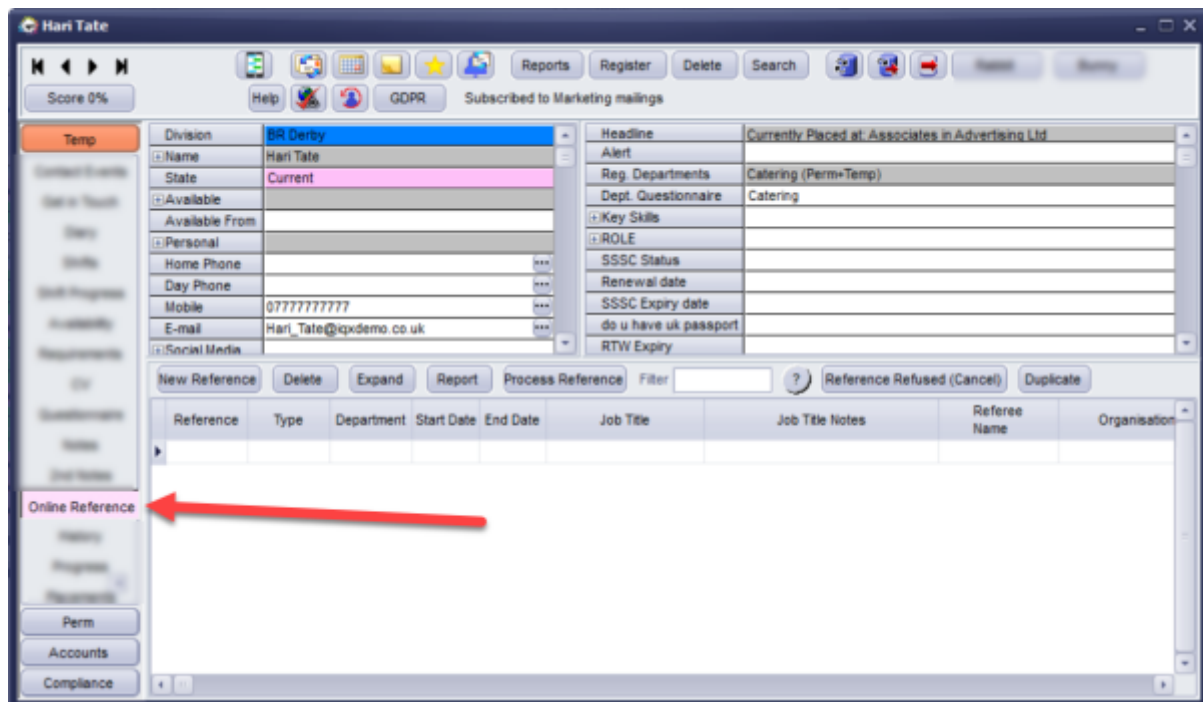




WORK IN PROGRESS

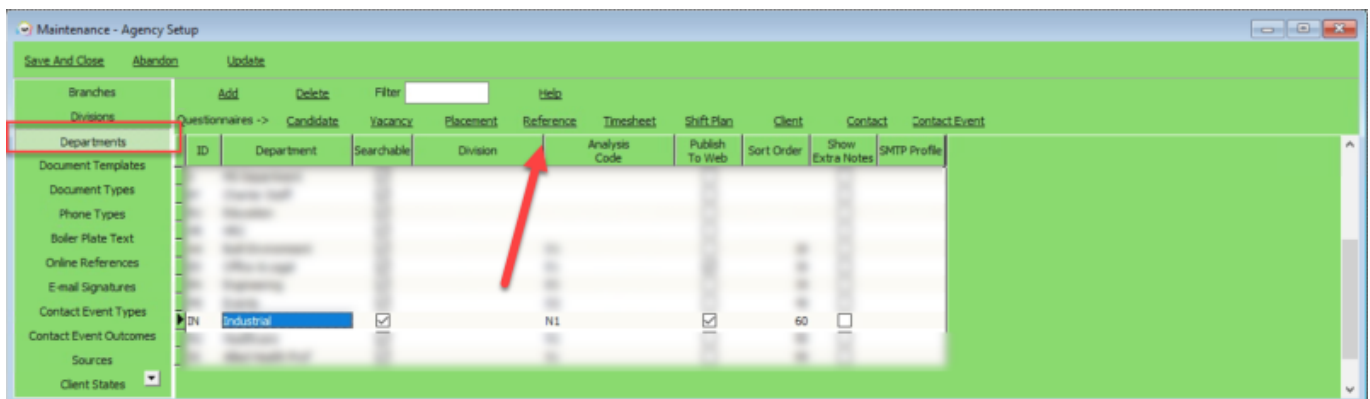
How to Configure Online Web Reference

1) To turn on the view in the Candidate Record: Go to General Settings > **Show Person On-line Reference View** > Set this to **Y** and ensure **Person Reference Request** is set to **N**. you will now see this on the Candidate Record



The screenshot shows the 'Hari Tate' candidate record form. The left sidebar contains various sections: Temp, Contact Events, Set a Task, Skills, Job Progress, Availability, Responsibility, Qualifications, Notes, Job Notes, Online Reference (highlighted with a red arrow), History, Progress, and Recruitment. The main form area displays details for 'Hari Tate' in the 'BR Derby' division, including contact information and a list of references. The 'Online Reference' section is currently empty.

2) You will need to set up Questions so when the form is sent to the Referee they can answer the Questions. Questions for References are Departmental therefore are found in Maintenance > Agency Setup > Departments > Questionnaire - Reference



The screenshot shows the 'Maintenance - Agency Setup' screen. The left sidebar lists various setup categories: Branches, Departments (highlighted with a red box), Document Templates, Document Types, Phone Types, Boiler Plate Text, Online References, E-mail Signatures, Contact Event Types, Contact Event Outcomes, Sources, and Client States. The main area displays a table of questions for different reference types. The 'Reference' tab is selected, and a red arrow points to the 'Reference' column header. The table shows a question for 'Industrial' with a 'Searchable' checkbox checked and a 'Division' of 'N1'.

The Questions are grouped so you can have specific Questions for each type of reference and options on who can see it.



0 Everyone to see **1** For Personal Reference - Candidate Answers
2 For Professional Reference - Candidate Answers
3 For Other Reference - Candidate Answers
100 For Personal Reference - Referee Answers
200 For Professional Reference - Referee Answers
300 For Other Reference - Referee Answers



Make sure for Candidate and Referee Questions Publish to Web is ticked

Order	Question ID	Question Description	Type	Min Step Size	Units	Required	Group	Audit	Web Publish	Web View	Search Hide	Heading Collapse	Heading Answers	Export
10	CON	Did the candidate work at your company?	Single Selection			☐	200	☐	☒	☐	☐	☐	☐	☐
20	DC	Are the worked dated provided above correct?	Single Selection			☐	200	☐	☒	☐	☐	☐	☐	☐
30	REC	Do you have any comments to add?	Text			☐	200	☐	☒	☐	☐	☐	☐	☐
40	RE2	What job title is your referee?	Text			☐	2	☐	☒	☐	☐	☐	☐	☐
50	PR1	Please describe your relationship to the candidate	Text			☐	100	☐	☒	☐	☐	☐	☐	☐
60	PR2	Would you describe the candidate as dependable?	Single Selection			☐	100	☐	☒	☐	☐	☐	☐	☐
70	PR3	What relation is this person to you?	Text			☐	1	☐	☒	☐	☐	☐	☐	☐
80	DR1	Do they accept feedback without getting defensive	Single Selection			☐	300	☐	☒	☐	☐	☐	☐	☐

Order	Choice ID	Choice Description	Autofill search words (comma separated)	Value	Web Hide	Analysis	Readonly	Lo
10	Y	Yes			☐		☐	
20	N	No			☐		☐	

Order	Choice ID	Sub Choice Description	Value
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3) To send the Reference to the Referee you need the job IQXWeb Web Referencing (Send References).xml

This will pick up all the references which have not been sent and 'Approve to Send' within the Reference has been ticked

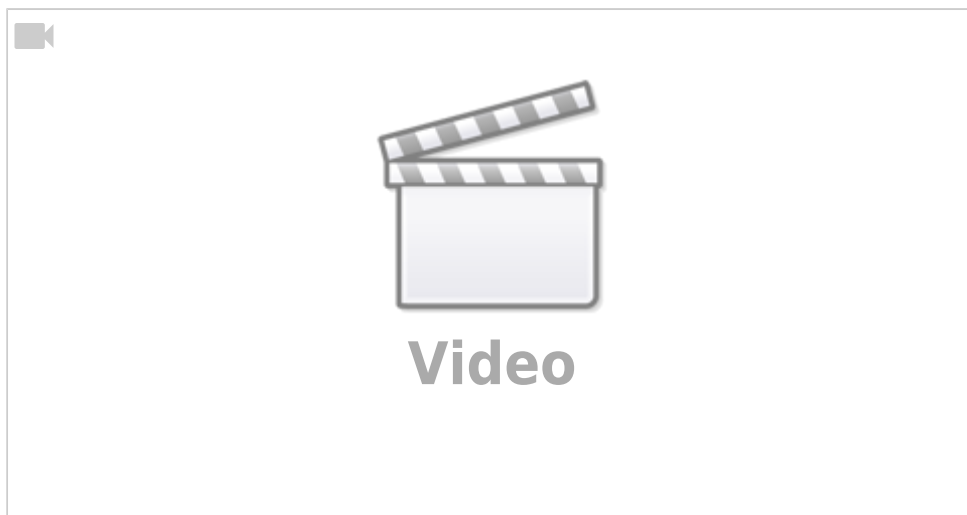


Department	Catering
Reference Type	Professional
Referee Name	John Adams
Organisation	IQX Limited
Referee Job Title	Managing Director
Address	
Contact Details	Email: support@iqx.co.uk
Job Title	Support Consultant
Job Title Notes	
Consultant	CATHERINE
Created	28/11/23 11:46
Approved to Send	☒
Ask Candidate Before Send	☐
Sent to Referee	☐
Reminder Blocked	☐
Last Reminder	
Completed by Referee	
Process Completed	
Reference Refused	

4) For the Email Body this is set up in Maintenance > Agency Setup > Email Signatures > the email signature **MUST** be called **WEBREF** and your body is written in HTML code with the below code required within the code for the Referee to access the Reference Form

```
<p><br></p>
<p><a href="{yourURL}/webReference/{URLRequestCode}" style="display: inline-block; color: #ffffff; background-color: #3498db; border: solid 1px #3498db; border-radius: 5px; box-sizing: border-box; cursor: pointer; text-decoration: none; font-size: 14px; font-weight: bold; margin: 0; padding: 12px 25px; text-transform: capitalize; border-color: #3498db;" target="_blank">Access Reference Request</a>&nbsp;</p>
<p><br></p>
```

How to create references can be found below [References](#)





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