How to:

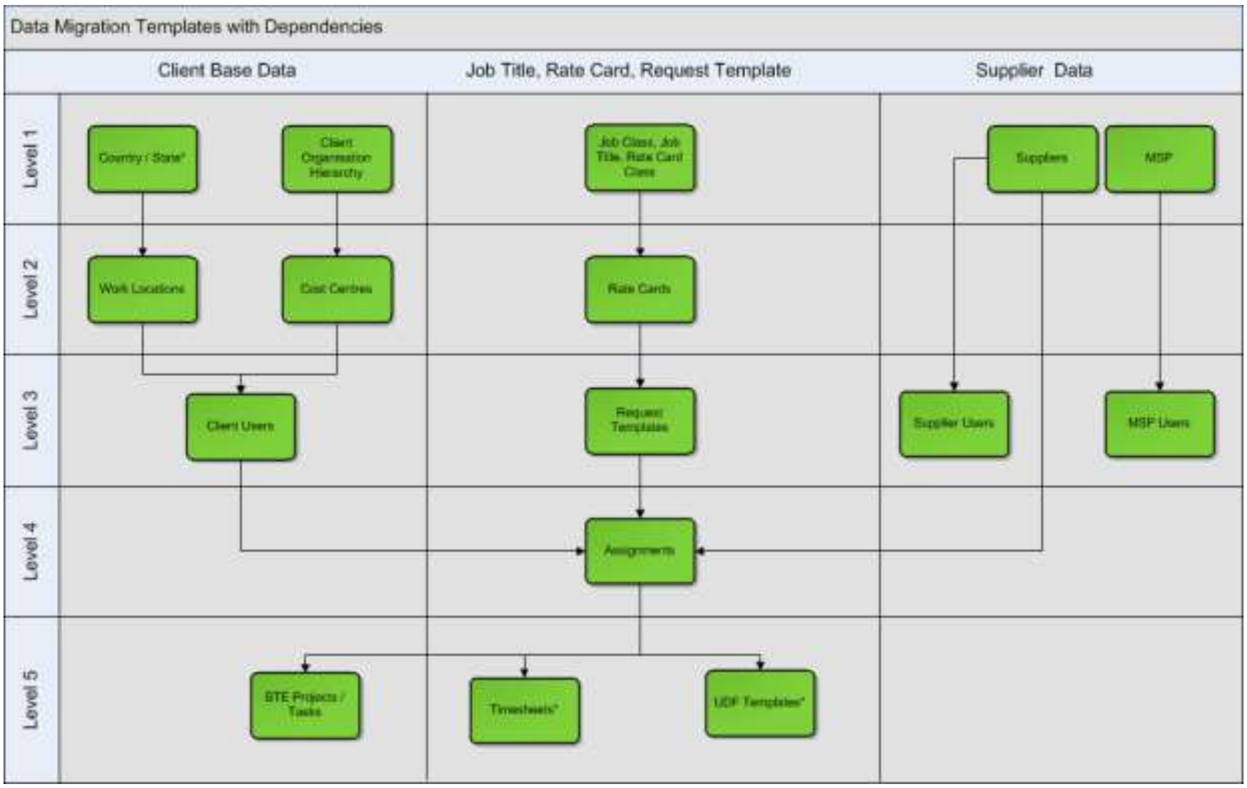
Data Imports

The data in this document contains trade secrets and confidential or proprietary information of Beeline.com, Inc., the disclosure of which would provide a competitive advantage to others. As a result, the contents of this document should not be disclosed, used or duplicated – in whole or in part – for any purpose other than to evaluate Beeline VMS features.

Contents

Import Templates

The illustration below shows how imports relate to the system. All Beeline imports that are most commonly used, as well as the recommended order of import, are listed below. Please note that if the Client desires to have Owners associated to their OUs, CCs, WLs, Projects, etc. we must first load the data without Owners, and then reload with Owners after the Client Users have been imported.



Data conversion dependencies diagram

How to Use This Guide

The Templates listed are in the order they should be imported. The Field Requirements List is the data import template with all the notes about what type of data needs to be filled in on the Data Import, for example, First Name.

All items in the Field Requirements List are highlighted:

- Yellow is required client data, depending on your program, the Implementation Consultant may require more data items to be added.
- Green is required Beeline data, for example the code that needs to be used for Resource type, would be one of the following values:
    - RT_W2Exempt

    - RT_W2NonExempt
    - RT_1099Independent
    - RT_SoleProprietor
    - RT_Employee
    - RT_Inc
- Gray is optional data.

The Purpose indicates what type of information is to be imported and how that data reacts in the system. The “be in sync” data indicates some special hints as to filling out the template. On the Imports that have “be advised”, this is additional information about the template. At the very end of the document is an Appendix, with additional information and a list for the Country State import. Please note: Maximum rows of data limit is: 10,000.

This guide has sample templates for your reference; this is for instructional purposes only.

PLEASE BE ADVISED: Make sure you always use the current template version when importing into Beeline VMS. Beeline is not liable for any errors caused by using an out-of-date template and you could incur billing charges for database cleanups. Check the instructions in the Web Import Tool Guide on how to download the current import templates. Never add or delete any columns on the templates.

All templates listed with an ◆ is considered to be used for Implementation purposes. Although, some can be used to update existing information.

All templates without the indicator are additional templates than can be used depending on your configuration.

Character limits are provided when known; blank cells indicate the value is not provided**.**

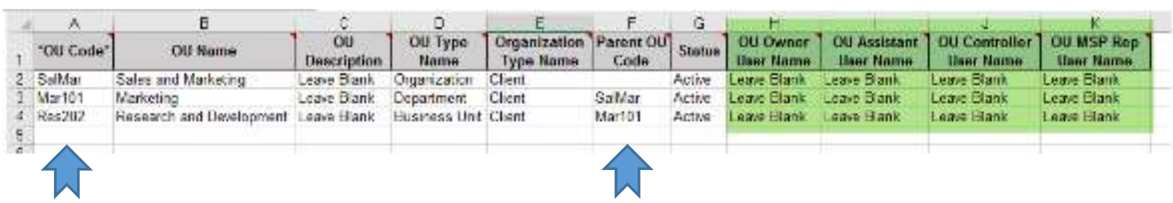
◆ Client Organizational Units (OUs)

Purpose: Beeline’s organizational unit (OU) data establishes the basis for your VMS solution. OUs are typically the highest-level structures in your company, and are usually very easy to identify on your organization chart. This is the first import that is prepared for new clients.

Organization Unit Type (column D on the import and this field in the UI)

The OU Type must match one of the types set up in Admin>Security>OU Types.

- The only OUs that will not have a parent are the highest-level ones.
- The "User" fields must be left blank when adding an OU. You can modify the OU and add them with a second OU import.



	A	B	C	D	E	F	G	H	I	J	K
1	*OU Code*	OU Name	OU Description	OU Type Name	Organization Type Name	Parent OU Code	Status	OU Owner User Name	OU Assistant User Name	OU Controller User Name	OU MSP Rep User Name
2	SalMar	Sales and Marketing	Leave Blank	Organization	Client		Active	Leave Blank	Leave Blank	Leave Blank	Leave Blank
3	Mar101	Marketing	Leave Blank	Department	Client	SalMar	Active	Leave Blank	Leave Blank	Leave Blank	Leave Blank
4	Res202	Research and Development	Leave Blank	Business Unit	Client	Mar101	Active	Leave Blank	Leave Blank	Leave Blank	Leave Blank

Also, ensure that the values in Parent OU Code, Column F, match the values in OU Code, Column A. If there are Codes in Column F, that are not in Column A, this load will fail validation.

Field Requirements List for OU template

Field Name	Comments:	Character Limit	Column
OU Code	Code of the Organizational Unit being created.	50	A
OU Name	Name of the Organizational Unit Being Created. Required for new Organization Units or Organizations. OU name must be unique.	255	B
OU Description	Description of the Organizational Unit.	255	C
OU Type Name	Name of the Type of Organizational Unit (Examples: Department, Organization, Business Unit) This value must	255	D

Field Name	Comments:	Character Limit	Column
	match a value in the database as set up during implementation. Required for new OUs. NOTE: The very top OUs must be a type of Organization, all other OUs can be anything but Organization.		
Organization Type Name	Name of the Type of Organization to which this OU should be mapped. Examples: • Client • Supplier • Client Rollup • Supplier Subcontractor These values must match one of the standard values in the database. If left blank, this will default to "Client"	255	E
Parent OU Code	Code of the Organization Unit that serves as the parent to this one. When left blank - Root OU assumed for new records only. Circular references A->B->A not allowed (A reports to B, B reports to A)	50	F
Status	Status of the OU upon creation must be '**Active**' or '**Inactive**'. If left blank this value defaults to 'Active'. **If record already exists and the status field is left blank then current status will not be changed. (Active will still be active and inactive will still be inactive.) Best practice is to always provide a value.**	8	G
OU Owner User Name	The UserName (Login) of the OU Owner(s). If Owner is a new user, it will be created upon import with Name and Email set to PlaceHolder, PlaceHolder and PlaceHolder@noreplyh.com respectively. If more than one name is specified, they should be separated by a pipe (|). For example, "jdoe1234|jsmith1234". Total field length for multiple owners is 4000 Characters. NOTE: The list of UserNames should always be a complete list. Any existing User mappings n the database will be removed and repopulated if this field is not blank.	50	H
OU Assistant User Name	The UserName (Login) of the OU Assistant(s). If Assistant is a new user/s, it will be created upon import with Name and Email set to PlaceHolder, PlaceHolder and PlaceHolder@noreply.com respectively. If more than one assistant is specified, they should be separated by a pipe (|). For example, "jdoe1234|jsmith1234". Total field length for multiple owners is 4000 Characters. NOTE: The list of UserNames should always be a complete list. Any existing User mappings in the database will be removed and repopulated if this field is not blank.	50	I

Field Name	Comments:	Character Limit	Column
OU Controller User Name	The UserName (Login) of the OU Controller(s). If Controller is a new user/s, it will be created upon import with Name and Email set to PlaceHolder, PlaceHolder and PlaceHolder@noreply.com respectively. If more than one assistant is specified, they should be separated by a pipe (|). For example, "jdoe1234|jsmith1234". Total field length for multiple owners is 4000 Characters. NOTE: The list of UserNames should always be a complete list. Any existing User mappings in the database will be removed and repopulated if this field is not blank.	50	J
OU MSP Rep User Name	The UserName (Login) of the OU MSP Representative. If OU MSP Rep is a new user/s, it will be created upon import with Name and Email set to PlaceHolder, PlaceHolder and PlaceHolder@noreply.com respectively. If more than one assistant is specified, they should be separated by a pipe (|). For example, "jdoe1234|jsmith1234". Total field length for multiple owners is 4000 Characters. NOTE: The list of UserNames should always be a complete list. Any existing User mappings in the database will be removed and repopulated if this field is not blank.	50	K
Localized Name	Used to enter localize names (i.e. - Japanese Kanji)	4000	L
Company Code	If nonexistent in the app, a new company code will be created	255	M
Company Name	Name is required for new records	255	N
External ID	External ID for this OU. An ID other than the OU Code may be used by the client to identify this OU	255	O

Click to download the Data Template Sample for Client Organizational Units.

Cost Centers

Purpose: The cost center is the most common "cost object" used by Beeline's clients for administrative and financial reporting. Your next step should be to consider how your cost centers might map to your organizational hierarchy, identify which cost centers might be associated with which part(s) of your organization. Cost centers are not hierarchical and so must be tied to organizational units (OUs), which are hierarchical, in order to have reporting at an aggregate level.

be in sync: How to fill out the Cost Centers template

Populate Column A, with the Organization Unit Code that you used on the Client Organization Unit template, as shown in the information above.

Populate Column B and C with your Cost Center Data.

Populate Column E, Status as **Active**.

Populate Column F, Billable as **Yes**.

- Once the template is prepared, check Column A – Organization Unit Code should match the Client Organization Units spreadsheet tab, Column A – OU Code. Otherwise, this load will not pass validation.

Field Requirements List for the Cost Centers Template

Field Name	Comments:	Character Limit	Column
Organization Unit Code	The Code for the Organization Unit that this Cost Center will be created for. Required only for New Cost Centers or when Cost Center Number is not unique. Should match value in the database.	50	A
Cost Center Number	Number for the Cost Center. **KEY VALUE** Depends on configuration. When CC Number is unique will be used to look up Cost Center. When CC Number is NOT unique Organization Unit code together with CC Number will be used to identify Cost Center.	100	B
Cost Center Name	Name of the Cost Center. Configuration Parameter - "Imports.Behavior.5XCostCenter.NameDynamicSqlExpression" will hold the actual computation formula. If none above applies and value not provided then this defaults to the OUCode + "-" + CC number for new Cost Centers. (If NULL on insert the Cost Cent Number is used). Cost Center Name if provided must be unique.	255	C
Description	Cost Center Description. (If NULL on insert the Cost Center Name is used)	255	D
Status	The Status of the Cost Center. Must Be: '**Active**' or '**Inactive**'. When left blank - 'Active' assumed. If record already exists and the status field is left blank then current status will not be changed. (Active will still be active and inactive will still be inactive.) Best practice is to always provide a value.	8	E
Billable	Is the Cost Center billable? Must Be: '**Yes**" or "**No**". When left blank "No" assumed. Otherwise, value will pull from configuration.	3	F

Field Name	Comments:	Character Limit	Column
Owner User Name	The UserName (Login) of the Cost Center Owner. If Owner is a new user, it will be created upon import with Name and Email set to PlaceHolder, PlaceHolder and PlaceHolder@noreply.com respectively.	50	G
Controller User Name	The UserName (Login) of the Cost Center Controller. If Controller is a new user, it will be created upon import with Name and Email set to PlaceHolder, PlaceHolder and PlaceHolder@noreply.com respectively.	50	H
Assistant User Name	The UserName (Login) of the Cost Center Assistant. If Assistant is a new user, it will be created upon import with Name and Email set to PlaceHolder, PlaceHolder and PlaceHolder@noreply.com respectively.	50	I
Related Rollup OU Codes	The list of client Rollup OUs that should be mapped to this Cost Center. The values entered should be the Codes of the OUs. If more than one value is entered they should be separated by a pipe (|). (Example: 'OU1234|OU2345|OU3456') NOTE: The list of Rollup OUs should always be a complete list. Any existing rollup OU mappings in the database will be removed and repopulated if this field is not blank.	50	J
Country Code	Is not required unless configuration is enabled. Country Code is validated against existing countries loaded in Beeline. this value is used to look up the Country Code in Security Country.	255	K
Headcount Indicator	Valid values are **Y** or **N**. Default value if not provided is **Y**	1	L
Project Indicator	Valid values are **Y** or **N**. Default value if not provided is **Y**	1	M
Cost Center UDF	Is not a required field unless configuration is enabled. Value provided must match preloaded values. This value is used to look up the User Defined Value.	255	N
Work Location	Work Location Code. Value provided must match existing values. When Cost Center is selected, work location will be pre-selected.	255	O
External ID	External ID of the Security Cost Center.	255	P

Field Name	Comments:	Character Limit	Column
[Click to download](#) the Data Template Sample for Cost Centers.			

Country State

Purpose: if the Country Name and/or Country Codes are missing from your site, this Country State data import template may add them. These codes can be added via this import, or manually. One thing to remember, if at a later date the ISO codes need to be added, this load will not add them and they will need to be added manually.

Country Codes – ISO – Mandatory when using Workday

- Alpha-2 code – a two-letter code that represents a country name, recommended as the general-purpose code.
- Alpha-3 code – a three-letter code that represents a country name, which is usually more closely related to the country name.

be in sync: How to fill out the Country State Import

Populate the Country Name, Country Code and Country Description will need to be filled in.

Populate the State Name, State Code and State Descriptions will need to be filled in.

The State, Country Codes and ISO codes (if needed) can be found in the Appendix Pages.

The ISO codes are required if you are using Workday.

Example of what the load should look like:

A	B	C	D	E	F	G	H	I	J	K	L	M
Country Name	*Country Code*	*Country Description*	Country Postal Code Format	Country ISO Alpha2	Country ISO Alpha3	Country ISO Numeric3	*State Name*	*State Code*	*State Description*	TDX Country	TDX State	ISO Code
South Africa	ZA	South Africa		ZA	ZAF		North-West	NC	North-West			
Belgium	BE	Belgium		BE	BEL		Namur	WNA	Namur			

Field Requirements List for the Country State Template

Field Name	Comments:	Character Limit	Column
Country Name	Country Name Must be unique with Country Code and Country Description	255	A

Field Name	Comments:	Character Limit	Column
Country Code	Country Code specific to Country Name. Must be unique with Country Name and Country Description	255	B
Country Description	Country Description must be unique with Country Name and Country Code	255	C
Country Postal Code Format	OPTIONAL Postal Code format specific to Country	255	D
Country ISO Alpha2	If using Workday, this field is required and is easy obtainable on the internet.	2	E
Country ISO Alpha3	If using Workday, this field is required and is easy obtainable on the internet.	3	F
Country ISO Numeric3	If using Workday, this field is required and is easy obtainable on the internet.	3	G
State Name	REQUIRED When State Code and State Description populated	255	H
State Code	REQUIRED WHEN State Name and State Description populated	5	I
State Description	REQUIRED WHEN State Name and State Code Populated	255	J
TDX Country	Optional String	5	K
TDX State	Optional String	5	L
ISO Code	State ISO Code	3	M

Click to download the Data Template Sample for Country State.

beeline

Work Locations

Purpose: This refers to where your employees and contractors are physically located by looking on a map. This information may facilitate later discussions such as taxable billing and region-specific contractor rate cards.

When a hiring manager logs into the application to create a request, we want to be able to default as much information as possible so that the hiring manager does not have to populate this information. Common data attributes that are needed to create a request are work locations, cost centers, and business units or organizational units.

be in sync: How to fill out the Work Locations Template

Fill out all items highlighted in Yellow that are required. All other items highlighted in gray are optional, but can be used if needed.

Field Requirements List for the Work Locations Template

Field Name	Comments:	Character Limit	Column
Location Name	Work Location Name	255	A
Location Code	The Code for the Work Location to be Added or Updated **KEY**: If a Work Location by this code already exists, the record will be **UPDATED.**	255	B
Description	The Description of the Work Location.	255	C
Address Line 1	Line 1 of the Address of the Location.	150	D
Address Line 2	Line 2 of the Address of the Location.	150	E
City Name	Name of the City of the Location.	50	F
State Code	State Code of the Location. Should be valid State for Supplied Country Code.	5	G
Zip	The Zip Code of the Location.	10	H

Field Name	Comments:	Character Limit	Column
Country Code	The Code of the Country of the Location.	255	I
State County Code	State County Code of the Location, Should match database value when supplied.	255	J
Location Status	Optional location status. Expected values are **Active** or **Inactive**. When left blank - active assumed for new locations	8	K
Phone Number	Location Business Phone.	30	L
Fax Number	Location fax number.	30	M
Location Region	Location internal region.	255	N
Is Client Location	Location provided is a customer location, with the only valid values being Y or N. Default value of Y if left blank.	1	O
Owner Names	The User Name of the OU Owner(s). If more than one owner is specified, they should be separated by a pipe (|). For example, "jdoe1234|jsmith1234" NOTE: Each User Name has a length limit of **50** international characters. Total field length for multiple owners is 450 Characters. NOTE: The list of User Names should always be a complete list. Any existing User mappings in the database will be removed and repopulated if this field is not blank.	50	P
Assistant Names	The User Name (Login) of the OU Assistant(s). If more than one assistant is specified, they should be separated by a pipe (|). For example, "jdoe1234|jsmith1234" NOTE : Each User Name has a length limit of **50** characters. Total field length for multiple owners is 450 Characters. NOTE: The list of User Names should always be a complete list. Any existing User mappings in the database will be removed and repopulated if this field is not blank.	50	Q

Field Name	Comments:	Character Limit	Column
Controller Names	The User Name (Login) of the OU Controller(s). If more than one controller is specified, they should be separated by a pipe (|). For example, "jdoe1234|jsmith1234" NOTE: Each User Name has a length limit of 50 international characters. Total field length for multiple owners is 450 Characters. NOTE: The list of User Names should always be a complete list. Any existing User mappings in the database will be removed and repopulated if this field is not blank.	50	R
MSP Names	The User Name (Login) of the OU MSP Representative(s). If more than one MSP Rep is specified, they should be separated by a pipe (|). For example, "jdoe1234|jsmith1234" NOTE: Each User Name has a length limit of **50** international characters. Total field length for multiple owners is 450 Characters. NOTE: The list of User Names should always be a complete list. Any existing User mappings in the database will be removed and repopulated if this field is not blank.	50	S
GSTIN	GST Identification Number. The **Goods & Services Tax Identification Number (GSTIN)** field may be required for some clients doing business in India for proper India Goods & Services Tax (GST) calculations.	450	T
Special Economic Zone	Special Economic Zone - locations in which business and trade laws are different from the rest of the country. The **Special Economic Zone (SEZ)** field may be required for some clients doing business in India for proper India Goods & Services Tax (GST) calculations.	450	U
Calendar	Calendar Code or Name. Optional. If provided must exist in application. Code or Name but Code is preferred.	255	V

Click to download the Data Template Sample for Work Locations.

Client Users

Purpose: Your list of client users could include every employee in your organization, depending on the scope of your VMS implementation. At a minimum, this list should include any VMO personnel involved in the program, and should exclude contractors. When thinking about which employees should have a login ID to Beeline, you should consider which individuals are responsible for contingent procurement activities for the portion(s) of the company in scope for the VMS implementation. A user's contingent procurement responsibilities might include one or more of the following activities: contractor requests, request approvals, timesheet approvals, running reports, processing supplier payments, (users that take action), etc.

be in sync: How to fill out the Client Users Template

Follow the instructions in the Field Requirements List; here are a few helpful hints for the Client Users import:

In Column A, Import Type, Enter: Client

Column H, Cost Center Number, Enter the Cost Center Number. It is required for New Client Users

Column Q, Enter the role names of: Hiring Manager

Column U, Culture Name, enter either en-US or en-GB depending on the culture of the user.

Field Requirements List for the Client Users Template

Field Name	Comments:	Character Limit	Column
Import Type	The Type of User that is being imported MUST BE : Client	10	A
User Name	The Login for the User must be unique	50	B
First Name	The First Name of the User	100	C
Middle Name	The Middle Name of the User	100	D
Last Name	The Last Name of the User	100	E
Title	The User's Title in the Organization.	255	F

Field Name	Comments:	Character Limit	Column
Organization Unit Code	The Code of the Organizational Unit for this User When left blank Cost Center OU Code will be used instead.	50	G
Cost Center Number	The Cost Center Number for this User	100	H
Cost Center OU Code	The Organizational Unit Code of the User's Cost Center. REQUIRED only for new "Client" Users when few Cost Centers found with the same number	50	I
Work Location	Code or Name of the Work Location for this User REQUIRED only for new "Client" Users	255	J
Email	The User's email address. Default email from configuration will be used when blank supplied for new users (noemail@noemail.com)	255	K
Phone Number	The User's Phone Number	30	L
Fax	The User's Fax Number	30	M
Employee External ID	External ID for this User An ID other than the UserName may be used by the Organization to identify this User if configured	15	N
Manager User Name	The User Name of the User's Manager	50	O
Status	The User's Status on creation Put: "**Active**" or "**Inactive**". When left blank active is assumed If the record already exists and the status field is left blank then current status will not be changed. (Active will still be active and inactive will still be inactive.) Best practice is to always provide a value.	8	P
Role Name	The Name of the Roles to assign to this user. Must match roles already in the database. If assigning user to more than one role, values must be separated by a pipe (|) (Example : "Hiring Manager|Reporting Admin") NOTE: If updating an existing user, ALL valid roles for that user should be specified. Any existing roles will be deleted	255	Q

Field Name	Comments:	Character Limit	Column
	and replaced with these. By default Role Names will be applied only to new users.		
User Types	The Names of the User Types to associate to this User If more than one, these must be separated by a pipe (|) (Example : "Board Approver|Position Approver") by default User Types will be applied only to new users.	255	R
Disallow Password Change	Disallow the change of the password? Put: "Yes" or "No". When left blank "No" assumed (so password change allowed)	3	S
Password Does Not Expire	Does the Password Expire? Put: "Yes" or "No". When left blank "No" assumed, so password does expire	3	T
Culture Name	The Name of the Culture for this User (Examples: "en-US", "en-GB") Must match a culture name already in the database. When left blank - default configured culture in the database will be applied for new users (not necessarily USD)	20	U
Suppress Emails	"Yes" or "No" When left blank "No" will be assigned to new users	3	V
Timesheet Escalator	Client User Only: Optional Timesheet Escalator User Name Must match existing user in the database or this file	50	W
Signing Limit Type	Positive Integer. Valid values are: 1 - Manager Signing Limit 2 - Timesheet Approver 3 - OU Signing Limit Default is 1 for new users when signing limit amount provided	1	X
Signing Limit Amount	The Amount of the Signing Limit This value must be numeric with no more than 4 decimals Example : 356.1245	15	Y
Signing Limit Currency	Code/Name for the Currency that should be used for the Signing Limit Amount. For backward capability only default currency may be pulled from configuration. By default it is USD.	255	Z

Field Name	Comments:	Character Limit	Column
	When few currencies is defined in the system than this column is required when signing limit is provided. Import will not ask for a currency when only one defined and will assumed that this currency is used for signing limit amount.		
User UDV	Not a required field unless configured. Value provided will be validated against pre-loaded values.	4000	AA
Functional Partition	Is not a required field unless configured. Value provided will be validated against preloaded values.	255	AB
Secondary Manager	Optional field to accommodate a 3rd Manager/Supervisor	450	AC
Admin Cost Center Number	Admin Cost Center Number for User	100	AD
Admin Cost Center OU Code	Admin Cost Center OU Code for user	50	AE
Time Zone	Name or Code of Time Zone of user. If left blank with default to the config setting in application. How import gets default value if time zone not provided in file: Get from config Internal.TimeZone.SiteTimeZone (the value if this config is the guide of the time zone. You need to query the dbo.UtilityTimeZone table using the guide to get the time zone name). Run this query to get the default time zone too select * from dbo.Default_UtilityTimeZone()	255	AF
Do Not Require SSO	Expected values Yes, No. Formatted to accept a Yes or No response, even though the character limit is 450.	450	AG
User Currency	Currency of user. Code/Name for the Currency. If No value provided and new user record will default to currency configured in configuration Currency.UserCurrency.DefaultCurrency If no value provided and existing user record will retain existing currency of the user.	255	AH
Security Project	Security Project.	255	AI

Field Name	Comments:	Character Limit	Column
Localized First Name	Localized First Name	100	AJ
Localized Middle Name	Localized Middle Name	100	AK
Localized Last Name	Localized Last Name	100	AL
Second Last Name	Second Last Name	100	AM
Click to download the Data Template Sample for Client Users			

Suppliers

Purpose: The Supplier import template is used to add new, or update existing, supplier agency profiles within Beeline VMS. The supplier profile resides in a client's master supplier list under Admin/Security in addition to industry-specific lists under Admin/Procurement/Industry/Supplier. Supplier imports are subject to Vendor Compliance policies and procedures based on a client's geographic location.

be in sync: How to fill out the Suppliers Template

All Field Names highlighted in Yellow are required.

- A supplier should have a unique record in each geography they serve. Supplier Code and Supplier Name. **NOTE:** The Supplier Code cannot be updated once it has been imported.
- Then fill in the Supplier Address and Billing Address.
- To associate a supplier in a geography to multiple industries, you will need to have multiple lines on the import, with the same supplier code (but different Industry Code).

- Example:
  - Supplier A - US
  - Supplier A - CAN

- After importing you can validate that your supplier was associated with the industries by going through simple search>suppliers. The supplier profile will show which industries it's associated with.

Field Requirements List for the Suppliers Template

Field Name	Comments:	Character Limit	Column
Supplier Code*	Internal Identifier for the Supplier Record. **KEY VALUE: If this code already exists in the database, the supplier information will be updated instead of inserted. The Supplier Code cannot be updated.**	50	A
Supplier Name*	Name of the Supplier. Cannot already exist for a different Supplier code. Required for new suppliers.	255	B
Industry Code*	Industry Code. Value should already exist in the database. Same Supplier code may exist in different industries.	255	C
Description	Description for the Supplier	255	D
Mailing Address Line 1	Line 1 of the Supplier's Mailing Address	150	E
Mailing Address Line 2	Line 2 of the Supplier's Mailing Address	150	F
Mailing City	City of the Supplier's Mailing Address	50	G
Mailing State Code	Code of the State for Supplier's Mailing Address. Should match value in the database.	5	H
Mailing Zip	Zip Code of the Supplier's Mailing Address	10	I
Mailing Country Code	Country Code of the Supplier's Mailing Address. Should match value in the database.	255	J
Phone Number	Supplier's Phone Number	30	K
Fax Number	Supplier's Fax Number	30	L

Field Name	Comments:	Character Limit	Column
Bill Supplier Name	Billing Name for the Supplier	100	M
Bill Address Line 1	Line 1 of the Supplier's Billing Address	150	N
Bill Address Line 2	Line 2 of the Supplier's Billing Address	150	O
Bill City	City of the Supplier's Billing Address	50	P
Bill State Code	State Code for the Supplier's Billing Address. Should match value in database	5	Q
Bill Zip Code	Zip code of the Supplier's Billing Address	10	R
Bill Country Code	Country Code of the Supplier's Billing Address. Should match value in the database	255	S
Minority Code	Name of Minority Code to be applied to this Supplier (Examples: Minority Owned, Minority Zoned). Multiple Minority Codes must be pipe-delimited: Minority Owned|Minority Zoned	255	T
Web Page	Supplier Web Page	255	U
ASV Flag	Is the Supplier ASV? Must be 'Yes' or 'No'. When left blank - 'No' will be applied for new supplier in the Industry	3	V
ADC Type	Name of the ADC Type for this Supplier Valid Values: • NonADC should be used instead of NA or N/A • Offshore • Nearshore This must match a value in the database. When left blank 'NonADC' will be applied to new suppliers in the industry.	255	W
Is Preferred	Is this a Preferred Supplier? Must be 'Yes' or 'No'. When left blank 'No' will be defaulted to new suppliers in the industry	3	X
Receive Requests	Is this Supplier flagged to receive request? Must be 'Yes' or 'No'. Required if supplier is new in the industry. When left blank 'No' will be assigned for new suppliers in the industry	3	Y

Field Name	Comments:	Character Limit	Column
Status	The status of the Supplier upon creation. Must be '**Active**' or '**Inactive**'. When left blank - Active assumed for new suppliers. If record already exists and the status field is left blank then current status will not be changed. (Active will still be active and inactive will still be inactive.) Best practice is to always provide a value.	8	Z
Tax Margin Percent	The Legal Entity Tax Margin Percent	18 digit with 4 decimal places	AA
AP Code	The Legal Entity AP Code	20	AB
Blanket PO	The Blanket Purchase Order Number for the Supplier	25	AC
Has Early Pay Discount?	Does this Supplier have an early pay discount by default? Must be: "Yes" or "No" If not provided, defaults to "No"	3	AD
Early Pay Discount	The percentage discount amount for early pay This field can have 2 decimals (i.e. 20.35)	3	AE
Bill Schedule Category	Client Billing Schedule Category	50	AF
External Code	External Code	255	AG
PnS Client Billing Schedule	Projects and Services Client Billing Schedule	255	AH
Tax Exempt	Is client tax exempt? Must be 'Yes' or 'No'. If left blank defaults to 'No' Acceptable values are Yes or No. Defaults to No if left blank	3	AI
Invoice Funding Model	The Supplier's Invoice Funding Model. Accepts Name or Code, try name first. Value is either Supplier Funded or Client Funded.	255	AJ
Localized Name	Used to enter localize names (i.e. - Japanese Kanji)		AK

Field Name	Comments:	Character Limit	Column
Signing Group ID	Used to store signing group id	255	AL
Reference Number 1	Clients can configure at an Industry level if these fields are Optional, Does Not Apply or Required. Clients can associate different details to each of their Industry – Supplier profiles that they can use later for reporting or invoicing. **NOTE**: These are **Industry – Supplier** Reference Number fields and should not be confused with the existing **Assignment – Edit Summary** Supplier Reference Fields. These are different fields / features.	255	AM
Reference Number 2	Clients can configure at an Industry level if these fields are Optional, Does Not Apply or Required. Clients can associate different details to each of their Industry – Supplier profiles that they can use later for reporting or invoicing. **NOTE**: These are **Industry – Supplier** Reference Number fields and should not be confused with the existing **Assignment – Edit Summary** Supplier Reference Fields. These are different fields / features.	255	AN
Reference Number 3	Clients can configure at an Industry level if these fields are Optional, Does Not Apply or Required. Clients can associate different details to each of their Industry – Supplier profiles that they can use later for reporting or invoicing. **NOTE**: These are **Industry – Supplier** Reference Number fields and should not be confused with the existing **Assignment – Edit Summary** Supplier Reference Fields. These are different fields / features.	255	AO
Reference Number 4	Clients can configure at an Industry level if these fields are Optional, Does Not Apply or Required. Clients can associate different details to each of their Industry – Supplier profiles that they can use later for reporting or invoicing. **NOTE**: These are **Industry – Supplier** Reference Number fields and should not be confused with the existing **Assignment – Edit Summary** Supplier Reference Fields. These are different fields / features.	255	AP
Reference Number 5	Clients can configure at an Industry level if these fields are Optional, Does Not Apply or Required. Clients can associate different details to each of their Industry – Supplier profiles that they can use later for reporting or invoicing. **NOTE**: These are **Industry –**	255	AQ

Field Name	Comments:	Character Limit	Column
	Supplier Reference Number fields and should not be confused with the existing **Assignment – Edit Summary** Supplier Reference Fields. These are different fields / features.		
Click to download the Data Template Sample for Suppliers.			

Supplier Users

Purpose: The Supplier User import template is used to create Supplier User records for a supplier's staff or update existing supplier user records in Beeline VMS. Typically, these records are managed by each supplier's designated Supplier Administrator. This template can also be used to create or update Client User (e.g., Hiring Manager) records. User records reside under Admin/Security in Beeline VMS.

be in sync: How to fill out the Supplier Users Template

Follow the instructions in the Field Requirements list; here are a few helpful hints for the Supplier Users import:

In Column A, Import Type, Enter: Supplier

Column H, Cost Center Number, leave this column blank.

Column Q, Enter the role names of:

- Supplier
- Supplier Admin

Use one or more, separated by a pipe "|", Example, Supplier|Supplier Admin

Field Requirements List for the Supplier Users Template

Field Name	Comments:	Character Limit	Column
Import Type*	Type of User being Imported. Must be: Supplier	10	A
User Name*	Login for the User	50	B

Field Name	Comments:	Character Limit	Column
First Name*	First Name of the User	100	C
Middle Name	Middle Name of the User	100	D
Last Name*	Last Name of the User	100	E
Title	User's Title in the Organization	255	F
Supplier Code	For Supplier Users should be a valid Supplier Code. Please reference Column A in the Supplier tab.	50	G
Cost Center Number	Not required for Supplier Users	100	H
Cost Center OU Code	Not required for Supplier Users	50	I
Work Location*	Not required for Supplier Users	255	J
Email	User's email address. Default email from configuration will be used when blank supplied for new users (noemail@noemail.com)	255	K
Phone Number	User's Phone Number	30	L
Fax	User's Fax Number	30	M
Employee External ID	External ID for this User. An ID other than the UserName may be used by the Organization to identify this User if configured	15	N
Manager User Name	UserName of the User's Manager	50	O
Status	User's status on creation. Must be '**Active**' or '**Inactive**'. When left blank 'Active' is assumed. **If record already exists and the status field is left blank then current**	8	P

Field Name	Comments:	Character Limit	Column
	status will not be changed. (Active will still be active and inactive will still be inactive.) Best practice is to always provide a value.		
Role Name	The Names of the Roles to assign to this user. Must match roles already in the database, Supplier User Role: Example: Supplier Admin **NOTE**: If updating an existing user, ALL valid roles for that user should be specified. Any existing roles will be deleted and replaced with these. By default Role Names will be applied only to new users.	255	Q
User Types	Name of the User Type to associate to this User: Supplier By default, User Types will be applied only to new users.	255	R
Disallow Password Change	Disallow the change of a password? Must be 'Yes' or 'No'. When left blank 'No' assumed (so password change allowed)	3	S
Password Does Not Expire	“Does the Password Expire?” Value must be a "Yes" or a "No". If left blank, "No" is assumed (so password does expire)	3	T
Culture Name	Name of the Culture for this User (Example: "en-US", "en-GB") Value must match a culture name already in the database. When left blank, the default configured culture in the database will be applied for new users (not necessarily USD)	20	U
Suppress Emails	"Yes" or "No" When left blank "No" will be assigned to new users	3	V
Timesheet Escalator	Client User Only: Optional Timesheet Escalator User Name. Must match existing user in the database or this file	50	W
Signing Limit Type	Positive Integer. Valid values are: 1 - Manager Signing Limit 2 - Timesheet Approver 3 - OU Approver Default is set to '1' for new users when a signing limit amount is provided.	1	X
Signing Limit Amount	Amount of the Signing Limit. This value must be numeric with no more than 4 decimals. Example : 356.1245	15	Y

Field Name	Comments:	Character Limit	Column
Signing Limit Currency	Code/Name for the Currency that should be used for the Signing Limit Amount. For backward capability only default currency may be pulled from configuration (Import.Behavior.UserImportSigningLimitCurrency) By default it is USD. When few currencies are defined in the system than this column is required when a signing limit is provided. Import will not ask for a currency when only one is defined and will assume that this currency is used for the signing limit amount.	255	Z
User UDV	Not a required field unless configured. Value provided will be validated against pre-loaded values.	4000	AA
Functional Partition	Specific to GM	255	AB
Secondary Manager UserName	Optional field to accommodate a 3rd Manager/Supervisor	450	AC
Admin Cost Center Number	Admin Cost Center Number for User	100	AD
Admin Cost Center OU Code	Admin Cost Center OU Code for user	50	AE
Time Zone	Name or Code of Time Zone of user. If left blank, this with default to the configuration setting in application.	255	AF
Do Not Require SSO	Expected values Yes, No. Formatted to accept a Yes or No response, even though the character limit is 450.	450	AG
User Currency	Currency of user.	255	AH

NOTE: The Data Type for all fields is NVARCHAR which supports two-byte characters (e.g., a mixture of English and non-English symbols – for example English and Japanese.)

beeline

Field Name	Comments:	Character Limit	Column
Click to download the Data Template Sample for Supplier Users.			

The Trifecta:

Purpose: The Trifecta contains three imports, Job Classes/Titles/Rate Card Classes, Rate Cards, and Request Templates. The Job Class/Titles/Rate Card Class is the first of three imports that are initially processed as a unit since they share several fields in common. These key data fields are used throughout the procurement process and need to be in sync for the efficient management of related workflows. They need to be imported in the order in which they are listed in this document.

◆ 1st – Job Class/Titles/Rate Card Class

Purpose: The Job Class/Titles/Rate Card Class is a single import template that populates these three different data tables. It is managed as a single template because fields from each of these tables are interdependent.

be in sync: How to fill out the Job Class/Titles/Rate Card Class Template

Follow the instructions in the Field Requirements List. Please see below for a few helpful hints for the Job Class/Titles/Rate Card Class import. These categories are arranged below to demonstrate the hierarchy levels in the VMS.

Industry Code

Ensure you have the correct Industry Code of each Job Title.

Job Class

A category classification (i.e., Developers or Customer Service Representatives) and the Job Titles mapped to each category Job Class.

Job Title

A job title is the name of the position procured in the VMS. The Job Titles and the job description are defined by the client. The job description will be placed on the Request Template Import.

Rate Card Class (RC)

An RC Class, groups multiple different rate cards and job titles. Similar job titles are generally tied to one rate card class. An RC Class acts as the bridge between the Job Title and the Rate Card. For simple Beeline VMS configurations, Beeline setups are a 1:1:1 relationship between Job Title, the Rate Card, and the Rate Card Class.

Example of how these fields may be set up:

Job Class Code, Job Class Name: Data Management

Job Title Code, Job Title Name: Data Analyst I

Rate Card Class Code, Rate Card Class Name: Data Analyst I

Procurement Type Name

The Values are: Contingent or Project, if left blank Contingent will be used. Contingent is used for Resources Tracking module and Project is used for the Services Procurement module.

Field Requirements List for the Job Class/Titles/Rate Card Class

Field Name	Comments:	Character Limit	Column
Industry Code*	Code for the Industry to create this Job Class under	255	A
Job Class Code*	Code of the Job Class. **KEY** If this value already exists the record will be **UPDATED**	255	B
Job Class Name	The Name of the Job Class, REQUIRED if Inserting new record	255	C
Job Class Description	Description for the Job Class (If NULL on insert - uses Job Class Name)	255	D
Job Title Code*	Code of the Job Title **KEY** If this value already exists the record will be **UPDATED**	255	E
Job Title Name	The Name of the Job Title, REQUIRED if Inserting new record	255	F
Job Title Description	The Description of the Job Title - Job description should be populated in the Request Template, leave this field blank.	255	G
Rate Card Class Code*	Code of the Rate Card Class. **KEY** If this value already exits the record will be **UPDATED**	255	H
Rate Card Class Name	Name of the Rate Card Class. REQUIRED if Inserting new record	255	I
Rate Card Class Description	Description of the Rate Card Class	255	J

Field Name	Comments:	Character Limit	Column
Procurement Type Name	Procurement Type Name. Should match value in the database. Examples: Contingent, Permanent, Services, Project. If left blank will be defaulted to Contingent for new records.	255	K
Position Code	Position Code	255	L
No Longer Used	*NO LONGER USED*	255	M
GL Code	Code for GL. (No data validation other than field character limit)	255	N
Salary Class	In Salary Class (No data validation other than field character limit)	255	O
Display Order	To put the order in which to display record in UI. Integer - no alpha characters.	No Alpha Char	P
Internal Job Grouping	Internal Job Grouping (No data validation other than field character limit)	255	Q
Service Accounting Code	Service Accounting Code	255	R
Industry Supplier Code	The code of the Security Organization for the Industry Supplier. If left blank then no Suppliers will be added to this Job Title.	255	S

NOTE: The Data Type for all fields is NVARCHAR which supports two-byte characters (e.g., a mixture of English and non-English symbols – for example English and Japanese.)

Click to download the Data Template Sample for Job Class, Titles, and Rate Card Class

2nd – Rate Cards

Purpose: The Rate Cards import template is used to create new, or update existing, rate cards in Beeline VMS. Each job title can have a Rate associated with it. It can be grouped by Supplier and Job Title, a one to one or one to many relationship. This import template includes several fields that correlate to data fields in the Job Classes, Titles, and Rate Card Category import template. Make sure to check your Effective Dates and Expiration Dates they need to be consecutive and do not overlap. You can only have a single active Rate Card per job title at any given time. Take care when updating rates or other data fields on active rate cards, once your changes are imported, they could duplicate rather than update as you intended.

If you are loading new Rate cards, ensure your effective date is the current date or in the past.

be in sync: How to fill out the Rate Cards Template

Follow the instructions in the Field Requirements List; here are a few helpful hints for the Rate Cards import.

A rate card shows the rates that will **default** on a request once certain pre-requisite selections are made.

- For example, once a rate card category 1 and 2 are selected during request creation, the rate card data is narrowed down and the preset rate will display.

Rate cards can be high level or defined at a very granular level. **The more granular, the more data that must be loaded.**

- For example, if there is only one rate card category 1 (default) and one rate card category 2 (default), and no supplier-specific rates, there would just be one rate card for a job title. The rate card import would most likely just have three lines, one for each earning code (RT, OT, DT).
- If rate card category 1 is used and there are 50 rate card categories (say one for each state), there would be a total of 150 lines to import.
- If supplier-specific rate cards are used, those 150 lines would be multiplied by the number of suppliers.

Rate card rules are set on each rate card, i.e., whether rates can be exceeded, markups can be exceeded, or offer rules can be relaxed.

Multiple lines on the import template make up one rate card because each earning code must have a line.

How Earning Codes need to be set up:

- **RT** lines will always have an override type of **manual**.
  - The **override value** column should therefore be left **blank**.
- **OT/DT** lines can be **manual**, **percentage**, **or a fixed amount**.
  - The **override value** will be as follows.
    - manual = leave it blank

- percentage - An example override value would be 150. This means that the rate for this earning code should be 150% of the RT rate.
- fixed amount - An example override value would be 10. This means that the rate for this earning code should be $10 more than the RT rate.

Example: Import template may look like this:

Earning Code	Rate Type	Min Rate	Bill Rate	Weekend Rate	Override Type	Override Value	Rate Category
RT	Hourly		75		Manual		Default
OT	Hourly				Percentage	150	Default
DT	Hourly				Percentage	200	Default

Data Requirements: Each situation is different, but here are some estimates on what to expect for data loads.

- Not using RCC1 or RCC2, No Supplier Specific Rate Cards - **3** rate card lines per job title
- Using RCC1 for regional rates with one for each state - 50 regions X 3 earning code lines per job title = **150** lines per job title
- Using RCC1 for regional rates and RCC2 as a Rate Type filter with hourly and daily rates - 50 regions X 3 lines per job title X 2 earning codes per job titles = **300** lines per job title

A few items to remember:

Default Rate Card must be imported prior to loading Supplier specific rate cards. For the Default Rate Card, the Supplier information will be left blank.

Rate Cards should always have an RT rate. When importing offshore rates, you must also have a default rate in order to import.

For rate cards that have effective dates in the future - the corresponding request template cannot be imported until the rate card take effect.

Currency is derived from the Currency field on the template. Do not use currency symbols ($, £, €, etc.) in the Min Rate or Bill Rate fields.

You should have a Rate Card for every Job Title you have listed on the Job Class, Title, and RC Class Import Template, the Job Titles will need to match exactly.

Field Requirements List for Rate Cards

Field Name	Comments:	Character Limit	Column
Industry*	Code or Name of the Industry for this Rate Card. This value must match a value in the database. **KEY VALUE** This value is used to identify the Rate Card	255	A

Field Name	Comments:	Character Limit	Column
Supplier	If loading supplier-specific Rate Card this MUST be populated with the Code or Name of the Supplier for whom the Rate Card is being created. If loading a default Rate Card this value should be left blank. If loading a Rate Card for multiple suppliers, multiple rows will need to be created - one for each supplier. **KEY VALUE** This value is used to identify the Rate Card	255	B
Not Used	**NO LONGER USED (NOTE: This field is left blank but the column should remain in place.)**		C
Job Class*	Code or Name of the Job Class in which to place the Rate Card. This value MUST match a value in the database. **KEY VALUE** This value is used to identify the Rate Card	255	D
Rate Card Class*	Code or Name for the Rate Card Class in which to place this Rate Card. This value MUST match a value in the database. **KEY VALUE** This value is used to identify the Rate Card	255	E
Category 1*	Code or Name for the Category 1 value for this Rate Card. This value MUST match a value in the database. **KEY VALUE** This value is used to identify the Rate Card	255	F
Category 2*	Code or Name for the Category 2 value for this Rate Card. This value MUST match a value in the database. **KEY VALUE** This value is used to identify the Rate Card	255	G
Effective Date*	The effective date for this Rate Card. **NOTE:** This value must be formatted as TEXT but the format of the date must be mm/dd/yyyy. **KEY VALUE** This value is used to identify the Rate Card. If there is an existing Rate Card with a different effective date, the existing Rate Card will be expired 1 day prior to the new effective date.	10	H
Expiration Date	Expiration Date for this Rate Card. **NOTE:** this value must be formatted as TEXT but the format of the date must be mm/dd/yyyy	10	I
Rate Exceeded Action Name	Name of the Action to take if the Rate is Exceeded. (Examples: 'Ignore', 'Warn') this value must match a value in the database. When left blank will be defaulted to 'Ignore'	255	J

Field Name	Comments:	Character Limit	Column
Markup Exceeded Action Name	Name of the Action to take if the Markup is Exceeded. (Examples: 'Ignore', 'Warn') this value must match a value in the database. When left blank will be defaulted to 'Ignore'	255	K
Markup Value	Markup Amount. REQUIRED if the Markup Exceeded Action is provided and is not 'Ignore' – Numeric Value	Numeric Value	L
Markup Is Percent?	Markup is Percent? Required when Markup Value provided. Must be 'Yes' or 'No'	3	M
Currency	Code or Name for the Currency. (Examples: 'USD', 'CAD') Required for New Rate Cards when few currencies defined in the system	255	N
Overtime Rule	Code or Name for the Overtime Rule associated to this Rate Card. Required for New Rate Cards. (Examples: 'OT40', 'NOOT') This value must match a value in the database	10	O
Allow Offer Negotiation Override Type Name	Specifies the type of offer negotiation allowed. Common Values: 'Allow', 'NotAllow', 'Default'. This value must match a value in the database. If left blank defaults to 'Default'	255	P
Billing Shift	Code or Name for the billing shift. (Examples: 'Default', 'Standard', '1st') This value must match a value in the database. **KEY VALUE** This value is used to identify the Rate Card. Required when rates provided.	255	Q
Earning Code	Code or Name for the Earning Code. (Examples: 'RT', 'OT', 'DT', 'NB') This value must match a value in the database. **KEY VALUE** This value is used to identify the Rate Card. Required when rates provided.	255	R
Rate Type	Code or Name for the Rate Type. (Examples: 'Hourly', 'Daily') Must match a value in the database.	255	S
Min Rate	Minimum Rate for the Earning Code and Shift provided in Rate Type measurements. Numeric value.	Numeric Value	T
Bill Rate	The weekday Billing Rate for the Earning Code and Billing shift in Rate Type measurements. Numeric value.	Numeric Value	U

Field Name	Comments:	Character Limit	Column
Weekend Rate	The weekend Rate for the Earning Code and Shift provided in Rate Type measurements. Numeric value.	Numeric Value	V
Override Type	Name of the Override Type (Examples: 'Manual', 'Percentage', 'FixedAmount') This value must match a value in the database. If left blank - defaults to 'Manual'	255	W
Override Value	Amount of the Override. Must be blank when Override Type is 'Manual'. Must have a value when Override Type is 'FixedAmount' or 'Percentage'. Numeric value.	Numeric Value	X
Rate Category	Rate Category Name. (Examples: 'Default', 'Offshore') **KEY VALUE** This value is used to identify the Rate. Required when rates provided.	255	Y
NOTE: The Data Type for all fields is NVARCHAR which supports two-byte characters (e.g., a mixture of English and non-English symbols) with the exception of those fields that indicate a DATE format should be used.			
Click to download the Data Template Sample for Rate Cards			

3rd – Request Templates

Purpose: The Request Templates import is used to gather data fields (such as Industry Code, Request Contract Type, Job Class Code, Job Description, etc.) associated with requisitions processed through the VMS. This load can be used to create new, or update existing, Request Templates.

This is the third, and final, template needed to build out Request Types and their associated Rate Cards. This import template includes several fields that correlate to data fields in the Job Classes/Titles/Rate Card Class and the Rate Cards import templates. If one of these required fields is not entered or if the value entered, does not match the existing value in Beeline VMS, then the import validations will error out. This is the final piece for the Rate Card process and it adds the job description and makes the job title discoverable in the **New Request** search.

be in sync: How to fill out the Request Templates

This template is created by using copy/paste from the Job Class/Title/Rate Card Class import, which is imported first. The only new data that will be added to this template is the Job Description, Column G.

For rate cards that have effective dates in the future - the corresponding request template cannot be imported until the rate cards take effect.

Invalid Job Class errors may be triggered by an invalid Industry Code. Job Class is defined per Industry. Verify the Industry Code being used is correct.

The number of rows must match the Job Class, Title and Rate Card Class import, if that import has 100 rows of data, this Request Template should also have 100 rows of data, 1 row for every Job Title.

Field Requirements List for the Request Templates

Field Name	Comments:	Character Limit	Column
Industry Code*	Code for the Industry in which to place this Template. **KEY VALUE** used to look up existing records	255	A
Request Contract Type	Procurement Request Contract Type. Example: W2	255	B
Job Class Code*	Code of the Job Class. **KEY VALUE** used to look up existing records	255	C
Job Title Code*	Code of the Job Title. **KEY VALUE** used to look up existing records	255	D
Job Description	Description of the job	8000	E
Dress Code Names	Pipe (|) delimited list of Dress Code Names for this Request Template. Example: Business Attire|Business Casual. Should be complete list	255	F
Rate Card Class Code*	Code for the Rate Card Class. **KEY VALUE** used to look up existing records	255	G
Status	**Active** or **Inactive.** Part of the **KEY VALUE** to locate request template	8	H
Interview Required	Is Interview required? When left blank - 'no' assumed for new records	3	I
Pay for Relocation	Is relocation expense paid? Examples: 'Yes', 'No', 'WillConsider'	3	J
Supplier Codes	Codes of suppliers to associate to this template. **NOTE:** If more than one, these need to be separated by a pipe (|) (Example: ABCSupplier|XYZSupplier)	50	K
Additional Skills	Optional additional skill requirements	8000	L

Field Name	Comments:	Character Limit	Column
Additional Tests	Optional additional test requirements	8000	M
Additional Certifications	Optional additional certifications requirements	8000	N
Culture	Culture when not provided defaults to Multicultural Integration Value. Example: en - US, en - GB	20	O
NOTE: The Data Type for all fields is NVARCHAR which supports two-byte characters (e.g., a mixture of English and non-English symbols – for example English and Japanese.)			
Click to download the Data Template Sample for Request Templates			

Assignments

Purpose: This is the result of a candidate placed on a job. The assignment will track all activity of the contract worker.

be in sync: How to fill out the Assignments Template

This Import Template should never be used to update existing assignments because not all fields will update and additional details would be overwritten.

Each Assignment would have one row for Regular time (RT). You will need additional rows for any other earning code that is configured for your client, for example Over time (OT) and Double time (DT).

The information on this load will need to match the data that has been imported into the system from the previous Data Templates (i.e., the Job Class, Titles and Rate Card Class, Rate Cards and Request Templates, etc.)

The information highlighted in blue below (Consultant External ID/Position ID) on the Assignment Template is information that needs to be followed when using the WorkDay Standard API Web Service for the Worker Download integration. If the data is not populated when importing, it will not pass over to WorkDay in the Web Service call. If the Client has a Contractor already in Workday, you will need to collect the Applicant ID from the client's WorkDay system - This is imported on the Resource Template in the "Consultant External ID" field- NOT on the assignment - Usually in the format of "A-###...".

Field Requirements List for the Assignments Template

Field Name	Comments:	Character Limit	Column
First Name	First Name of the Consultant on this Assignment. Required when Resource is new	100	A
Middle Name	Middle Name of the Consultant on this Assignment May be required depending on configuration	100	B
Last Name	Last Name of the Consultant on this Assignment required for new resource	100	C
Localized First Name	Localized First Name of consultant on this assignment. May be required depending on configuration.	100	D
Localized Middle Name	Localized Middle Name of consultant on this assignment.	100	E
Localized Last Name	Localized Last Name of consultant on this assignment. May be required depending on configuration.	100	F
Second Last Name	Second Last Name optional	100	G
Email	The email address of the Consultant on this Assignment. If left blank, this defaults to value from configuration for new resource only.	255	H
Personal ID	A private and unique identifier for the Consultant such as an SSN. This value populates the Full SSN of the consultant. Will be validated against defined format when configured (xxx-xx-xxxx). The Initial SSN value is pulled from the right side of this value based on the number of characters defined in configuration (default of 4)	100	I
Initial Personal ID	Feed Initial SSN	50	J
Personal ID Type	The Code/Name for the Type of Personal ID being imported This value must match a valid value in the database Examples: "SSN", "NationalID" If left blank and only 1 value defined in the system - will use this value. Required otherwise when personal id provided.	255	K
Date of Birth	The Consultant's Date of Birth. Can also be used to identify them uniquely. This field must be formatted as text but must be in the format of mm/dd/yyyy or mmdd	10	L

beeline

Field Name	Comments:	Character Limit	Column
Private ID	The Resource's Unique External Identifier This value is used to identify an existing resource record If left blank, this will default to the GID (consultant login) KEY VALUE: This value cannot be updated and is used to identify an existing unique resource and assignment. IF configuration setting Tenure.TenurePolicyAndEnforcement.ResourceTenureUses = 1 then this column will be used to identify Resource.	50	M
GID	The Consultant's Unique Login. KEY VALUE: This value cannot be updated and is used to identify an existing unique resource and assignment. IF configuration setting Tenure.TenurePolicyAndEnforcement.ResourceTenureUses = 2 then this column will be used to identify Resource.	50	N
Culture Name	Culture of resources assignment. Culture must be active in database. Can be inserted or updated. If culture not provided will default to client default culture set in the database.	40	O
Supplier	Code or Name of the Supplier for this Resource and Assignment KEY VALUE: This value cannot be updated and is used to identify an existing unique rate card, resource and assignment	50	P
Industry	Code or Name of the Industry for this Assignment KEY VALUE: This value cannot be updated and is used to identify an existing unique rate card and assignment	255	Q
Client OU Code	Default OU Code for Bill To/Admin Cost Center. Optional	255	R
Work Location	The Code/Name of the Work Location for this Assignment. When left blank - work location will be assigned from resource manager work location for new assignments only	255	S
Physical Work Location	Code or Name of the Physical Work Location for this Assignment. This may or may not be a different value from the Work Location. If left blank, this will default to the Work Location or Manager Work Location	255	T
Job Title	The Code/Name of the Job Title for this Assignment	255	U
Job Class	The Code/Name of the Job Class for this Assignment KEY VALUE: This value cannot be updated and is used to identify an existing unique rate card and assignment	255	V

Field Name	Comments:	Character Limit	Column
Start Date	The Start Date of the Assignment. This field must be formatted as TEXT and must be in the layout of mm/dd/yyyy KEY VALUE: This value cannot be updated and is used to identify an existing unique assignment	10	W
End Date	The End Date of the Assignment. This field must be formatted as TEXT and must be in the layout of mm/dd/yyyy KEY VALUE: This value cannot be updated and is used to identify an existing unique assignment	10	X
Billing Start Date	The Start Date of the Billing for the Assignment. If left blank, this defaults to the Assignment Start Date. This field must be formatted as TEXT and must be in the layout of mm/dd/yyyy	10	Y
Hours Per Week	The number of expected hours per week for this Assignment. When hours per week not specified values from request type will be copied into New assignment. Does not apply to existing assignments.	18 digit with 2 decimal precision	Z
Rate Card Class	The Code/Name of the Rate Card Class for this Assignment NOTE : The import will automatically pull the Rate Card Class from the Request Template if one is available. If not, this field is required. KEY VALUE: This value cannot be updated and is used to identify an existing unique rate card and assignment	255	AA
Rate Card Category 1	The Code/Name for the Rate Card Category 1. KEY VALUE: This value cannot be updated and is used to identify an existing unique rate card and assignment	255	AB
Rate Card Category 2	The Code/Name for the Rate Card Category 2. KEY VALUE: This value cannot be updated and is used to identify an existing unique rate card and assignment	255	AC
Resource Manager User Name	The UserName of the Resource Manager (Hiring Manager)	50	AD
Admin Cost Center Number	The Number of the Admin Cost Center. When left blank - Bill Cost Center will be used for new assignments	100	AE
Admin Cost Center OU Code	The Code of the Client Organizational Unit to which the Admin Cost Center belongs. If left blank and Cost Center Number is not unique value from Column "Client OU Code" will be used to lookup Cost Center	255	AF
Bill to Cost Center Number	The Number of the Billable Cost Center. KEY VALUE: This value cannot be updated and is used to identify an existing unique resource and assignment. If left blank - bill to cost center will be resource manager cost center for new assignments only	100	AG

Field Name	Comments:	Character Limit	Column
Bill To Cost Center OU Code	The Code of the Client Organizational Unit to which the Bill To Cost Center belongs. If left blank and Cost Center Number is not unique then value from "Client OU Code" will be used to lookup Cost Center	255	AH
Resource Type	This is a required field. The standard code values for US or Canada are: • RT_W2Exempt, • RT_W2NonExempt, • RT_1099Independent, • RT_SoleProprietor, • RT_Employee, • RT_Inc	255	AI
Procurement Type	The Name of the Procurement Type. This is used to identify the Request Template and Rate Card for the assignment. List of acceptable values: • Contingent • Permanent • Services • Project When left blank - Contingent assumed for new assignments	255	AJ
Request Type	Code or Name of Request Type	255	AK
ADC Type	The Name of the ADC Type for this Supplier Valid Values: • NonADC (should be used instead NA) • Offshore • Nearshore Must match a value in the database. When left blank - NonADC will be applied for new assignments	255	AL
Assignment Number	The Beeline internal number allocated to the assignment. If not specified, this number will be incremented by one from the last number in the database. OPTIONAL KEY VALUE: If provided for an existing assignment, this value must match the existing assignment number. Must be an integer	Numeric Value	AM
Assignment Amendment Number	The Beeline internal number allocated to the assignment amendment. If not provided, the import process will use the most current amendment	Numeric Value	AN
Overtime Rule	The Code/Name of the Overtime Rule for the Assignment	10	AO
PO Number	The Purchase Order Number on the Assignment	255	AP

Field Name	Comments:	Character Limit	Column
Currency	Code or Name of the Currency for the Assignment When left blank and only 1 currency is defined in the system - this value will be used. Otherwise required for new assignments	255	AQ
Bill Rate Earning Code	The Code/Name for the Earning Code: (Examples: "RT", "OT", "NB") Must match a value in the database	255	AR
Bill Rate Shift	The Code/Name for the Billing Shift (Examples : "Default", "Standard", "1st") This value must match a value in the database	255	AS
Bill Rate Type Code	The Code/Name for the Bill Rate Type (Examples : "Hourly", "Daily") Must match a value in the database	255	AT
Bill Rate Amount	The Amount of the Bill Rate for the Assignment Only needed if you want to override the Rate Card Rates or copying of Default rates is disabled in configuration	Numeric Value	AU
Weekend Bill Rate Amount	The Amount of the Weekend Bill Rate Only needed if you want to override the Rate Card Bill Rates	Numeric Value	AV
Pay Rate Type	The Code/Name for the Pay Rate Type (Examples : "Hourly", "Daily") ONLY REQUIRED if a Pay Rate is being entered	255	AW
Pay Rate Amount	Pay Rate, may be required depending on the Request Type	Numeric Value	AX
Rate Category Name	Rate Category Name. Example: Default, Offshore. When left blank Default will be applied for new rates	255	AY
Timesheet Approver User Name	The UserName of the Timesheet Approver. When left blank Manager User Name will be used for new assignments	50	AZ
Last Financial Approve User Name	User Name of the Last Financial Approver. May be required depending on configuration.	50	BA
Tax Job Category	The Code of the Tax Job Category for this Assignment Tax Job Category associated with Request Type will be used when this column left blank for new assignments.	255	BB
Scheduled Shift	The Code of the Scheduled Shift for the Assignment may be required, depending on Request Type	255	BC
Days Per Week	Expected Days Per Week for this Assignment. May be required, depending on Request Type. When days per week not specified values from request type will be copied into New assignment. Does not apply to existing assignments.	Numeric Value	BD

Field Name	Comments:	Character Limit	Column
Billing Term Category	The Code/Name of the Bill Term Category for the Assignment. If only 1 defined for country on the request type - this value will be used when left blank on the import.	255	BE
Special Financial Indicator Name	The Name of the Special Indicator for the Assignment. May be required, depending on Request Type. Valid Values: None, ExemptFromEarlyPay, BillSuppressed, TimeSuppressed	255	BF
User Defined Flags	Pipe (|) delimited list of User Defined Flags. At least one value may be required depending on the request type on the assignment	255	BG
Offer Estimated Cost	The Estimated Cost of the Assignment. If left blank, this defaults to zero (0)	Numeric Value	BH
Security Project	The Name of the default Security Project for the Assignment may be required, depending on Request Type	255	BI
Projects Services	Code or Name of the Project in the Projects and Services module to use for this Assignment. May be required depending on Request Type	255	BJ
User Defined Status	Code or Name of the User Defined Status to apply to this assignment. If only 1 user defined status is in the system and this column is left blank - this user defined status will be used for new assignments	255	BK
Supplier Reference 1	A reference field that can be used to hold special information about the supplier.	25	BL
Supplier Reference 2	A reference field that can be used to hold special information about the supplier	25	BM
Client Reference 1	A reference field that can be used to hold special information about the client	25	BN
Client Reference 2	A reference field that can be used to hold special information about the client	25	BO
Consultant External ID	The External ID for the Consultant. If left blank, this field will default to the Private ID	15	BP
Consultant External ID	**USE THIS ALTERNATIVE FOR WORKDAY IF -** NEW CONTRACTOR IS **NOT** IN WorkDay -- Leave the Consultant External ID field blank. The WorkDay webservice call should automatically populate this once imported and we should see it in the system.	15	BP

beeline

Field Name	Comments:	Character Limit	Column
Consultant External ID	**USE THIS ALTERNATIVE FOR WORKDAY IF -** CLIENT HAS CONTRACTOR IN WorkDay -- Need the WorkDay ID from the client's WorkDay system- goes in the Consultant External ID Field of the load and usually format of "C-#####...."	15	BP
MSP User Name	The User Name of the MSP User	50	BQ
MSP User Type Name	The Name of the Type of User to be associated with the MSP User. For Example, "Client MSP", "MSP". This value must match a value in the system	255	BR
SubContractor Supplier Code	The Code of the Subcontracting Supplier (ASV). This code must match an existing ASV Supplier in the system	255	BS
Assignment Source	The standard code values for the Assignment Source are: • AS_ProgramStaffing, • AS_PayrollStaffing, • AS_PassThroughStaffing This must match a value in database when supplied.	255	BT
Original Resource Start Date	The Original Start Date for the Resource with this client. This field must be formatted as TEXT and must be in the layout of mm/dd/yyyy	10	BU
Current Budget	Current Budget: Format = Money. Can be null. If null we converted to 0. If new assignment, insert in current and original budget in the assignment table and in assignmentdetailbudget in the assignmentdetail table. If update, we update only the current budget into the assignment table.	Numeric Value	BV
Total Approved Cost	Total Approved Cost for the Assignment. Format - money. When left blank - 0.00 will be applied to new assignments	Numeric Value	BW
Spend Prior To Beeline	Spend Prior To Beeline, positive money value, optional	Numeric Value	BX
Is Exempt From Prompt Pay Discount	Is Exempt From Prompt Pay Discount, (boolean value), optional. When not specified - "No" assumed for new assignments. Possible Values: • **Yes** • **No** • **True** • **False** • **1** • **0**	Possible Values	BY

Field Name	Comments:	Character Limit	Column
Bill Rate Override Type	Optional Bill Rate Override Type. When blank - "Manual" assumed. Other values: FixedAmount, Percentage. This column comes handy when OT rates derives from RT rates.	255	BZ
Bill Rate Override Value	When Override Type is not Manual then this value is required. Dollar amount or Percentage for derived OT/OC from RT rates	Numeric Value	CA
Pay Rate Override Type	Optional Pay Rate Override Type. When blank - "Manual" assumed. Other values: FixedAmount, Percentage. This column comes handy when OT rates derives from RT rates.	255	CB
Pay Rate Override Value	When Override Type is not Manual then this value is required. Dollar amount or Percentage for derived OT/OC from RT rates	Numeric Value	CC
Weekend Pay Rate Amount	The Amount of the Weekend Pay Rate	Numeric Value	CD
Estimated Expense	If entering values should be formatted as: Expense Code1|Amount 1| Expense Code 2|Amount 2	255	CE
Estimated Overtime Per Week	Numeric value of Overtime hours estimated per week	18 digit with 2 decimal precision	CF
Functional Partition	This is mapped to Assignment Detail Functional Partition.	255	CG
Offshore Physical Location	This is mapped to Assignment Detail Physical Work Security Location.	255	CH
Offshore Work Location	This is mapped to Assignment Detail Physical Work Security Location.	255	CI
Offshore Tax Job Category	This is mapped to Assignment Detail Alternate Physical Work Security Location	255	CJ
Offshore Start Date	This is mapped to Assignment Detail Alternate Scheduled Start Date.	255	CK
Offshore End Date	This is mapped to Assignment Detail Alternate Scheduled End Date.	255	CL

Field Name	Comments:	Character Limit	Column
Procurement Sub Type	Required when Procurement Type is provided. Expected Values For Procurement Sub-Type: • **Contingent** • **Permanent** • **Services** • **Project** • **SOWLineItems** Procurement Sub Type is validated against the Request Type's financial Indicators.	255	CM
Project Estimated Hours	Estimated hours for assignments associated to a Project using formula (hours x rates), SP Rules. Represents a burned-in total of the Project Estimated Hours for all details at the time the Assignment Detail was created.	8 digit with 2 decimal precision	CN
Project Estimated Offshore Hours	Estimated offshore hours for assignments associated to a Project using formula (hours x rates), SP rules. Represents a burned-in total of the Project Estimated Offshore Hours for all details at the time the Assignment Detail was created.	8 digit with 2 decimal precision	CO
Specific Project Estimated Hours	Specific Project Estimated Hours represents the Project Estimated Hours that are specific to that AssignmentDetail. If left blank the DetailedProjectEstimateHours will be used to populate the SpecificProjectEstimatedHours on the Assignment Detail.	8 digit with 2 decimal precision	CP
Specific Project Estimated Offshore Hours	SpecificProjectEstimatedOffshoreHours represents the Project Estimated Hours that are specific to that AssignmentDetail. If left blank the DetailedProjectEstimateOffshoreHours will be used to populate the SpecificProjectEstimatedOffshoreHours on the Assignment Detail.	8 digit with 2 decimal precision	CQ
Sponsoring Manager User Name	Sponsoring Manager Username of the grandfathered assignment	50	CR
Requesting Manager UserName	Requesting Manager Username of the grandfathered assignment	50	CS
Original Tenure Start Date	Maps to Assignment, Assignment Tenure Start Date	450	CT
Client	Must be a valid value in the database for Procurement Client (Admin > Procurement > Procurement Client).	255	CU
Client Bill Rate	Amount being mapped to AssignmentDetailClientBillRate.ClientBillRate	Numeric Value	CV
Is Primary Assignment	Expected values Blank, **Yes/Y, or No/N**	255	CW

Field Name	Comments:	Character Limit	Column
Enable trueRATE	Expected values: **Yes, No, Y, N**	255	CX
BTE Project	Must be a list of projects associated with the assignment. (Each project names should be separated by pipe delimited).	2550	CY
Request External ID	Unique request identifier from client's internal system	100	CZ
Alternate Email	Alternate email address	255	DA
Source Location	Source Location associated to supplier	255	DB
Service Clock Assignment ID	The associated assignment to a service clock	Assignment ID	DC
Service Clock Type	Service clock type that contains the Service Break in Weeks (max break in weeks where a service clock duration is then reset) Service in Weeks duration in which the Service Clock would be eligible for AWR if met service alerts in weeks of a service clock, duration when an alert would be sent.	255	DD
General Ledger	If provided should exist in the system.	50	DE
Point Of Origin	Optional by default but can be set to required.	255	DF
Buyer Time Classification	Name of the Buyer Time Classification on the Assignment. Used by RTE for classifying time	255	DG
Assignment Type	Code or Name of procurement assignment type. Matching type should be of same industry as the assignment.	255	DH
Position ID	Position ID for Workday assignments	50	DI
Position ID	**USE THIS ALTERNATIVE FOR WORKDAY IF-** NEW CONTRACTOR **NOT** IN WorkDay -- Leave the Position ID blank. The WorkDay webservice call should automatically populate this once imported and we should see it in the system.	50	DI

Field Name	Comments:	Character Limit	Column
Position ID	**USE THIS ALTERNATIVE FOR WORKDAY IF-** CLIENT HAS CONTRACTOR IN WorkDay -- Need the WorkDay Position ID from the client's WorkDay system - Position ID is the unique contract for each contractor in the WorkDay system - place this in the position ID usually format of "P-#####..."	50	DI
SocialMediaProfile			DJ
Cost Allocation Reference UDF Value	Code/Name of User Defined Value Item	255	DK

be advised: Assignment

Due to your configuration, some data elements may change, the following standard data elements will have the following values. These are standard data items that can be populated with these values on your worksheet.

Please note: Text displayed in green, is the text you should enter. This is example information only, your configuration may be different.

Column AI – Resource Type – enter one of the following values:

- RT_W2Exempt
- RT_W2NonExempt
- RT_1099Independent
- RT_SoleProprietor
- RT_Employee
- RT_Inc

Column AJ – Procurement Type - enter one of the following values:

- Contingent (most common, when left blank Contingent will be used)
- Project

Column AK – Request Type

- Enter: Contract

Column AQ – Currency

- Enter: USD (or enter currency code to match country)

Column BB – Tax Job Category

- Enter: TJC_US

Column BE – Billing Term Category

- Enter: BTC_US

Column BF - *Special Financial Indicator Name*

- Enter: None

Column BK – User Defined Status

- Enter: SS_NA

Column CM – Procurement Sub Type

- Enter: Contingent

Click to download the Data Template Sample for Assignments

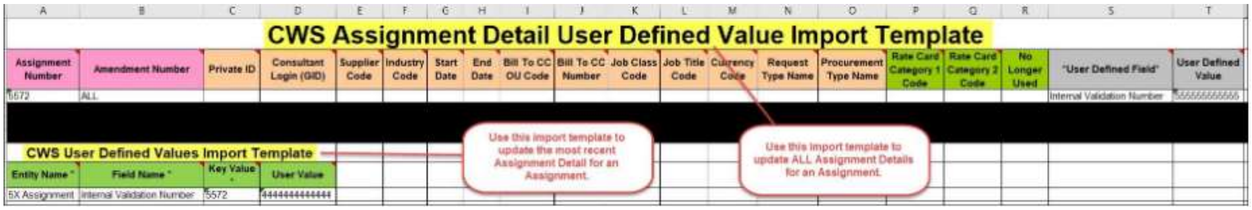
◆ Assignment Detail *UDV (User Defined Values)

Purpose: A feature that can be added to any of Beeline's products which enables the capture of client-specific information pertinent to the decision making or approval process throughout the procurement life cycle.

be in sync: How to fill out the Assignment Detail UDV Template

The information will need to closely match the Assignment data and the last columns of the template will add your User Defined Fields and their Values to the Assignment. (Examples, Performance Rating, Expense PO or Overtime Hours, any kind of data that needs to be captured.)

NOTE: The **CWS User-Defined Values Import Template** ***cannot*** be used to update **ALL** Assignment Details. It will only update the most recent/current Assignment Detail. If a client wants to update ALL Assignment Details for an Assignment they will need to very carefully use the **CWS Assignment Detail User-Defined Value Import Template**, and ensure the **Amendment Number** Column (**Column B**) has the value **ALL**, so ALL Assignment Details get updated. The only other Columns that need to be populated on this import template are **Assignment Number** (Column A), **User-Defined Field** (Column S), and **User Defined Value** (Column T) (comparison example below):



The **CWS User Defined Values Import Template** is also found in this document.

Field Requirements List for the Assignment Detail Template

Field Name	Comments:	Character Limit	Column
Assignment Number	The Beeline internal number allocated to the assignment. When provided - must match existing assignment number. KEY VALUE	10	A
Amendment Number	The Beeline internal number allocated to the assignment amendment. OPTIONAL KEY VALUE used to locate assignment detail records. When blank - them most current assignment detail will be used. User may put ALL into this column. Then user defined value will be applied to all assignment amendments	10	B
Private ID	The Resource Private ID or Consultant Login (Global ID - GID, next column) will be used depending on configuration to identify Resource on the Assignment	50	C
Consultant Login (GID)	Consultant login (Global ID). Depending on configuration this column or Private ID will be used to identify Procurement Resource on the Assignment	50	D
Supplier Code	The Code of the Supplier for this Resource and Assignment KEY VALUE: This value is required when Assignment Number is not supplied.	50	E
Industry Code	The Code of the Industry for this Assignment KEY VALUE: required when assignment number is not supplied	255	F
Start Date	The Start Date of the Assignment This field must be formatted as TEXT and must be in the layout of mm/dd/yyyy. KEY VALUE: This value is used to identify an existing unique assignment	10	G
End Date	The End Date of the Assignment This field must be formatted as TEXT and must be in the layout of mm/dd/yyyy. KEY VALUE: This value is used to identify an existing unique assignment	10	H

Field Name	Comments:	Character Limit	Column
Bill To CC OU Code	The Code of the Client Organizational Unit to which the Bill To Cost Center belongs. Required when Cost Center Number is not unique Part of KEY VALUE to identity bill to cost center on the assignment	50	I
Bill To CC Number	The Number of the Billable Cost Center KEY VALUE: This value is used to identify an existing assignment (when few found for a resource)	100	J
Job Class Code	The Code of the Job Class for this Assignment KEY VALUE: This value is used to identify an existing assignment	255	K
Job Title Code	The Code of the Job Title for this Assignment KEY Value: This value is used to identify an existing assignment	255	L
Currency Code	The Code of the Currency for the Assignment KEY VALUE: Used to locate existing assignment and request type	3	M
Request Type Name	The Name of the Request Type KEY VALUE: Used to locate existing assignment and/or Rate Card Class via Request Template for a Default Rate Card	255	N
Procurement Type Name	The Name of the Procurement Type KEY VALUE: Used to locate existing assignment and/or Request Template with Rate Card Class Code for Default Rate Card	255	O
Rate Card Category 1 Code	The Code for the Category 1 KEY VALUE: This value cannot be updated and is used to identify an existing unique rate card and assignment	255	P
Rate Card Category 2 Code	The Code for the Category 2 KEY VALUE: This value cannot be updated and is used to identify an existing unique rate card and assignment	255	Q
No Longer Used	No Longer Used		R
User Defined Field	Name or Code of the User-Defined Field for which the value is being loaded. Examples include: Performance Rating, Expense PO, Overtime Hours. KEY Value, required always	255	S

Field Name	Comments:	Character Limit	Column
User Defined Value	The Value of the Field to be loaded. Type of User Value is driven by Field Code, so field name expects a date/integer/money/boolean/item the value will be validated before conversion. For example, if the Field Name is "PO Number", this Value might be "ABC-1234" If Field Name is "Performance Rating", this Value might be "95" If the Field allows multiple values, you can load those by separating them with a pipe (|). For example, if you are loading "Regions", you might load "Region1|Region2|Region3" Please supply complete list: For example, if "Region1" exists in the database and you are loading "Region2|Region3" then "Region1" will be deleted (assuming that it is no longer associated with the assignment)! User value can store a long text (up to 2Gb)	255	T

Click to download the Data Template Sample for Assignment Detail *UDV (User Defined Values).

MSP User

Purpose: Provides a dedicated place to house Managed Service Provider (MSP) users in Beeline VMS. Program Administrators can easily identify and self-manage the setup of geography and industry visibility throughout their user base to ensure programs are running efficiently.

be in sync: How to fill out the MSP User Template

Ensure all required fields are populated before validating the import.

Field Requirements List for the MSP User Template

Field Name	Comments:	Character Limit	Column
User Name	The Login for the User	50	A
First Name	The First Name of the User Required for new users	100	B
Middle Name	The Middle Name of the User	100	C
Last Name	The Last Name of the User Required for new Users	100	D
Title	The User's Title in the Organization.	255	E
Organization Unit Code	The Code of the Organizational Unit for this User. Must be a valid MSP OU Code	50	F
Email	The User's email address. Default email from configuration will be used when blank supplied for new users (noemail@noemail.com)	255	G
Phone Number	The User's Phone Number	30	H
Fax	The User's Fax Number	30	I
Employee External ID	External ID for this User An ID other than the UserName may be used by the Organization to identify this User if configured	15	J
Status	The User's Status on creation Example: "**Active**" or "**Inactive**". When left blank active assumed **If record already exists and the status field is left blank then current status will not be changed. (Active will still be active and inactive will still be inactive.) Best practice is to always provide a value.**	8	K

Field Name	Comments:	Character Limit	Column
Role Names	The Code Names of the Roles to assign to this user. Must match roles already in the database. If assigning user to more than one role, values must be separated by a pipe (|) (Example : "MSP|MSPAdmin|MSPServiceWorkerAccess") NOTE : If updating an existing user, ALL valid roles for that user should be specified. Any existing roles will be deleted and replaced with these. By default Role Codes will be applied only to new users. Use Imports.Behavior.5XUser.ApplyRolesToExistingUsers configuration value to apply roles to existing users	255	L
User Types	The Names of the User Types to associate to this User If more than one, these must be separated by a pipe (|) By default User Types will be applied only to new users. Use Imports.Behavior.5XUser.ApplyRolesToExistingUsers configuration value to apply user types to existing users	255	M
Disallow Password Change	Disallow the change of the password? Expected values: "Yes" or "No". When left blank "No" assumed (so password change allowed)	3	N
Culture Name	The Name of the Culture for this User (Examples : "en-US", "fr-CA") Must match a culture name already in the database. When left blank - default configured culture in the database will be applied for new users (not necessarily USD)	20	O
Suppress Emails	Expected Values: "Yes" or "No" When left blank "No" will be assigned to new users	3	P
Click to download for the Data Template Sample for MSP User.			

Skills

Purpose: Optionally adds or overhauls the skills that are already loaded through base config.

be in sync: How to fill out the Skills Template

You must have separate lines for each industry you want the skills added to.

Skill Code - It is critical to get the Skill Code right. The skill code field should be a combination of the industry, skill category, and skill name. You will see the code you enter in the industry level skill records.

(The code shown in the master skill table automatically generated by the system based on the skill name.)

The system ignores dashes, underscores, spaces, periods, etc. So don't use them as a way to make unique skill codes.

Here is a visual to help you build the skill code. The combination of Skill Category and Skill Name form the uniqueness under each Industry.

Skill Code		
Industry	Category	Skill Name

Field Requirements List for the Skills Template

Field Name	Comments:	Character Limit	Column
Industry Code	The Code of the Industry for the Skill. KEY value to locate skill.	255	A
Category Name	The Name of the Category for this Skill NOTE: If this category does not already exist, it will be created. Key value to locate Skill.	255	B
Skill Name	The Name of the Skill to be added Combination of Industry Code, Category Name, Skill Name should be unique.	255	C
Skill Code	Code of skill to be added. Skill Code must be unique and must not contain characters.	255	D
Description	The Description of the Skill to be added. (If Null on insert skill name will be used).	255	E

Click to download for the Data Template Sample for Skills.

beeline

Tax Definition

Purpose: Each assignment and milestone must have a tax job category. It gets associated with the assignment based on what's selected on the request or imported via assignment load. And, it gets added to the milestone based on what comes through from the SOW.

be advised: Tax Definition Data comes from a Base Report from Beeline

This load sheet comes from a Beeline base report that is shared with the client. It is the client's responsibility for providing this completed file back to Beeline during implementation, for importing. Beeline cannot advise on taxes or rates, we provide a base guidelines report as a guide only, the client needs to confirm accuracy according to tax laws before it is imported. After go-live, it falls to the client's Program Office to notify Beeline if changes are needed to any tax rates.

Field Requirements List for the Tax Definition Template

Field Name	Comments:	Character Limit	Column
Country Code	Country Code. Key value, required always. Should match value in the database Example: USA, CAN	255	A
Tax Job Category Code	Tax Job Category Code. Key Value. When no matching value found will be inserted. Otherwise values will be updated for matching record. Required when Tax Rate supplied	255	B
Tax Job Category Name	Tax Job Category Name. Required for new records.	255	C
Tax Job Category Description	Optional Tax Job Category Description.	255	D
Tax Job Category Status	Optional Tax Job Category Status. Example: **Active**/**Inactive**, **A/I**, **1/0**. When left blank "Active" assumed for new records.	8	E
Tax Job Category Is Taxable	Optional Is Taxable flag. Should evaluate boolean value. Example: True/False, T/F, Yes/No, Y/N, 1/0. When left blank false assumed on new records.	8	F
Tax Definition Code	Key value to search existing tax definitions. When not found new tax definition assumed. Required when Tax Rate supplied	255	G
Tax Definition Name	Unique Tax Definition Name. Required for new records.	255	H
Tax Definition Description	Optional Tax Definition Description.	255	I

Field Name	Comments:	Character Limit	Column
Tax Definition Status	Optional Tax Definition Status. Example: **Active**, **Inactive**, A/I, 1/0 When left blank "Active" assumed for new records.	8	J
Tax Type Name	Tax Type Name. Should match value in the database. Required for new records	255	K
Tax Calculation Name	Tax Calculation Name. Should match value in the database. Required for new records.	255	L
Tax Effective From Name	Tax Effective From Name. Should match value in the database. Required for new records.	255	M
Parent Tax Definition Code	Optional Reference to another Tax Definition. Should match value in the database or in this file.	255	N
Tax Definition Charge Code	Optional Tax Definition Charge Code.	255	O
Tax Definition Tax Beeline Fee	Does Tax Definition Tax Beeline Fee? Should evaluate Boolean expression: True/False, T/F, Yes/No, Y/N, 1/0. When left blank "False" assumed on new records.	1	P
State Code	Optional State Code. Should match value in the database for given country code. Part of the combined key to locate existing tax rate.	5	Q
County Code	Optional County Code. Should Match value in the database of given State Code. Part of the combined key to locate existing tax rate.	255	R
City Name	Optional City Name. Part of the combined key to locate existing tax rate.	50	S
Tax Rate Percent	Tax Rate Percentage. Four Decimal points maximum precision. Required for new records.	19	T
Effective Date	Effective Date of Tax Rate. Part of the key value. Required for new records	10	U
Expiration Date	Optional Expiration Date	10	V
Tax Code	Is not a required field.	50	W
Jurisdiction Code	Is not a required field.	50	X

Field Name	Comments:	Character Limit	Column
Special Economic Zone	Optional Special Economic Zone. **KEY VALUE.** If null, the default value will be "**1**" / "**True**" / "**Yes**" / "**Y**"	255	Y

Click to download for the Data Template Sample for Tax Definition.

Resources

Purpose: This import gives the client the flexibility for creating or updating Resource Pool records. Or, adding Resources who do not currently have an active Assignment.

be in sync: How to fill out the Resources Template

Fill in all the Yellow highlighted required fields with the Resources information.

Column K – Personal ID Type Codes will depend upon your configuration, the most common is MMDD or DDMM.

The information highlighted in blue below (Consultant External ID/Workday Applicant ID) is the Resource Template information that needs to be followed when using the WorkDay Standard API Web Service for the Worker Download integration. If the data is not populated when importing, it will not pass over to WorkDay in the Web Service call.

Field Requirements List for the Resources Template

Field Name	Comments:	Character Limit	Column
First Name	First Name of the Resource. Required for new Resource or when consultant login provided	100	A
Middle Name	Middle Name of the Resource.	100	B
Last Name	Last Name of the Resource. Required for new Resource or when consultant login provided	100	C
Localized First Name	Localized First Name of the resource. May be required depending on configuration. (Example: Japanese names would appear in kanji or katakana)	100	D
Localized Middle Name	Localized Middle Name of the resource.	100	E

Field Name	Comments:	Character Limit	Column
Localized Last Name	Localized Last Name of the resource. May be required depending on configuration	100	F
Second Last Name	Second Last Name of the resource.	100	G
Email	The email address of the Resource. If left blank, this defaults to noemail@noemail.com or what ever is configured as "DefaultEmail"	255	H
Personal ID	A private and unique identifier for the Resource such as a SSN. This value populates the Full SSN of the resource Valid format will be enforced for non blank values when configured. The Initial SSN value is pulled from the right side of this value based on the number of characters defined in configuration (default of 4)	100	I
Initial Personal ID	The Initial SSN value is pulled from the right side of this value based on the number of characters defined in configuration (default of 4)	100	J
Personal ID Type Code	The Code for the Type of Personal ID being imported. This value must match a valid value in the database Examples: "SSN", "NationalID" If left blank, this will default to "SSN". May be required when personal id is provided and few id types are defined in the system	255	K
Date Of Birth	The Resource's Date of Birth. Can also be used to identify them uniquely. This field must be formatted as text but must be in the format of mm/dd/yyyy or mmdd	10	L
Private ID	Required when configured to use Private as Resource's Unique External Identifier. This value is used to identify an existing resource record	50	M
Consultant Login (GID)	The Consultant's Unique Login. When supplied - security user record will be created. Depending on configuration, it can either be Private ID or GID but neither allow for updating this value. **Primary Key** used to locate existing data.	50	N
Culture Name	Culture of the resources. Culture must be active in database. Can be inserted or updated. If culture not provided will default to client default culture set in the database.		O
Time Zone	Time Zone of the resource. Time Zone must be active in database. Can be inserted or updated. If Time Zone is not provided it will default to the default Time Zone set in the database.	450	P
Supplier Code	The Code of the Supplier this Resource is Assigned to	50	Q

Field Name	Comments:	Character Limit	Column
Industry Code	The Code of the Industry for this Resource	255	R
Consultant External ID	The External ID for the Resource. If left blank, this field will default to the Private ID	15	S
Consultant External ID	Will be the **Workday Applicant ID**. Need to collect the Applicant ID from the client's WorkDay system - Usually in the format of "A-###..."	15	S
Status	Status. **Active** or **Inactive**. When left blank - active assumed for new resources. **If record already exists and the status field is left blank then current status will not be changed. (Active will still be active and inactive will still be inactive.) Best practice is to always provide a value.**	8	T
Client Visible?	Optional Is Client Visible. Yes or No. When blank - no assumed for new records	3	U
Private ID Confirmed?	Optional Is Private Id Confirmed? Yes or No. When left blank – no assumed for new resources	3	V
Former Employee?	Optional Former Employee. Yes or No. When blank - no assumed for new records	3	W
Former Consultant?	Optional Former Consultant. Yes or No. When left blank – no assumed for new resources	3	X
Date Available	Resource Available Date. Valid date or blank.	10	Y
Home Phone	Optional Home Phone.	30	Z
Cell Phone	Cell Phone.	30	AA
Business Phone	Business Phone.	30	AB
Fax Number	Fax Number.	30	AC
Address Type	Address Type. Example: Home, Business. Required only when actual address supplied	255	AD
Address Line1	For new resources: if at least one address field provided the rest 3 is required (to make complete address)	150	AE

Field Name	Comments:	Character Limit	Column
Address Line2	For new resources: if at least one address field provided the rest 3 is required (to make complete address)	150	AF
City	For new resources: if at least one address field provided the rest 3 is required (to make complete address)	50	AG
State	2 Letter US State or Canadian Province	5	AH
Zip	Zip code	10	AI
Country Code	Candidate Country. Required only when address provided for new resources. Example USA, CAN	255	AJ
Additional Skills	Additional Skills, free text	8000	AK
Alternate Email	Recovery Email/Alternate Email Address	255	AL
SocialMediaProfile	Value Format -Type:Value. If multiple pairs separate each with pipe (|)	4000	AM
Click to download the Data Template Sample for Resources			

Project BTE (Beeline Time and Expense)

Purpose: BTE includes the ability to associate the project to the contractor that should assign their time and expense. BTE projects is the list of all possible projects for tracking time entry.

be advised: Project BTE

This template is very client-specific. It supports several Invoice related activities, so entries and configuration may need adjustments. Since several of these settings reflect your specific invoice processes, care needs to be taken to ensure that your data is in sync for Finance Steady State.

For new Implementations: Please work with your Implementation Consultant to answer your questions.

For Client Expansions: Please reach out to your Beeline Representative.

For Integration: Consult the Jira Ticket already open to track this project.

beeline

Field Requirements List for the Project BTE Template

Field Name	Comments:	Character Limit	Column
Project ID	Key Value: if supplied - will be used in project lookup. Leave blank for new projects.	128	A
*** Project Code ***	Key value. When project ID not supplied, this will be used to lookup project. Required for new projects.	255	B
*** Project Title ***	The Title of the Project. Required for new projects. Must be unique per project (secondary key value).	255	C
Project Manager User Name	The Login of the Project Manager.	55	D
Project Type	The Type of Project. This value must be in the list of available types in the database.	30	E
Project Description	The Description of the Project.	4000	F
Project Status	The Status of the Project MUST BE: "**Active**" or "**Inactive**" If left blank, this will default to "ACTIVE".	8	G
Financial Task Number 1	Mapped to tblProject.cFinTaskNumber.	128	H
Financial Task Number 2	Mapped to tblProject.cFinTaskNumber2.	128	I
Project Sub Code	Mapped to tblProject.cExtNumber.	50	J
Billable	Is the Project billable? MUST BE : "**Yes**", "**No**", or "**Unknown**" If left blank, this will default to "Unknown".	3	K
Budget	The budget dollar amount for the project.	Numerical value	L
Is Offshore Project	Is the project an Offshore project? MUST BE : "**Yes**" or "**No**" If left blank, this will default to "No".	3	M
Allow Self Signup	Is Self Signup allowed for this project? MUST BE : "**Yes**" or "**No**" If left blank, this will default to "No".	3	N

Field Name	Comments:	Character Limit	Column
Is Task Level Assignment	MUST BE: "**Yes**" or "**No**" If left blank, this will default to "No". Enables the assignment of individual tasks to BTE resources. If true resource must be assigned the tasks to see task otherwise resource can see all task associated to projects assigned to them.	3	O
Is Task Required	Does this project require a task? MUST BE : "**Yes**" or "**No**" If left blank, this will default to 'No'.	3	P
Technical Manager User Name	The Login for the Project's Technical Manager.	55	Q
Allocation Cost Center Division	May be required based on configuration. Should match a valid division from the database when supplied.	50	R
Allocation Cost Center Number	May be required based on configuration.	50	S
Start Date	Project Start date for reporting purposes. Uses standard date formats: MM/DD/YYYY, YYYY/MM/DD, YYYY-MM-DD	10	T
End Date	Project End date for reporting purposes. Uses standard date formats: MM/DD/YYYY, YYYY/MM/DD, YYYY-MM-DD	10	U
Capitalized	Capitalized (SOP98) value should be Blank/Null, Yes, No, Y or N	3	V
Short Name	Project ShortName. If blank, the ProjectCode is used to fill this instead. Must be unique. Also part of the criteria for searching a BTE project and if re-used by another record, it would count as an UPDATE.	255	W
Click to download the Data Template Sample for Project BTE.			

Project Task BTE

Purpose: The BTE Project Task integration point is used to upload Project Tasks into Beeline and can be used for one or all of the following:

- Contractor Time & Expense Entry
  - Workers can select a BTE Project and Task from a list of all active BTE Projects and Tasks that have been loaded
  - Workers can be manually allocated to specific BTE Projects and Tasks

- Workers can be assigned to specific BTE Projects and Tasks by using the BTE Resource Import

- Invoicing
- Reporting

be advised: Project Task BTE

This template is very client-specific. It supports several Invoice related activities, so entries and configuration may need adjustments. Since several of these settings reflect your specific invoice processes, care needs to be taken to ensure that your data is in sync for Finance Steady State.

For New Implementations: Please work with your Implementation Consultant to answer your questions.

For Client Expansions: Please reach out to your Beeline Representative.

For Integration: Consult the Jira Ticket already open to track this project.

Field Requirements List for the Project Task BTE Template

Field Name	Comments:	Character Limit	Column
Project Task ID	KEY Value. Must be unique together with project code (next column).	128	A
Project Code	Key value. Must reference a valid project by code.	255	B
Task Name	Required for new tasks, unique together with wbs code per project.	100	C
Task Description	Description of the Task.	50	D
Phase Code	When supplied must be a valid reference from the database.	30	E
Start Date	Task Start Date, optional. Uses standard date formats: MM/DD/YYYY, YYYY/MM/DD, YYYY-MM-DD.	10	F
End Date	Task End Date, optional. Uses standard date formats: MM/DD/YYYY, YYYY/MM/DD, YYYY-MM-DD	10	G
Status	**Active** or **Inactive**. When left blank active assumed for new records. **If record already exists and the status field is left blank then current status will not be changed. (Active will still be active and inactive will still be inactive.) Best practice is to always provide a value.**	8	H

Field Name	Comments:	Character Limit	Column
WBS Code	WBS Code	50	I
Sequence Number	Optional positive integer value. In UI this is LOB.	Numerical Value	J
Allocation Cost Center Division	Allocation Cost Center Division. May be required based on configuration. Should match a valid division from the database when supplied.	50	K
Allocation Cost Center Number	Allocation Cost Center Number. May be required based on configuration.	100	L
cLineItemType	Client Specific Field - Used to backfill Security Project. Expected values: E, F, M, O, T.	1	M
Capitalized	Expected values: Y (Yes), N (No), or blank (Null).	3	N

Click to download the Data Template Sample for Project Tasks BTE.

User Defined Values (UDV)

Purpose: This import allows you to add UDVs or also known as Customer Defined Fields (CDF) onto the following objects/entities:

• Assignment	Security Client User
• Cost Center	• Security OU
• Project	• Security Project
• Resource	• Supplier
• Request	•
Cannot import these UDV types	
• Attachment	• Single Selector
• Checkbox	•

This would be data that you would like to track, examples; Purchase Orders, Performance Ratings, etc.

be in sync: How to fill out the User Defined Value Template

- For the first column, decide which object you need to connect to, 5X Assignment, Cost Center, see list below.
- Then add the Field Name, exactly as it appears in the database.

- Key Values, The Value that is used to search for the correct User-Defined field. For example, if you are loading a value for an Assignment, this would be the Assignment Number for that assignment lookup. If you are loading a value for a Cost Center, this would be the Cost Center Number.
- The User Value is the value for the Field Name. For example, if the Field Name is PO Number, the Value might be "01-1234".

Field Requirements List for the User Defined Value Template

Field Name	Comments:	Character Limit	Column
Entity Name *	Name of the Entity for which the value is being loaded. Must be one of the following: • 5X Assignment • Cost Center • Request • Project • Security Client User • Supplier • SecurityProject • Security OU • Resource **NOTE: Milestone UDFs are not supported through the import tool**	255	A
Field Name *	The name of the User-Defined Field for which the value is being loaded. Examples include: • Performance Rating, • Expense PO, • Overtime Hours If Single Selector is based on a drop down then in then in the Field Name both Field Name and Single Selector are required. Example: Single Selector (name/code) | Field Name (name)	255	B
Key Value *	The Value that is used to search for the correct User-Defined field. For example, if you are loading a value for an Assignment, this would be the Assignment Number for that assignment lookup. If you are loading a value for a Cost Center, this would be the Cost Center Number. In addition, this field allows multiple values separated by a pipe(|). If you have a Cost Center, for example, that is identified by both its Cost Center Number and OU Code, you would put both values separated by a pipe. For Request import follow this format "1|2" where 1 is request group number and 2 is request number for this group.	255	C

Field Name	Comments:	Character Limit	Column
	Example: For Resource, Key Value should be INDUSTRYCODE|SUPPLIERCODE|EXTERNALID or INDUSTRYCODE|SUPPLIERCODE|USERNAME		
User Value	The Value of the Field to be loaded. For example, if the Field Name is "PO Number", this Value might be "01-1234". If the Field allows multiple values, you can load those by separating them with a pipe (|). For example, if you are loading "Regions", you might load "Region1|Region2|Region3" When this field is left blank, the item values will be deleted from the database. Type of User Value is driven by Field Code, so if integer or date is expected it will be validated as such. Notes: When this field is left blank... • For user defined field types of String, Date, Int, Money, Text, Boolean - the item value will be updated to NULL in the database • For user defined field types of DropDown (Item) and Single Selector - existing item value will not be updated.	8000	D
Click to download the Data Template Sample for User Defined Values			

be advised: User Defined Value Template

There is another load that can be used, it is template **CWS User Defined Values Import Template** ***cannot*** be used to update **ALL** Assignment Details. It will only update the most recent/current Assignment Detail. If a client wants to update ALL Assignment Details for an Assignment they will need to very carefully use the **CWS Assignment Detail User Defined Value Import Template**, and ensure the **Amendment Number** Column (**Column B**) has the value **ALL**, so ALL Assignment Details get updated. The only other Columns that need to be populated on this import template are **Assignment Number** (Column A), **User Defined Field** (Column S), and **User Defined Value** (Column T).

User-Defined Items

Purpose: A new Self Service menu that lets Managed Service Provider (MSP) or Vendor Management Office (VMO) staff adjust the lists on any of their existing CDFs. Access to this new feature is conveniently available directly from their home dashboard by expanding the Admin pull-down menu. Click the Client Defined Fields (CDF) heading under the Self Service section and then click in the Client Defined

Field box to select the specific CDF that needs adjustments. Use the + Add New CDF Item link and then follow the prompts to add as many new items as needed.

be in sync: How to fill out the User-Defined Items Template

First, ensure that you have access to this feature before beginning the validation/import process. If you don't have many values to add, this may be a better option.

Fill in all the items highlighted in Green and Yellow.

Field Requirements List for the User Defined Items Template

Field Name	Comments:	Character Limit	Column
User Defined Field	The name or code of the User-Defined Field for which the value is being loaded. Must match value in the database. Must be unique for User Defined Field. Example: • Performance Rating • Expense PO • Overtime Hours	255	A
Item Code	Key value. Item Code used to locate existing items or adding new. Required always.	255	B
Item Name	Item Name. Required for new Items.	255	C
Item Description	Optional Description of the UDF Item to be loaded.	255	D
Item Status	Optional Item Status. Example: '**Active**' or '**Inactive**'. When left blank 'Active' is assumed when creating record. **If record already exists and the status field is left blank then current status will not be changed. (Active will still be active and inactive will still be inactive.) Best practice is to always provide a value.**	8	E
Item XML	Optional. Any well-formed xml.	8000	F
Default	Optional. Indicates if given Item should be marked as default Item. Example : 'Yes', 'No'; 'Y', 'N'; 'True', 'False', 'T','F'. when left blank 'No' is assumed. Only one Item per Field can be marked as default.	50	G

Field Name	Comments:	Character Limit	Column
Click to download the Data Template Sample for User Defined Items			

Work Location Region Mapping

Purpose: This template will help with automatically selecting the RCC1 based on the location selected and the mapping on this file so that the users don't have to choose the RCC1 manually, as most won't know if their location is RCC1 or RCC2.

be in sync: How to fill out the Work Location Region Mapping Template

For this import, you will need to fill in all fields.

This information can be found on the past templates that have been imported.

- The Labor Category (usually the same as the Industry) can be found on the Rate Card Template, along with the Category 1, know here as Rate Category 1.
- The Work Location Name or Code can be found on the Work Location template.
- The Status is either **Active** or **Inactive**.

Field Requirements List for the Work Location Region Mapping Template

Field Name	Comments:	Character Limit	Column
Labor Category	Labor Category Name or Code.	255	A
Work Location	Work Location Name or Code.	255	B
Rate Category 1	Rate Category 1 Code.	255	C
Status	Status upon creation must be '**Active**' or '**Inactive**'. If left blank this value defaults to 'Active'. **If record already exists and the status field is left blank then current status will not be changed. (Active will still be active**	255	D

Field Name	Comments:	Character Limit	Column
	and inactive will still be inactive.) Best practice is to always provide a value.		
Click to download the Data Template Sample for Work Location Region Mapping.			

Signing Limit

Purpose: A signing limit generally defines the largest financial commitment (money amount) that an individual is authorized to make on behalf of the organization.

be advised: Signing Limit

This template is very client-specific. It supports several Invoice related activities, so entries and configuration may need adjustments. Since several of these settings reflect your specific invoice processes, care needs to be taken to ensure that your data is in sync for Finance Steady State.

For New Implementations: Please work with your Implementation Consultant to answer your questions.

For Client Expansions: Please reach out to your Beeline Representative.

For Integration: Consult the Jira Ticket already open to track this project.

Field Requirements List for the Signing Limit Template

Field Name	Comments:	Character Limit	Column
Spending Limit Type	REQUIRED Field. Valid Spending Limit Types are Manager, Time, and OU.	255	A
User Name	User Name.	255	B
Organizational Unit Code	Organization Unit Code is REQUIRED when Spending Limit Type is OU.	255	C

Field Name	Comments:	Character Limit	Column
Currency Code	REQUIRED Field. Code of currency for signing limit. Examples of currency USD, CAD.	255	D
Authorized Signing Limit	Amount of Authorized Signing Limit.	19	E
Status	Valid Statuses are **Active** and **Inactive**. If Status is left blank Active is assumed. If record already exists and the status field is left blank then current status will not be changed. (Active will still be active and inactive will still be inactive.) Best practice is to always provide a value.	8	F
Reference Type	Only applies if limit type is Timesheet Approver or Sequential manager.	255	G
Click to download the Data Template Sample for Signing Limit			

Currency Exchange

Purpose: By activating "My Preferred Currency," you can now see both your local country currency and the currency of the country for the procurement request. This will give you;

- Side-by-side currency amounts displayed in the financial sections of the VMS during the lifecycle of the request and assignment; and
- Currency amounts shown are based on current exchange rates.

be advised: Currency Exchange Template

This template is very client-specific. It supports several Invoice related activities, so entries and configuration may need adjustments. Since several of these settings reflect your specific invoice processes, care needs to be taken to ensure that your data is in sync for Finance Steady State.

For New Implementations: Please work with your Implementation Consultant to answer your questions.

For Client Expansions: Please reach out to your Beeline Representative.

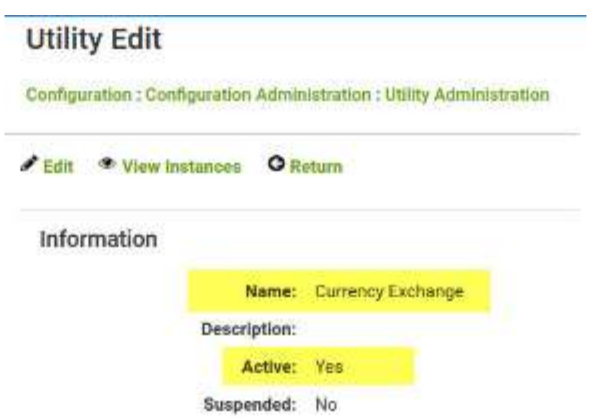
For Integration: Consult the Jira Ticket already open to track this project.

Field Requirements List for the Currency Exchange Template

Field Name	Comments:	Character Limit	Column
Base Currency Code	Required: Currency Code Must exist prior to loading into System. Example would CAD for Canadian Dollar.	255	A
Convert To Currency Code	Required: Currency Code Must exist prior to loading into System. Example would CAD for Canadian Dollar. Convert To Currency Code cannot match Base Currency Code.	255	B
Exchange Rate	Required: Exchange Rate cannot be greater than 6 decimal places.	10	C
Effective Date	Effective Date is the date in which the Exchange Rate should start and must be a valid date format. This field is for informational purposes only.	10	D
Status	Optional location status. **Active** or **Inactive**. When left blank - active assumed on creation of record. **If record already exists and the status field is left blank then status will not be changed. (Active will still be active and inactive will still be inactive.) Best practice is to always provide a value.**	8	E

be advised: Currency Exchange Template

If the Client is using the Utility Process: Currency Exchange, then Custom Exchange Rates cannot be loaded.



The import will generate a validation error: The site is not configured to use a currency conversion provider and currency exchange rates may not be imported.

The Currency Exchange process would have to be disabled to import Custom Exchange Rates. The Currency Exchange process can be located under Admin > Utilities > Processes > Currency Exchange. If the process is Active it should be assumed the Client is using an external Currency Exchange service such as ONADA.

Timesheets

Purpose: Beeline VMS incorporates a timesheet display that is used by contractors (or suppliers on their behalf) to designate time-related activity. Once the timesheet is completed, it is routed to the designated Timesheet Approver for review and approval before it can be queued for invoicing. Beeline VMS supports a broad range of timesheet functionality including hourly, weekly, and monthly time entry as well as time-in and time-out tracking to support local legislative requirements.

be in sync: How to fill out the Timesheets Template

These are a few of the items to keep in mind when populating the Timesheets:

If Exists Action data needs to be one of the following:

- Ignore
- Replace
- Add
- Replace

Cost Center Number: The Cost Center Number of the Consultant's assignment.
This value is required ONLY if the client has set up the timesheet configuration to make it required.

Timesheet Status: Must be one of the following:

- Not Submitted
- Submitted
- Approved
- Rejected

Units Worked: The number of units (hours) worked on the Work Date. This value cannot exceed 24.

This can be imported in any increments that is needed:

- 1/100
- 1/10
- 1/4
- 1/2
- One Hour
- Half Day

- Whole Day

All Field Names highlighted in Yellow and Green are required and will need to be filled in, in order to validate and import the file.

Field Requirements List for the Timesheets Template

Field Name	Comments:	Character Limit	Column
If Exists Action	The Action that the Import should take if there is an existing timesheet header. Must be one of the following: **"Ignore", "Replace", "Add", "Delete"**. See below for descriptions of each. <u>Business Rules for different actions:</u> **"Ignore"** - If an existing timesheet header is found, this data will not be loaded. This option is best used when the user is going to be importing timesheet but then changing them or approving them through the application. This will reduce the risk of overwriting work done through the application. If no header exists, the time will be loaded as normal. **"Replace"** - If an existing timesheet header is found, the entire header (and all day-level records related to it) will be replaced by the data being imported. The status will also be rolled back if different and if the existing timesheet has already been billed, it will be marked for reprocessing. This is the best option to use if you are going to be using the timesheet import exclusively and will not be using the application. Be careful though in realizing that this will always result in existing data being wiped out and reentered. If no header exists, the time will be loaded as normal. **"Add"** - This option will add one day-level timesheet to an existing header. If no header exists, the time will be loaded as normal. The status of the header will also roll back to the status of the incoming detail record, if different. If the existing header has already been billed, it will be marked for reprocessing. This is an optional method that is best used when you do not plan on sending over an entire week's timesheet. **"Delete"** - This option can ONLY be used when there is an existing timesheet header AND detail record. This option allows the deletion of the existing detail record. If the existing header has already been billed, it will be marked for reprocessing. This option should be used with care as it can result in data loss and incorrect billing.	7	A
Consultant Login	The Login for the Consultant for whom time is being loaded. KEY VALUE: The import process will attempt to identify the assignment to log the time against using the	50	B

Field Name	Comments:	Character Limit	Column
	Consultant Login and the Work Date. If there are multiple assignments for those KEYS, then the use of one or more Secondary KEYS may be necessary.		
Supplier Org Code	Internal Identifier for the Supplier. This value can optionally be used to identify a specific assignment to log the time against. Secondary KEY VALUE: The import process will attempt to identify the assignment to log the time against using the Consultant Login and the Work Date. If there are multiple assignments for those KEYS, then the use of one or more Secondary KEYS may be necessary.	100	C
Assignment Number	Internal Identifier for the Beeline Assignment. This value can optionally be used to identify a specific assignment to log the time against. Secondary KEY VALUE: The import process will attempt to identify the assignment to log the time against using the Consultant Login and the Work Date. If there are multiple assignments for those KEYS, then the use of one or more Secondary KEYS may be necessary.	Numeric value	D
PO Number	The Purchase Order Number of the Consultant's assignment. This value can optionally be used to identify a specific assignment to log the time against. Secondary KEY VALUE: The import process will attempt to identify the assignment to log the time against using the Consultant Login and the Work Date. If there are multiple assignments for those KEYS, then the use of one or more Secondary KEYS may be necessary.	25	E
Project Code	The Short Name of the Project to log the time against. This value is required ONLY if the client has set up the timesheet configuration to make it required. Based on the client's configuration, it will be used to identify the resource or to specify a project different from the default project. Secondary KEY VALUE: The import process will attempt to identify the assignment to log the time against using the Consultant Login and the Work Date. If there are multiple assignments for those KEYS, then the use of one or more Secondary KEYS may be necessary.	255	F
Project Task Name	The Name of the Project Task to log the time against. This value is required ONLY if the client has set up the timesheet configuration to make it required. This value may be necessary to identify the existing Timesheet detail record, if one exists.	100	G

Field Name	Comments:	Character Limit	Column
Cost Center Number	The Cost Center Number of the Consultant's assignment. This value is required ONLY if the client has set up the timesheet configuration to make it required. Based on the client's configuration, it will be used to identify the assignment or to specify a Cost Center different from the one on the assignment. Secondary KEY VALUE: The import process will attempt to identify the assignment to log the time against using the Consultant Login and the Work Date. If there are multiple assignments for those KEYS, then the use of one or more Secondary KEYS may be necessary. Some Stinger Clients have Cost Center Number as globally unique value; some may reuse cost center number within different OU. When Cost Center Number is NOT UNIQUE, or several already found - import need Cost Center OU code. So the input in this column may look like this: Number001|OrgUnit00 Number001|OrgUnit01 Number002|OrgUnit03 Use Pipe (|) to separate Cost Center Number and its OU code.	100	H
Industry Code	The Code of the Industry for the Assignment's Job Class\Job Title. This value is required ONLY if the Job Class and Job Title are provided and the same Job Class\Job Title exists for more than one industry. Secondary KEY VALUE: The import process will attempt to identify the assignment to log the time against using the Consultant Login and the Work Date. If there are multiple assignments for those KEYS, then the use of one or more Secondary KEYS may be necessary.	50	I
Job Class Name	The Name of the Job Class for the Assignment's Job Title. This value is required ONLY if the Job Title is provided and the same Job Title exists for more than one Job Class. Secondary KEY VALUE: The import process will attempt to identify the assignment to log the time against using the Consultant Login and the Work Date. If there are multiple assignments for those KEYS, then the use of one or more Secondary KEYS may be necessary.	255	J
Job Title Name	The Name of the Assignment's Job Title. This optional value can be used to identify the assignment to log the time against. Secondary KEY VALUE: The import process will attempt to identify the assignment to log the time against using the Consultant Login and the Work Date. If there are	255	K

Field Name	Comments:	Character Limit	Column
	multiple assignments for those KEYS, then the use of one or more Secondary KEYS may be necessary.		
Timesheet Status	The Status of the Timesheet Header. Must be one of the following: "**Not Submitted", "Submitted", "Approved", "Rejected**" NOTE: The status of the timesheet header will be inferred from the statuses of all of the details that belong to that header. For example, if 2 days are "Submitted" and a third day is "Approved", the timesheet header will be set to "Submitted", the earliest status in the cycle. NOTE: If the "If Exists Action" is "Delete", the value in this field should specify what you want the new status of the header to be.	13	L
Pay Code	The Code for the type of pay to attribute this time to. Common Examples: "RT", "NB" This value must match a value in the database	255	M
Work Date	The date to which the imported time should be loaded. This date is used to identify the Week Ending Date based on the billing schedules set up by the client. This date must be within the start and end dates of a valid assignment. This value must be formatted as text but needs to be in the format mm/dd/yyyy. KEY VALUE: The import process will attempt to identify the assignment to log the time against using the Consultant Login and the Work Date. If there are multiple assignments for those KEYS, then the use of one or more Secondary KEYS may be necessary.	10	N
Units Worked	The number of units (hours) worked on the Work Date. This value cannot exceed 24 and is also restrained by the max number of hours identified as the Pay Code level and Resource level, if any.	Numeric Value	O
TimeIn	The date when the shift started, if the client uses shifts. This value is required ONLY if the client has set up the timesheet configuration to make it required. If used in conjunction with "Units Worked", the number of units worked must match the difference in the TimeIn and TimeOut, also considering the Break. This value must be formatted as text but needs to be in the format mm/dd/yyyy hh:mm:ss.	Numeric Value	P
TimeOut	The date when the shift ended, if the client uses shifts. This value is required ONLY if the client has set up the timesheet configuration to make it required. It is also required if TimeIn is used. If used in conjunction with "Units Worked", the number of units worked must match the difference in the TimeIn and TimeOut, also considering the	Numeric Value	Q

Field Name	Comments:	Character Limit	Column
	Break. This value must be formatted as text but needs to be in the format mm/dd/yyyy hh:mm:ss.		
Break	The number of units (hours) of break. This value can be specified as a decimal (i.e. ".75" to specify a portion of a unit). This value is required ONLY if the client has set up the timesheet configuration to make it required. It cannot be used if both TimeIn and TimeOut are not also used. If used in conjunction with "Units Worked", the number of units worked must match the difference in the TimeIn and TimeOut, also considering the Break.	Numeric Value	R
Day Level Comments	The Comments to include in the detail (day) level of the timesheet.	1500	S
Week Level Comments	The Comments to include in the header (week) level of the timesheet. The timesheet import process will use the first non-empty Week Level Comments for an entire week's time to load into the header comments. Therefore, you do not need to put the same comments on each row of a particular week's time.	1500	T
Project Type	Optional Project Type Name. When left blank - default T&M (time and material) project type assumed.	30	U
Contractor Time Classification	Optional	255	V
ScheduledShift	Match via code. Valid scheduled shift record. Will use to match timesheet record in the system.	255	W
IsBreak	Will treat the entire line as break, Possible Values are: **True, False, T, F, Yes, No, 1, 0, Y, N**	Possible Values	X

Click to download the Data Template Sample for Timesheets.

beeline

Functional Partition

Purpose: In addition to the clients Organizational Units, Departments, and Cost Centers, which might have a linear hierarchical organizational structure, the client can hold their horizontal organizational structure so the approvals and reporting will not be changed.

Functional Partition are a sub-organization, sub-component, sub-function, business partition, sub-project, lines of business, or supervisory organization within a client organization that are each associated with one Business Area.

be advised: Functional Partition

This template is very client-specific. It supports several Invoice related activities, so entries and configuration may need adjustments. Since several of these settings reflect your specific invoice processes, care needs to be taken to ensure that your data is in sync for Finance Steady State.

For New Implementations: Please work with your Implementation Consultant to answer your questions.

For Client Expansions: Please reach out to your Beeline Representative.

For Integration: Consult the Jira Ticket already open to track this project.

Field Requirements List for the Functional Partition Template

Field Name	Comments:	Character Limit	Column
Functional Partition Code	Functional Partition Code must be unique	255	A
Functional Partition Name	Function Partition Name. Must be unique	255	B
Functional Partition Description	Functional Partition Description	4000	C
Status	Status of record upon creation must be **Active** or **Inactive**. If left blank value will default to Active. If record exists and status field is blank current status will not be updated. (Active will remain active and inactive will remain inactive.) Best practice is to always provide a value.	255	D
Effective Date	Field must be formatted as TEXT and in the format of mm/dd/yyyy or other recognizable date formats.		E

Field Name	Comments:	Character Limit	Column
Business Area	Should match existing value in database when supplied, can be code or name.	255	F
Functional Partition Type	Should match existing database value when supplied.	255	G
Owner User Name	The UserName (Login) of the Cost Center Owner	50	H
Cost Center Number	Number for the Cost Center	100	I
Cost Center OU Code	Code for the Organization Unit of the Cost Center	50	J
Click to download the Data Template Sample for Functional Partition.			

Functional Partition Business Area

Purpose: The Business Area & Functional Partition can be leveraged to capture a client's horizontal or independent organizational structure. This might align with their Supervisory or Functional Organization. This provides another independent level to capture a client's organizational structure, as shared services or departments.

Business Areas are an area of business, category of business, project, or shared service within a client organization used for grouping Functional Partitions.

be advised: Functional Partition Business Area

This template is very client-specific. It supports several Invoice related activities, so entries and configuration may need adjustments. Since several of these settings reflect your specific invoice processes, care needs to be taken to ensure that your data is in sync for Finance Steady State.

For New Implementations**: Please work with your Implementation Consultant to answer your questions.**

For Client Expansions: **Please reach out to your Beeline Representative.**

For Integration: **Consult the Jira Ticket already open to track this project.**

Field Requirements List for the Functional Partition Business Area Template

Field Name	Comments:	Character Limit	Column
Business Area Code	Business Area Code. Code Must be Unique	255	A
Business Area Name	Business Area Name. Code Must be Unique	255	B
Business Area Description	Business Area Description	4000	C
Status	Status of the record upon creation must be '**Active**' or '**Inactive**'. If left blank value defaults to 'Active'. If record exists and status field is blank current status will not be changed. (Active will remain active and inactive will remain inactive.) Best practice is to always provide a value.	255	D
Effective Date	Value must be formatted as TEXT and date format must be mm/dd/yyyy or other recognizable date formats.		E
Click to download the Data Template Sample for Functional Partition Business Area.			

General Ledger

Purpose: The goal for this feature is to refactor/build a new field that can be used to house a commonly requested field value, the "General Ledger", that resides on the SOW, Project, Request, and Assignment for use later in the worker life-cycle.

be advised: General Ledger

This template is very client-specific. It supports several Invoice related activities, so entries and configuration may need adjustments. Since several of these settings reflect your specific invoice processes, care needs to be taken to ensure that your data is in sync for Finance Steady State.

For New Implementations: Please work with your Implementation Consultant to answer your questions.

For Client Expansions: Please reach out to your Beeline Representative.

For Integration: Consult the Jira Ticket already open to track this project.

Field Requirements List for the General Ledger Template

Field Name	Comments:	Character Limit	Column
Status	Status which indicates whether record status needs to be **Yes** or **No**	255	A
GL Number	General Ledger code	50	B
Start Date	Start Date	255	C
End Date	End Date	255	D
Description	Description	4000	E
Click to download the Data Template Sample for General Ledger			

Resource User Contact Information

Purpose: As part of our dedicated efforts to support business continuity needs through the Covid pandemic, this enhancement allows workers to independently manage their contact information via a new screen. A worker will be able to add and edit their own contact details including Personal Email, Address Details and Phone Numbers, when logged into the VMS.

Field Requirements List for the Resource User Contact Information Template

Field Name	Comments:	Character Limit	Column
Consultant Login	Resource's Unique Login (username)	50	A
Personal Email	The personal email address of the Resource	255	B
Phone Type Code	Type of phone number being updated. Required whenever phone number is specified. Examples: Home, Mobile, Business	255	C

Field Name	Comments:	Character Limit	Column
Phone Number	Phone Number - no specific format required.	30	D
Address Type Code	Required when address is specified. Example: Home, Business. Required whenever address is specified	255	E
Is Primary Address	Is this the primary address. Required whenever address is specified. Examples: Yes, No. If left blank, defaults to No.		F
Address Line 1	Required whenever address is specified.	150	G
Address Line 2	Optional.	150	H
City	Required whenever address is specified.	50	I
State Code	The State's code. For a US State or Canadian province, the 2-letter abbreviation. Examples: FL, ON Required whenever address is specified. Please see the State, Country Codes Appendix.	5	J
Postal Code	Zip. Required whenever address is specified.	10	K
Country Code	The Country Code. Required whenever address is specified. Examples: USA, CAN	255	L
County Code	The county code (subdivision of State). Optional	255	M

Click to download the Data Template Sample for Resource User Contact Information

Rate Card Categories

Purpose: This load creates a great time savings to import data as opposed to manually entering it.

Field Requirements List for the Rate Card Categories Template

Field Name	Comments:	Character Limit	Column
Rate Card Category Type	Expected values are RCC1 and RCC2	255	A
Name	Rate Card Category Name. Required for new record. Optional for existing record. Not used in matching record. This field is Updatable	255	B
Code	Rate Card Category Code. Used in matching record together with Industry	255	C
Description	This field is Updatable	255	D
Industry	Industry Rate Card Category is used in matching record together with Code	255	E
Display Order	If null for new record will default to 1. This field is Updatable		F
Status	Expected values: Active, Inactive, I, A, True, False, T, F, 1 or 0	255	G
Work Locations	The list of tax work location(s) of a given rate card category 1. Only applies to type of RCC1 Matches to security location's code or name Multiple values separated by pipe (|) Null will retain existing list in the system If it has a value, this will replace the existing list in the system "**<REMOVEALL>**" - keyword to wipe out all tax work locations to a given RCC1	4000	H

Click to download the Data Template Sample for Rate Card Categories

beeline

Assignment Cost Allocation

Purpose: A new import template has been developed so Cost Allocations can be imported to grandfathered assignments. This will relieve the DBAs of the task of scripting these changes to the assignments.

Limitations
There are several limitations to importing Cost Allocations to existing assignments.

- The assignment must be 'grandfathered' in the Beeline system and not procured through Beeline.
- The assignment cannot have any current Cost Allocations attached to it.
- The assignment cannot have any invoiced timesheets against it.
- The assignment detail must be in Active or Scheduled status.
- The total Cost Allocation Unit Share for the assignment must equal 100%.

Data Validation
Data validations will be executed in the Import Tool to ensure the correct assignment is located. The following fields are compared for a successful validation.

- **Consultant ID**: This is the Consultant's unique login to the Beeline system.
- **Assignment Number**: The Beeline internal number allocated to the assignment.

Field Requirements List for the Assignment Cost Allocation Template

Field Name	Comments:	Character Limit	Column
Private ID	The Resource's Unique External Identifier. This value is used to identify an existing resource record. If left blank, this will default to the GID (consultant login). LIMIT: 50 International Characters. **KEY VALUE**: This value cannot be updated and is used to identify an existing unique resource and assignment. IF configuration setting Tenure.TenurePolicyAndEnforcement.ResourceTenureUses = 1 then this column will be used to identify Resource.	50	A
Consultant ID	The Consultant's Unique Login. LIMIT: 50 International Characters. **KEY VALUE**: This value cannot be updated and is used to identify an existing unique resource and assignment. IF configuration setting Tenure.TenurePolicyAndEnforcement.ResourceTenureUses = 2 then this column will be used to identify Resource.	50	B
Supplier Code	Code or Name of the Supplier for this Resource and Assignment. **KEY VALUE**: This value cannot be updated and is used to identify an existing unique rate card, resource and assignment.		C

Field Name	Comments:	Character Limit	Column
Industry	Code or Name of the Industry for this Assignment. **KEY VALUE**: This value cannot be updated and is used to identify an existing unique rate card and assignment.		D
Client OU Code	Default OU Code for Bill To/Admin Cost Center. Optional		E
Job Title	Code/Name of the Job Title for this Assignment.	255	F
Job Class Code	The Code/Name of the Job Class for this Assignment. **KEY VALUE:** This value cannot be updated and is used to identify an existing unique rate card and assignment.		G
Start Date	The Start Date of the Assignment. Field must be formatted as TEXT and must be in the layout of mm/dd/yyyy. **KEY VALUE:** Value cannot be updated and is used to identify an existing unique assignment.		H
End Date	The End Date of the Assignment. Field must be formatted as TEXT and must be in the layout of mm/dd/yyyy. **KEY VALUE:** This value cannot be updated and is used to identify an existing unique assignment.		I
Rate Card Class	The Code/Name of the Rate Card Class for the Assignment. NOTE: The import will automatically pull the Rate Card Class from the Request Template if one is available. If not, this field is required. **KEY VALUE:** This value cannot be updated and is used to identify an existing unique rate card and assignment.		J
Rate Card Category 1	The Code/Name for the Rate Card Category 1. **KEY VALUE:** This value cannot be updated and is used to identify an existing unique rate card and assignment.		K
Rate Card Category 2	The Code/Name for the Rate Card Category 2. **KEY VALUE:** This value cannot be updated and is used to identify an existing unique rate card and assignment.		L
Bill to Cost Center	The Number of the Billable Cost Center. **KEY VALUE:** This value cannot be updated and is used to identify an existing unique resource and assignment.		M
Bill To Cost Center OU Code	The Code of the Client Organizational Unit to which the Bill To Cost Center belongs. If left blank and Cost Center Number is not unique then value from "Client OU Code" will be used to lookup Cost Center.		N

Field Name	Comments:	Character Limit	Column
Procurement Type	The Name of the Procurement Type. This is used to identify the Request Template and Rate Card for the assignment. List of acceptable values: • Contingent • Permanent • Services • Project When left blank - Contingent assumed for new assignments. Required when Procurement Sub Type is provided.	255	O
Request Type	Code or Name of Request Type.		P
Assigment Number	The Beeline internal number allocated to the assignment. If not specified, this number will be incremented by one from the last number in the database. OPTIONAL KEY VALUE: If provided for an existing assignment, this value must match the existing assignment number. Must be an integer		Q
Assignment Amendment Number	The Beeline internal number allocated to the assignment amendment. If not provided, the import process will use the most current amendment.		R
Currency	Code or Name of the Currency for the Assignment. When left blank and only 1 currency is defined in the system - this value will be used.		S
Procurement Sub Type	Required when Procurement Type is provided. Expected Values For Procurement Sub-Type: • Contingent • Permanent • Services • Project • SOWLineItems Procurement Sub-Type is validated against the Request Type's financial Indicators. Required when Procurement Type is provided.		T
Cost Allocation Unit Group Number	**Required**. This is the Group Number groups a particular set of Cost Allocation Unit Segment, Cost Allocation Unit Segment Value. The import also uses this number to determine the order in which Cost Allocations display in the		U

Field Name	Comments:	Character Limit	Column
	application. Group Number must be unique for every set of Cost Allocations on an assignment. Without the Group Number, the import will not be able to determine on which particular set of Segments belong to a particular Cost Allocation and will not be able to determine where the Share will apply.		
Cost Allocation Unit Segment Code	The Segment Template Code/Name of the Cost Allocation. For example: Cost Center, Project, PO #, etc.		V
Cost Allocation Unit Segment Value	The value of the Unit Type. For example, the Cost Center Number if the Unit Type is Cost Center, or PO Number if PO#. • Type Text no lookup. Stores cost allocation value of feed's value. • Type Lookup, lookup maps to CostAllocationUnitSegmentLookup.(Code field) Stores cost allocation value of CostAllocationUnitSegmentLookup.(Code field) • Type SecurityProject lookup maps to SecurityProject.(Name field) Stores cost allocation v.Name • Type SecurityProject lookup maps to SecurityProject.(Name field) Stores cost allocation value of SecurityProject.Name • Type GLCode lookup maps to GeneralLedger.(Code field and is active) Stores cost allocation value of GeneralLedger.Code • Type BteProject lookup maps to tblProject.cShortName field and doesn't check for active. Stores cost allocation value of tblProject.cName.		W
Cost Allocation Unit Share	The percentage (%) of each of "share" of the cost unit type in the entire Cost Allocation for that assignment. Value should be same for a given Assignment - Cost Allocation Unit Segment Group Number combination.		X

Field Name	Comments:	Character Limit	Column
Click to download the Data Template Sample for Assignment Cost Allocation.			

Projects and Services

Purpose: Provides the ability to import projects, budgets and milestones into the Services Procurement module.

Template Tips

Statement of Work (SOW) projects, milestones, and funds can now be imported correctly using the **Projects and Services Import** tool. Imported items are validated against and must meet these criteria for a successful import:

- The global configuration **Sow.AllowCreationFromProject** is *Yes/True*
- The milestone status is **SupplierApproved**
- The **IsFromGeneralFunds** value is Y*es/True*
- The configuration parameter **Imports.Behavior.ProcessProjectFunds** is *Yes/True*

Important! If importing milestones, make sure to set the column "Milestone Is From General Funds?" to Yes. This ensures the funds get allocated to the milestone bucket for invoicing.

Field Requirements List for the Projects and Services Template

Field Name	Comments:	Character Limit	Column
Project Name	Name of the project. Required for new projects.	255	A
Project Abbreviation	Project Name abbreviation. Optional	255	B
Project Code	Project Code. **Key Value**. This value cannot be updated	255	C
Project Type Code	Project Type Code. Must match a valid value in the database. Required for new projects	255	D
Project Status Name	Status of Project. Required for new projects.	255	E

Field Name	Comments:	Character Limit	Column
	Expected values (choose one): **Saved, Active, Closed, Pending, Rejected, Scheduled, Expired, Void, Pending Release, Open**		
Project Status Reason	Optional project status reason code. When supplied must match value in database	255	F
Project Description	Description of the project. Free text up to 8000 characters	MAX	G
Start Date	Project Start Date	255	H
End Date	Project End Date	255	I
Required Start Date	Required Start Date	255	J
Project Manager	Project Manager userID. Must be a subset of client user. Required for new projects	255	K
Technical Manager	Technical Manager UserID	255	L
Sponsor	Sponsor UserID	255	M
Resources Estimate	Optional positive money value		N
Milestones Estimate	Optional positive money value		O
Supplier Code	Supplier Code. Must match value in database	255	P
Detail Start Date	Project Detail Start Date. EX from 1/15 to 2/15. Project may be assigned certain work location where 1/15 is detail start date	255	Q

Field Name	Comments:	Character Limit	Column
Detail End Date	Project Detail End Date. EX from 1/15 to 2/15. Project may be assigned certain work location where 2/15 is detail end date	255	R
Detail Numbers	Positive integer, non zero. When blank the most current detail assumed		S
Detail Status	Project Detail Status. When left blank value of project status will be used	255	T
Bill To CC Number	Bill To Security Cost Center Number	255	U
Bill To CC OU Code	Bill To Cost Center OU Code, requried when configured Cost Center Number is not unique (configuration item) for new projects	255	V
Amendment Reason	Project Detail Amendment Reason	255	W
Security Project Name	Optional Security Project Name, must be a valid reference in the database when supplied	255	X
Work Location Code	Work Location Code required for new projects	255	Y
Physical Work Location	Physical Work Security Location Code. When left blank same Work Location Code will be used for new records	255	Z
Tax Job Category Code	Procurement Tax Job Category Code. Required for new Projects, must be valid referenc	255	AA
Project PO Number	Project's PO Number. For new insert Projects only, cannot be updated via import.	25	AB
Milestone Name	**Key Value** For Milestone. Must be unique within project	255	AC
Milestone Type Code	Valid reference to Milestone Type Code in given industry code. Required for new milestones.	255	AD

Field Name	Comments:	Character Limit	Column
Milestone Description	Optional Milestone Description	MAX	AE
Milestone Status	Expected Values (Choose one): **Saved, Pending, Rejected, Paid, Closed, ReOpen, SupplierApproved, SupplierRejected Required for new milestones**	255	AF
Milestone Start Date	Optional Milestone Start Date	255	AG
Milestone End Date	Optional Milestone End Date	255	AH
Milestone Amount	Must be valid money value. Required for new projects		AI
Milestone Is From General Fund?	Is Milestone from General Fund? Must Valid boolean value. When left blank "No" assumed. When ***Yes***. This ensures the funds get allocated to the milestone bucket.	255	AJ
Milestone Physical Location Code	Milestone physical work security location code. When left blank - project value will be used for new milestones	255	AK
Milestone Work Location Code	Milestone work security location code. When left blank - project value will be used for new milestones	255	AL
Milestone Tax Job Category Code	Milestone Tax Job Category Code. Required for new milestones. When left blank - Project Detail Tax Job Category will be used for new milestones	255	AM
Milestone Bill To CC Number	Milestone Bill To Security Cost Center Number, when left blank - project detail bill to cost center applied for new milestones	255	AN
Milestone Bill To CC OU Code	Milestone Bill To Cost Center OU Code, when left blank - project detail bill to cc ou code assumed for new milestones	255	AO
Milestone Security Project Name	Optional Milestone Security Project Name	255	AP

Field Name	Comments:	Character Limit	Column
Milestone Has Early Pay Discount?	Does milestone have early pay discount? When left blank - no assumed for new milestones	255	AQ
Milestone Gross Amount	Optional Milestone Gross Amount	255	AR
Milestone Total Taxes and Fees	Optional Milestone Total Taxes and Fees	255	AS
Milestone PO Number	Milestone PO Number. If Force Flag Project PO Number is ON, then the Milestone PO Number should be the same as the Project PO Number.	25	AT
Resource Bucket Amount	Represents the financials captured on the SOW, that indicates the "Not to Exceed" amount for resources. Can be null if not importing SOW Resource Bucket Funded Assignments. Limited to 2 decimal places *NOTE: Config flag must be set in UI*	255	AU
Spend Prior to Beeline	Client's historical spend that has been captured outside of the Beeline application and/or spend prior to the adoption of the new services procurement module.		AV
Project Catalog Item	Required field when a Milestone Type has a setting of "IsCatalog = Yes" and should not be populated when for Non-Catalog. Project Catalog Item is based on per Supplier, and per Currency of the Project	255	AW
Catalog Item Quantity	Required field when a Milestone Type has a setting of "IsCatalog = Yes" and should not be populated when for Non-Catalog. Accepts decimal and whole number.	255	AX
Catalog Item Number Of Units	Required field when a Milestone Type has a setting of "IsCatalog = Yes" and should not be populated when for Non-Catalog. Accepts whole number only.	255	AY
Catalog Category	Used only if Milestone Type has a setting of "IsCatalog = Yes"	255	AZ

Click to download the Data Template Sample for Projects and Services

Appendix

How to Use the Navigation Pane in Word®

If you are not familiar with the Navigation Pane feature in Microsoft Word®, you will quickly discover what a useful tool this can be. It provides a quick way to move from one section to another within a document. It provides a quick browse of all pages within a document. In addition, it provides a search option that is feature-rich for targeting both content by subject or even content by format.

How to open the Navigation Pane

Key Combination: <CTRL>+F The Navigation Pane displays as a panel down the left-hand side of the open document.

From the Home ribbon: Click “Find” in the Editing section. The Navigation Pane displays as a panel down the left-hand side of the open document.

From the ribbon: Click “View” and then select “Navigation Pane” in the Show section. The Navigation Pane displays as a panel down the left-hand side of the open document.

Navigation Pane tabs

The Navigation Pane feature includes three tab options, starting from the left these options include:

Headings – This option displays all formatted headings used in the document. It creates an “at-a-glance” index of the document’s contents. A click of any heading, takes you directly to that section in the document. You can click-and-drag a section by grabbing the header and moving it to your preferred location in the Navigation Pane. You can right-click a header to select the ENTIRE section for copy/paste or even identify single sections as a print option.

Pages – This option lets you quickly scroll through thumbnail images of all the pages in your document. You can quickly locate which pages have highlighted content, images, tables, or other formatted content.

Results from your current search – This option gives you the option to search for specific content in the document. Text that matches the search text will be highlighted throughout. Search text can be single words, a combination of words, part of a word, or even punctuation. Clicking the icon tab displays a list of each usage along with sample text for each instance. Clicking the down arrow in the search document field gives you access to the full range of search options including Find/Replace. You can even limit your search to just graphics or tables.

Navigation Pane options

You can Move, Size, or Close the Navigation Pane by clicking the down arrow in the Navigation Pane header bar.

- **Move** – Allows you to “float” the Navigation Pane to the location of your choice on your display screen. (NOTE: You can restore the Navigation Pane to its original settings by double clicking anywhere on the pane.)
- **Size** – Allows you to adjust the width of the display area for the Navigation Pane by sliding the double-sided arrow.
- **Close** – Allows you to turn off the Navigation Pane. You can also click the X button in the header bar of the Navigation Pane to close it.

beeline

State, County and Country Codes

Click the link below to download and view the full list of the respective codes.

	State and Country Codes
	US County Codes
	Country/ISO Codes