

# **IQX Web Referencing User Guide**

**V1.02**

**IQX Release 2.16.2 onwards**

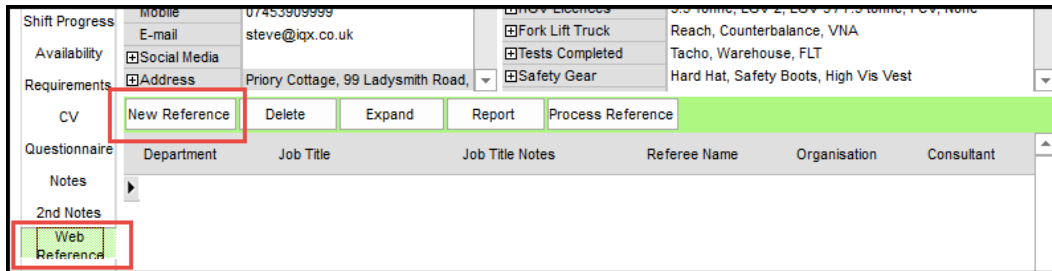
**Gareth Johnstone and Ivan Baldwin**

## Web Referencing User Guide

If configured by IQX Users can 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.

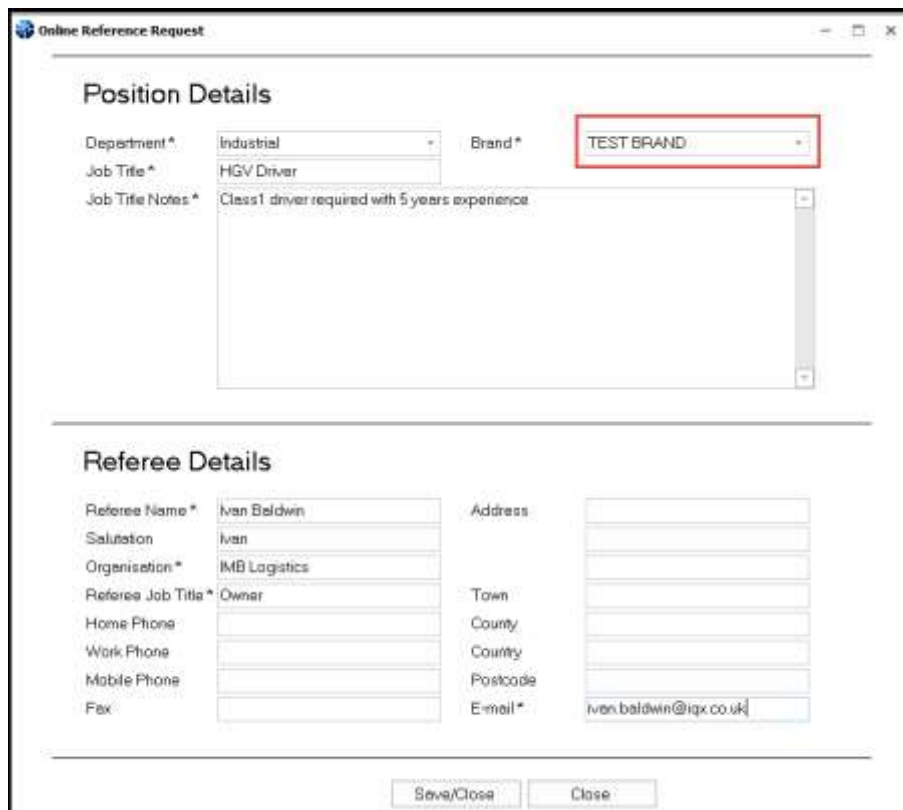
### Using Web Referencing

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



The screenshot shows a candidate record in the IQX system. The 'CV' tab is selected, and the 'New Reference' button is highlighted with a red box. Other buttons like 'Delete', 'Expand', 'Report', and 'Process Reference' are also visible. The 'Web Reference' button is also highlighted with a red box.

Complete the reference details in the next window. If the full Branding has not been set up use the **WEBREFERENCE** Brand, as a default, which will fulfil the needs of this feature. Once the reference request details are complete **Save/Close**.




The screenshot shows the 'Online Reference Request' window. The 'Position Details' section includes fields for 'Department' (Industrial), 'Job Title' (HGV Driver), 'Job Title Notes' (Class1 driver required with 5 years experience), and 'Brand' (TEST BRAND). The 'Referee Details' section includes fields for 'Referee Name' (Ivan Baldwin), 'Salutation' (Ivan), 'Organisation' (IMB Logistics), 'Referee Job Title' (Owner), 'Home Phone', 'Work Phone', 'Mobile Phone', 'Fax', 'Address', 'Town', 'County', 'Postcode', and 'E-mail' (ivan.baldwin@iqx.co.uk). The 'Save/Close' button is highlighted with a red box.

On returning to the Person Record the new reference record will be coloured green. This indicates the reference has been created but not sent yet.

Notes	Address		Priority Cottage, 99 Ladysmith Road,		Security Code		Hard Hat, Safety Boots, High Vis Vest					
2nd Notes	<div>New ReferenceDeleteExpandReportProcess Reference</div>											
Web Reference	Department		Job Title		Job Title Notes		Referee Name		Organisation		Consultant	
Reference	Industrial		HGV Driver		Class1 driver required with 5 years...		Ivan Baldwin		IMB Logistics		JBLOGGS	
Perm												
Accounts												

Expanding the record will show the current status of the reference request and indicate the Brand used or WEBREFERENCE.

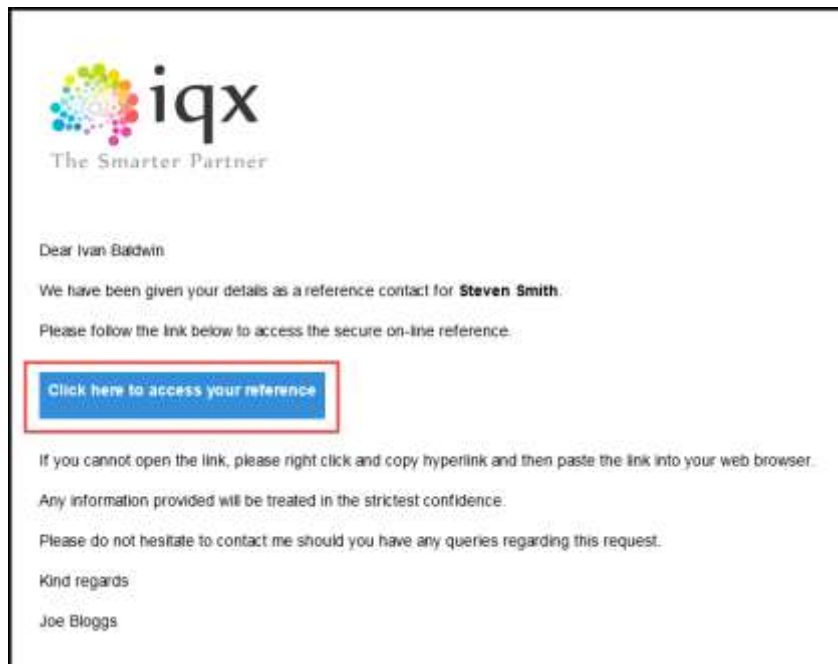

**Reference Request for Steven Smith from Ivan Baldwin at IMB Logistics**

Department	Industrial
Referee Name	Ivan Baldwin (Ivan)
Organisation	IMB Logistics
Referee Job Title	Owner
Address	
Contact Details	Email: ivan.baldwin@iqx.co.uk
Job Title	HGV Driver
Job Title Notes	Class1 driver required with 5 years experience
Consultant	JBLOGGS
Created	16/02/2016 12:02
Sent to Referee	
Completed by Referee	
Process Complete	
Attitude	
Brand	TEST BRAND

Reference requests will be sent out periodically, as set up by your System Administrator. Once the reference request has been despatched the date and time will be recorded in Person - Web Reference and the record will change to black. The record colour will remain black until the record is processed.

CV	New Reference	Delete	Expand	Report	Process Reference
Questioning	Department	Job Title	Job Title Notes	Referee Name	Organisation
Person	Industrial	HGV Driver	Class 1 driver with 5 years experience...	Ivan Baldwin	IMB Logistics
					JBLOGGS
					16/02/16 12:02
					16/02/16 12:02
					Completed by Referee
					Process Completed
					Processed By: 55

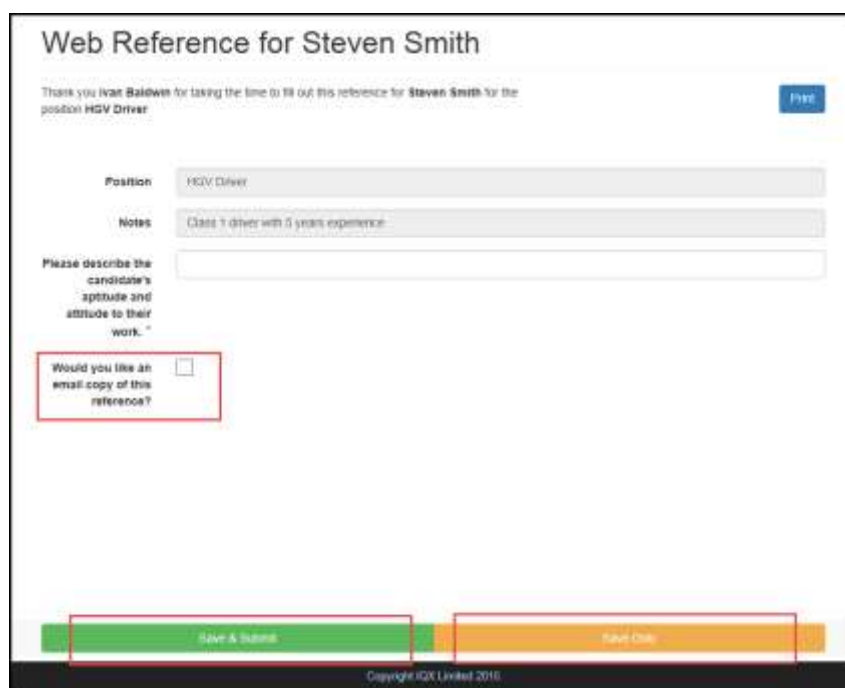
Overleaf is an example of the email a referee will receive.



To open the reference the referee will need to click 'Click here to access your reference'. The text of the letter can be set up using Boiler Plate text from with Agency Setup – Branding by your System Administrator.

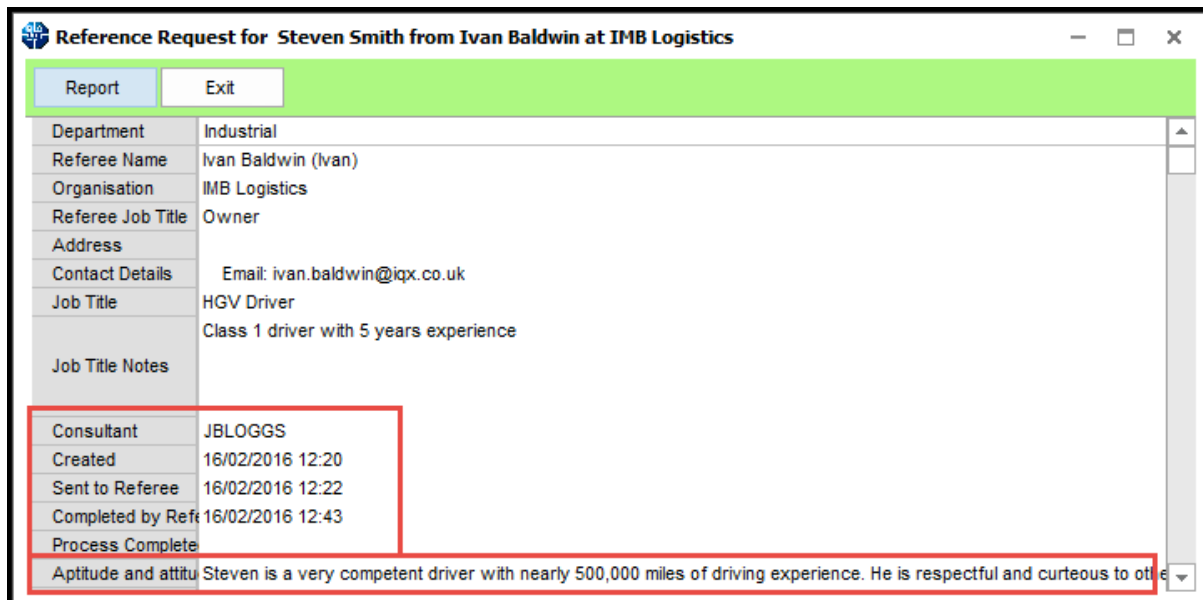
On clicking this button they will be taken to a temporary website containing the reference questions. The temporary website is only available for 7 days after which another request will have to be sent out

Referees can complete the reference in one sitting then click **Save and Submit** or they can choose to **Save Only** the reference and return to complete it, at a later date. If the referee requires a summary of their reference they can click the email copy tick box. An automatic summary email job is available to send out summaries.

This image shows a web form titled 'Web Reference for Steven Smith'. It includes a thank you message: 'Thank you Ivan Baldwin for taking the time to fill out this reference for Steven Smith for the position HGV Driver'. There is a 'Print' button. The form has input fields for 'Position' (pre-filled with 'HGV Driver') and 'Notes' (pre-filled with 'Class 1 driver with 3 years experience'). Below these is a text area for 'Please describe the candidate's aptitude and attitude to their work.' At the bottom left, there is a checkbox labeled 'Would you like an email copy of this reference?'. At the bottom, there are two large buttons: 'Save & Submit' (green) and 'Save Only' (orange). The footer says 'Copyright iQX Limited 2016'.

Reminder reference requests can be sent out if set up by your System Administrator. If a reminder is sent out the **Sent to Referee** column in the Web Reference record will be updated.

Once the referee has completed the reference the Web Reference record will be automatically updated. Expanding the record will show the referee's response along with audit information.



Reference Request for Steven Smith from Ivan Baldwin at IMB Logistics	
Report	Exit
Department	Industrial
Referee Name	Ivan Baldwin (Ivan)
Organisation	IMB Logistics
Referee Job Title	Owner
Address	
Contact Details	Email: ivan.baldwin@iqx.co.uk
Job Title	HGV Driver
	Class 1 driver with 5 years experience
Job Title Notes	
Consultant	JBLOGGS
Created	16/02/2016 12:20
Sent to Referee	16/02/2016 12:22
Completed by Ref	16/02/2016 12:43
Process Complete	
Aptitude and attitude	Steven is a very competent driver with nearly 500,000 miles of driving experience. He is respectful and courteous to other

A summary of the referee's response can be sent to the referee if set up by your System Administrator and requested by the referee.

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



Dear Ivan Baldwin

Thank you for taking the time to provide a reference for Steven Smith.

Please find below a summary of your completed reference for your records.

**Steven Smith**

Question	Answer
What is your relationship to the candidate	Manager
Please confirm the candidate's last job title during employment with you	Accountant with special responsibility for fraud investigations
Please confirm start date of employment with you	29/01/2002
Please confirm date employment ended.	06/11/2015
What was the reason the employment ended	Redundancy
Would you re-hire this person?	Yes
Please tick any of the below qualities you feel are applicable to this candidate	Trustworthy, Punctual, Hardworking
Please provide any further information you feel may be relevant	An excellent worker with the tenacity to succeed.
If you are happy for us to follow up this reference by telephone please provide a contact number	1835870311
On a scale of 1(poor) to 5(excellent) please rate the candidate's subject knowledge.	Accounting 4

Kind regards  
Gareth Johnstone

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

CV	New Reference	Delete	Expand	Report	Process Reference					
Outstanding	Department	Job Title	Job Title Notes	Referee Name	Organisation	Consultant	Request Created	Sent to Referee	Completed by Referee	Process Completed
Perm	Industrial	HGV Driver	Class 1 driver with 5 years experience...	Ivan Baldwin	IMB Logistics	JBLOGGS	16/02/16 12:20	16/02/16 12:22	16/02/16 12:43	16/02/16 12:46

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

Report

Exit

Department

Industrial

Referee Name

Ivan Baldwin (Ivan)

Organisation

IMB Logistics

Referee Job Title

Owner

Address

Contact Details

Email: ivan.baldwin@iqx.co.uk

Job Title

HGV Driver

Job Title Notes

Class 1 driver with 5 years experience

Consultant

JBLOGGS

Created

16/02/2016 12:20

Sent to Referee

16/02/2016 12:22

Completed by Referee

16/02/2016 12:43

Process Complete

16/02/2016 12:46

Aptitude and attitude

Steven is a very competent driver with nearly 500,000 miles of driving experience. He is respectful and courteous to other road users.