

IQX Web Referencing User Guide

V1.01

Gareth Johnstone and Ivan Baldwin





Web Referencing User Guide

Users can now 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.

🍄 Steven Sn	nith				_ 🗆 ×
		Reports Register Del	ete	Search	
	Help Look	up Address			
Temp	Division	BR Nottingham		Headline	
	+Name	Steven Smith		Alert	
Contact Events	State	Current		Reg. Departments	Construction (Perm+Temp), Financial Services (Perm+Temp)
Get in Touch	Available From	10/11/2015		Dept. Questionnaire	Financial Services
oct in locality	Personal	Male 49		***Person Q'aire***	
Diary	Home Phone	01835000919		Location Zone	Any Area
Shifts	Day Phone	01835340033		Emergency Contact D	4
	Mobile	07453909999		Driving Licence	Full, Clean
Availability	E-mail	steve@iqx.co.uk		±Languages	
cv	Social Media			Do not mailmerge UN	r
0	Address	Priory Cottage, 99 Ladysmith Road, A			
Questionnaire	Source		•		
Notes	New Reference	Delete Expand	Rep	ort Process Reference	•
2nd Notes					
Wab Reference	Department	Job Title Jo	ob Ti	tle Notes Ref	feree Name Organisation Consultant
webherence	*				

Complete the reference details in the next window. Save and close.

Proprietation III	Financial Services	(£)	
Job Title *	Forensic Accountent		
			117
Referee De	etails Iven Beldwin	Address	
Referee De Referee Name * Solutation	etails Ivan Baldwin Ivan	Address	
Referee De Referee Name * Solutetion Organisation * Rateree Job Title * Hame Phone Work Phone Mobile Phone	etails Iven Beldwin Iven Big 4 Accountency 'Senior Accountent	Address Town County County Postcode	



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.

🏶 Steven Sn	nith				- 0
HAPH	Help Looki	L Reports Register Del	ete	Search 🧃 🔮	
Tamp	Division	BR Nottingham	-	Headline	
Temp		Steven Smith		Alert	
Contact Events	State	Current		Reg. Departments	Construction (Perm+Temp), Financial Services (Perm+Temp)
Get in Touch	Available From	10/11/2015		Dept. Questionnaire	Financial Services
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	Mobile	07453909999		Driving Licence	Full, Clean
Availability	E-mail	steve@iqx.co.uk		∃Languages	
CV				Do not mailmerge UN	r
Quantinansia	Address	Priory Cottage, 99 Ladysmith Road, A			
Questionnaire	Source		•		
Notes	New Reference	Delete Expand	Rep	ort Process Reference	
2nd Notes	Department	Job Title Jo	ъьт	itle Notes Ref	feree Name Organisation Consultant
Reference	Financial S Fo	rensic Accountant HMRC Vacanc	y de	etecting fraud and m Ivan E	Baldwin Big 4 Accountancy GARETH 10/1

Reference requests to referees will be sent out periodically, as set up by your System Administrator.

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.

Deixta	Respond		Quick Steps	G,	Motor		Tagi
1	Fue 10/11/2015 10:22						
	gareth.johnstone@id	qx.co.uk					
r 1	Reference Request						
to handhaile	0.08						
O If there are	problems with how this message is dis	played, click here	to view it in a web browser.				
	10	Y					
	See 14	~					
	The Smarter Pa	uther					
	Dear Ivan Baldwin						
	We have been given you	ir details as a i	elerence contact for Ste	ven Smith.			
	Please follow the link be	low to access	the secure on-line refere	nce.			
	-		-				
	Click here to access	your reterenc					
	If you cannot open the it	nk, please rigt	t click and copy hyperlini	k and then past	e the link int	o your wet	browser.
				22			
	Any information provided	a will be treate	a in the strictest contider	ce.			
	Please do not hesitate to	contact me st	hould you have any queri	es regarding th	is request.		
	Kind regards						
	Course Internet						
	Gareth Johnstone						

On clicking this button they will be taken to a temporary website containing the reference questions.



Referees can complete the reference in one sitting then click Save and Send or they can Save the reference and return to complete it at a later date. Note – the website is only available for 7 days.

1 20				
	Web Refere	ance for Steven Smith		
	March you from Balabace (c) Associations	using the last is 20 out has adversed for Sixon body for the	position Preservation	
	Persilian	(free loose)		
	Hotes	wetching test plant and the sectors		
	What is your yearlowering to the secondate *			4
	Pagaga confirm the contractive law just field and grand pages with you			
	Please conduct any in the second seco			
	Massa isottum data anginyakan kukan."			30
	Will of whit the Helson. Her employment proved			
	Wenned you re-monitors			
	Peece tild any of the			

Once the reference has been completed The Web Reference record will change font colour to black.

2nd Notes	Department	Job Title	Job Title Notes	Referee Name	Organisation	Consultant	-
Reference	Financial S For	ensic Accountant	HMRC Vacancy detecting fraud and m	Ivan Baldwin	Big 4 Accountancy	GARETH	10/1
							- 1

Double clicking on the Web Reference record will open it. It will show the referee's response along with some audit information.

🍄 Reference Request for Stever	n Smith from Ivan Baldw	in at BIg 4 Accountancy	×		
Report Exit					
Department	Financial Services		•		
Referee Name	Ivan Baldwin (Ivan)				
Organisation	Big 4 Accountancy				
Referee Job Title	Senior Accountant				
Address					
Contact Details	Email: ivan@iqx.co.uk				
Job Title	Forensic Accountant				
	HMRC Vacancy detecting fra	ud and money laundering			
Job Title Notes					
Consultant	GARETH				
Created	10/11/2015 10:16				
Sent to Referee	10/11/2015 10:22				
Completed by Referee	10/11/2015 10:29				
Process Completed					
Relationship to candidate	Manager				
Candidate job title	Accountant with special res	ponsibility for fraud investigations			
Employment start date	29/01/2002				
Employment end date	06/11/2015				
Reason for leaving	Redundancy				
Would you re-hire this person	Yes				
 Đ Qualities	Trustworthy, Punctual, Hardworking				
Further notes	An excellent worker with the tenacity to succeed.				
Contact number	1835870311				
Eubject Knowledge	Accounting 1				



To send a summary of the referee's response, if required, is also an automatic job.

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



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

I		Source	I								
	Notes	New Reference	Delete	Expand	Report	Process Reference					
	2nd Notes	Department	Job Title		Job Title Not	es Refe	ree Name	Organisation	Consultant		4
	Reference	Financial S Fo	rensic Accountant	HMRC Vacar	ncy detecting	fraud and m Ivan Ba	ldwin	Big 4 Accountancy	GARETH	10/1	

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

Report	Exit	
epartment	Financial Services	
leferee Name	Ivan Baldwin (Ivan)	
Organisation	Big 4 Accountancy	
leferee Job Title	SeniorAccountant	
ddress		
Contact Details	Email: ivan@iqx.co.uk	
ob Title	Forensic Accountant	
ob Title Notes	HMRC Vacancy detecting fraud and money laundering	
Consultant	GARETH	
created	10/11/2015 10:16	
ent to Referee	10/11/2015 10:22	
ompleted by Ref	10/11/2015 10:29	