



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.

	Position	PO Ref	Company	Miles	Monday 04/07/2022	Tuesday 05/07/2022	Wednesday 06/07/2022	Thursday 07/07/2022	Friday 08/07/2022	Saturday 09/07/2022	Sunday 10/07/2022
Class 1			10 Group PLC			1P	1P	1P	1P		
Delivery			A & M Stephens								
Class 1			ABC Contract Serv								
Driver			ABC Contract Serv		1U	1U	1U	1U	1U		
Driver			ABC Contract Serv								
HGV			ABC Contract Serv								
Class 2			Alorby Limited					3U	3U	3U	3U
Delivery			Anec Services Ltd.								
Delivery			Bordens		1P	1P					
HGV			Bordens								
TEST			Bordens								
Delivery			Eden Brown Ltd.								
Driver			Eden Financial Ltd.								
7.5			Habitat Group PLC								

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.

Temps

In this tab you can view all the Temps 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 Desk

Desk: Industrial Drivers View: Weekly Shift Year: 2022 Week: 14 Ends 10/07/2022 (Current) Process Update

Vacancies Search Expand Holiday Pay Current Pool Filter Available Unavailable On Holiday Add Shifts

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 4th, 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																											
Isobelle 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.

The screenshot shows the 'Shifts' window in the Temp Desk application. The window has a sidebar on the left with a menu containing: Vacancies, Tempa, Availability, Placements, Vacancy, Shifts (highlighted), Timesheets, Cascades, AWR Temps, AWR Checking, TS Query Log, Expiry Dates, Compliance, and Reports. The main area displays a table of shifts for the week of 28/11/2022 to 04/12/2022. The table has columns: Temp, Company, Vacancy, Cancel Shift details, Date, From, To, Break, Description, Our Ref, and Their R. The table lists shifts for Charlie Byrd, Grayson Brown, and Chris Cross. Below the table, there are buttons for Fill, Expand Vacancy, Cancel, Expand Temp, Cascade Now, Expand Timesheet, Confirmation, and Move Shift. The bottom section shows details for a selected shift, including State (Provisional), Temp (Charlie Byrd), Company (10 Group PLC), Vacancy (Class 1), Date (Mon 28/11), From (08:00), To (17:30), and Break (60).

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...	☒	AWR Applies	Secretary	4	3		Y	
Stuart Humphries	AWR Appli...	☐	AWR Applies	ASA Test	1	4			
Simon Jones	AWR Appli...	☐	AWR LK2 Applies	Secretary	6	0 L		Y	
Rob McAllister	AWR Appli...	☐	AWR Applies	Secretary	3	0		Y	
Rob McAllister	AWR Appli...	☐	AWR LK1 Applies	pa	3	0			
Rob McAllister	AWR Appli...	☒	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)			
Process Update Close Help											
Vacancies											
Expand Placement Applicant Gap or Qual Qual Wks >= 1 Other Agency Work Report Show Weekly Details											
	Applicant	AWR Status	Linked	Company	Job Title	Weeks	Gap	Grade	Speciality	Rates	
Temp	Kevin Drummond	AWR Appli...	☒	AWR Applies	Secretary	4	3			Y	
Placements	Stuart Humphries	AWR Appli...	☐	AWR Applies	ASA Test	1	4				
Timesheets	Simon Jones	AWR Appli...	☐	AWR LK2 Applies	Secretary	6	0 L			Y	
AWR Temps	Rob McAllister	AWR Appli...	☐	AWR Applies	Secretary	3	0			Y	
AWR Checking	Rob McAllister	AWR Appli...	☐	AWR LK1 Applies	pa	3	0				
	Rob McAllister	AWR Appli...	☒	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)																	
Questions Add Delete Units Restore Deleted Filter Reset Order Font Colour Compliance Messages Expiry Excluded States																	
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			☐	1	6	☐	☐	☐	☐	☐	☐			
141	SP	Right to Work	Single Selection			☐	1	6	☐	☐	☐	☐	☐	☐			
142	RTW	Right to Work Type	Single Selection			☐	1	6	☐	☐	☐	☐	☐	☐			
144	RSC	Right to Work Share Code	Text	8		☐	1	6	☐	☐	☐	☐	☐	☐			
146	RTX	Right to Work Expiry	Date			☐	1	6	☐	☐	☐	☐	☐	☐		45 Warning	CARZ
150	IDG	ID Shown	Multiple Selection			☐	1	6	☐	☐	☐	☐	☐	☐			
152	RRN	Passport Number	Text			☐	1	6	☐	☐	☐	☐	☐	☐			

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		
Dexter Ball		E5 8FU	-465	26	30/08/2021								
Lolly Cherry		SW12 Q/Y	2520	0			01/01/2023				01/11/2025		
Dexter Choi	Check expiry dates	KT23 4DH	-1100	0	26/11/2019		07/11/2019						
Sam 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		
Haris 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					
Jamie 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		
Dexter Ball		E5 8FU	-465	26	30/08/2021								
Lolly Cherry		SW12 Q/Y	2520	0			01/01/2023				01/11/2025		
Dexter Choi	Check expiry dates	KT23 4DH	-1100	0	26/11/2019		07/11/2019						
Haris Greene		PH31 4AH	-3082	12	01/07/2014			15/03/2025					
Lola-Rose Mayer		M33 5H5	-1997	52	20/06/2017			21/03/2023					
Jamie 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 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.

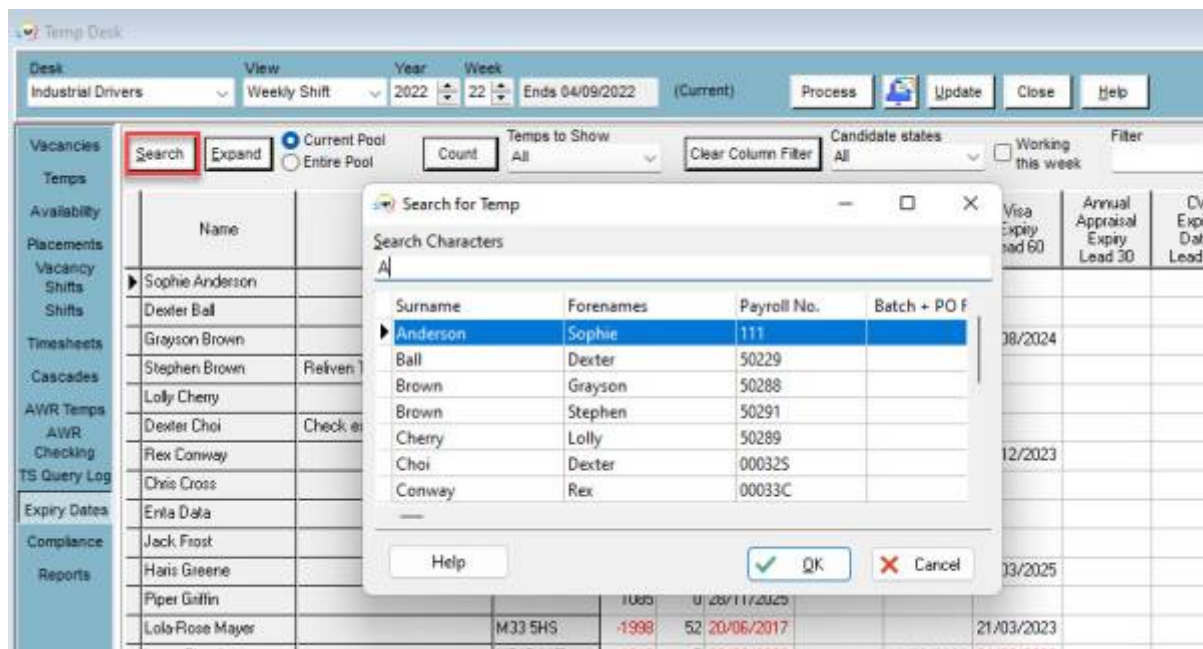
Name	alert	Custom Column	Days before Expiry	Shifts after Expiry	Licence Expiry Lead 30	Mandatory Training Lead 30	Right to Work Expiry Lead 45	Visa Expiry Lead 60	Annual Appraisal Expiry Lead 30	CV Expiry Date Lead 30	Ref 1 Expiry Date Lead 30	Ref 2 Expiry Date Lead 30	Compliance outside Expiry Lead 30
Rex Conway		LL48 6PL	367	0				10/12/2023					
Haris Greene		PH31 4AH	-3082	12	01/07/2014			15/03/2025					
Lola-Rose Mayer		M33 5H5	-1997	52	20/06/2017			21/03/2023					
Jamie 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.

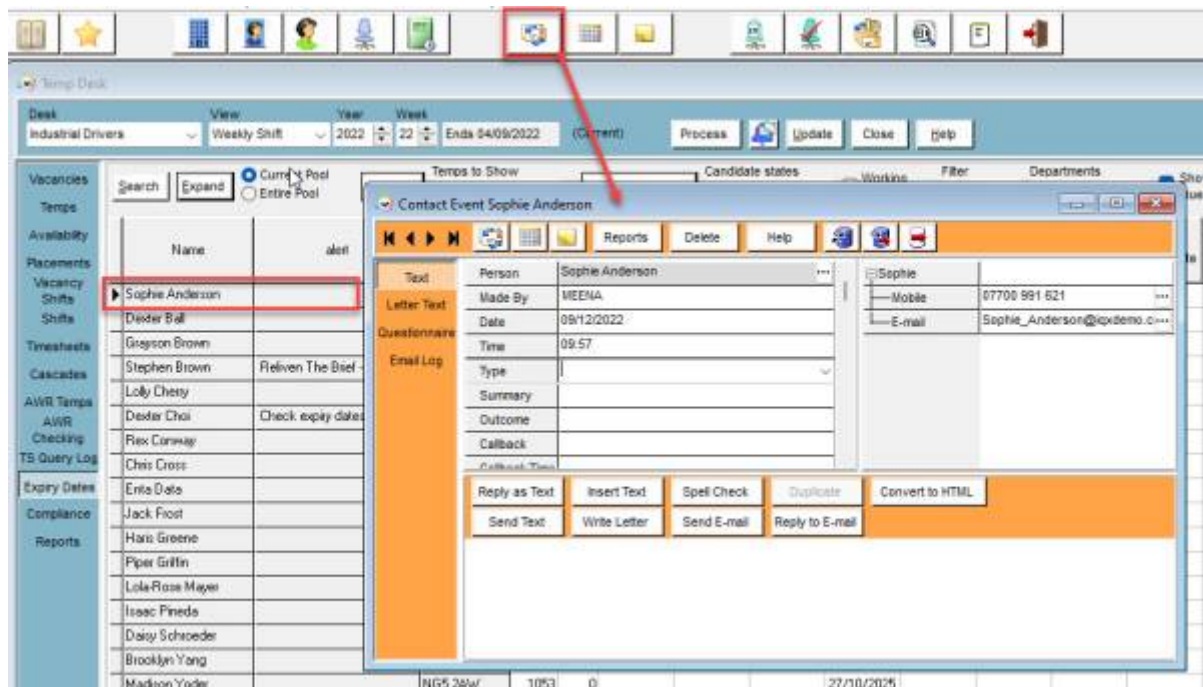
To include non-current Temps such as pre-registered or not active select the radio button for **Entire Pool**.



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.



Name	Status	Score %	Compliance Failures and Warnings. Expand for Details
Judith Woodstone	Current	100	

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.

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