



## Person Record - Placements

### Refers to:

Person form → placements tab

The **placements** tab shows all the placements, either permanent, contract or shift, that are linked to the Candidate.

The **Process** button will open the **Placement Selector form** prefilled with these placements, for reporting or analyzing.

**Note:** The **Placements** tab appears in the **Temp**, **Perm** and **Accounts** sections

## Vacancy Record - Placements

### refers to:

vacancies form → placements

This table shows the candidates who have been placed in the vacancy. Normally you make a placement from the **Short List** but you can add it directly from here. The Placement holds all the details required for invoicing a Perm placement or generating timesheets for a Temp. **It is important to get the details correct.**

To place a candidate from the **vacancy placement screen** (no short list):

- Click on the **Placements** option on the left hand side of the screen.
- Click on the **Add** button. In the selector enter the **keyname** of the candidate you are entering.
- Select the candidate, and click **Ok**.
- Enter/confirm the **start date** and **Leave date** (if known) and click on **OK**.
- If the placement completes the number of posts to be filled you will be asked if you want to change the vacancy state to Filled and change the progress state of all unsuccessful candidates in the short list to Rejected. If you say **Yes** then the status will have to be manually changed when the placement comes to an end.
- Now **complete** the details of the Placement form.

### Extending a Placement

When an existing placement requires to be extended rather than create a whole new placement users can use the Placement Extension System (from version 2.21.4 onwards).

Users with the layout role to enable them to authorise Placement Extensions will see this new button on Placements.



Temp Placement of Craig Adams as Scott Test 1 at A & M Stephens

Details

Applicant: Craig Adams

Company: A & M Stephens, A Stephens

Job Title: Scott Test 1

Client Department:

PO Number:

Contract:

Placement Date: 09/04/2021

Override Invoice Layout:

Sales Brand: Alt1

Invoice Prefix: A1

Invoice Email: alt1@iqx.co.uk

Start Date: 09/04/2021

Leave Date: 13/06/2021

Department: Events

Consultant: SCOTTM

Our Ref.: 3460

Concurrent or Shifts: ☒

Override IR35: ☐

Days per Week: 5

Work Pattern: MTWTF\_\_ 09:00 7.5 hours

When this is pressed you are then prompted to select the reason for the extension, the new leave date and the reporting start date, you can also add any relevant notes at this point.

Add Placement Extension

Extension Reason: [Dropdown]

Leave Date: 13/06/2021

Reporting Start Date: 13/06/2021

Notes: [Text Area]

Ok Cancel

All of the changes made are detailed in a placement extension table which can be viewed at the bottom of the Placement. This shows the original Start Date, original Leave Date, the updated Leave Date as well as who changed it and when. This table is also updated if you manually change the Leave Date or create a Provisional Timesheet that is beyond the current Leave Date.

Temp Placement of Craig Adams as Scott Test 1 at A & M Stephens

Details

Applicant: Craig Adams

Company: A & M Stephens, A Stephens

Job Title: Scott Test 1

Client Department:

PO Number: 12345

Contract:

Placement Date: 09/04/2021

Override Invoice Layout:

Sales Brand: Alt1

Invoice Prefix: A1

Invoice Email: alt1@iqx.co.uk

Start Date: 09/04/2021

Leave Date: 13/06/2021

Work Pattern: MTWTF\_\_ 09:00 7.5 hours

Department: Events

Consultant: SCOTTM

Our Ref.: 3460

Concurrent or Shifts: ☒

Override IR35: ☐

Days per Week: 5

Original Start Date	Original Leave Date	Reporting Start Date	Leave Date	Who Changed	When Changed	Who Authorised	When Authorised	Extension Reason
09/04/21			13/06/21	SCOTTM	26/05/21 10:33	SCOTTM	04/06/21 11:45	
09/04/21			06/06/21	SCOTTM	26/05/21 10:31	SCOTTM	26/05/21 10:31	More Time
09/04/21			06/06/21	SCOTTM	26/05/21 10:31			

This feature requires system administrator setup.



## Company - Placements View

From this tab you can view all Placements directly linked to this Client.

You are able to expand Placements and view the Candidate from here as well as process Candidates and Placements.

Consultant	Contact	Applicant	Job Title	Temp	From	To	Pay	Charge	Margin	Our Ref.	PO Number
VHS	Mabel Wills	Piper Vega	Class 1 Opera	✓	10/02/2020	13/02/2020				3438	1234
VHS	Mabel Wills	Elliott Dean	Class 1 Opera	✓	26/10/2017	02/11/2017	14.00	20.00	13.92 %	3374	3
VHS	Mabel Wills	Vinnie Ali	Class 1 Opera	✓	26/10/2017	02/11/2017	14.00	20.00	13.92 %	3378	8
VHS	Mabel Wills	Bethan Howell	Class 1 Opera	✓	26/10/2017	02/11/2017	14.00	20.00	13.92 %	3379	9
VHS	Mabel Wills	Riley Vance	Class 1	✓	25/10/2017	17/02/2019				3372	1
VHS	Mabel Wills	Harry Davenport	Class 1	✓	25/10/2017	01/11/2017				3373	2
VHS	Mabel Wills	Orla Foster	Class 1	✓	25/10/2017	08/11/2017				3375	4
VHS	Mabel Wills	Amirah Barr	Class 1	✓	25/10/2017	01/11/2017				3380	A

Go back to [Placement Records...](#)

From:

<https://iqxusers.co.uk/iqxhelp/> - iqx

Permanent link:

<https://iqxusers.co.uk/iqxhelp/doku.php?id=placement:ug4-02>

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