



# Temp Desk

If you are a Temp consultant, this view is where you will spend most of your time. Almost everything can be done from this view in relation to Temp vacancies.

## Vacancies

The Temp Desk will automatically open on the Consultants default Temp desk. You can select a different Temp desk from the drop down menu in the top left of the window. From this tab there are several things you can do:

- Expand the Vacancy
- Add a new Vacancy
- Search for a Vacancy by the Company/Client name
- Add shifts to existing Vacancy
- Fill shifts for vacancy
- Confirm shifts - this will also send out a notification if you have one set up.
- Copy shifts
- Access the Timesheet for a candidate

You can also filter the Vacancies by those that have Shifts in the week, are in a Current, or have unfilled shifts in the week.

## Tempa

In this tab you can view all the Tempa for your selected desk, and see what vacancies they are booked into. If you right click on the cell a small window will popup showing you more details about



the booking. You can access the Person record and the Vacancy record from here by clicking on the option.

Temp	Licences	Distance	Monday 04/07/2022	Tuesday 05/07/2022	Wednesday 06/07/2022	Thursday 07/07/2022	Friday 08/07/2022
Angel Acevedo							
Bilal Aguilar			S J Berwin Llp	S J Berwin Llp	S J Berwin Llp	S J Berwin Llp	S J Berwin Llp
Dexter Ball							
Jasper Bean							
Calvin Bonilla							
Meena Brock							
Grayson Brown							
Megan Browning							
Ismaeel Bryan			Beale & Co.	Beale & Co.	Beale & Co.	Beale & Co.	Beale & Co.

Other actions you can perform from this tab are -

- Enter Availability or Unavailability
- Enter Holidays
- Add shifts
- Book Shifts
- Confirm Shifts
- Access the Timesheet

If enabled by your Agency, you can also set the distance in miles from the postcode (vacancy)

## Availability

This view shows you the Candidates Availability, Unavailability and Holidays on your chosen desk. You can view the next month or the previous month. You can also change the candidates status, filter by has availability and NOT working this week. You can also expand the Candidates record from this tab.



The screenshot shows the 'Temp Desk' interface. At the top, there are filters for 'Desk' (Healthcare), 'View' (Weekly Shift), 'Year' (2019), and 'Week' (45). It also shows 'Ends 09/02/2020' and buttons for 'Go to Current', 'Make Current', 'Process', and 'Upd'. Below these are search and filter options, including 'Search', 'Expand', 'NOT Working this week', 'Has Availability', 'Count', 'Candidate Status' (All), 'Filter', and 'Departments' (Health). The main table lists candidates with columns for Name, Miles, and days of the month (Feb 1-26). A context menu is open over the cell for Ezekiel Ali on Feb 3, showing options: 'Thursday 06/02/20 - Available - 07:00 to 18:00', 'Thursday 06/02/20 - Available - 07:00 to 18:00', 'Add Day Availability', 'Add Day Holiday', 'Add Day Unavailability', 'Book Shift', 'Confirm Shift', and 'Enter Timesheet'.

Name	Miles	Feb 1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26
Angel Acevedo																											
Malik Aguirre																											
Simon Alderman																											
Ezekiel Ali				A	A	A	A	A																			
Woody Allen																											
Ela Alvarez				U	U	U	U	U																			
Philippa Alvarez																											
Lana Andrade																											
Rose Baird				A	A	A	A	A																			
Macie Baker																											
Lawson Ballard																											
Henri Barker				A	A	A	A	A																			
Mollie Barrera																											
Isabelle Barrett				A	A	A	A	A																			

By right clicking on any populated cell, a new window will pop up giving you more details. From this window you can also add Availability, Unavailability and Holidays. Book shifts, confirm shifts and access the timesheet.

## Placements

### refers to:

temp desk form → placements tab

This is where you manage your group of placed candidates. All contacts can be made and recorded from this view.

In order to save entry time a Placement is not required until a first Timesheet is Completed – IQX takes care of it in the background. This means that looking at the Placement list does NOT show who is working in the week.

If a Placement is needed because a Temp is getting different rates to the Vacancy then from the Vacancy it is possible to early-create the Placement **from the shift view** by clicking the **Placement/Rates** button. **Do not** use the normal method of adding a Placement as it will not see the shift links.

2.22.2+ If set up by your system administrator unavailability entered for a contract temp the reason is now visible on the Placements, Timesheets and Availability views.





## Shifts

When you click on this tab a new window will open detailing all the shifts for the week on your selected desk. From here you can view each shift in more detail > move the arrow to the shift and all the details will be in the bottom section of the window. You will see several buttons to the left of this section detailing all the tasks you can carry out from this view. This includes, filling shifts, expanding the vacancy, cancelling shifts, expanding the Temp record, cascade, expanding the timesheet, confirm, move shift.

On the main window you can filter the shifts to narrow down what you are looking for. Add shifts and bulk cancel any unfilled shifts

## Timesheets

This is where you can view your timesheets, create timesheets or add new ones. You can also directly access the Vacancy Record and Person's Record by clicking the corresponding buttons in the top bar menu. By expanding up the timesheet you can complete it ready for invoicing.



Number	Batch + PO Ref	Paid to - Ref and Name	Temp Desk	Payroll No.	Temp	Account Code	Company	Position	Comment	Dispatch Date	Dispatch Method
8885	0 -	Exchequer Solutions	Industrial Dr	50289	Lolly Cherry	513	Alkenby Limited	Class 2			
8872	0 -	Exchequer Solutions	Industrial Dr	50292	Made Call	ABC001	ABC Contract Services Ed	HGV			
8884	0 - 23		Industrial Dr	50295	Chris Cross	1010101	Bardens	Delivery			
8886	0 -		Industrial Dr	50295	Jack Frost	ABC001	ABC Contract Services Ed	Driver			
8887	0 - 3022		Industrial Dr	000340	Charlie Byrd	11	10 Group PLC	Class 1			
8880	0 -	Exchequer Solutions	Industrial Dr	50292	Made Call	EDE01	Eden Brown Ltd	Delivery			

## AWR Temps & AWR Checking

The Temp Desk has two new views - AWR Temps and AWR Checking. These have to process a LOT of information so can be slow to load.

### AWR Temps

This view shows the current roles for the Temps registered with the desk.

The default view is to check the roles that have 11 weeks of qualification. This can be changed to look at less weeks of qualification or to look at the gap since the last timesheet.

After six weeks of gap, the role reverts to Unqualified State with a Qualifying count of 0.

Applicant	AWR Status	Linked	Company	Job Title	Weeks	Gap	Grade	Speciality	Rates
Kevin Drummond	AWR Appli...	<input checked="" type="checkbox"/>	AWR Applies	Secretary	4	3		Y	
Stuart Humphries	AWR Appli...	<input type="checkbox"/>	AWR Applies	ASA Test	1	4			
Simon Jones	AWR Appli...	<input type="checkbox"/>	AWR LK2 Applies	Secretary	6	0 L		Y	
Rob McAllister	AWR Appli...	<input type="checkbox"/>	AWR Applies	Secretary	3	0		Y	
Rob McAllister	AWR Appli...	<input type="checkbox"/>	AWR LK1 Applies	pa	3	0			
Rob McAllister	AWR Appli...	<input checked="" type="checkbox"/>	AWR LK2 Applies	PA	6	0		Y	

The example is showing candidates with at least one week's qualifying but in practise it should be used to see who is coming up to qualifying to ensure all the details are set up and correct.

The Show Weekly Details button will list the events that count towards qualifying and pausing the gap. Other Agency Work can also be entered from here - **make sure to choose the correct role that it is to be entered for before clicking the button.**

### AWR Checking

This view shows the AWR information for Companies, Vacancies and AWR Roles (which can encompass several Placements). You can filter to just one type. The dates refer to the checked date and information can always be updated from this view.





Temp Desk											
Desk		View		Year		Week					
AWR Contract New		Weekly Contract		2011		34		Ends 27/11/2011 (Current)			
<a href="#">Process</a> <a href="#">Update</a> <a href="#">Close</a> <a href="#">Help</a>											
Vacancies											
<a href="#">Expand</a> <a href="#">Placement</a> <a href="#">Applicant</a> <a href="#">Gap or Qual</a> <a href="#">Qual</a> <a href="#">Wks &gt;= 1</a> <a href="#">Other Agency Work</a> <a href="#">Report</a> <a href="#">Show Weekly Details</a>											
	Applicant	AWR Status	Linked	Company	Job Title	Weeks	Gap	Grade	Speciality	Rates	
Temp	Kevin Drummond	AWR Appli...	<input checked="" type="checkbox"/>	AWR Applies	Secretary	4	3			Y	
Placements	Stuart Humphries	AWR Appli...	<input type="checkbox"/>	AWR Applies	ASA Test	1	4				
Timesheets	Simon Jones	AWR Appli...	<input type="checkbox"/>	AWR LK2 Applies	Secretary	6	0 L			Y	
AWR Temps	Rob McAllister	AWR Appli...	<input type="checkbox"/>	AWR Applies	Secretary	3	0			Y	
AWR Checking	Rob McAllister	AWR Appli...	<input type="checkbox"/>	AWR LK1 Applies	pa	3	0				
	Rob McAllister	AWR Appli...	<input checked="" type="checkbox"/>	AWR LK2 Applies	PA	6	0			Y	

## Expiry Dates

The Temp Desk has an Expiry View which shows all Date Criteria/Skills/Questions that have been set up with a number of 'Lead' days to expiry. This should be used to initiate bulk communications with the Temps needing updating. In order to appear in this view a question needs to be a date question and have a lead time entered:

Candidate Questionnaire (P)																	
<a href="#">Questions</a> <a href="#">Add</a> <a href="#">Delete</a> <a href="#">Units</a> <a href="#">Restore Deleted</a> <a href="#">Filter</a> <a href="#">Reset Order</a> <a href="#">Print Colour</a> <a href="#">Compliance Messages</a> <a href="#">Expiry Excluded States</a>																	
Order	Question ID	Question Description	Type	Min Step Size	Units	Required	Group	Word Count	Audit	Web Publish	Web View	Searchable	Heading Collapse	Heading Answers	Expiry Lead	Expiry Behaviour	Expiry Status
140	K3	ID	Reading			<input type="checkbox"/>	1	6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
141	SP	Right to Work	Single Selection			<input type="checkbox"/>	1	6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
142	RTW	Right to Work Type	Single Selection			<input type="checkbox"/>	1	6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
144	RSC	Right to Work Share Code	Text	8		<input type="checkbox"/>	1	6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
146	RTX	Right to Work Expiry	Date			<input type="checkbox"/>	1	6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		45 Warning	CRR2
150	IDG	ID Shown	Multiple Selection			<input type="checkbox"/>	1	6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
152	PNH	Passport Number	Text			<input type="checkbox"/>	1	6	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			

## Expiry Dates View Features

If the date is in the future by more days than the lead number, the date is in **Black**

If the date is in the future by fewer days than the lead number, the date is in **Blue** to show it's nearing expiry.

If the date is in the past, the date is in **Red** to show that it has expired.



Name	alert	Custom Column	Days before Expiry	Shifts after Expiry	Licence Expiry Lead 30	Mandatory Training Lead 30	Right to Work Expiry Lead 45	Visa Expiry Lead 60	Annual Appraisal Expiry Lead 30	CV Expiry Date Lead 30	Ref 1 Expiry Date Lead 30	Ref 2 Expiry Date Lead 30	Compliance outside Expiry Lead 30
Sophie Anderson		PA77 B/B	-434	0	30/09/2021		31/03/2022				31/12/2021		
Devier Ball		E5 8FU	-465	26	30/08/2021								
Lolly Cherry		SW12 Q/Y	2520	0			01/01/2023				01/11/2025		
Devier Choi	Check expiry dates	KT23 4DH	-1100	0	26/11/2019		07/11/2019						
Sain Code		MHT 1MH	345	0	18/11/2023								
Rex Conway		LL48 6PL	367	0				10/12/2023					
Chari Cross		TD1 1TD	935	0	30/06/2025								
Ents Data		EH4545EH	195	0	11/06/2023								
Jack Frost		EC4V 3PD	1399	0	17/09/2029		10/03/2029				07/10/2026		
Hari Greene		PH31 4AH	-3082	12	01/07/2014			15/03/2025					
Piper Griffin			1086	0	28/11/2025								
Lola-Rose Mayer		M33 5H5	-1997	52	20/06/2017			21/03/2023					
Janie Montes		BD23 1TZ	-310	0				01/02/2022					
Abigail Roman	Construction AND Industrial	DA10 0LN	136	0				23/04/2023					
Daisy Schroeder		TS26 8SD	-895	0				26/06/2020					

To see just the Candidates who have a date due to expire or already expired click on the 'Temps to Show' and select **Expired and Expiring** from the dropdown.

Name	alert	Custom Column	Days before Expiry	Shifts after Expiry	Licence Expiry Lead 30	Mandatory Training Lead 30	Right to Work Expiry Lead 45	Visa Expiry Lead 60	Annual Appraisal Expiry Lead 30	CV Expiry Date Lead 30	Ref 1 Expiry Date Lead 30	Ref 2 Expiry Date Lead 30	Compliance outside Expiry Lead 30
Sophie Anderson		PA77 B/B	-434	0	30/09/2021		31/03/2022				31/12/2021		
Devier Ball		E5 8FU	-465	26	30/08/2021								
Lolly Cherry		SW12 Q/Y	2520	0			01/01/2023				01/11/2025		
Devier Choi	Check expiry dates	KT23 4DH	-1100	0	26/11/2019		07/11/2019						
Hari Greene		PH31 4AH	-3082	12	01/07/2014			15/03/2025					
Lola-Rose Mayer		M33 5H5	-1997	52	20/06/2017			21/03/2023					
Janie Montes		BD23 1TZ	-310	0				01/02/2022					
Daisy Schroeder		TS26 8SD	-895	0				26/06/2020					

To filter to just one type of Expiry Date - e.g. Visa Expiry - click on the column header. Only Temps with a date in that column will now show. All their other dates also remain in view.

Name	alert	Custom Column	Days before Expiry	Shifts after Expiry	Licence Expiry Lead 30	Mandatory Training Lead 30	Right to Work Expiry Lead 45	Visa Expiry Lead 60	Annual Appraisal Expiry Lead 30	CV Expiry Date Lead 30	Ref 1 Expiry Date Lead 30	Ref 2 Expiry Date Lead 30	Compliance outside Expiry Lead 30
Rex Conway		LL48 6PL	367	0				10/12/2023					
Hari Greene		PH31 4AH	-3082	12	01/07/2014			15/03/2025					
Lola-Rose Mayer		M33 5H5	-1997	52	20/06/2017			21/03/2023					
Janie Montes		BD23 1TZ	-310	0				01/02/2022					
Abigail Roman	Construction AND Industrial	DA10 0LN	136	0				23/04/2023					
Daisy Schroeder		TS26 8SD	-895	0				26/06/2020					

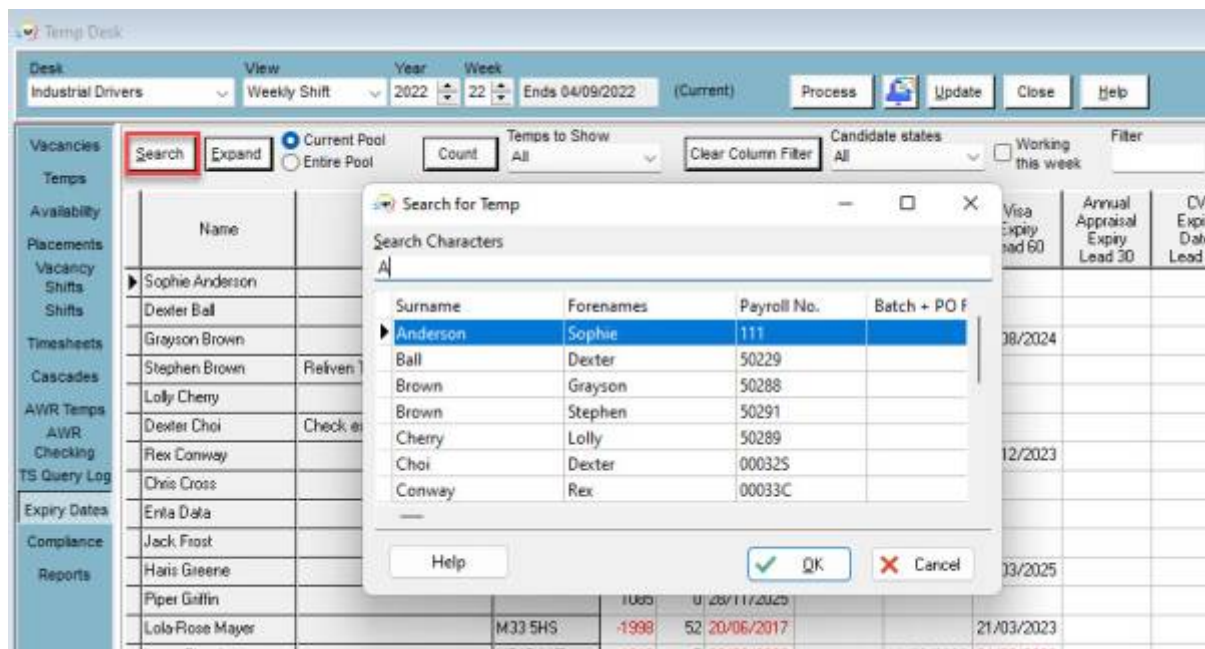


To clear this selection click on the **Clear Column Filter** button.

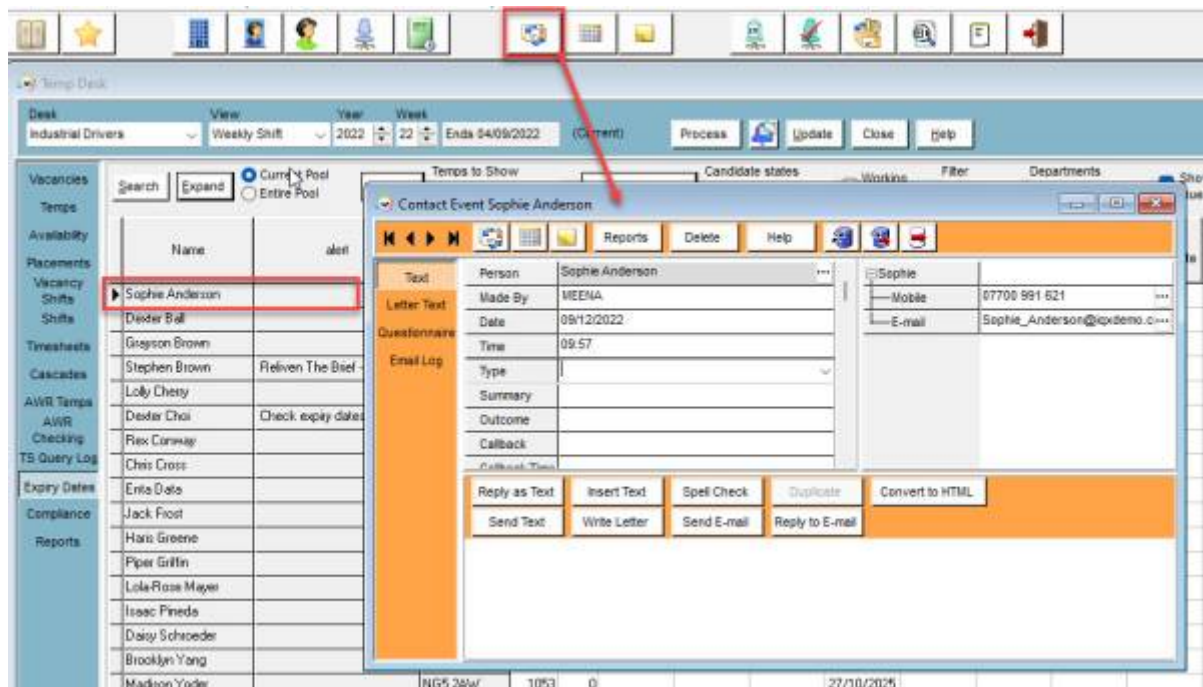
To include non-current Temps such as pre-registered or not active select the radio button for **Entire Pool**.



To search for a Temp by name you can use the Search button. A window will pop up where you can search for the Temp by name.



To make an individual contact event to send an email or write a letter. Click on the line once to select the Temp - then use the **Make Contact Event** button or **F2** to bring up the Contact Event window.



## To send emails or print letters in bulk - Mail Merge

Use the **Process** button to take all the visible records to the **Person Selector** or select by holding CTRL and click on the required records to process only the selected records to the selector. From the **Person Selector** use the Mail Merge view to write the email/letter to the Temps.

## Compliance

If compliance domains are set up by the Agency a summary of the states for all Temps in the Temp Desk can be seen on the Compliance view.



By default you will see Temps that are working in the week, but you can see all Temps in the desk by unticking the **Working this Week** box.

**Expand** will open the Temps record. If any expiry dates are expired or expiring, you will get a list of these in the final column. Again from here you can make individual contact events or process Temps to send a Mail Merge.

## Reports

Here you will find all the reports that are linked to the Temp Desk. These are usually reports that require their data to be pulled from the timesheets or shifts. To run the required report, click on the line once to select then click on open. The report will either prompt you to make a further selection i.e. a date range, or it will open immediately using the information from the week you have selected on the Temp Desk.

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