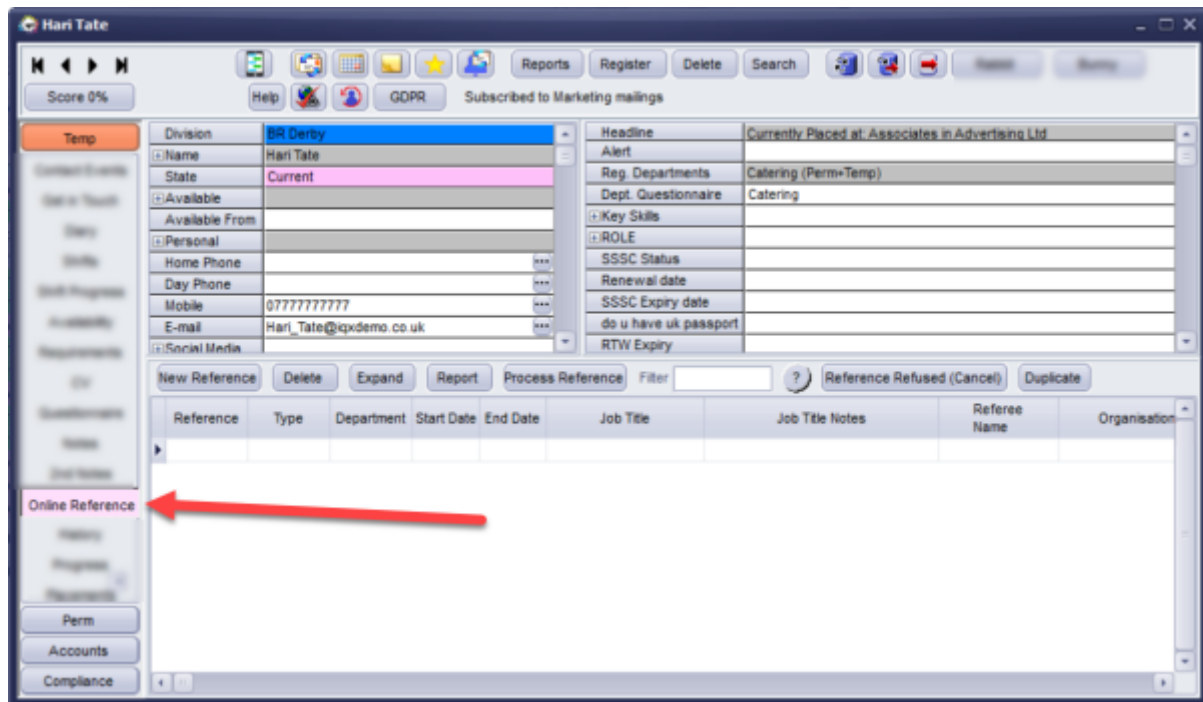


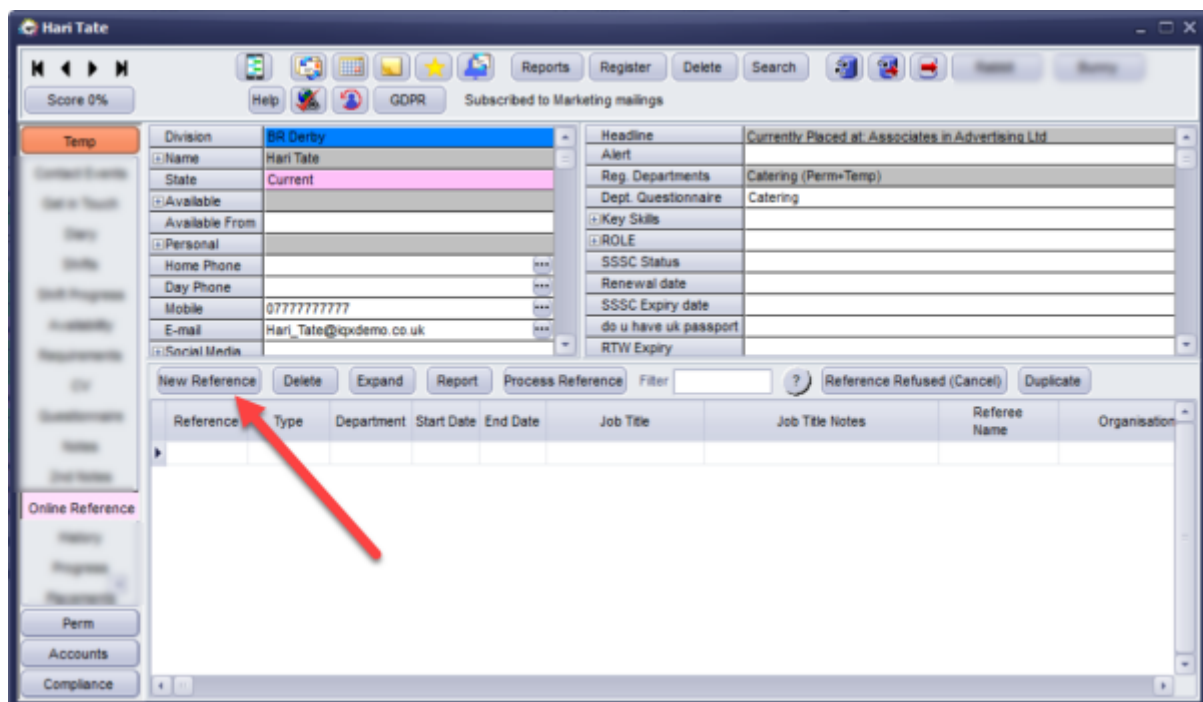
References

On the Candidate Record you will see a tab for 'Online References'



The screenshot shows the 'Hari Tate' software interface. On the left sidebar, the 'Online Reference' tab is highlighted with a red arrow. The main area displays a form for a candidate named 'Hari Tate' with various fields for personal and professional information. The 'Online Reference' tab is currently selected, showing a table with columns: Reference, Type, Department, Start Date, End Date, Job Title, Job Title Notes, Referee Name, and Organisation. The table is currently empty.

To add a new reference to a Candidate, use the **New Reference** button.



This screenshot shows the same 'Hari Tate' software interface. A red arrow points to the 'New Reference' button located at the top of the reference table. The button is labeled 'New Reference' and is positioned next to other action buttons like 'Delete', 'Expand', 'Report', 'Process Reference', 'Filter', 'Reference Refused (Cancel)', and 'Duplicate'.

This will bring up the Reference Form.

The information you are required to fill in will depend on what 'Type' you select



Fill in the required fields and Save.

Online Reference Request

Department * Catering

Type * Professional

Referee Details

Referee Name * Ben Jamieson

Salutation

Keyname

Organisation * IQX Limited

Referee Position * Managing Director

E-mail * ben.jamieson@iqxdemo.com

Fax

Work Phone 01835340034

Mobile Phone

Address

Town

County

Country

Postcode

Requesting Reference for Previous Position

Job Title * Support Consultant

Start Date * 01/09/2019

End Date * 07/11/2023

Notes

Save/Continue Save/Close Close

The referee will now appear on the Online Reference screen for that Candidate as **green**. When the Reference is ready to be sent Expand the Reference and Click 'Approve to Send'. An automated job will then pick up this Reference and send it to the Referee and the Reference will be highlighted in **pink**. The Referee will receive an Email with a Link to return the reference where it will then be highlighted black in IQX.



The screenshot shows the iqx software interface for managing candidate references. The main window is titled 'Hart Tale'. On the left, there is a sidebar with various navigation options: Temp, Contact Events, Get in Touch, Diary, Shifts, Shift Progress, Availability, Requirements, CV, Questionnaire, Notes, 2nd Notes, Online Reference, History, Progress, Placements, Perm, Accounts, and Compliance. The main area is divided into two panes. The top pane shows the candidate's details for 'Hart Tale', including their name, state (Current), and various contact information. The bottom pane shows a list of references. The table below represents the data shown in the references table.

Reference	Type	Department	Start Date	End Date	Job Title	Job Title Notes	Referee Name	Organisation	Consultant	Request Created
Personal	Catering						Jamie Stevenson	ABC Limited	CATHERINE	28/11/23 12:41
Professional	Catering		01/09/19	07/11/23	Support Consultant		Ben Jamieson	IQX Limited	CATHERINE	28/11/23 12:38

Further references can be added by repeating the steps. Once a reference request has been sent the record cannot be deleted.

Set up - for Systems Administrators

How to Configure Online Web Reference

Back to [Candidates](#). [How to...](#)

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