title	Forensic Accountant
Job Title Notes	HMRC Vacancy detecting fraud and money laundering
Consultant	GARETH
Created	10/11/2015 10:16
Sent to Referee	10/11/2015 10:22
Completed by Referee	10/11/2015 10:29
Process Completed	
Relationship to candidate	Manager
Candidate job title	Accountant with special responsibility for fraud investigations
Employment start date	29/01/2002
Employment end date	06/11/2015
Reason for leaving	Redundancy
Would you re-hire this person	Yes
Qualities	Trustworthy, Punctual, Hardworking
Further notes	An excellent worker with the tenacity to succeed.
Contact number	1835870311
Subject Knowledge	Accounting 4

To send a summary of the referee's response, if required, is also an automatic job.

Below is an example of the email the referee will receive.



Once the reference has been reviewed and a summary sent (if required) click 'Process Reference' to indicate you have viewed the data. This will turn the Web Reference record blue.



The date and time the reference was processed will be added to the web reference. See below.

