

IQX Web Referencing User Guide

V1.02

IQX Release 2.16.2 onwards

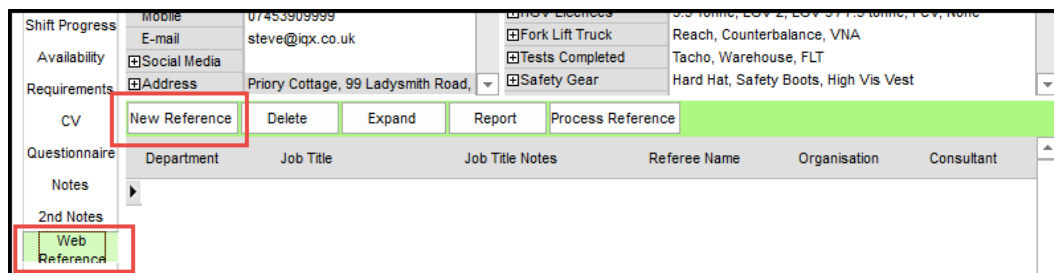
Gareth Johnstone and Ivan Baldwin

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.

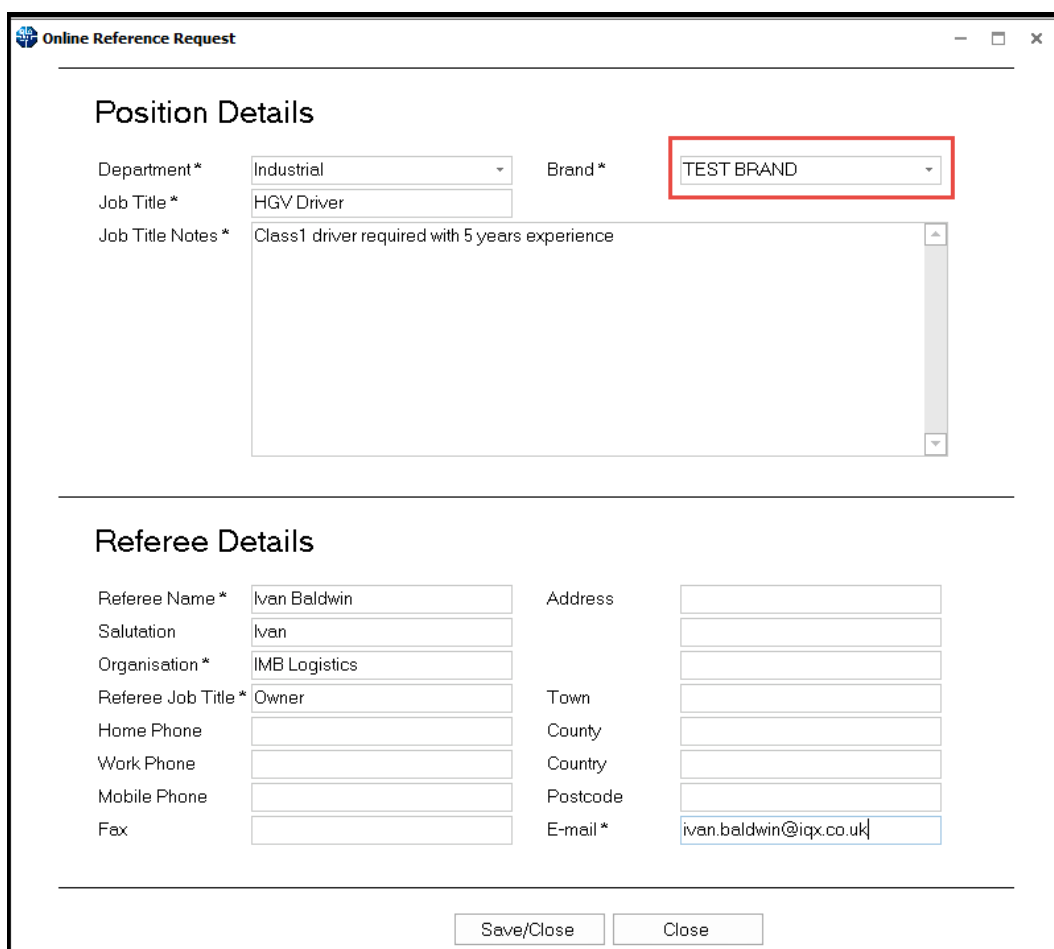
Using Web Referencing

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



The screenshot shows a sidebar menu on the left with options like 'Shift Progress', 'Availability', 'Requirements', 'CV', 'Questionnaire', 'Notes', and '2nd Notes'. The 'Web Reference' option is highlighted in green and has a red box around it. The main area shows a candidate's details, including 'Mobile', 'E-mail', 'Address', and 'Requirements'. The 'New Reference' button is also highlighted in a red box.

Complete the reference details in the next window. Branding can be applied to the emails sent to the referee and once set up can be selected using the drop down menu shown. If the full Branding has not been set up the **WEBREFERENCE** Brand will fulfil the needs of this feature. Once the reference request details are complete **Save and Close**.




The screenshot shows the 'Online Reference Request' window. It has two main sections: 'Position Details' and 'Referee Details'. In the 'Position Details' section, 'Department' is set to 'Industrial', 'Job Title' is 'HGV Driver', and 'Job Title Notes' is 'Class1 driver required with 5 years experience'. The 'Brand' dropdown menu is set to 'TEST BRAND' and is highlighted with a red box. The 'Referee Details' section contains fields for 'Referee Name', 'Salutation', 'Organisation', 'Referee Job Title', 'Home Phone', 'Work Phone', 'Mobile Phone', 'Fax', 'Address', 'Town', 'County', 'Country', 'Postcode', and 'E-mail'. The 'E-mail' field is pre-filled with 'ivan.baldwin@iqx.co.uk'. At the bottom, there are 'Save/Close' and 'Close' buttons.

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.

Notes	Address	Priority Cottage, 99 Lausman Road, ...	Priority Cottage, 99 Lausman Road, ...
2nd Notes	New Reference	Delete	Expand
Web Reference	Report	Process Reference	
References	Department	Job Title	Job Title Notes
Perm	Referee Name	Organisation	Consultant
Accounts	Industrial	HGV Driver	Class1 driver required with 5 years... Ivan Baldwin
			IMB Logistics
			JBLOGGS
			16/02/2016 12:02

Expanding the record will show the current status of the reference request and indicate any branding selected.


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

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

CV	New Reference	Delete	Expand	Report	Process Reference	
Guidance	Department	Job Title	Job Title Notes	Referee Name	Organisation	Consultant
Perm	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

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

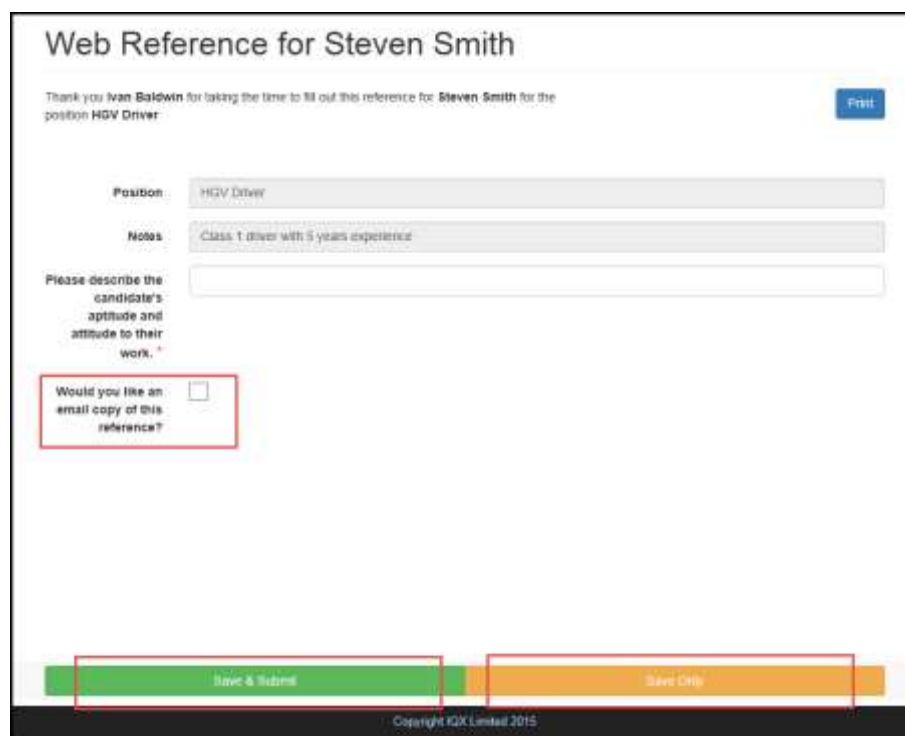
To complete the reference they will need to click 'Click here to access your reference'. The text of the letter can be set up using Boiler Plate text and is accessed through our Branding feature.



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

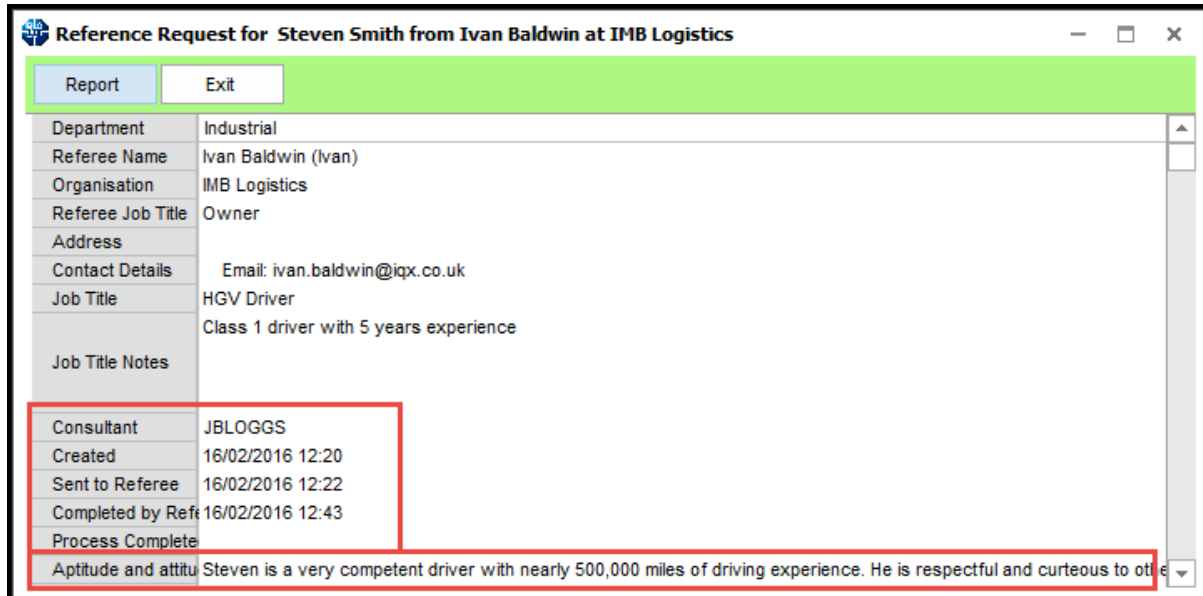
Referees can complete the reference in one sitting then click **Save and Send** or they can **Save Only** the reference and return to complete it at a later date. If the referee requires a summary of their reference they can click the email copy tick box. An automatic summary email job is available to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

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.



The image shows a web form titled 'Web Reference for Steven Smith'. Below the title is 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 in the top right. The form contains several input fields: 'Position' (pre-filled with 'HGV Driver'), 'Notes' (pre-filled with 'Class 1 driver with 5 years experience'), and a larger text area for 'Please describe the candidate's aptitude and attitude to their work.'. Below these is a checkbox labeled 'Would you like an email copy of this reference?'. At the bottom of the form are two buttons: 'Save & Send' (highlighted with a red box) and 'Save Only' (also highlighted with a red box). The footer of the form reads 'Copyright IQX Limited 2015'.

Once the referee has completed the reference the Web Reference record will be automatically updated. Double clicking on the Web Reference record will show the referee's response along with some 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
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 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.

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



From: Gareth Johnstone <gareth.johnstone@iqx.co.uk>
To: Ivan Baldwin
Subject: Reference Summary

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						
Questionnaire	Department	Job Title	Job Title Notes	Referee Name	Organisation	Consultant	Request Created	Sent to Referee	Completed by Referee	Process Completed	Processed By
Answer	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	JBLOGGS
Perm											
Accounts											

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


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
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.