Hiring Manager Experience ~ the basics

Welcome to the Hiring Manager Experience!

From your initial **Log in** to your final **Log out** signoff, the **Hiring Manager Experience** is designed to simplify your Beeline Enterprise usage by providing easy access to your online tasks, summary lists, and reports. Everything is accessible within a few clicks along with the ability to drill down for detailed records when more insights are needed.

This overview provides instructions on how to navigate throughout the **Hiring Manager Experience** along with descriptions of the key features and highlighted screenshots for easy identification.

◈ For a more interactive learning experience, try our eLearning module. It walks you through the **Hiring Manager Experience** using a series of instructional modules, followed by a frequently asked questions section, and finally, a knowledge assessment quiz to test what you've learned. Click the link provided below to begin:

Hiring Manager Experience Training Module

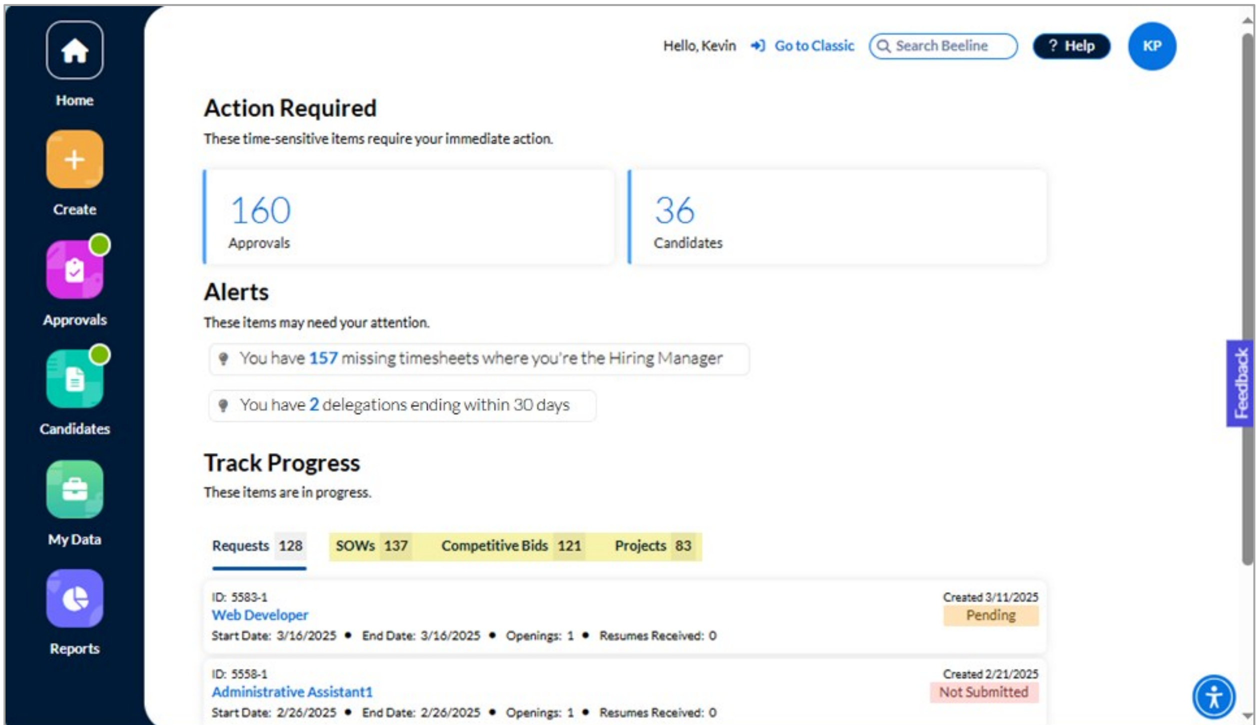
Use the **Directory** links in the chart below to skip to the topic of your choice. (Hold down the <Ctrl> key and click the linked text.) Or use the **Table of Contents** feature available in your web browser to navigate throughout this document. Not sure how to access a web browser's Table of Contents feature? We've included instructions beneath the **Directory** table.
Please note: The **Table of Contents** functionality varies by web browser.

Directory		
Home	Create	Approvals
Candidates	My Data	Reports
	Appendix	

- **Microsoft Edge**: Click the Table of Contents icon ( ) in the pdf header bar and a slide-out panel displays all headings as a Table of Contents. Click any heading to navigate directly to that section.
- **Chrome**: A page thumbnail index automatically displays to the left of the document. To switch to a Table of Contents view, click the TOC icon ( ) in the panel. Click each arrow ( ) to expand the headings sections; then click any heading to go directly to that section.
- **Mozilla Firefox**: Click the Toggle Sidebar icon ( ) in the pdf header bar and the thumbnail index displays to the left of the document. Click the Show Document Outline icon ( ) to view the Table of Contents. Double-click to expand all sections in the TOC. Click any header to go directly to that section.

The first screen you'll see once you log in is **Home**. Notice that it is divided into two areas, the navigation panel on the left and the work area on the right.

Home

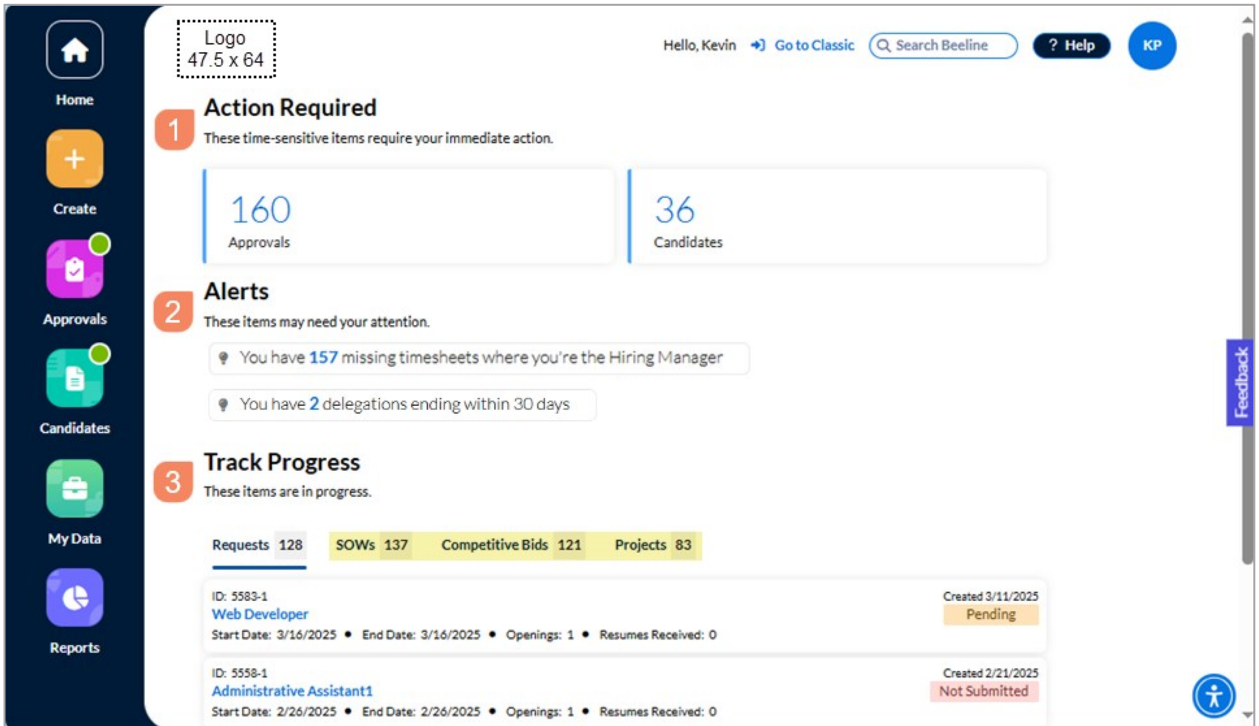


Selections highlighted in yellow are visible only to programs with an active Services Procurement and/or Resource Tracking solution.

Each button in the navigation area is a separate, direct link to one of the **My Apps**. The panel includes a direct link to **Home**, **Create**, **Approvals**, **Candidates**, **My Data**, and **Reports** apps. A green circle displays in the upper right corner of any app button as an alert to let you know that there are items in that app that need your attention.

The **Home** button navigates you directly back to **Home** from any location throughout the **Hiring Manager Experience** application.

Action Required, Alerts, and Track Progress



Selections highlighted in yellow are visible only to programs with an active Services Procurement and/or Resource Tracking solution.

1

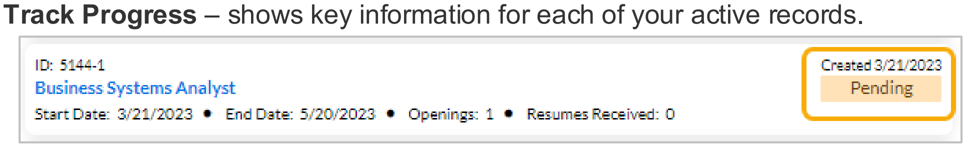
Action Required – shows the total number of standard approvals and submitted candidates waiting for your review and action. Click the number to navigate directly to your list.

2

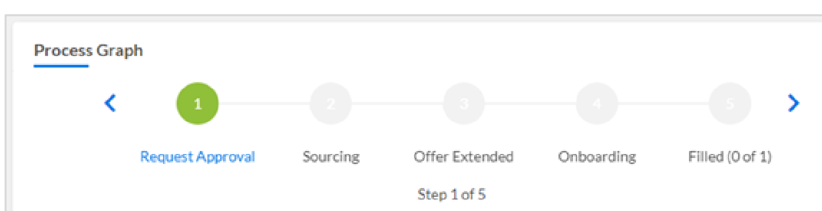
Alerts – shows activity you need to be aware of, even if you are not the designated system approver. Click the number to drill down for details. Alerts can inform you of a variety of system issues such as missing timesheets or even of upcoming events such as assigned delegation rights that are about to expire. Each listing displays the number of associated items but also the reason for the posting.

3

Track Progress – shows key information for each of your active records.



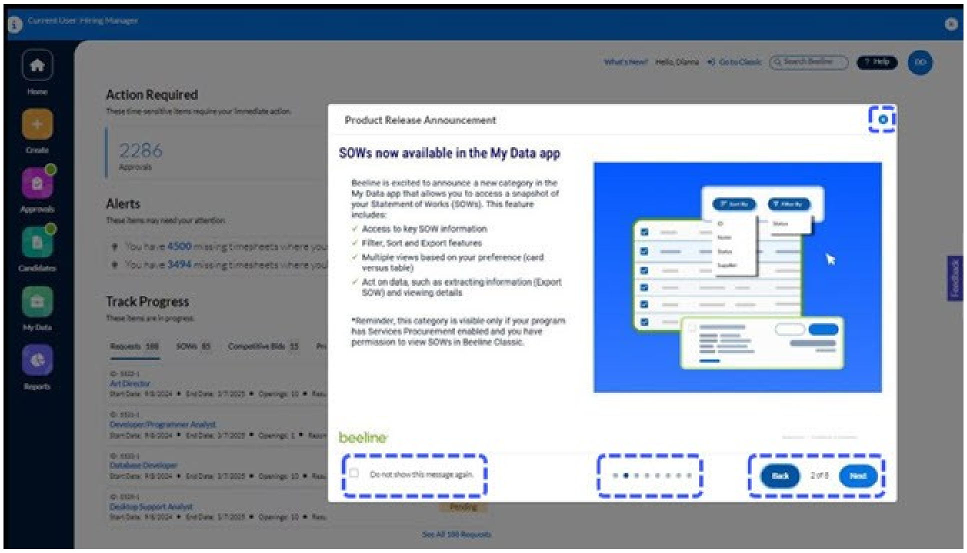
Click the **Status** (Pending, etc.,) to drill down and view the Process Graph where you can check to see which workflow steps still remain to be completed.



	Alert Button – highlights which apps have actions waiting on your attention.
? Help	Click for access to standard **Beeline Help** or for access to a **Guided Tour**, client-specific guides, forms, or this guide and the eLearning module that goes with it. Can't find what you need? Use the **Feedback** link to submit your questions or reach out to your Program Office.
KP	Click your initials to access/edit the **Manage Preferences** options on your Beeline Enterprise account record—or to use the **Reset Password** link. Need to delegate your tasks/approvals while you're away? Click **Delegates** under **Manage Preferences**, then click **+ Add New**. Follow the prompts to fill in the Delegate, Date, and Approvals sections. Additional settings can be added for Reports, Delegate Subordinate, Visibility, and Impersonation. Click **OK** to save your changes. When you are ready to exit Beeline Enterprise, use the **Log Out** option.
Feedback	Help us, help you! Use the **Feedback** option to share your insights, make suggestions, or just let us know how we can make the **Hiring Manager Experience** better suit your needs.
Home	Click the **Home** button to navigate directly back to Home at any time.
Create	Click any app button to navigate directly to that app. Remember, the green alert circle identifies which apps have items that need your attention.
Home	Clients or a Program Office can now brand the **Hiring Manager Experience** with their **company logo** to replace the logo displayed in the upper left corner of the work area. Instructions to add logo are posted in **Beeline Community**. Please note: The dimensions for this logo slot are 47.5 x 64 pixels.
	Click the **UserWay® Widget** button located at the bottom right corner of the screen to open the slide-out panel. The widget lets you adjust accessibility features and functionality for a variety of disability profiles and adjust settings to your personal preferences. Details are provided in the Appendix.

Product Release Announcements

Keep informed of the new Hiring Manager Experience features and functionality as they are released by viewing the posted items shown in the **Product Release Announcement**'s dialog window display. Use the Back or Next button to navigate through the items. The "dots" in the rotation section indicate the total number of items and which item is the current display. Use the checkbox in the lower left corner to activate the "Don't show this again" option. Use the X button in the upper right corner to close the window and return to your Home screen.



When you want to restore the display, just click the “What’s New?” label at the top of your screen.

Search Beeline

Located in the upper right section of the screen is the **Search Beeline** feature. This global search feature is accessible on all major screens throughout the **Hiring Manager Experience**.

- Click in the **Search** field and a pop-up displays with your search results.

- Use the down arrow in the **Search** field to select a different search option or enter text in the **Type here** field to refine your current search. Use the scroll bar to navigate to the bottom of the results and click the **See All** link to be redirected to the My Data App to view your full list of results. To drill down to the **Details** screen, click either the hyperlink on the left or the status displayed on the right for any item posted in the results list. Request and Assignment records are visible to both the Hiring Manager as well as the Hiring Manager's manager, making these records visible and actionable by either manager.

- Search options include:

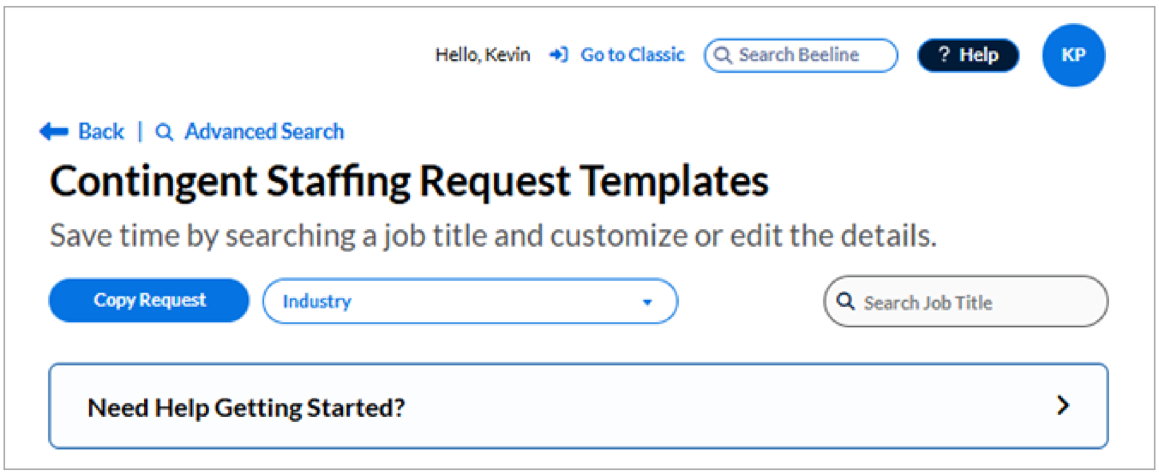
Option:	Sample search result record:
Assignments	Aaron, Jacob — Active ID: 21304 • Job Title: Data Warehouse Manager • Industry: IT
Candidates	Tsunami, Johnny — Business Systems Analyst ID: 3003-1
Competitive Bids*	US Services — ID: 3507 Owner: Parham, Kevin
Expenses	Aadland, Sharen — SAadland2293 ID: 15960
Master Hierarchy	2021 Master Project — Active ID: 7 • PM: Parham, Kevin
Milestones*	IT Infrastructure Enhancements - Equipment — Supplier Approved ID: 321 - 3 • Type: Catalog Item • Supplier:
Projects*	IT Infrastructure Enhancements - #321 Supplier: • SOW: IT Infrastructure Enhancements • SOW #: 3328
Reports	% Spend vs Budget — Financial Type: Published Adhoc
Requests	Database Administrator — Pending ID: 4998-1 • HM: Manager, Hiring Manager • Openings: 1
SOWs*	Independent Contractor - Graphic Designer ID: 3411 • Owner: Manager, Hiring Manager • Supplier:
Timesheets	Aaron, Jacob — JAaron2218 ID: 18296

*Only visible to a client with an active Services Procurement account.

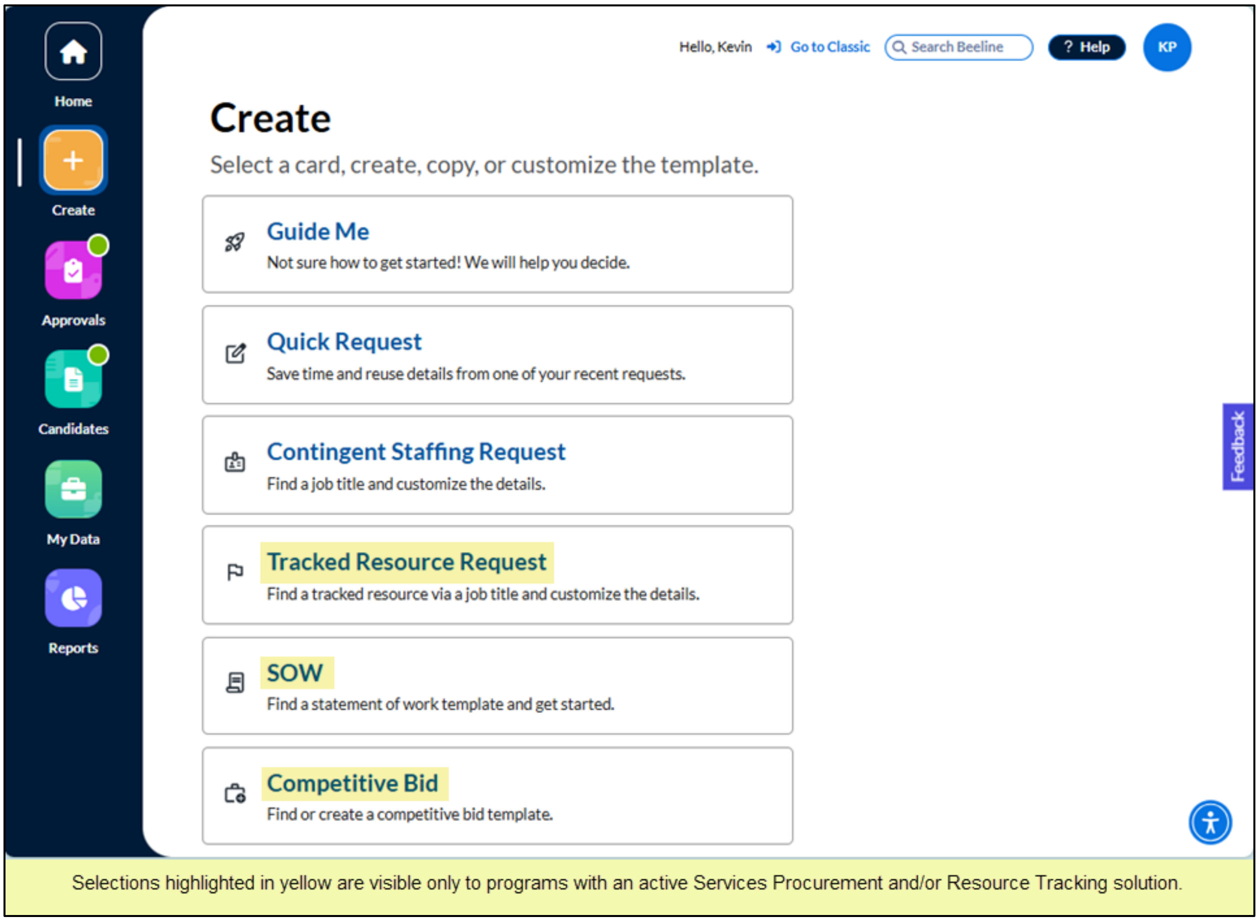
Create

- ➢ Need to submit a request for a new contingent worker?
- ➢ Need to onboard a new tracked resource?
- ➢ Need a new project-related statement of work (SOW) or competitive bid?

The **Create** app is where you begin. And like all beginnings, the path, and the task, is easier when there is guidance along the way. Select the Guide Me option if you want a digital assistant to direct you throughout the request process. Once you're familiar with the process you can switch to the Quick Request option and repurpose a previous request to create your new one. Or just follow the standard process with the Contingent Staffing Request option—but notice that we've added a "Need Help Getting Started?" section to provide helpful insights and search filters to narrow your search by geography and industry. There's even a copy option that lets you adjust a previous request to create a whole new different one—that's quite a timesaver!

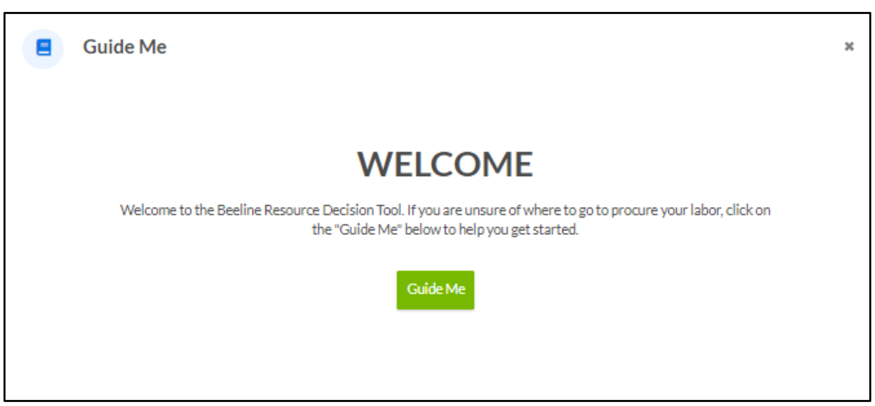


You'll find these same helpful features available for Resource Tracking and SOWs. Competitive Bid has all these features as well, with the exception of being able to copy.



Guide Me

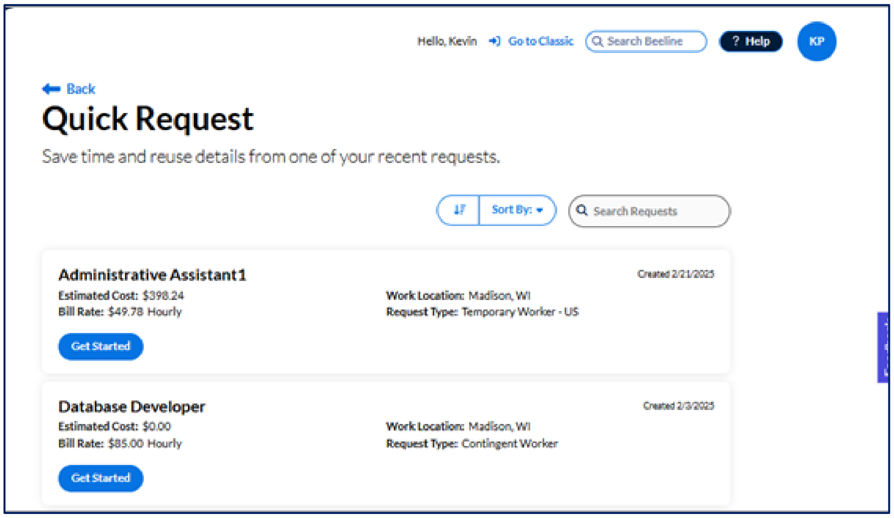
Guide Me walks you through the decision process to create a request by having you answer a series of questions. The system responds to these question by advancing you through the workflow steps based on your answers. The questions and responses are based on client configuration settings to ensure that the process follows the path intended by the client.
NOTE: Some programs use **Guide Me** as their default method for all new Requests, which makes it the only visible option.



Please note: If you do not see a Guide Me card on your Create App landing screen, then reach out to your Program Office to verify if Guide Me is a valid option for your Beeline Enterprise account.

Quick Request

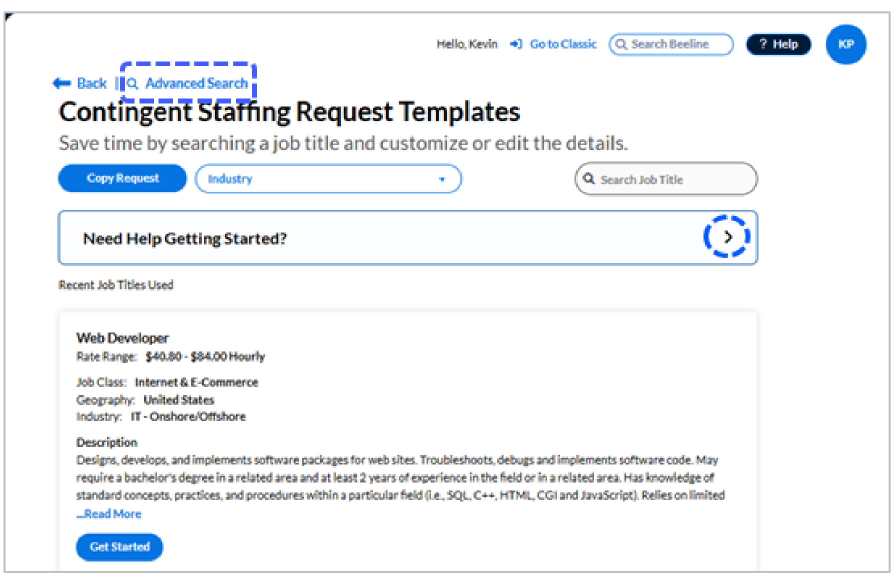
The **Quick Request** option lets you use a previous request as a model for a new one. In instances where there are few differences between the request you need to create and a prior request, this method can be a real time saver. The data field selections have already been made. You just need to review them and make any necessary adjustments needed for the new request. Be sure to check the auto-populated fields to verify that the entries are what you need for your “new” request.



Please note: If you do not see a Quick Request card on your Create App landing screen, then reach out to your Program Office to verify if Quick Request is a valid option for your Beeline Enterprise account.

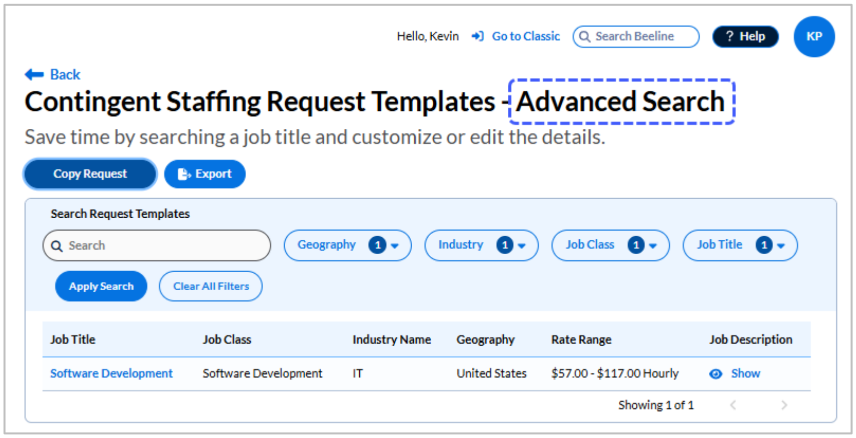
Contingent Staffing Request

When there’s no prior request that’s a close enough match to copy or use as a model, you’ll need to fill out the complete form by first selecting the job title. Check the “Need Help Getting Started?” content for guidance and potential shortcuts. Take care when making selections and filling in fields so that you can use this request as a “copy” or Quick Request option in the future. Time and effort invested now, can save you time and effort in the future.



♦ Advanced Search

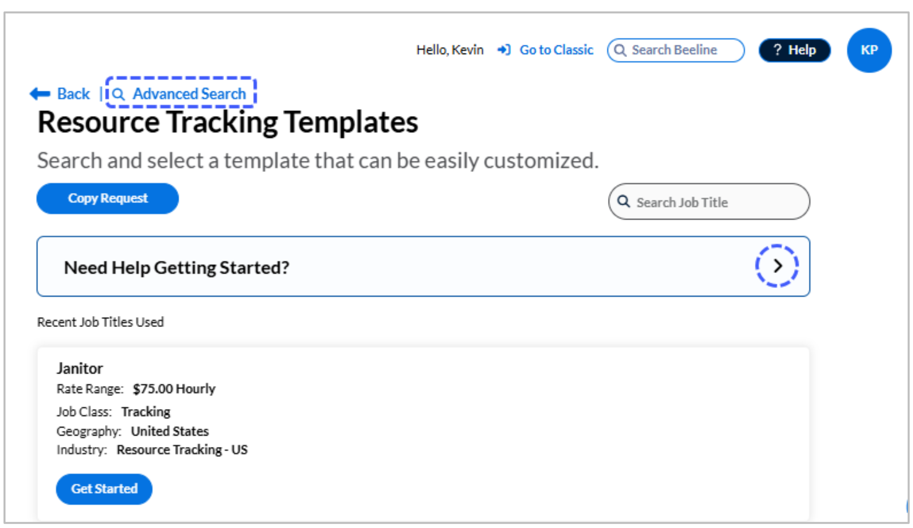
If you need more than an industry and/or job title search to locate the request template you need, and none of the items in the *Recent Job Title Used* list are a workable option, then click **Advanced Search** at the top of the screen. From the Advanced Search screen, you can filter your search by Geography, Industry, Job Class, and/or Job Title. There's also a standard Search field. Set the filters to the selections of your choice, then click Apply Search to start the search process and your results display in table format on the bottom section of the screen. Table columns include Job Title, Job Class, Industry Name, Geography, Rate Range, and Job Description.



You can copy any request from the search results or even export the list of request templates for offline review. Advanced Search lets you spend less time looking for request templates so you can spend more time focusing on time-to-fill tasks.

Tracked Resource Request

Resource Tracking is used to track third-party workers who work onsite at client work locations but whose time and expense processing is handled by their third-party employer. This tracking provides oversight and visibility at work locations for both onboarding and offboarding protocols to ensure that only authorized workers are onsite at a work location at any given time. Review the "Need Help Getting Started?" content for helpful tips working with these records.



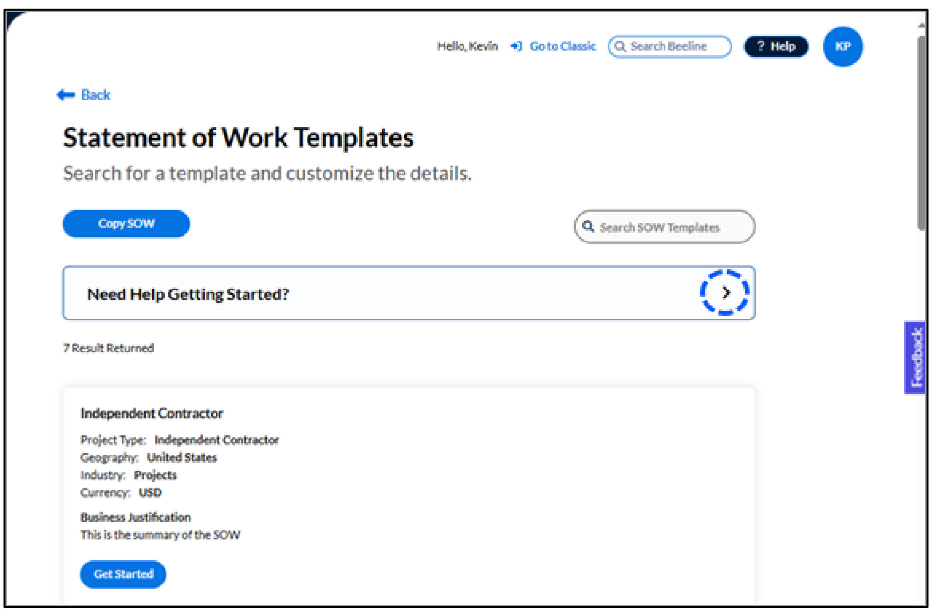
Click the **Get Started** button and the screen refreshes to display the full request form. Parts of the form are similar to the Contingent Staffing Request form but they are not the same. Take care that your entries reflect Resource Tracking rather than a Contingent Staffing request. Fill in the fields as indicated; then click **Save** to complete your request and forward it to the Approver.

♦ Advanced Search

The Advanced Search option includes additional search filters that let you narrow the focus of your search for the request template you need. Results display details for Job Title, Job Class, Industry Name, Geography, Rate Range, and Job Description in table format making it easier to compare and locate the template you need. Check the Advanced Search section in the Contingent Staffing Request entry above for additional details.

SOW – Statement of Work (Services Procurement)

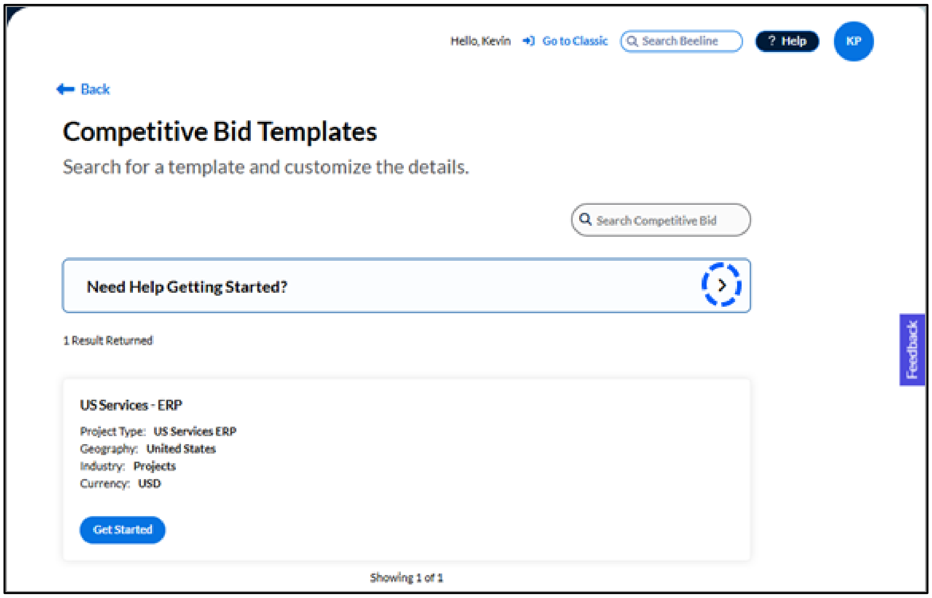
Beeline Enterprise's Services Procurement solution supports the entire Services Procurement lifecycle from *sourcing,* through *negotiation,* into *engagement management,* and *invoicing*. Programs can use the full range of components or just the basics. Services Procurement is a project-based solution with payments based on milestones and/or units of measure (UOM). Some programs may also incorporate time and expense payments for their projects-based contingent workers. Check the “Need Help Getting Started?” content for helpful tips working with these records. The overall objective for the SOW process is to create a legally-binding agreement between the client and the vendor that details the Terms & Conditions to be followed throughout the active Project.



Click the **Get Started** button and the screen refreshes to display the initial step in the SOW creation ribbon. Follow the prompts to complete the steps; then click **Submit** to forward the SOW to the approval process. Depending on program requirements, terms and financials may be negotiated after this initial approval and prior to releasing to the vendor.

Competitive Bid (Services Procurement)

For some Projects, the client may already know who the service provider will be and the bidding process can be skipped. In those instances where a formal process is needed to identify and request products and/or services from multiple potential service providers, a **Competitive Bid** is used to award the SOW to the successful applicant. Review the content in the “Need Help Getting Started?” for tips and guidance.



Click the **Get Started** button and the screen refreshes to display the initial step in the Competitive Bid creation ribbon. Follow the prompts to complete the steps; then click **Submit** to complete the Competitive Bid and forward it for approval before it can be released to the designated vendors.

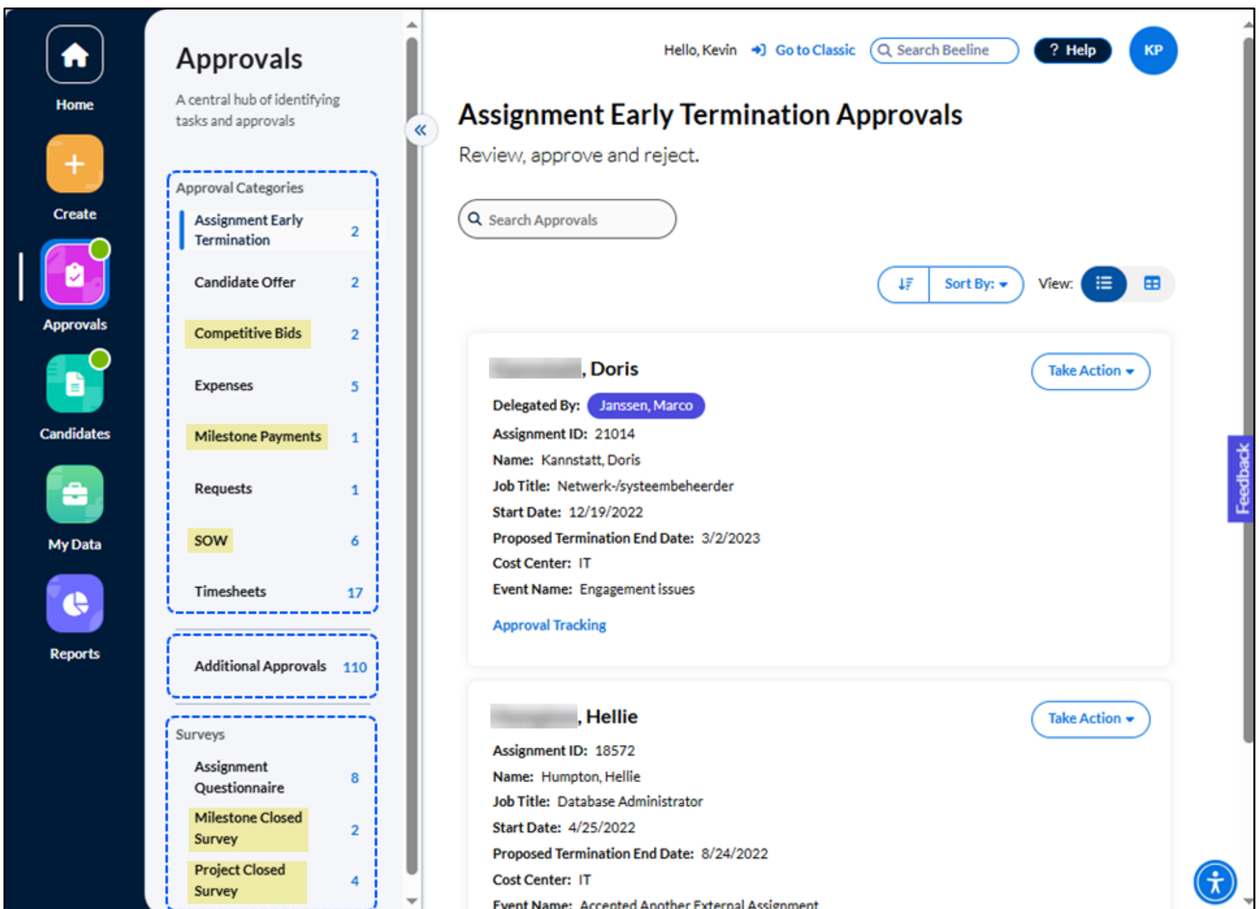
beeline Enterprise

Approvals

Ready to take action? Let's start with Approvals.

Click either the **Approvals** number in the **Action Required** section of the **Home** screen or the **Approvals** app button in the navigation panel. Your screen refreshes to display all approvals waiting for you to take action. The slide-out panel located between the navigation panel and your work area separates the approvals into sections by **Approval Categories**, **Additional Approvals**, and **Surveys**. What you see listed depends on which tasks are assigned to YOU within Beeline Enterprise. Request and Assignment related approvals are visible to both the Hiring Manager as well as the Hiring Manager's manager, making these records visible and actionable by either manager.

In the sample below, the client program has active Beeline Time and Beeline Expenses modules as well as Contingent Staffing and Services Procurement solutions. The Approvals slide-out panel displays tally numbers to give you a quick overview of your current activity. It also helps you determine which areas need your attention first. Click any tally number to refresh the screen to display the associated list of tasks.



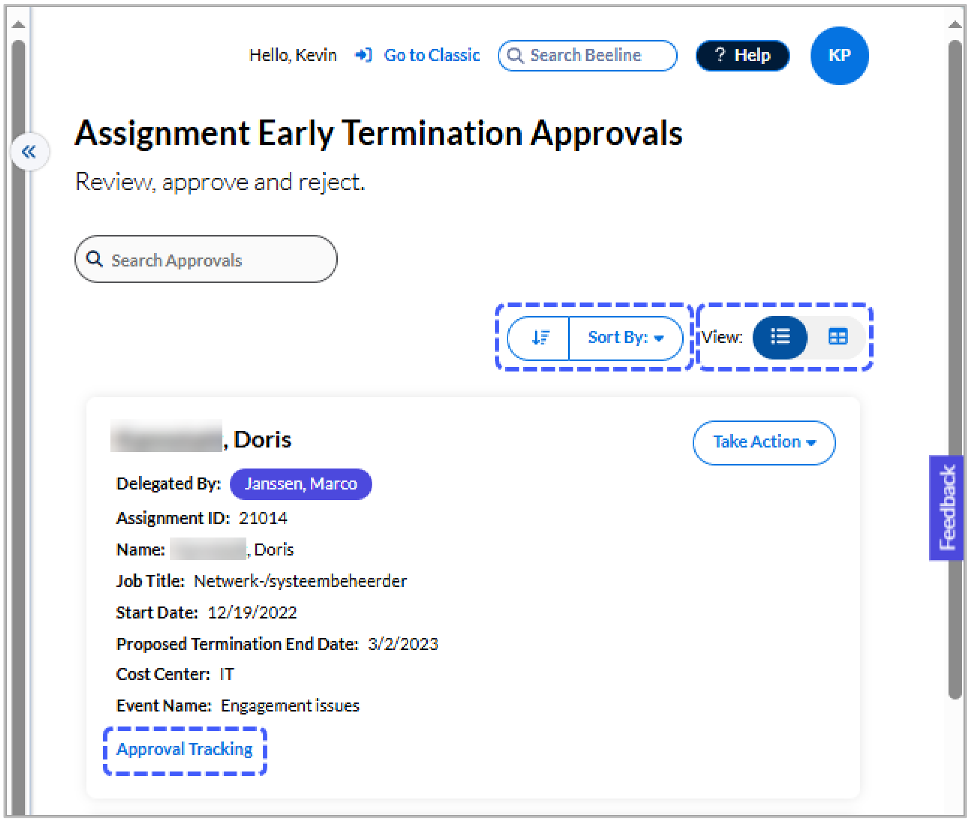
Selections highlighted in yellow are visible only to programs with an active Services Procurement solution.

Notice the white line next to **Approvals** in the navigation panel. This indicator is a quick way to always know which app is currently active.

Views and Bulk Processing

The screen layouts are similar for all **Approval Categories** to provide consistent ease of use. You have the option to display records in Card View or Table View. There are a total of twelve **Approval Categories**, however only those that are valid for your program will be visible. Even if the Approval Category is valid for your program, it will only appear in the panel if there are active records needing approval. Any approval that does not fall under one of the twelve Approval Categories will be included in the **Additional Approvals** section.

• Card View

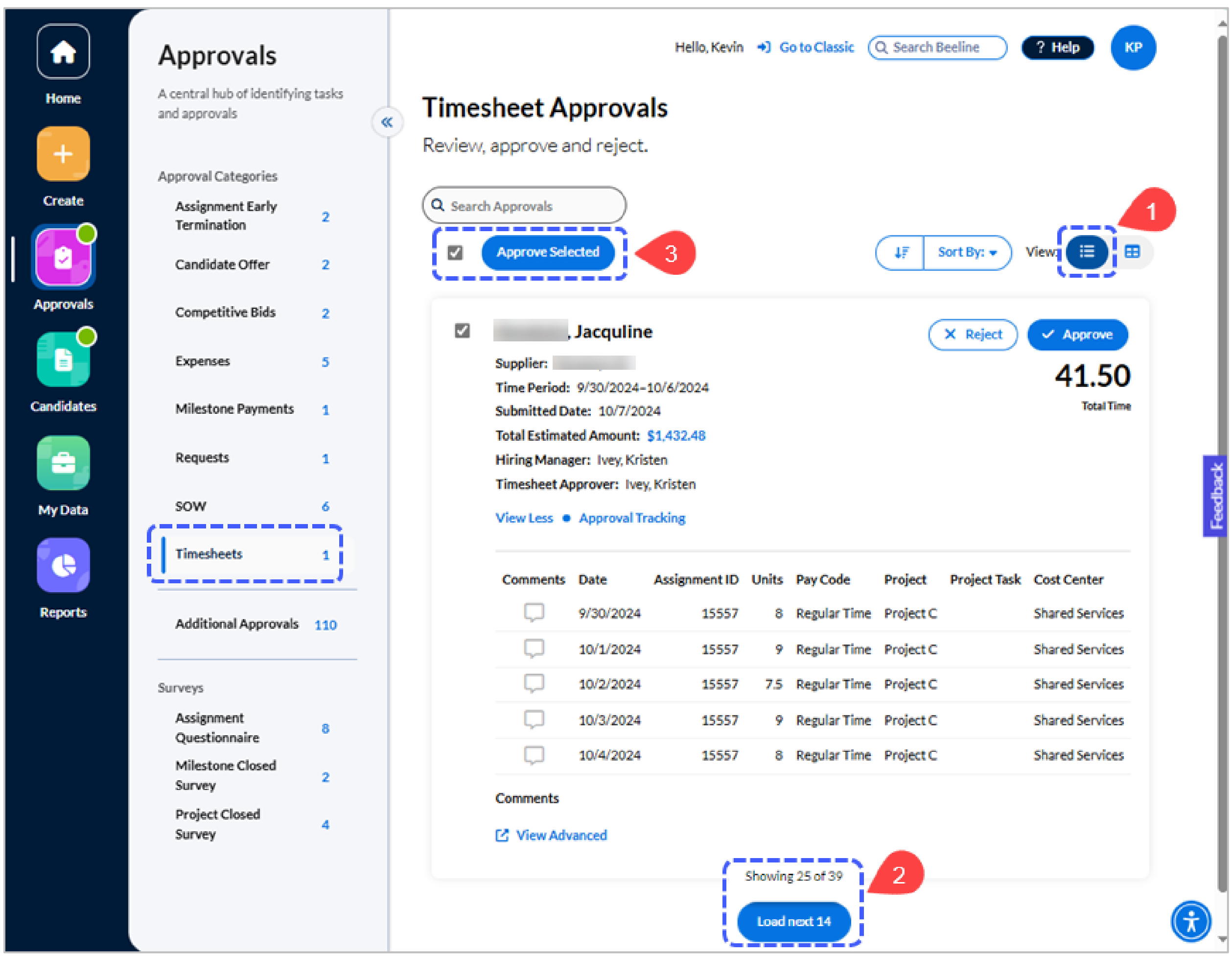


In **Card View**, records display in order of the **Sort By** filter setting. Fields display in a single column aligned along the left hand side. Buttons and features are located in the same area of the screen throughout the categories although the functionality may vary slightly. Take care to notice the differences in summary data fields and the differences in **Sort By** options. All card views include an **Approval Tracking** link that displays an approval process graph (see sample below) to let you know which approval steps have been completed, as well as which steps still need to be completed. They also include either a **View Advanced** or **View More** link to access additional details related to the approval record.

The Card View is best suited for taking action on a one-by-one basis. Keeping layouts similar from one Approval category to the next helps you work through your lists quickly. There is an option to approve multiple records in bulk, however this is only valid for Timesheets, Expenses, Recertifications, and Milestone Payments.

⇨ Bulk Approval process

Approvals can be processed in bulk for Timesheets, Expenses, Recertifications, and Milestone Payments by batching these records together and then approving them as a distinct group. Each Card View screen can display up to 25 records. You can combine ALL records together into a combined group by clicking through the screens until you reach the end of the list. Then scroll to the top of your combined list and click the checkbox next to Approve Selected. This activates the Approve Selected button. (It will turn blue.) Click **Approve Selected** and ALL the records will be approved as a distinct group.



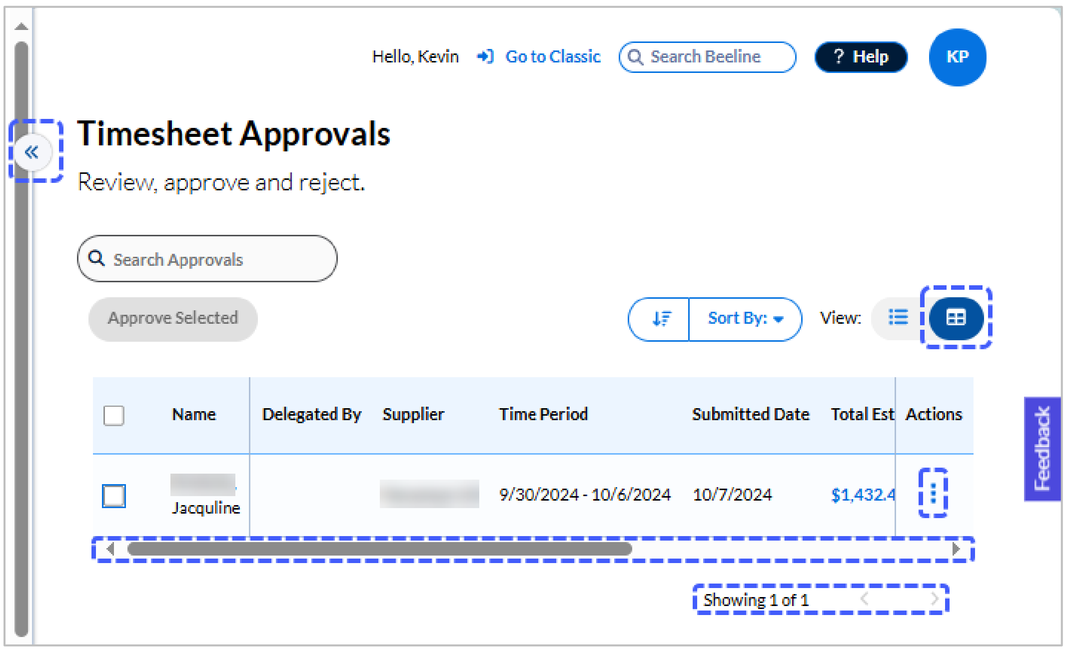
Steps for bulk approval:

1. Select the Card View (see example above).
2. Verify the total number of records to be approved by clicking the checkbox for each, then click **Load next…** until you reach the end of the list.
3. Scroll back up to the top of the list and select the **Approve Selected** checkbox—the button activates. Click **Approve Selected**. All the selected records will be processed in a single batch.

TIP: If there are any 'exception' records in the approvals list, process those FIRST so that when you create your combined list, it only includes records that qualify for the same 'action'.

• Table View

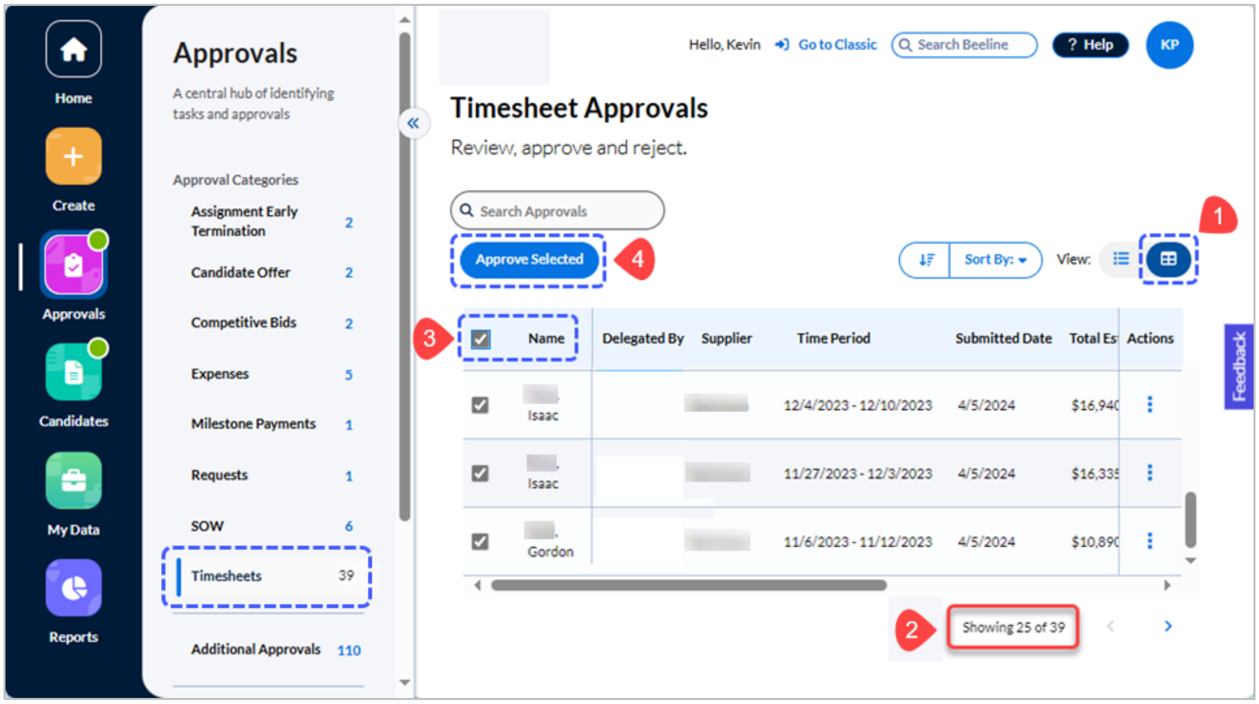
In **Table View**, records display in rows and columns, similar to a spreadsheet. The default sort order is the same as the Card View. The column headers are the same fields as displayed in the card view with the addition of a **Delegated By** column. The final **Actions** column is locked in place, and for some approval types, other key identifier columns (for example, **Name** or **Assignment ID)** might be locked as well, while all other columns are visible by using the horizontal scrollbar. Take care to notice the differences in data fields (columns) across categories. Each table can display up to 25 records (rows). The counter located in the bottom right corner lets you know how many records there are in total. Click the kebab icon (**⋮**) in the **Actions** column to view your options for taking action on the listed records.



TIP: You can maximize your visible work area space by hiding the **Approvals** slide-out panel. Click the slider button («) to hide it, then click it again to restore it.

⇨ Bulk Approval process

Approvals can be processed in bulk (i.e., batches) for Timesheets, Expenses, Recertifications, and Milestone Payments by selecting all records from a single table and then approving them as a group. Click the checkbox in the table header row to select all records (rows). This activates the Approve Selected button. (It will turn blue.) Click **Approve Selected** and ALL the records in the table will be approved as a distinct group. Repeat the process on each screen until all records have been processed.



Steps for bulk approval:

1. Select the Table View (see example above).
2. Verify the total number of records to be approved. You can approve up to 25 records as a single batch.
3. Click the **checkbox** in the header row of the table to select ALL the records, or scroll through the screen to select individual rows—the **Approve Selected** button activates.
4. Click **Approve Selected**. All the selected records will be processed in a single batch.

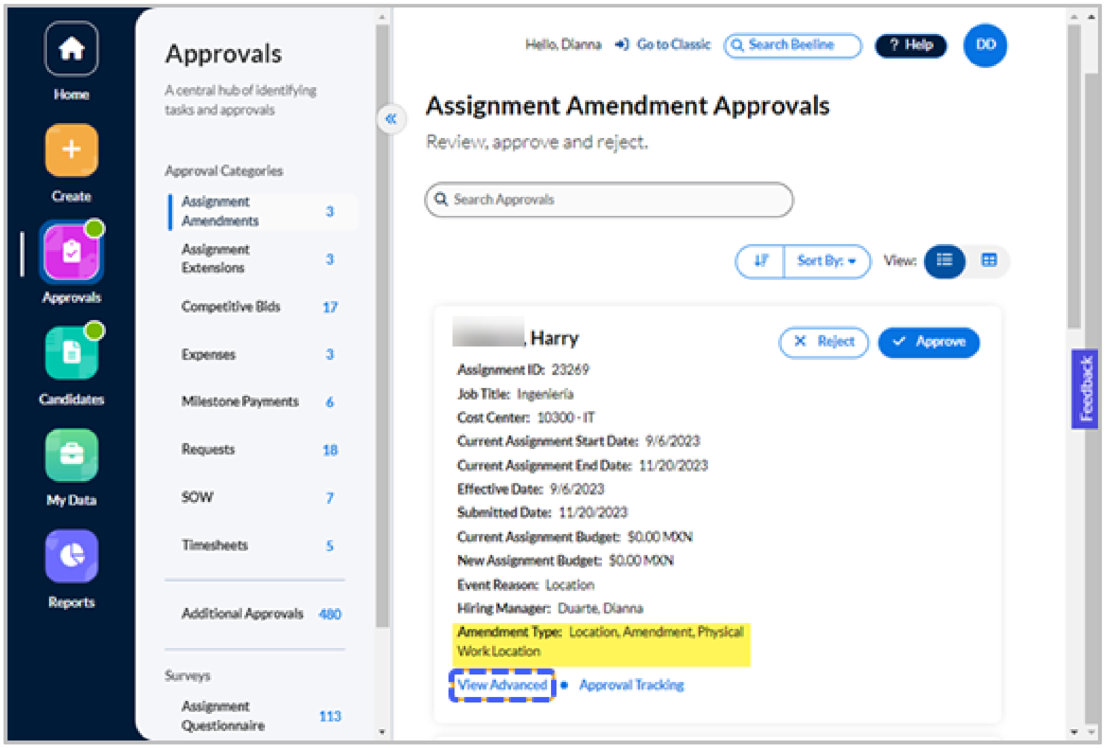
TIP: If there are any ‘exception’ records in the approvals tables, process those FIRST so that when you process the tables as groups, they only include records that qualify for the same ‘action’.

Approval Categories

Assignment Amendments

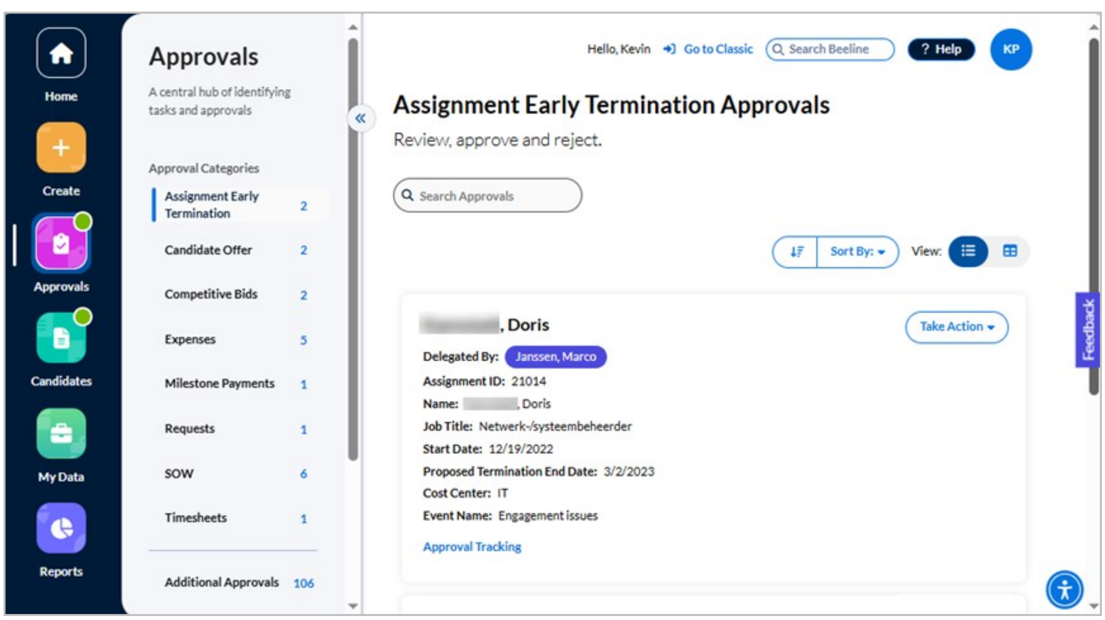
Not all assignment amendments require approvals. Approvals are needed for updates that impact the budget (for example, extensions, cancellations) or assignment management (for example, work location or equipment issued during onboarding). Be sure to check the **Amendment Type** field so you’ll know which information to check on the assignment record. To view the full assignment record, click the **View Advanced** link. The **Reject** action button opens a text box for you to explain why the amendment was rejected and what adjustments need to be made in order to resubmit.

beeline Enterprise



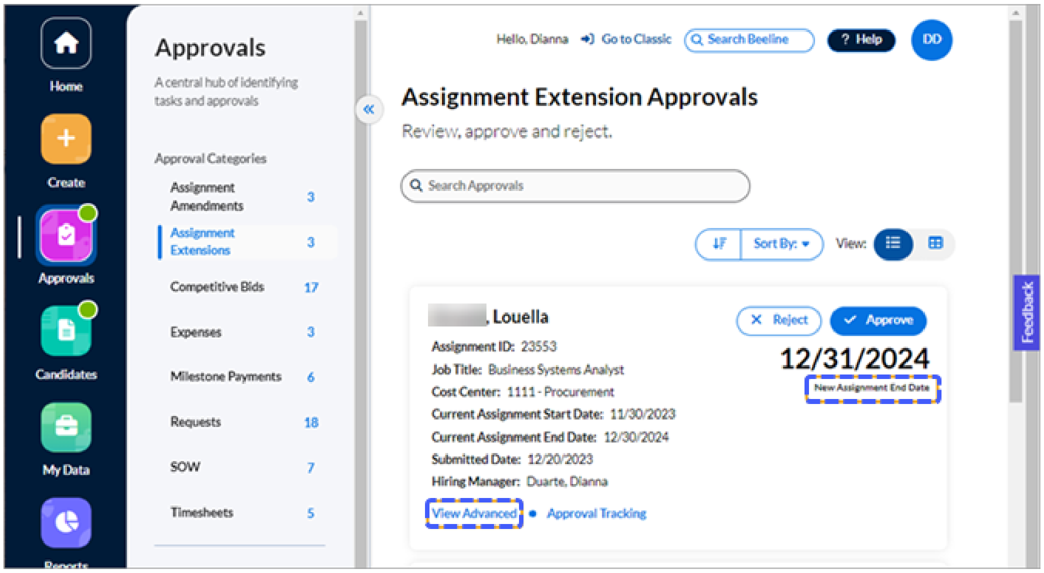
Assignment Early Terminations

When an assignment ends prior to its original End Date, then an Assignment Early Termination workflow needs to be processed. There can be several reasons to end an assignment earlier than expected but the assignment early termination process ensures that information related to the assignment as to end date, budget calculations, and valid timesheet submission timeframes will be accurate. This is important not only for assignment and timesheet tracking but also for system and analytics reporting.



Assignment Extensions

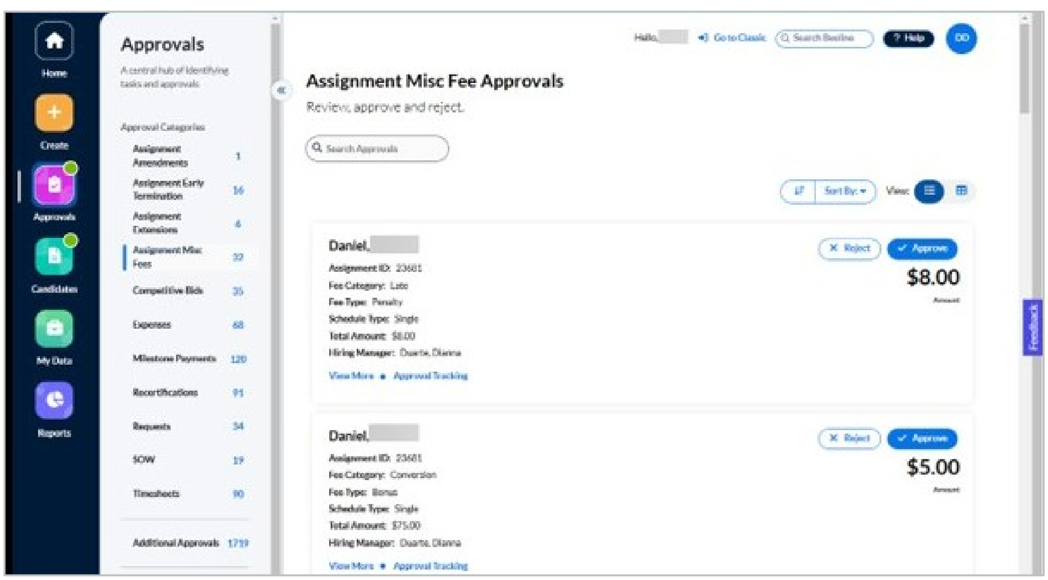
Assignment extensions have their own workflow approval path. The extension amendment can combine an extension with a budget adjustment (for example, an increased rate) or just be an extension without any budget adjustment. When actioning an approval, check the **Amendment Type** field in the **Event Reason Information section** (go to **View Advanced** screen) so you're aware if the changes are only to duration timeline or also include budget related fields.



Assignment Miscellaneous Fee

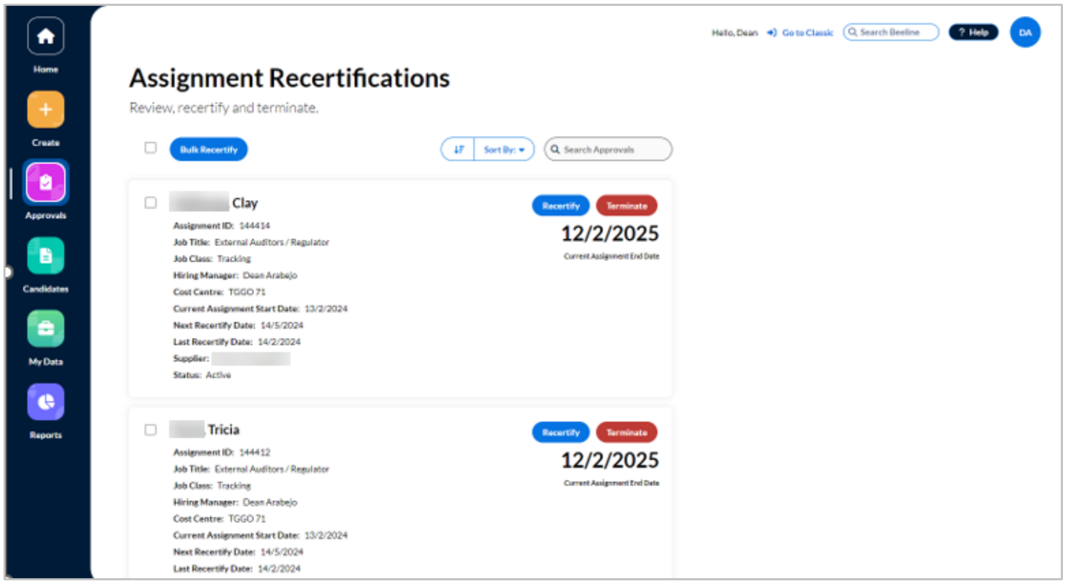
When a financial transaction needs to be made between the Client, Supplier, and/or Contract Worker that is NOT a standard timesheet or expense entry, then a Miscellaneous Fee can be processed through the Assignment record. Once approved, these transactions are captured for the Client's invoice processing.

There is a broad range of flexibility for the use of Misc Fees within Beeline Enterprise depending on Client needs and Program Office procedures. If you have questions about when to submit a charge as a Misc Fee, or the details required, you should reach out to your Program Office.



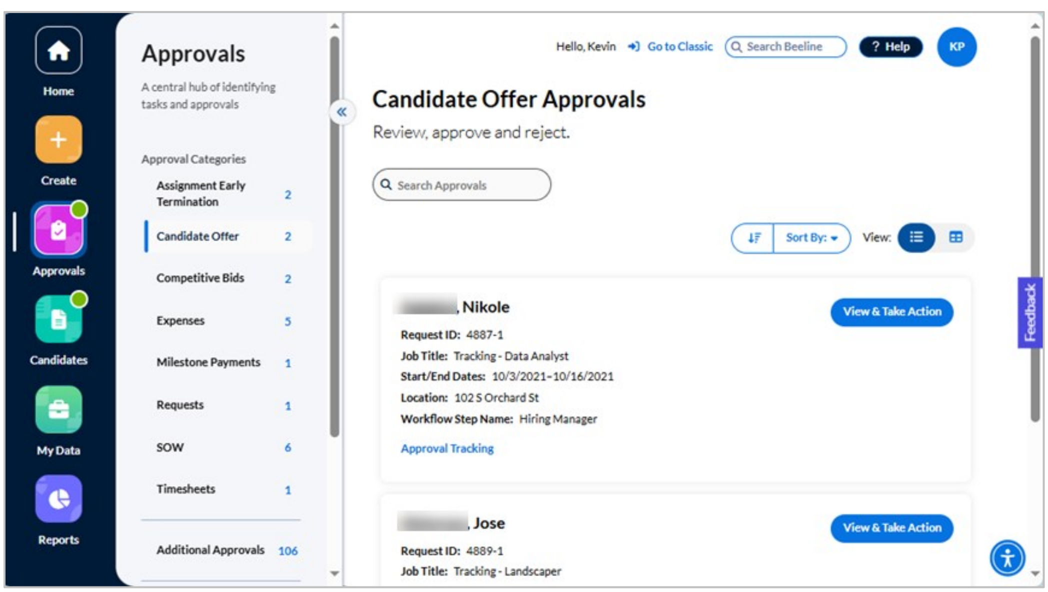
Assignment Recertifications

It's important for you to keep the recertification or termination status current for your contingent workers. The Approvals app makes it easy to manage your recertifications either on a one-by-one basis or in batch mode. It can also identify assignments that do not qualify for recertification so you can begin the offboarding process. Clients/Programs want to be sure that contingent workers have badges and system access rights when they need them, but they also want to be sure that badges are collected when a worker leaves and their system access rights are rescinded to avoid security risks to the organization.



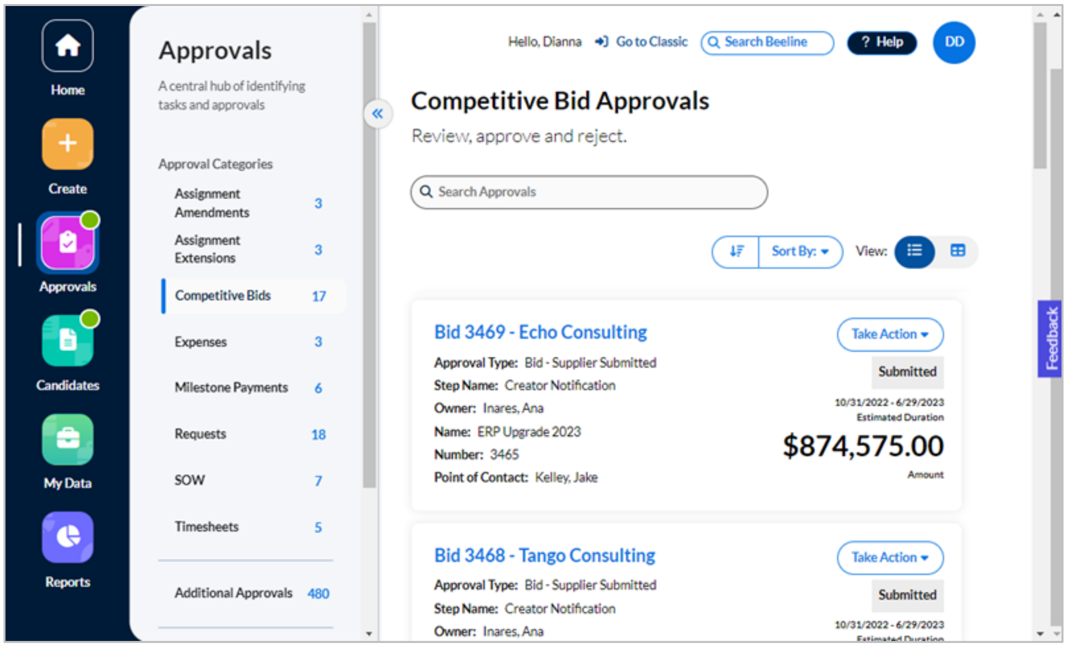
Candidate Offer

The Candidate Offer marks the end of the candidate review process when the successful candidate is identified and the Program Office works with Supplier to finalize the details of the offer. The Hiring Manager approves prior to onboarding. Separating Candidate Offers into their own section of the Approvals app makes it easy for Hiring Managers to search, sort, and track all Offer approvals. Approval step information is readily available by clicking the **View & Take Action** button.



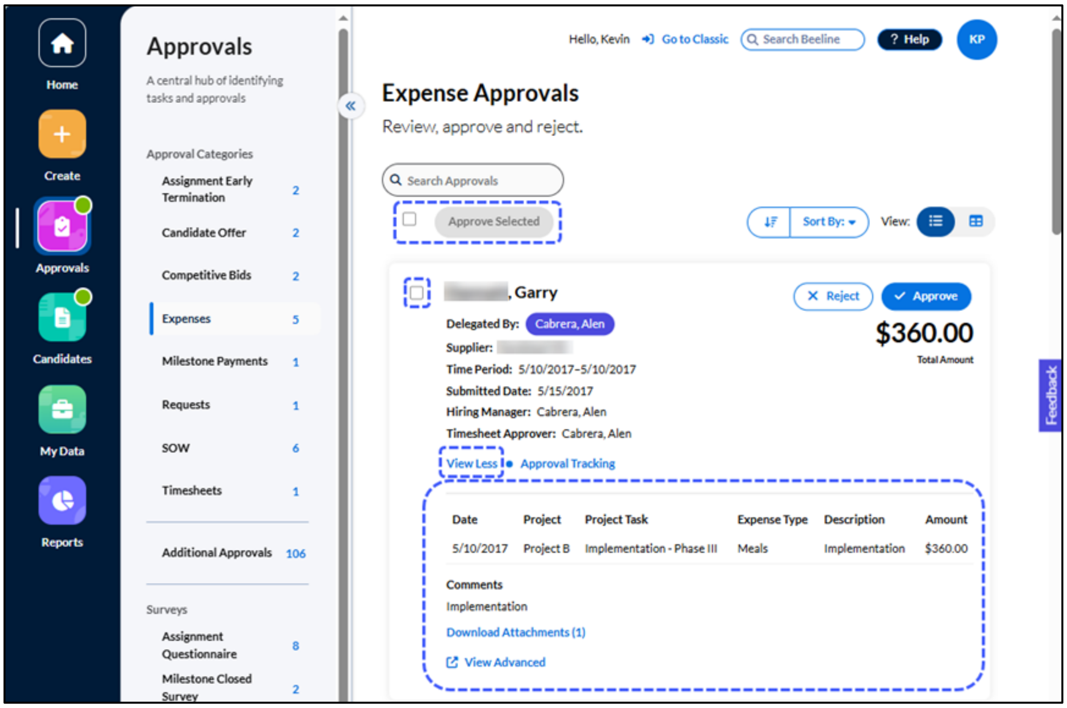
Competitive Bids

Competitive Bids are an optional feature in the Services Procurement solution. Clients use competitive bids to solicit multiple vendors to respond to a single sourcing event for a defined scope of work. The successful vendor then advances to the SOW (Statement of Work) stage to scope out the terms and conditions. Once the terms and conditions are agreed upon, the SOW is promoted to an active Project which is used to manage the agreed upon scope of work.



Expenses

You can take action on a single Expense approval or you can use the checkbox option to bundle similar expense types together and take action on them as a batch (**Approve Selected**). Scroll through the list and determine which items need separate handling. Take action on those as needed. Then go back and combine all the remaining expense items into "like" batches for quicker and more efficient processing. Notice that the amount displayed on the right-hand side is the **total** amount of the submitted Expense. When you reject an expense, a text box displays so you can enter Comments as to why it was rejected and what needs to be adjusted before it can be resubmitted.

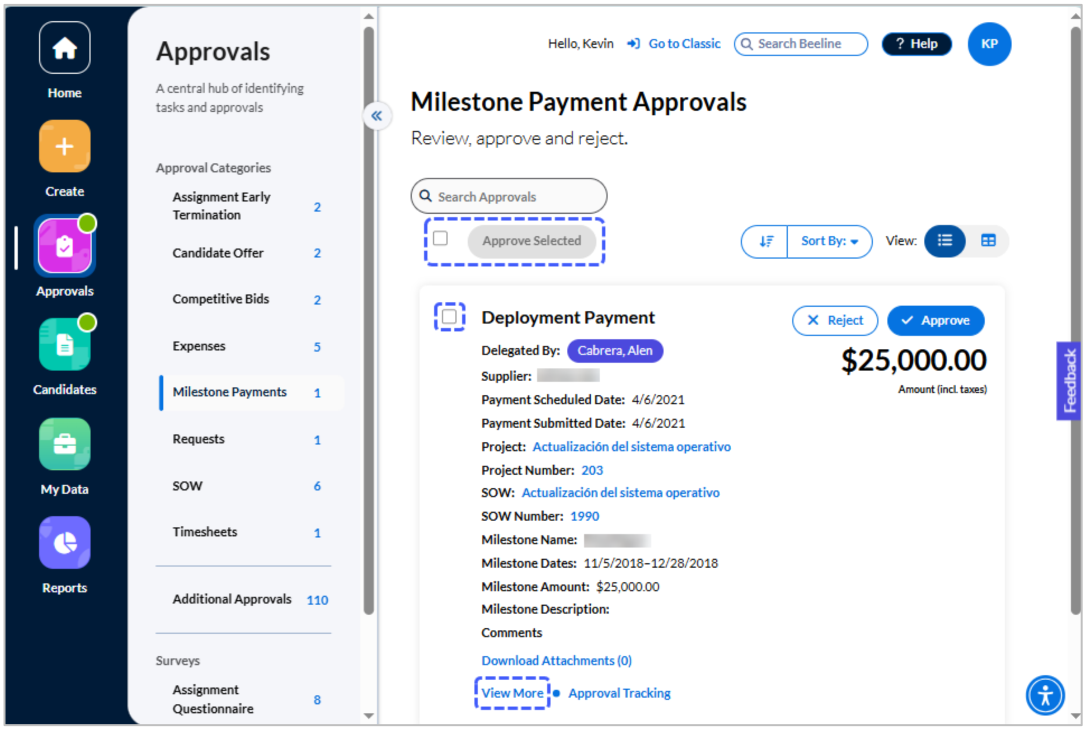


Use the **View More** option to reveal a slide down section that displays expense entry details. Click the **Download Attachments** link to view submitted expense documentation. Click **View Less** to collapse this section. Notice that the **Download Attachments** link is only visible in the **View More** expansion section.

TIP: You can set your preference to **View More** or **View Less** and the system will honor your preference as you work with other expense approvals. However, once you log out or if you change browsers, the setting reverts back to the default view.

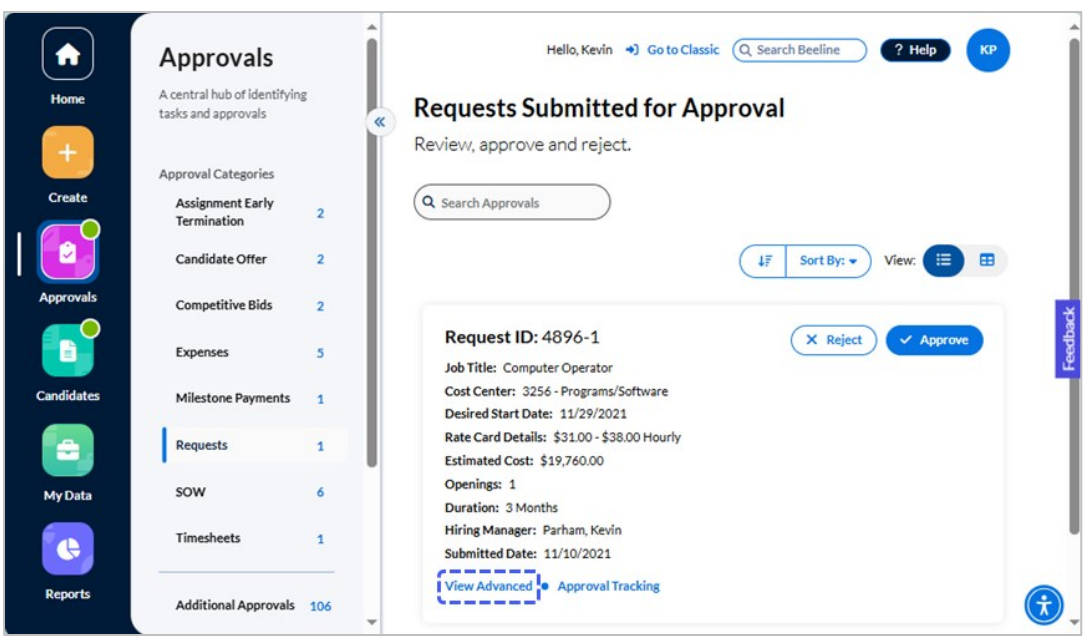
Milestone Payments (including Units of Measure)

Milestone Payment Approvals is a standard feature used in the Services Procurement solution. Milestone payments are managed under the active Project based on the details agreed to in the SOW (Statement of Work). When you click **View More**, the Milestone section expands to display additional details.



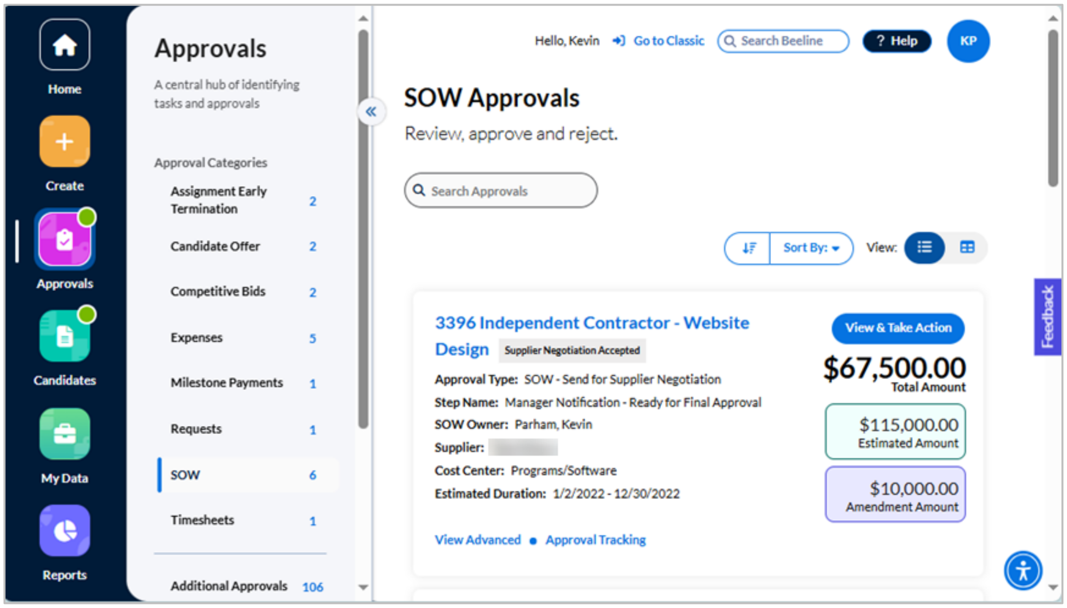
Requests

Follow the same principles used for the assignment approvals to work through your Request approval list. The screen layouts are similar and the buttons and features are located in the same area of the screen. Take care to notice the differences in summary fields and the differences in **Sort By** options. The **Openings** field lets you instantly view how many positions are associated with the requisition. Use the **View Advanced** link to access more details if you can't determine how to action the approval based on the summary fields information. Remember the Card View is best for actioning short lists on a one-by-one basis while the Table View is better for actioning multiple records in batch mode.



SOW (Statement of Work)

As mentioned previously, the SOW is a phase of the Services Procurement solution used to scope out the terms and conditions of the proposed work Project. Once the terms and conditions are agreed upon between the client and the vendor, the SOW is promoted to an active Project to manage the agreed upon scope of work. The Card and Table views display key summary information. Financial tracking is simplified by showing the Total Amount of the Project as well as the Estimated Amount and the Amendment Amount specific to the open approval.

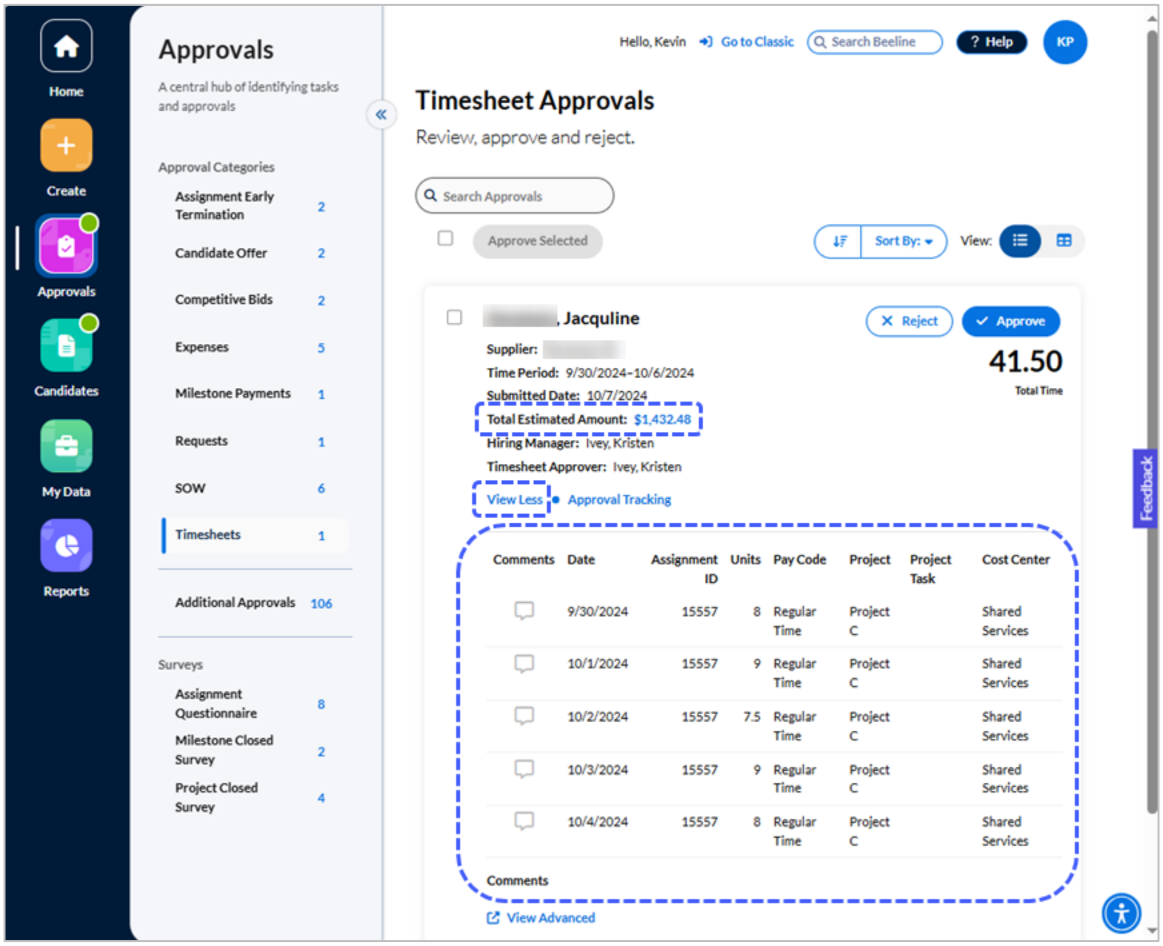


Timesheets

Timesheets are typically approved by the Hiring Manager or the designated Timesheet Approver. For some programs this is the same individual while for other programs these roles are separate. Either method can be managed within the Hiring Manager Experience. You can instantly see the total estimated amount for a submitted timesheet before you approve it by checking the **Total Estimated Amount** field in the timesheet summary on either the **Card** and **Table** views. Click the hyperlinked total **Amount** and a window opens with **Estimated Amount Breakdown** details for the entire timesheet.

In the Card View, you can take action on a single timesheet record or you can use the checkbox option to bundle similar timesheets together and take action on them as a batch (**Approve Selected**). To simplify the process, scroll through the list and determine which timesheets need to be actioned on an individual basis. Take action on those as needed. Then go back and combine all the remaining timesheets into "like" batches for quicker and more efficient processing. Notice that the **total** displayed on the right-hand side is the **Total Time** submitted. When you reject a timesheet, a text box displays so you can enter Comments as to why it was rejected and what needs to be adjusted before it can be resubmitted.

In the Table View, it is easier to organize timesheets into groups for batch processing.



In the Card View, click **View More to** reveal a slide-down section with timesheet details, including Comments. Click **View Less** to collapse this section.

You can set your preference to **View More** or **View Less** and the system will honor your preference as you work with other timesheet approvals. However, once you log out or if you change browsers, this setting reverts back to the default view.

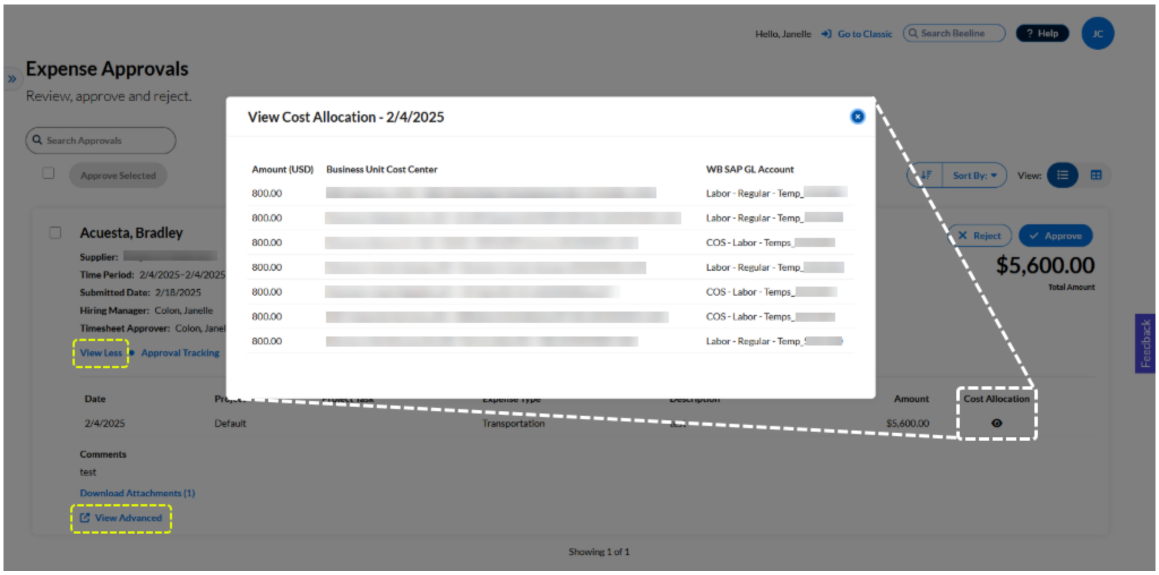
The **View Advanced** option navigates you to the complete timesheet record to view all details. Click the **Back to My Apps** link to return to the Timesheet Approvals list.

NOTE: The **View Advanced** link is only visible in the **View More** expansion section.

Cost Allocation details

If your Beeline Enterprise instance includes Cost Allocations as part of its financial tracking, you can easily check this information on approval records for Timesheets, Expenses, Miscellaneous Fees, and Milestones. Follow the same process steps provided below to access information for all approval categories where cost allocation is a valid option.

1. Navigate to the *card view* of the respective approval category. The example below is from an Expense Approval.

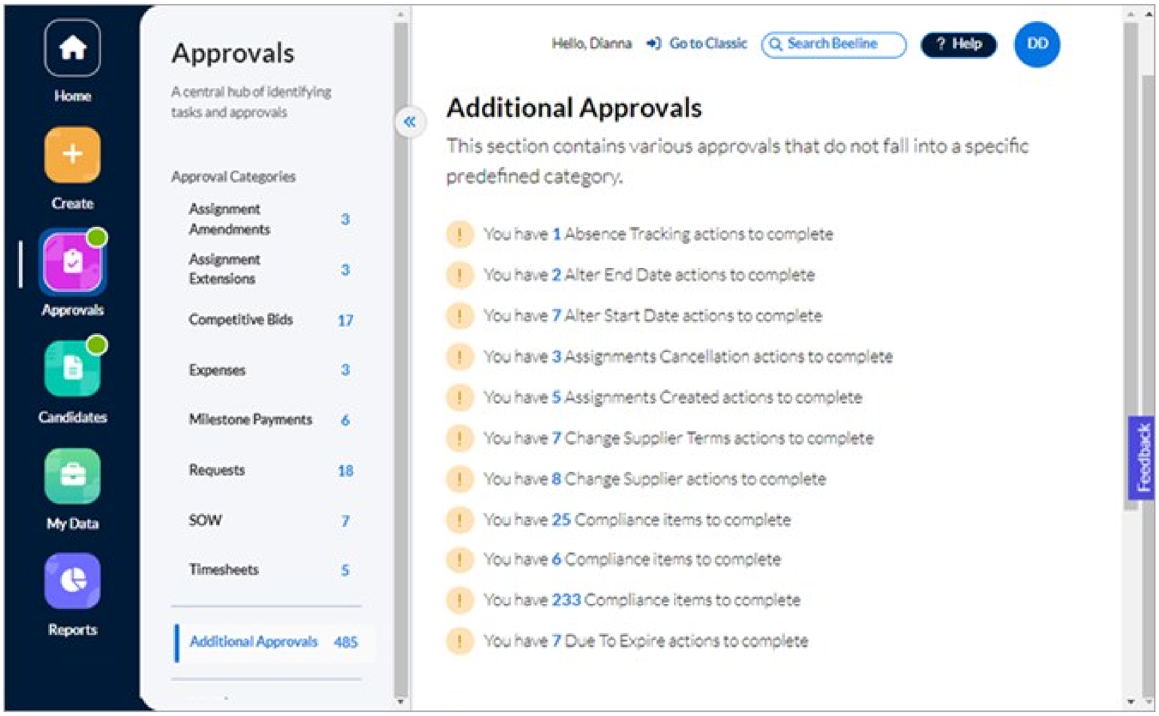


2. Click **View More** to expose the expansion section. (View Less will be the visible label.)
3. Click the ‘eye’ icon in the Cost Allocation column for the record of your choice. A window opens to display the relevant cost allocation string.
   Optional: Click the **Approve** button to view the cost allocation string for Milestone payments.
4. Click the **X** button in the upper right corner to close the window and return to the previous screen.

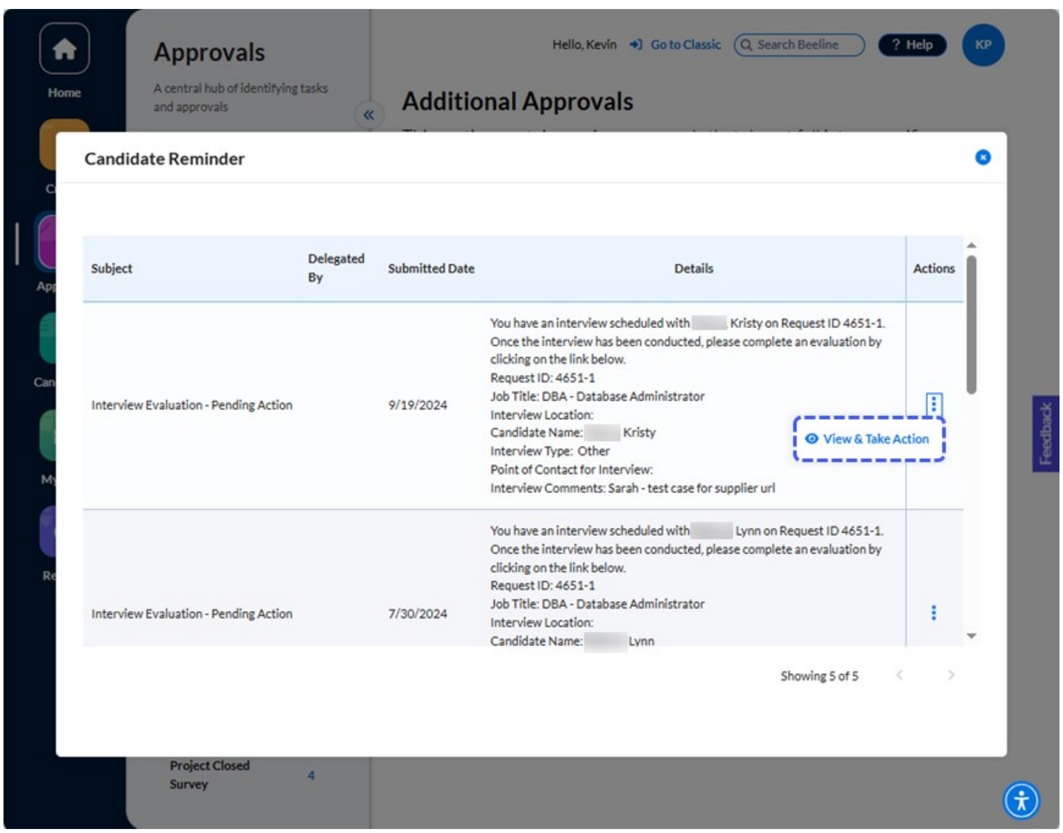
To make edits to either the Timesheet or Expense cost allocations, you need to click **Advanced View** and navigate to BTE (Beeline Time and Expense) to access the edit options. Edits can be made to Miscellaneous Fee and Milestone cost allocations by clicking the **Approve** button.

Additional Approvals

All other approval types are combined into a single list in the **Additional Approvals** section.



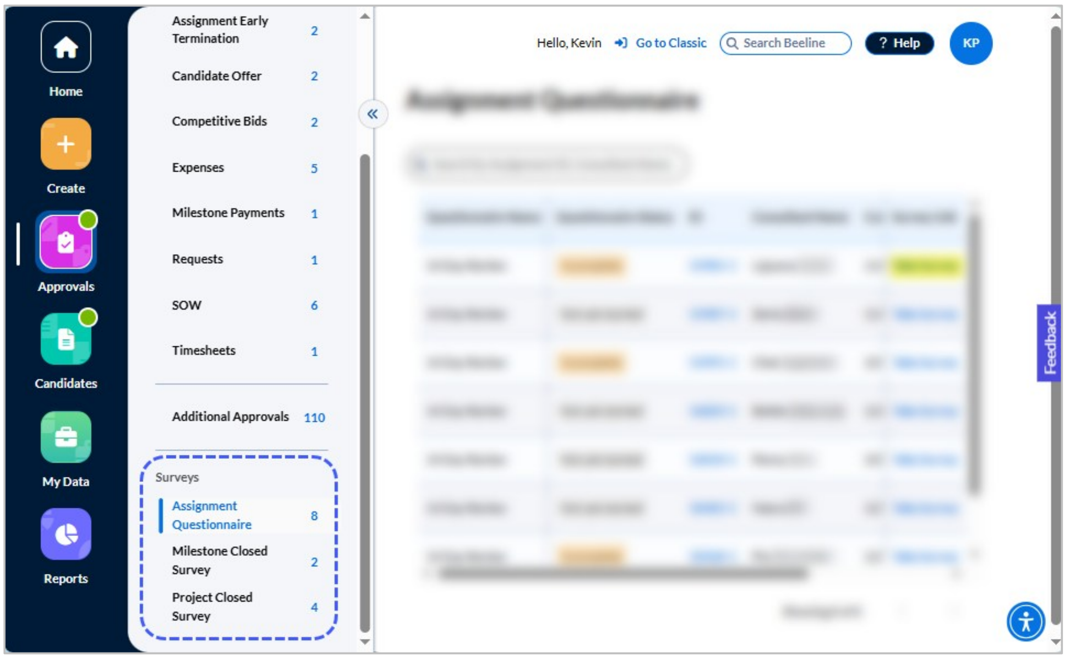
Click any blue tally number in the list to open the dialog window with further details (Table View).



Click **View & Take Action** in the **Actions** column to navigate to the record **Details** screen. Review the record and use the displayed action buttons to approve or reject. Click **← Back to My Apps** to navigate back to the list.

Surveys

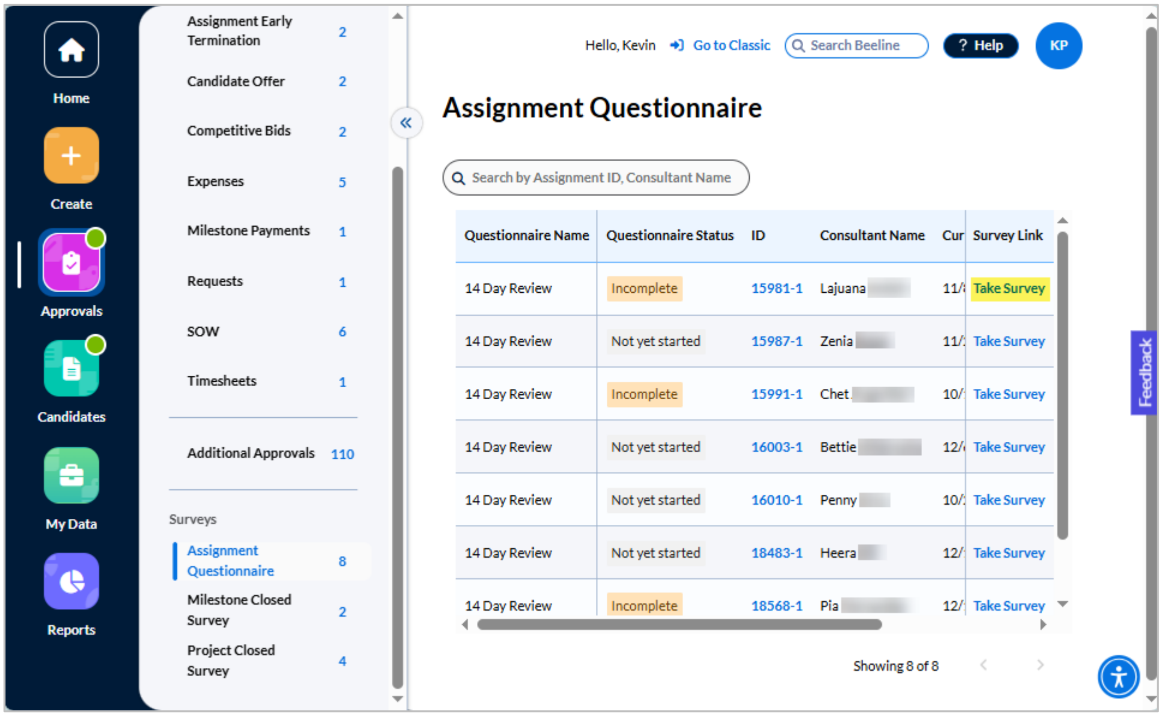
Programs decide which, if any, questionnaires and surveys to assign to Hiring Managers. In Classic Beeline, notifications informed Hiring Managers of these tasks. The **Surveys** section in the **Approvals** app now lists all outstanding questionnaires or surveys and includes a direct link for easy access. No more overlooked notifications causing you to miss providing this valuable feedback!



NOTE: Only those questionnaire/survey categories that are valid for your program display in your Hiring Manager Experience instance. All **Surveys** screens display in Table View format.

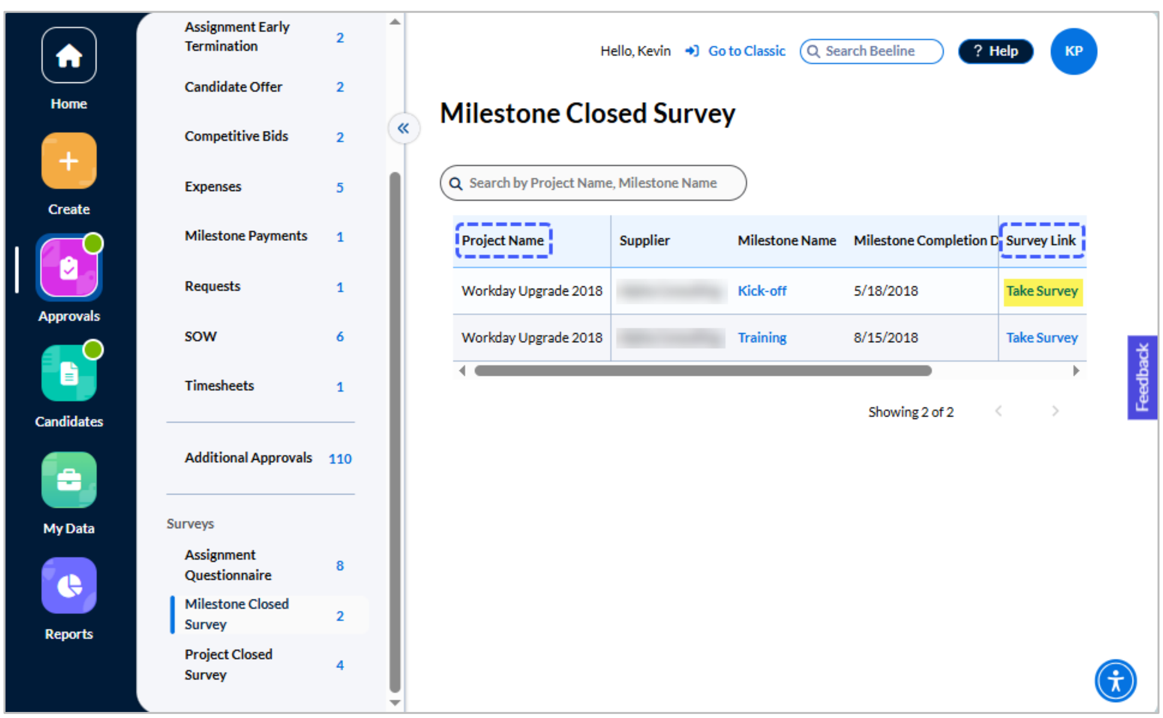
Assignment Questionnaire

Assignment questionnaires can be created for a variety of purposes throughout the assignment lifecycle. They provide important feedback to the Program Office not only as to worker performance but also VMS processes and functionality. Therefore, timely completion can go a long way to provide better oversight and program efficiencies.



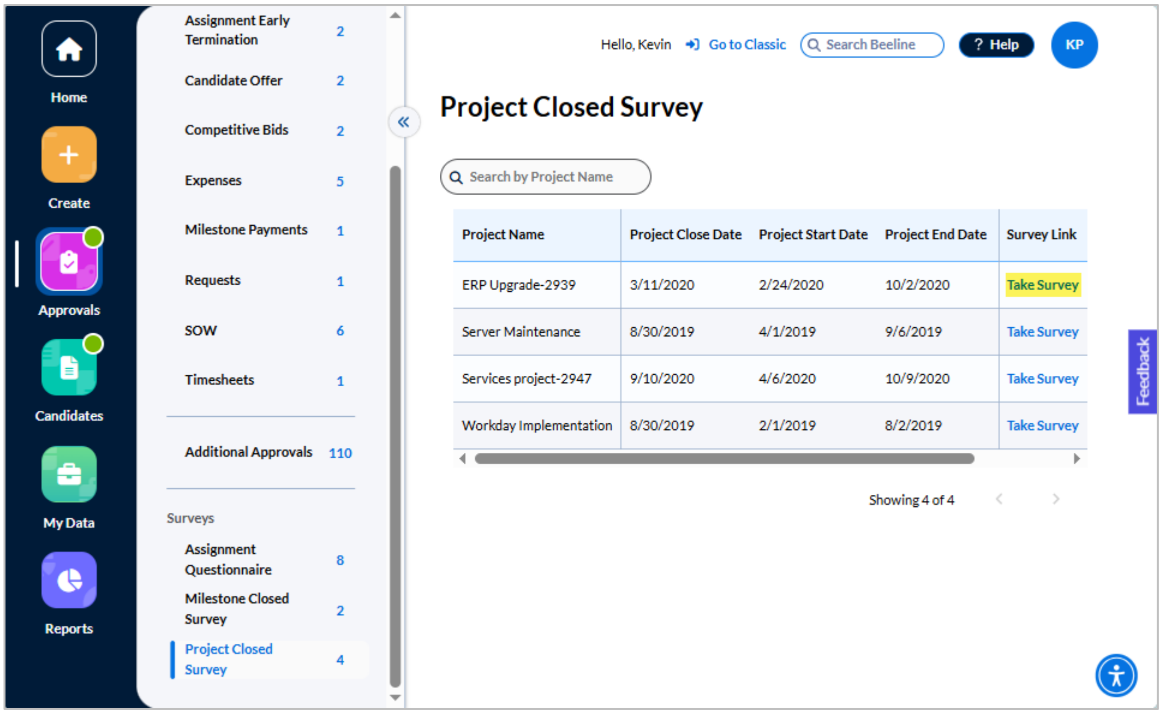
Milestone Closed Survey

Milestones are specific to the Services Procurement solution. They are used to ensure that the overall Project is meeting its SOW (Statement of Work) related terms and conditions. Each Project has its own specific requirements; however, these surveys ensure that not only are the specific Project requirements being met, but also that the project-based model is working effectively as well.



Project Closed Survey

Project Closed surveys assess the overall Project rather than the separate stages managed as Milestones. The objective is feedback that covers the broad range of actions and workflow tracking throughout the lifecycle of the active project.

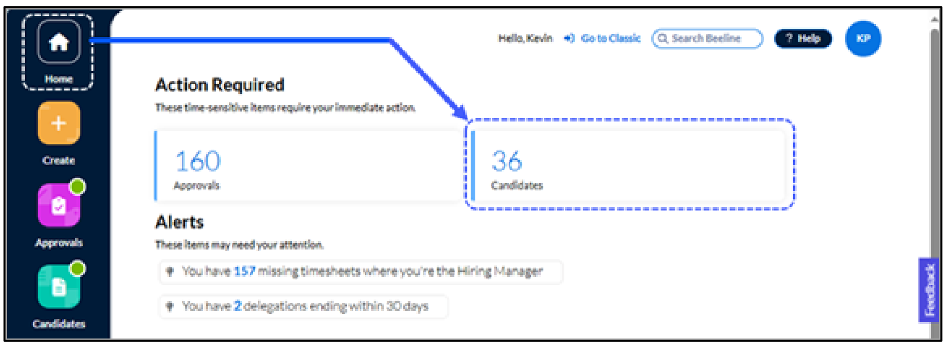


Candidates

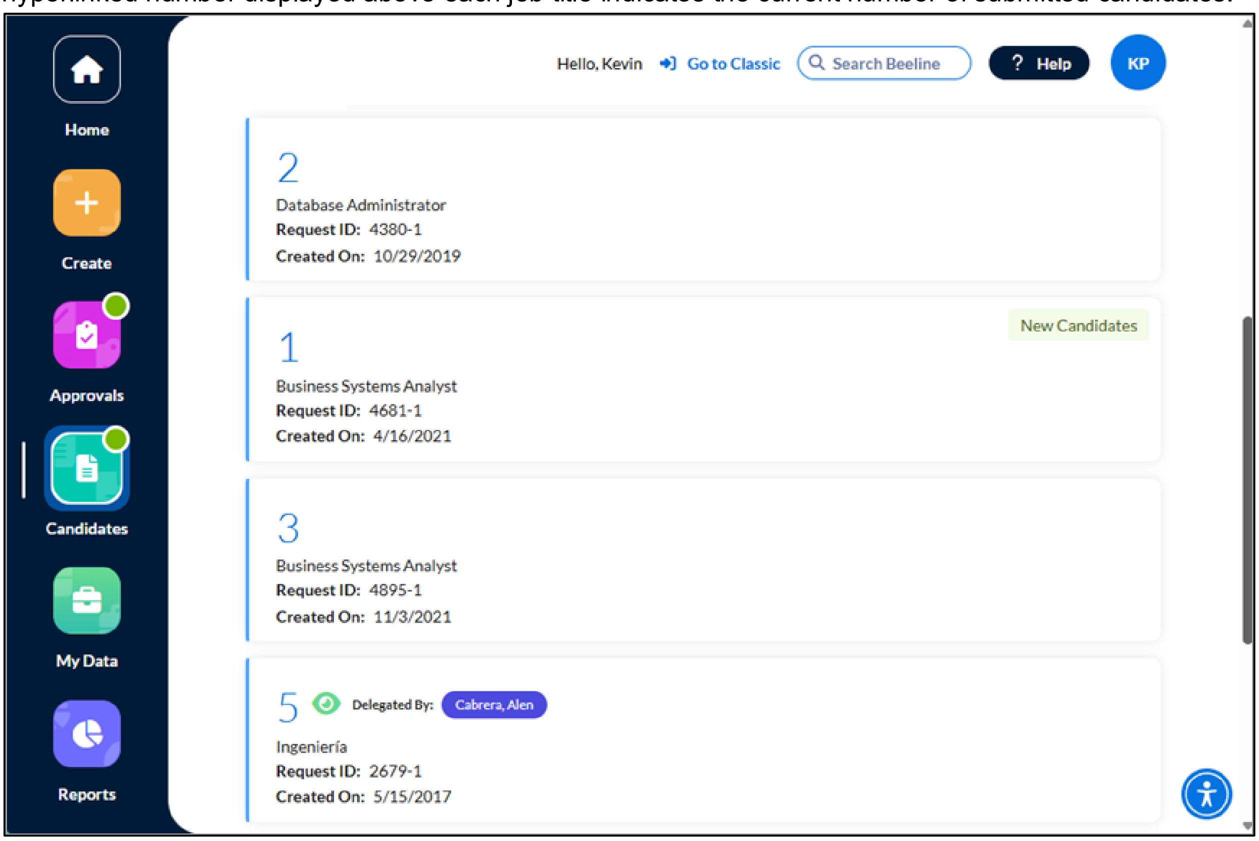
The **Candidates** app simplifies the workflow needed to review, assess, and qualify candidates. Best of all—it does this with streamlined screens and easy access to action links making it quick to navigate from one evaluation task to another with minimal clicks.

The process begins when you click the **Candidates** app button in the navigation panel and the platform "fetches" all candidates submitted for your review based on **your** open Requests, or those delegated to you. Then, just sit back and let the "digital assistants" do their job!

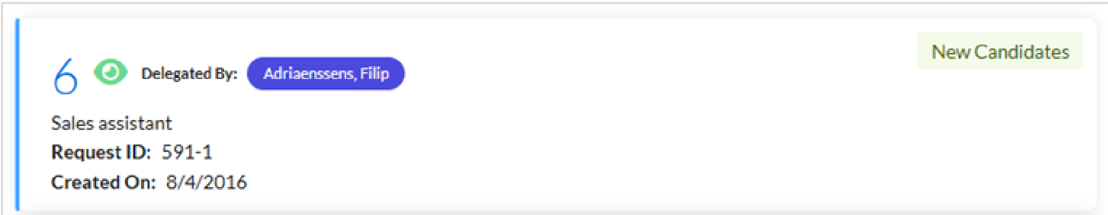
TIP: You can also click the **Candidates** tally number in the **Action Required** section on the Home screen to navigate directly to the **Candidates** list in the **Candidates** app.



When the "fetching" is complete, you'll see a list of your open Requests organized by Job Title. The hyperlinked number displayed above each job title indicates the current number of submitted candidates.

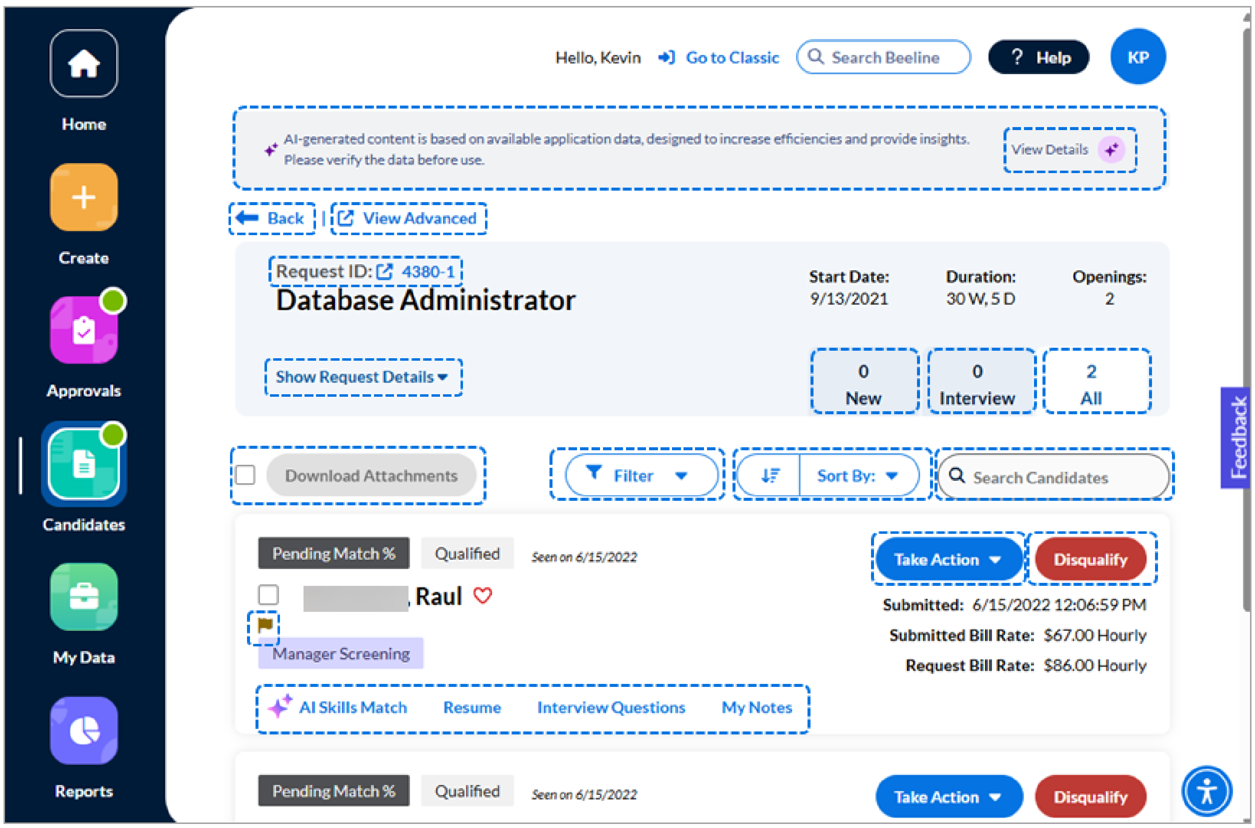


Each Request is shown as a separate card. The details inside the card include Job title, Request ID, and the Created On date. If the Request is one that was delegated to you, the Delegator's name will display to the right of the number of submitted candidates. A New Candidates tag displays on the right side of the card to indicate that candidates have been added to the open Request.



Scroll through the list and click the hyperlinked number of submitted candidates on any card to drill down to the Candidate Details screen.

Candidate Details

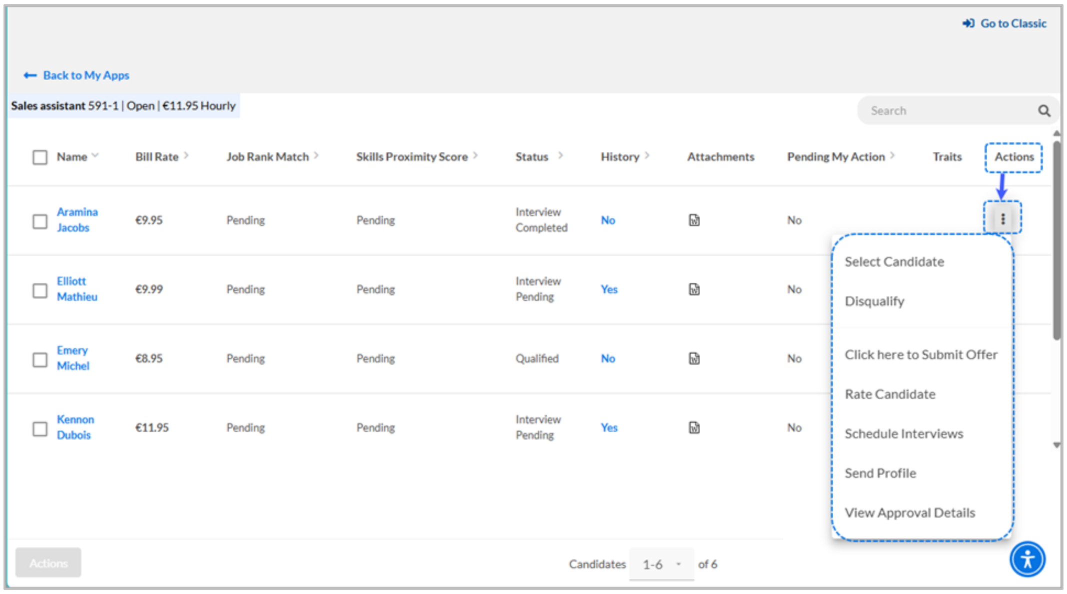


Take a moment to review the screen layout and get familiar with all the available options. These options are specifically designed to make the candidate review process go faster and be more efficient. They let you sort, filter, and search content for the details you need—when you need them.

The *AI Skills Match*, *Skills Proximity Score*, *Resume Insights*, and *Interview Questions* are AI-generated content. The intent is to support decision making throughout the Candidate review process, but they are not intended to replace human judgment. Please note our AI Disclaimer statement at the top of the screen. Click the **View Details** button to review the AI analysis process these features use to generate information.

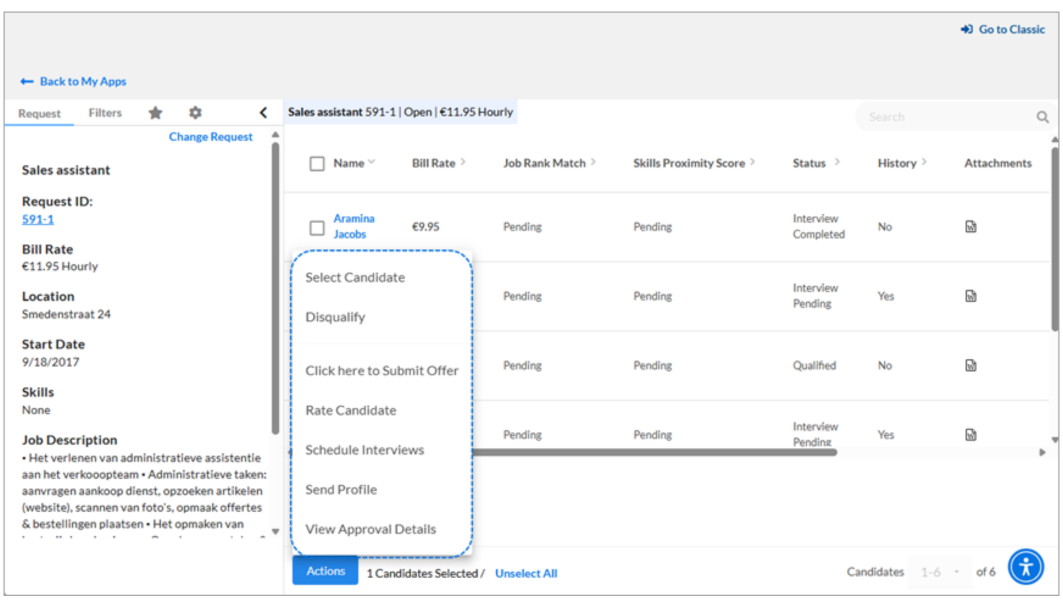
➔ Located at the top of the workspace are the navigation links and Request details.

- Click **← Back** to return to the previous **Candidates** list screen.
- Click View Advanced to navigate to the **Candidate Evaluation** list screen. Candidates are arranged in a table format to make it easy for you to compare candidates based on the information in the various columns. Click the kebab icon (⋮) in the Actions column on the far right and you'll see which actions you can take on an individual candidate. Options will change as the candidate advances through the review process.



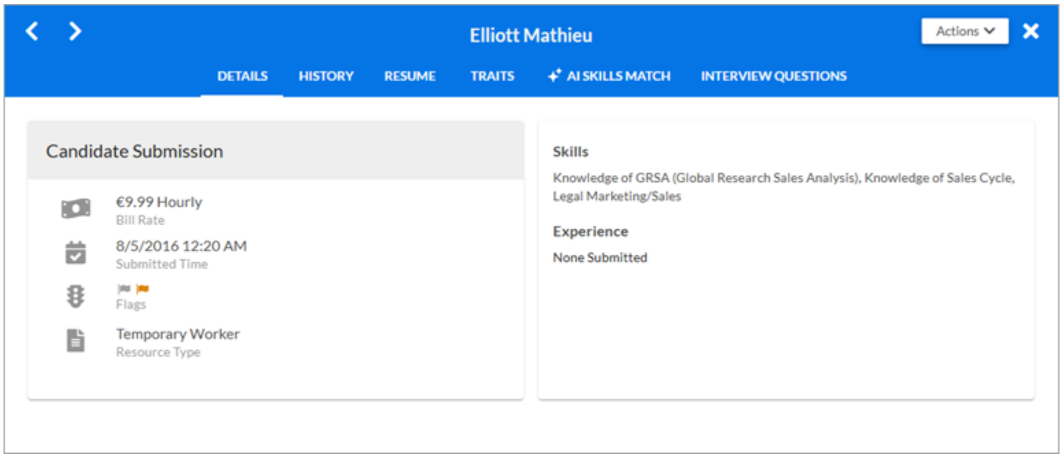
Candidate Evaluation – Candidate Actions

Click the **Name** checkbox, or any checkbox on the left side and the Actions button in the bottom left corner activates. The list of valid Actions you can take for a selected group of candidates will change as you advance through the review process.



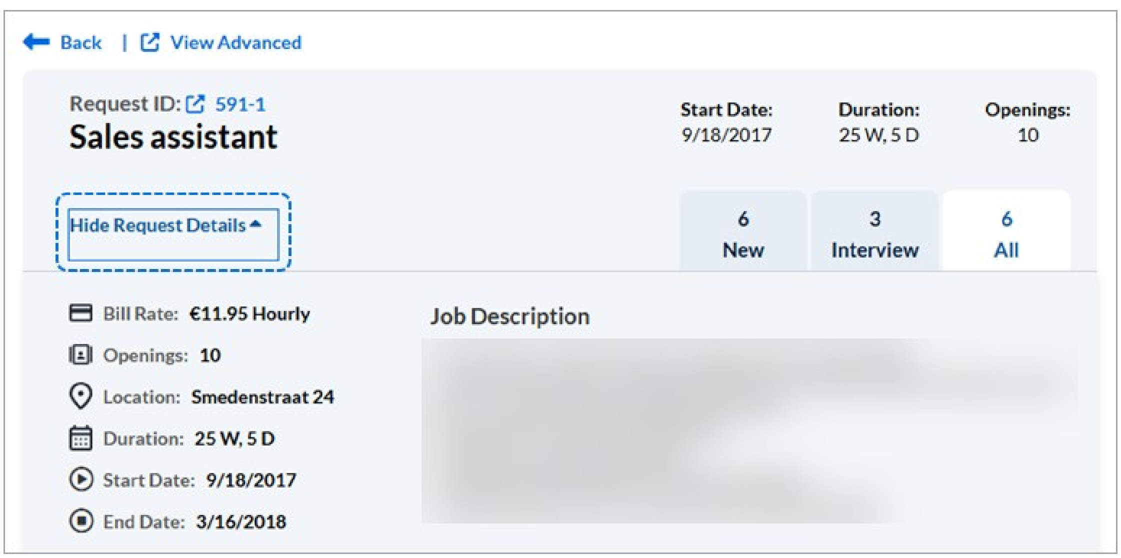
Candidate Evaluation – Group List Actions

Click the candidate's hyperlinked name on the left to open the **Candidate Details modal** window. This modal window gives you easy access to the candidate's details, history, attachments (for example, resume), traits, and Actions options. Access is available all from a single pop-up window without the need to open additional tabs or windows to research or take actions on the candidate. You can use the forward and reverse arrows (< >) to switch to any other candidate in the list. Click **X** in the upper right corner to close the modal window and return to the Candidates Evaluation screen.



From the Candidates Evaluation screen, click the **← Back to My Apps** link to return to the Candidates App screen.

- Click **Show Request Details** (located below the job title on the Candidate Details screen) to expand the summary view to the expanded view for additional Request details. Start Date, Duration, and Openings are repeated while Bill Rate, Location, End Date, and the Job Description are only visible in the expanded view.

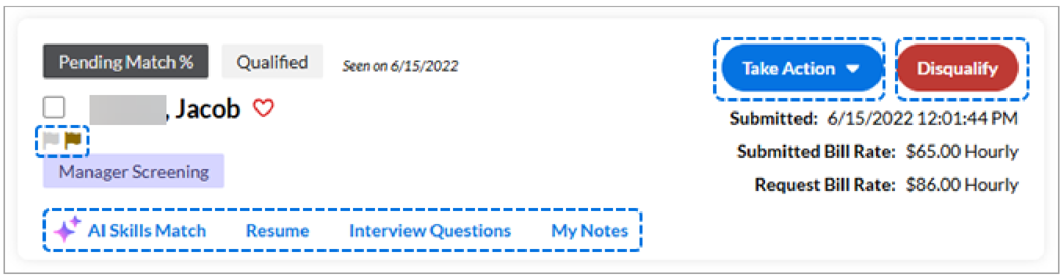


- Need to see more Request details? Click the Request ID: ####-# hyperlink to navigate to the Request dashboard which gives you access to the full Request record.
- Need to view just the **New** candidates, the candidates going through the **Interview** process, or **All** the candidates submitted for this Request? Click the respective tab to the right of the **Show/Hide Request Details** link.

➔ Located below the Request details are the download, filter, sort, and search links.

- Click the checkbox next to **Download Attachments** to download all available items for all the candidates listed or click the checkbox next to each respective candidate's name to select which individual downloads you want. The Download Attachments button only activates once a selection is made. The ability to download attachments in bulk not only streamlines the overall review process but it also gives you better options for comparing one candidate to another.
- Click the down arrow to select which **Filter** you want to use for your candidates list. The list includes multiple options for Job Rank Match and Candidate Status.
- Click **Sort By** to change the sort order of the candidates list based on the category option you select. Use the Arrow option to further refine your list into ascending or descending order.
- Don't see the candidate you're looking for? Use the **Search Candidates** feature to locate a specific candidate.

➔ Next comes the list of submitted candidates—with easy access to take action.

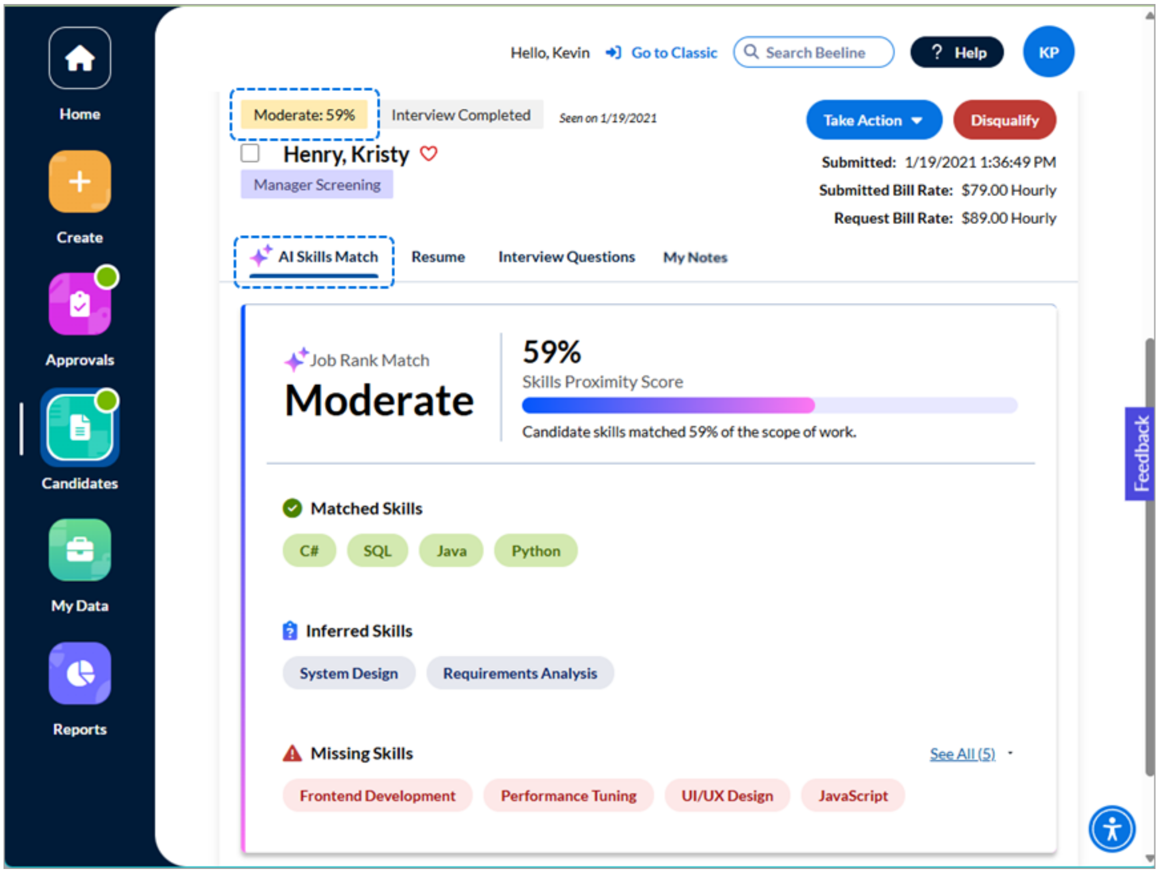


- ✓ Each candidate record is shown in a card format to provide an at-a-glance summary of key information and single-click access to detailed information or actionable buttons.
- ✓ Directly above the candidate's name you'll see the **candidate's current status**.
- ✓ Click the checkbox to activate the **Download option** for any attached files.
- ✓ Hover over any visible **Candidate Flag** (🚩) for details. **NOTE**: For a complete list of Candidate Flags and other identifying icons that you may encounter throughout these evaluation screens, review the **Candidate Flags and Icons** section at the end of this section.
- ✓ Verify the current **Candidate Submission workflow status** by checking the status displayed beneath the candidate's name.
- ✓ The **Take Action button** gives you access to Select Candidate, Manage Interviews, Rate Interview, Send Profile, or Submit Offer.
- ✓ The **Disqualify button** displays a pop-up window where you can select the Reason and enter Comments as to why a candidate is disqualified.
- ✓ Easily verify the **candidate's submitted date**, **submitted Bill Rate**, and **Request Bill Rate** by viewing the information posted beneath the Take Action button.
- ✓ Drill down for detailed insights into the candidate's work history, job experience, or skill sets by using the **AI Skills Match** or **Resume** tabs. The **Interview Questions** tab helps you generate question lists for the interview process and then evaluate the responses. Details for each feature tab are included below.

✓ Use the **My Notes** tab to create your own summary to refer to as needed.

♦ AI Skills Match / Skills Proximity Score

Notice that the overall Skills Match score displays above the candidate's name on the Candidate Details screen but click the **AI Skills Match** tab and the section expands to show summary information for Matched Skills, Inferred Skills, and Missing Skills.



The Job Rank Match and Skills Proximity Score are columns on the Candidate Evaluation screen. The Candidate Details modal window also includes an AI Skills Match tab that repeats this information to provide easy access to key analysis information throughout the candidate review process.

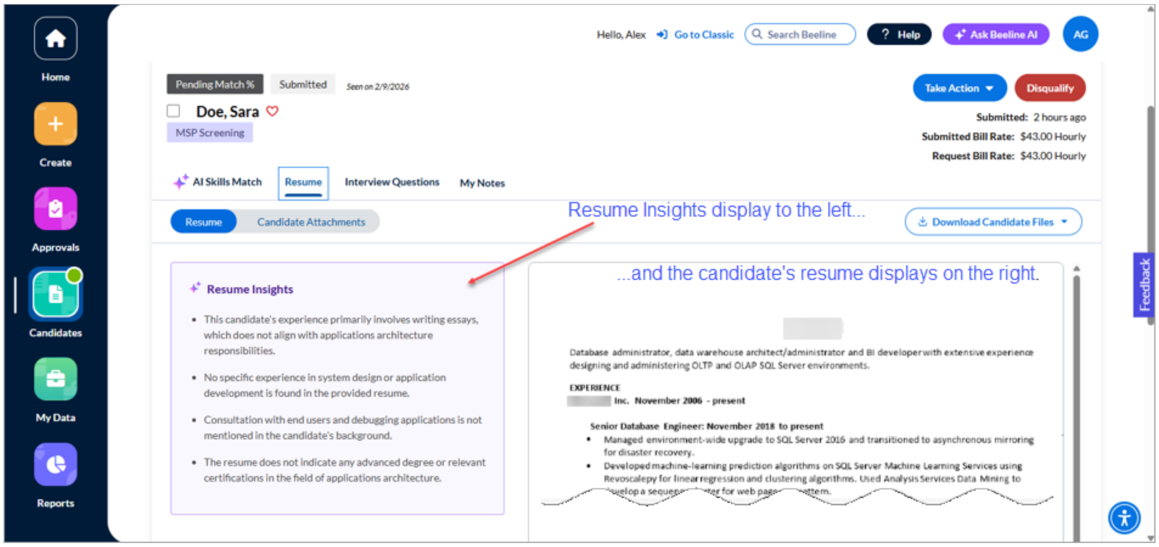
Please note: *Skills Proximity Score requires a Premium subscription. This is a Self-Service feature that your Program Office will need to activate before it is available on your Beeline Enterprise site. Please reach out to your Program Office to confirm activation.*

♦ Resume / Resume Insights

To view the candidate's full resume, just click the **Resume** tab. The submitted resume displays on the right side of the screen and the AI-generated Resume Insights display on the left side as four bullet points. These bullet points are designed to provide insights as to the candidates:

- Relevant skills and qualifications
- Experience that aligns with the role
- Notable achievements

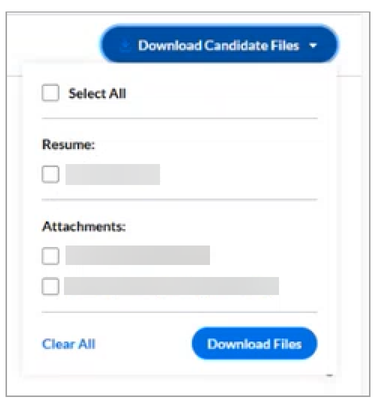
- Missing qualifications or potential risk areas (such as gaps or limited experience).



The content is produced by an AI analysis of the submitted resume against the job description. These insights are designed to reduce the time and effort typically used for manual resume screening and to generate overall process efficiencies by helping the hiring manager make informed decisions. The content identifies insights, it is not intended to compare, rank, or score submitted candidates. Resume Insights are only generated once and only if a resume is submitted for the candidate. If for any reason the system cannot produce the Resume Insights, then a message will display in the screen's left side Resume Insights space as to why.

Resume Insights are also accessible from the Candidate Evaluation list screen as well as the Candidate Details modal window.

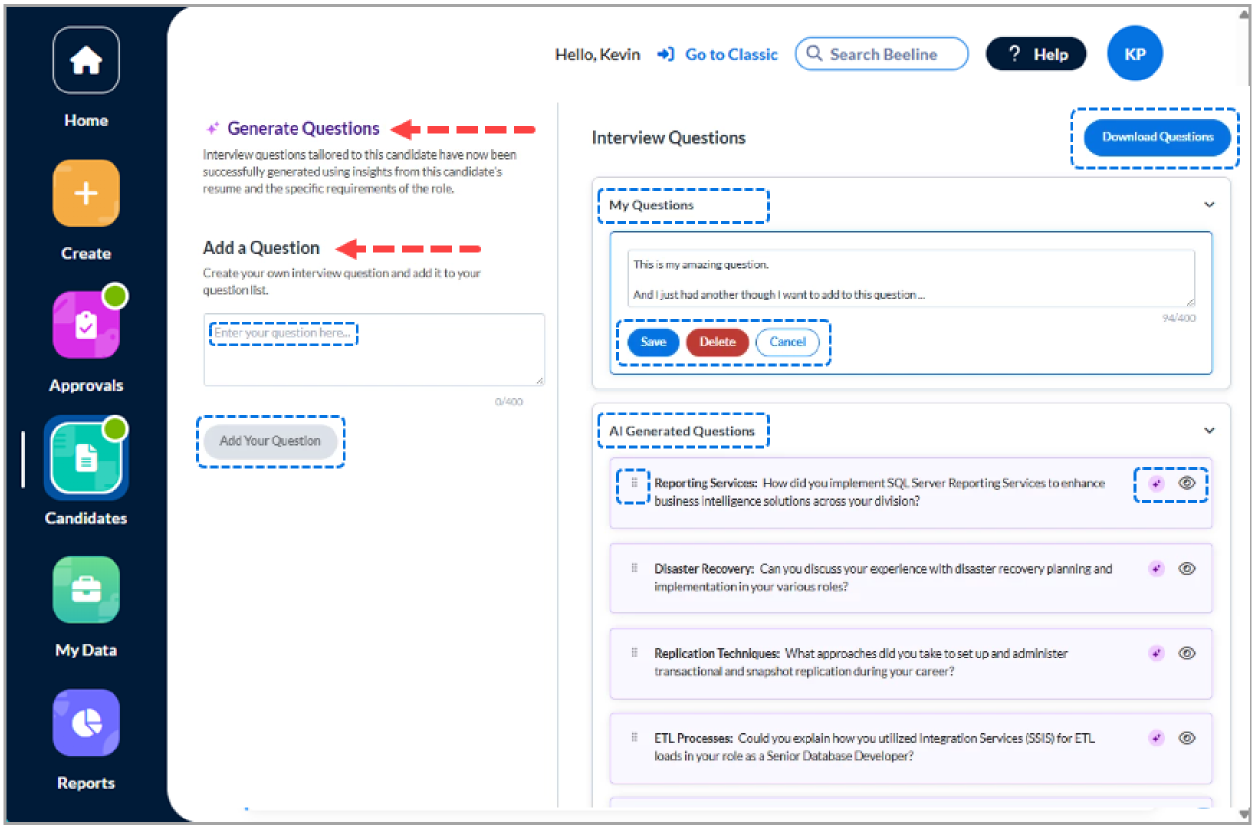
Click the **Candidate Attachments** tab to view any additional submitted documentation. The **Download Candidate Files** tab gives you the option to select some or all submitted documentation and then download your selection.



Please note: *Resume Insights is a Self-Service option. It will only be visible and functional for candidates that are submitted* ***after*** *this has been enabled on your Beeline Enterprise production account. Reach out to your Program Office for details as to your enablement date.*

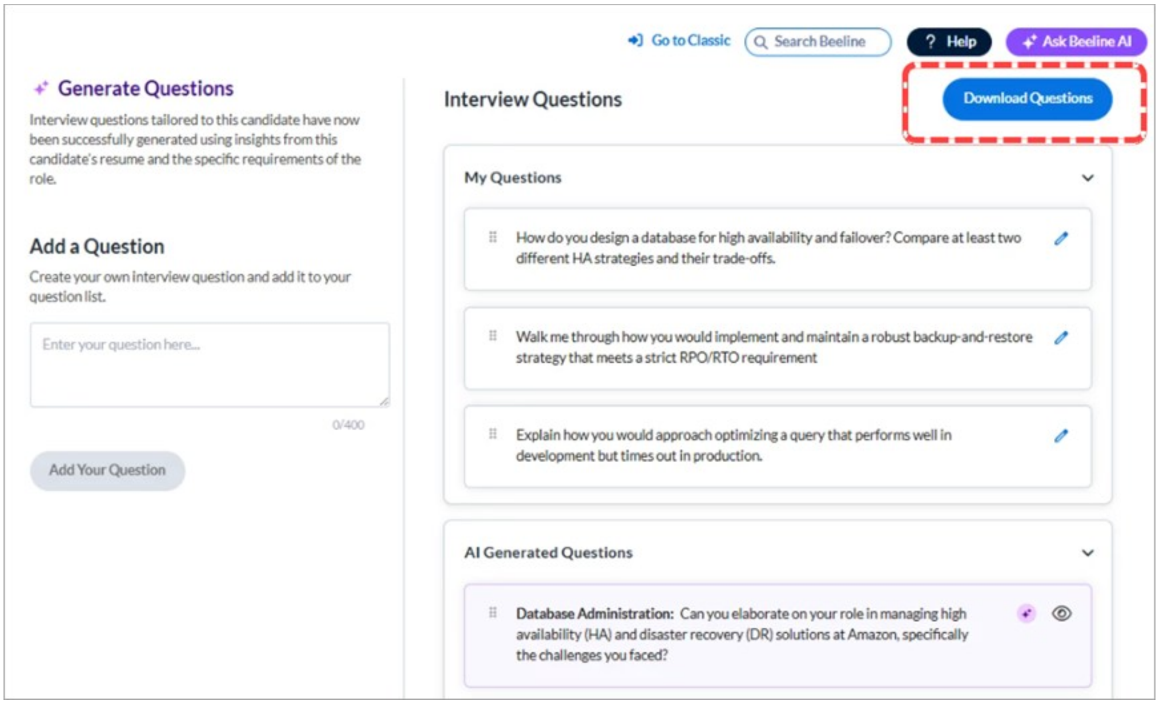
♦ Interview Questions / Interview Question Generator

Questions are a key element to any interview, but every interviewer knows that creating an effective questions list is no simple task. Our Interview Question Generator uses AI analysis to compare the submitted resume against the job description. Then it takes the results to generate 10 custom-tailored questions that the hiring manager can use during the interview process.



Our objective is to enhance and facilitate the overall process, so this functionality also includes a section where the hiring manager can create and incorporate their own questions (My Questions) into the interview process.

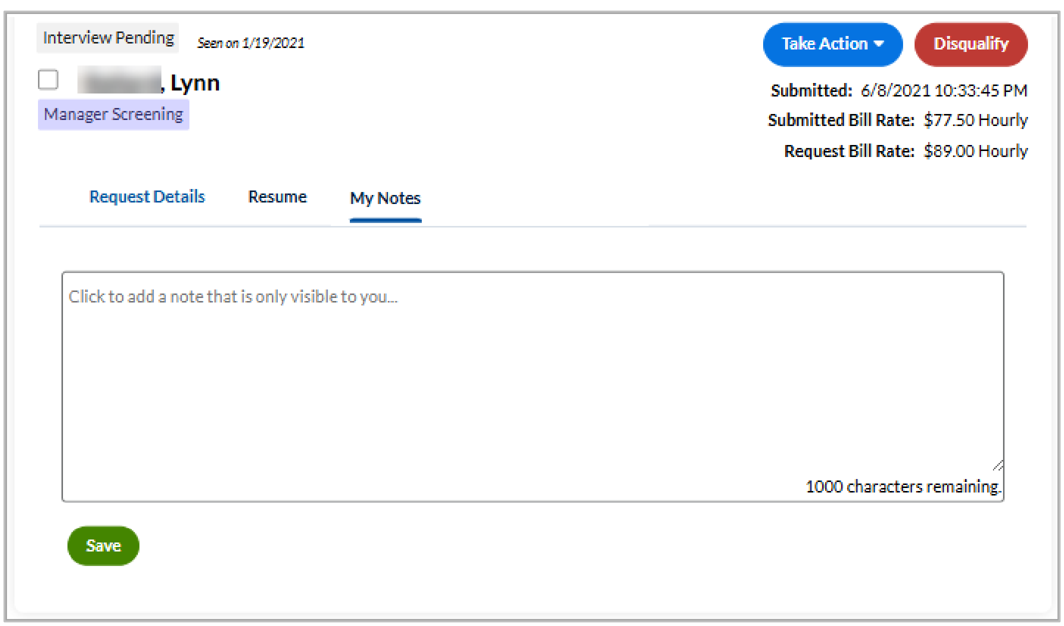
The AI-generated list can be further refined with the option to hide any question (as well as restore it back if you change your mind!) Each list can be adjusted to the order of your choice using the drag-and-drop option. The text of AI-generated questions is fixed but your My Questions entries include an <edit> option. (TIP: If you want to revise an AI-generated question, you can always rewrite it as a My Question with the adjusted wording of your choice.) And, once the final lists are complete, the combined list can be downloaded in a PDF format.



Please note: *Interview Question Generator requires a Premium subscription. This is a Self-Service feature that your Program Office will need to activate before it is available on your Beeline Enterprise site. Please reach out to your Program Office to confirm activation.*

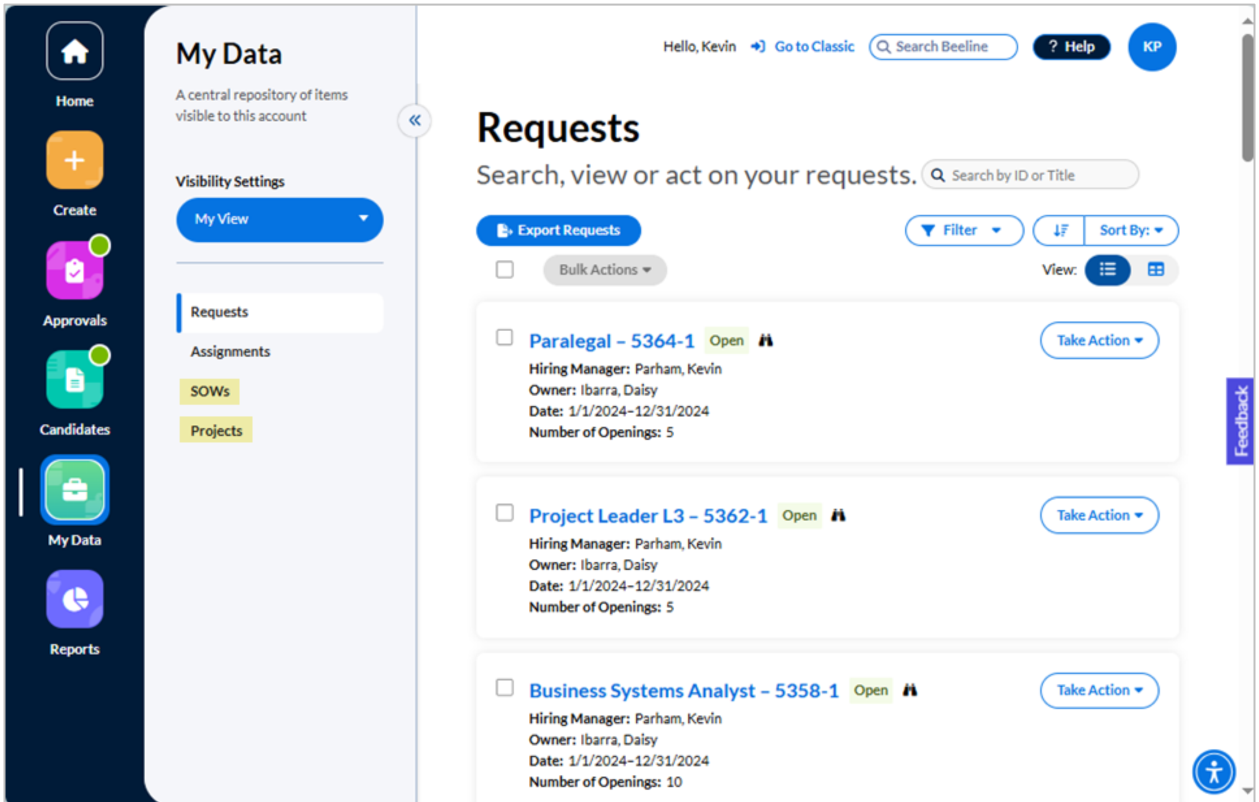
♦ My Notes

Use this feature to take notes for your private use throughout the evaluation process.



My Data

The My Data app highlights YOUR records and YOUR actions. Request, Assignment, SOW, and Project records are visible to both the Hiring Manager as well as the Hiring Manager's manager, making these records visible and actionable by both.



Selections highlighted in yellow are visible only to programs with an active Services Procurement solution.

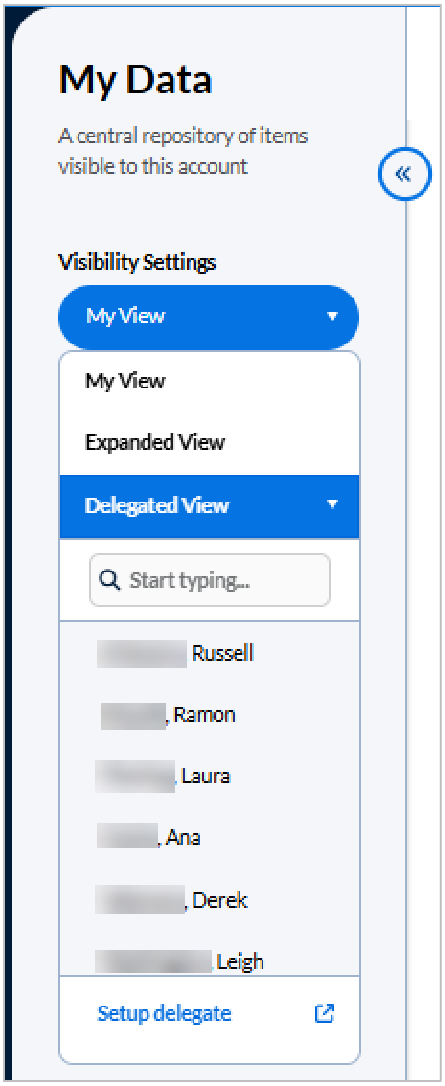
Visibility Settings

Beeline Enterprise is workflow-driven. You can easily check the current status of a workflow by viewing the associated visual Process Graph throughout the various workflow steps. However, it can be just as critical to know "who" is responsible for taking action in addition to "what" action needs to be taken. By hovering over the binoculars icon (binoculars icon) visible on the various card and table views throughout the My Data app you can easily determine "who" the responsible person is—and why.

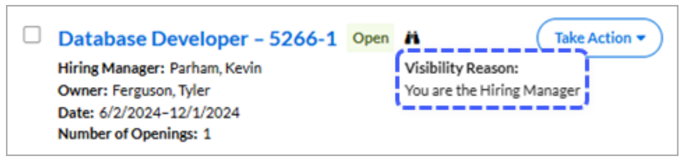
Depending on the scope of your Beeline Enterprise instance, you could be a Hiring Manager, a Hiring Manager's Manager, an SOW owner, or a Project Manager. And then there's all those workflow-related tasks such as requestor, approver, timesheet approver, sponsor, or contributor—or just being the one responsible for system data when it isn't even associated with an active task. Simplify all this oversight responsibility by using the filter options and the Setup delegate hyperlink located in the Visibility Settings section (left-side slide-out panel) of your My Data app to choose the data you want to view and focus on.

Click the **My View** tab to reveal the filter selection list.

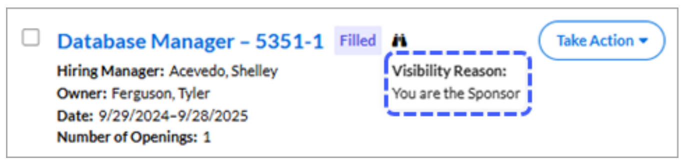
Visibility Settings filter options include:



♦ **My View** – Select this option to retrieve and display all the Requests, Assignments, SOWs, and Projects for which *you* are the *direct* Hiring Manager, SOW Owner, or Project Manager. **This is the system default view,** and the data displayed in this view belongs *only to you*. Hover over the binoculars icon of any record, and a pop-up indicates why you have visibility to it.



♦ **Expanded View** – Select this option to retrieve and display *your* **My View** records *along with* all the records and data associated to the managers you manage. Hover over the binoculars icon and check the pop-up text for your visibility details as to the data where you are a requestor, an approver, a timesheet approver, a sponsor, or a contributor.



♦ **Delegated View** – Select this option to retrieve and display all the Requests, Assignments, SOWs, and Projects *delegated to you* by another user. Hover over the binoculars icon to verify that you are the delegate.

Working with Multiple Delegator Lists

Click **Delegated View** in the Visibility Settings panel and the panel expands to list each Delegator by name—up to a total of six names. A search box displays above the list when you have more than six Delegators. Click any name in the list and your screen refreshes to display the records delegated to you by that Delegator for the category (Requests, Assignments, SOWs, Projects) you currently have open. Or use the search box to enter a name and change your records display to a different Delegator's records. The system retains the Delegator's name as the active filter even when you switch from one category to another *within* the My Data app. Navigate away from the My Data app and the system reverts to the default view (My View) or to the "favorite" view you previously selected.

How to set a Favorite / Preferred View

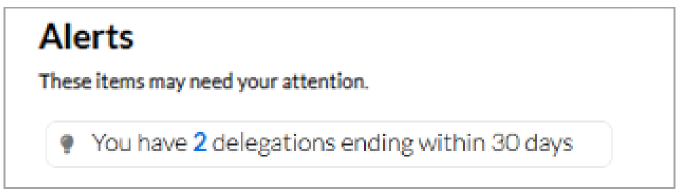
As noted, the My Data view is the system default. However, when you click Expanded View, the system sets that option as your new "favorite" or preferred view. This "favorite" setting is retained even if you navigate to different apps within the Hiring Manager Experience. It is also retained when you log out, and log back in. You can change your “favorite” back to My View simply by clicking its button tab.

Please note, whenever you clear the cookies or cache on your web browser, your Visibility Settings will return to the default settings. Delegated View is a Visibility Settings option but it cannot be set as a “favorite”.

Setup Delegate

You also have easy access to assign a delegate directly from the Visibility Settings. Simply click the **Setup delegate** hyperlink and the system navigates you to your Manage Preferences screen. Click **Delegates** under Manage Preferences, then click **+ Add New**. Follow the prompts to fill in the Delegate, Date, and Approvals sections. Additional settings can be added for Reports, Delegate Subordinate, Visibility, and Impersonation. Click **OK** to save your changes.

If you enter an End Date when you assign a delegate, Beeline Enterprise tracks that date and posts an Alert on your Home screen to let you know in advance when the delegation rights are about to expire. This reminder helps you keep your delegates “active” as needed.

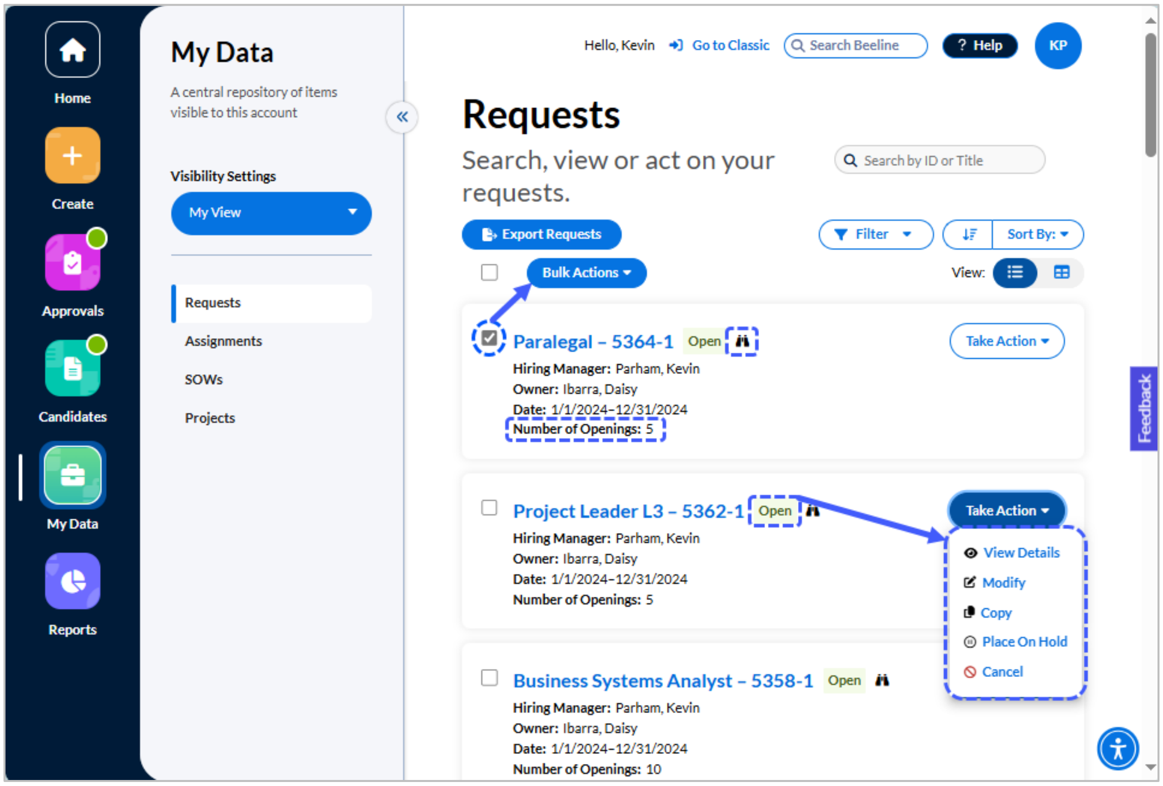


Be aware: These Visibility Settings are only functional within the My Data app. They are not included in Classic Beeline or any other app within the Hiring Manager Experience.

Requests

◈ Card View

The Card View displays each record as a separate section (card). Cards are arranged in a scrollable list based on the default value or selected option set under the Filter and/or Sort By selection lists.



Each card displays summary information for a single Request record. Click the hyperlinked Job Title and the screen refreshes to display the Request Dashboard with access to full details including the visual Process Graph. The current status of the Request displays after the hyperlinked text. Hover over the binoculars icon () to view the Visibility information.

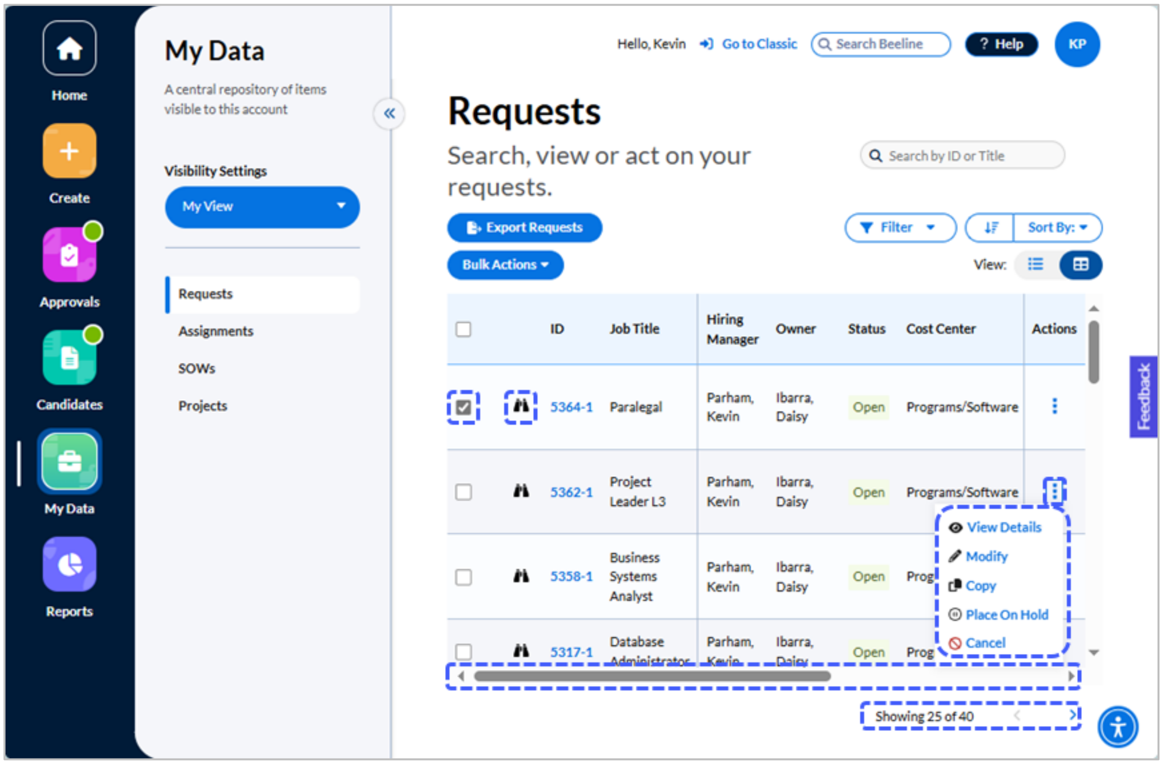
Other card features include:

- **Search by ID or Title –** This search field filters your results to display records with an Open status. Use the Search Beeline field at the top of the screen to make unfiltered searches that include closed records.
- **Filter –** Lets you select which records to display in your card list by status. Pick any combination (or limitation) by Pending, Open, On Hold, Cancelled, Filled, Rejected, Not Submitted, or Correction Required. Multiple statuses can be selected—remember to click Apply at the bottom of the list to activate your selection(s). The default setting is Open.
- **Sort By –** Gives you the option to arrange your card list by Request ID, Job Title, or Status. The default setting is Request ID.
- **View** – Click the respective icon to easily switch from Card to Table View.
- **Take Action** – Click the button to reveal which action options are valid for your current setting. The Action options change depending on the current status of the record.
- **Checkbox / Bulk Actions** – Click the checkbox for each record you want to group together for a bulk (batch) action. The Bulk Actions button only activates when at least one checkbox is 'checked'. Batching items into groups in order to take the same action for all the records in the group is an efficient way to save time and effort!

- **Export Requests** – Need to extract a list of your Requests? A single click of the Export Requests button and your requests list is exported as a download in xlsx format.

◈ Table View

The alternative display option is the Table View. This option lets you see more data by using less vertical space. Use this option to view content arranged in rows and columns like a spreadsheet, or to easily compare one record to another.



The Table View retains several of the features of the Card View. Click the hyperlinked Request ID number to navigate to the Request Dashboard with access to full details including the visual Process Graph. The current status of the Request displays as a column in the table. Hover over the binoculars icon (🔭) to view the Visibility information.

Other table features include:

- **Search by ID or title –** This option filters your results to display records with an Open status. Use the **Search Beeline** field at the top of the screen to make unfiltered searches that include closed records.
- **Filter –** Lets you select which records to include in your table by status. Pick any combination (or limitation) by Pending, Open, On Hold, Cancelled, Filled, Rejected, Not Submitted, or Correction Required. Multiple statuses can be selected—remember to click Apply to activate your selection(s). The default setting is Open.
- **Sort By –** Gives you the option to arrange your table rows by Request ID, Job Title, or Status. The default value is Request ID.
- **View** – Click the respective icon to easily switch from Card to Table View.

- **Checkbox / Bulk Actions** – Click the checkbox for each record you want to group together for a bulk (batch) action. The Bulk Actions button only activates when at least one checkbox is 'checked'. Batching items into groups in order to take the same action for all the records in the group is an efficient way to save time and effort!
- **Export Requests** – Need to extract a list of your Requests? A single click of the Export Requests button and your Requests list is exported as a download in xlsx format.

Additional Table View features include:

- **Actions** is now a locked column on the right side of the table. Click the kebab icon (⋮) to reveal which actions can be taken on any given row. The Actions options change depending on the current status of the record.
- **Tally Numbers** – The "Showing" text below the table layout indicates how many records are displayed out of how many total records are available.
- **Horizontal scroll bar** -- The scrollbar beneath the table layout gives you full access to all columns included in the table for those who have screen dimensions not able to accommodate the full width of the table. The ID, Job Title, and Actions are locked columns and will always be visible.

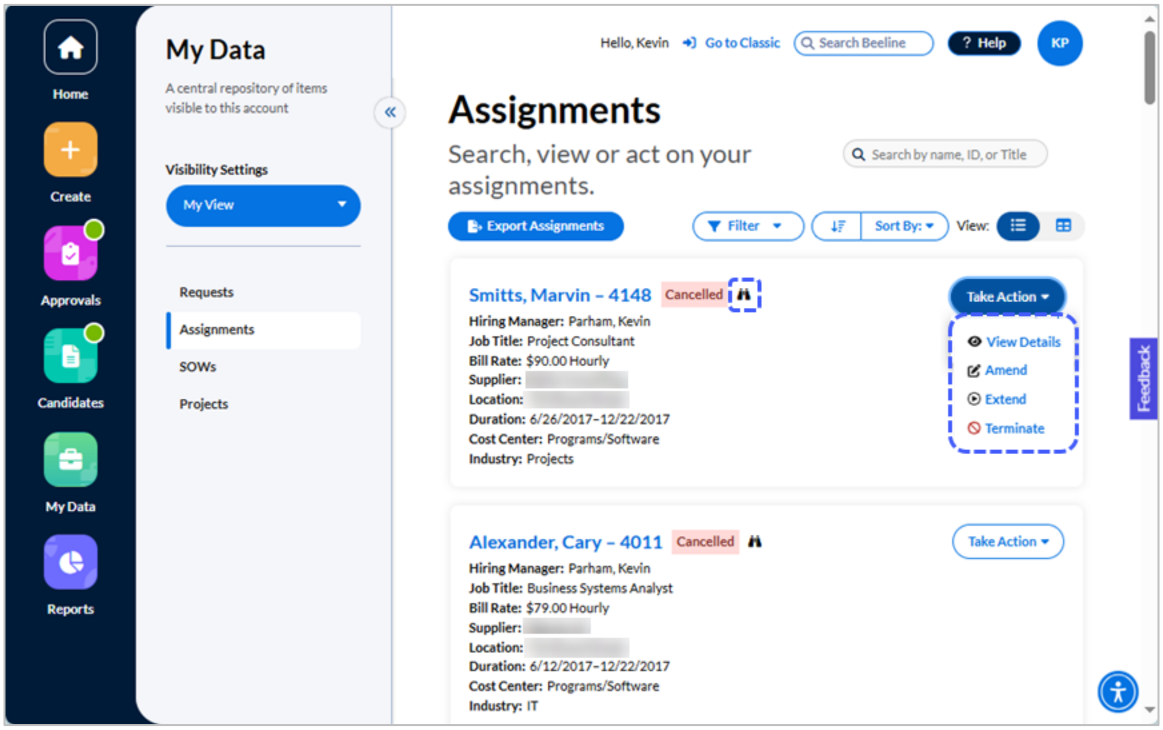
TIP: You can maximize your table layout space by hiding the **My Data** slide-out panel. Just click the slider button («) to hide it. Click it again at any time to restore visibility to the panel.

Assignments

It may seem curious, but the Assignment process in Beeline Enterprise starts once the Supplier has accepted the Offer. The assignment record is then created with a status of **Scheduled** and stays in this state of anticipation until the **Assignment Start Date** is reached. Once the worker is onboarded, the assignment becomes **Active** and stays in this status until the scheduled **Assignment End Date**—unless the assignment is amended. Reasons to amend an assignment might include an Assignment Extension or an Assignment Early Termination. In some instances, an Assignment Amendment may be to change the assigned Hiring Manager or Timesheet Approver. Timesheet reprocessing can also generate an assignment amendment. Throughout the duration of any amendment process, the assignment has a status of **Pending Approval** until the amendment is complete.

◈ Card View

The Card View displays each record as a separate section (card). Cards are arranged in a scrollable list based on the default value or selected option set under the Filter and/or Sort By selection lists.



Each card displays summary information for that assignment record. Click the worker's hyperlinked name and the screen refreshes to display the Assignment Dashboard with access to full details.

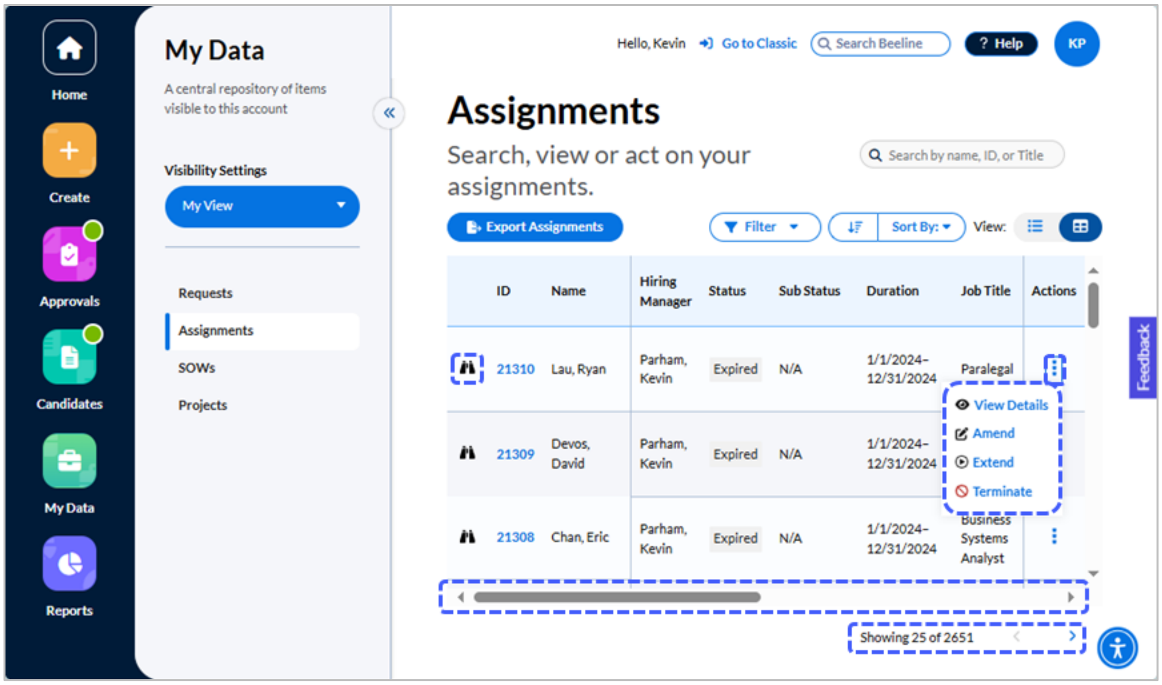
Each card displays summary information for a single Assignment record. Click the worker's hyperlinked name and the screen refreshes to display the Assignment Dashboard with access to full details including the visual Process Graph. The current status of the Assignment displays after the hyperlinked worker's name. Hover over the binoculars icon () to view the Visibility information

Other features include:

- **Search by name, ID, or title –** This search field filters your results to display active assignments only. Use the **Search Beeline** field at the top of the screen to make unfiltered searches that include closed records.
- **Filter –** Lets you select which assignment statuses to display in your card list. Pick any combination (or limitation) by Active, Scheduled, Expired, or Cancelled. Multiple statuses can be selected—remember to click Apply at the bottom of the list to activate your selection(s). The default setting is Active.
- **Sort By –** Gives you the option to arrange your card list by Assignment ID, End Date, Job Title, Name, Start Date, or Supplier. The default setting is Assignment ID.
- **View** – Click the respective icon to easily switch from Card to Table View.
- **Take Action** – Click the button to reveal which action options are valid for the respective assignment. The Action list will change depending on the current status of the assignment record.
- **Tally Numbers** – Scroll to the bottom of the screen to view the "Showing" text which indicates how many records are displayed out of how many total records are available.
- **Export Assignments** – Need to extract a list of your Assignments? A single click of the Export Assignments button and your assignments list is exported in xlsx format.

Table View

The alternative display option is the Table View. This option lets you see more data by using less vertical space. Use this option to view content arranged in rows and columns like a spreadsheet, or to easily compare one record to another.



The Table View retains several of the features of the Card View. Click the hyperlinked worker's name to navigate to the Assignment Dashboard with access to full details including the visual Process Graph. The current status of the Assignment displays as a column in the table. Hover over the binoculars icon () to view the Visibility information.

Other table features include:

- **Search by name, ID, or title –** This column filters your results to display active assignments only. Use the **Search Beeline** field at the top of the screen to make unfiltered searches that include closed records.
- **Filter –** Lets you select which records to include in your table by status. Pick any combination (or limitation) by Active, Scheduled, Expired, or Cancelled. Multiple statuses can be selected—remember to click Apply to activate your selection(s). The default setting is Active.
- **Sort By –** Gives you the option to arrange your card list by Assignment ID, End Date, Job Title, Name, Start Date, or Supplier. The default value is Assignment ID.
- **View** – Click the respective icon to easily switch from Card to Table View.
- **Export Assignments** – Need to extract the table in xlsx format? Just click the Export Assignments button.

Additional Table View features include:

- **Actions** is now a static column locked on the right side of the table layout. Click the kebab icon (⋮) to reveal which actions can be taken on any given row. The Actions options change depending on the current status of the record.
- **Tally Numbers** – The "Showing" text below the table layout indicates how many records are displayed out of how many total records are available.
- **Horizontal scroll bar** -- The scrollbar beneath the table layout gives you full access to all columns included in the table for those who have screen displays not able to accommodate the full width of the table. The ID, Name, and Actions are locked columns and will always be visible.

TIP: You can maximize your table layout space by hiding the **My Data** slide-out panel. Just click the slider button («) to hide it. Click it again at any time to restore visibility to the panel.

Assignment Status

Some data remains constant throughout the lifecycle of the assignment while other data may change depending on the current status of the assignment. Checking the Status first is a way to remember which data may be "temporary".

TIP: **ALWAYS CHECK THE AMENDMENT HISTORY SECTION** of the assignment record to verify whether there are any other "open" amendments! You can have multiple active amendments but the time durations should not overlap or one could negatively impact the other. You cannot take action on an assignment when it is in a "Pending Approval" status. Always check the status BEFORE processing an assignment amendment!

• Assignments Pending Approval

An assignment can be amended for any number of reasons. Some amendments are simple information updates while others are event/budget related such as extensions or terminations. Regardless of the reason for the amendment, once it is submitted any amendment that requires approval (financial or administrative) is placed in the Pending Approval queue.

• Scheduled Assignments

An assignment record has a status of Scheduled from the date the Supplier accepts the Offer until the Assignment Start Date when the worker is onboarded. This may be just a transitional waiting period although it is typically used to complete pre-onboarding activities (for example, background checks, badging, etc.)

• Active Assignments

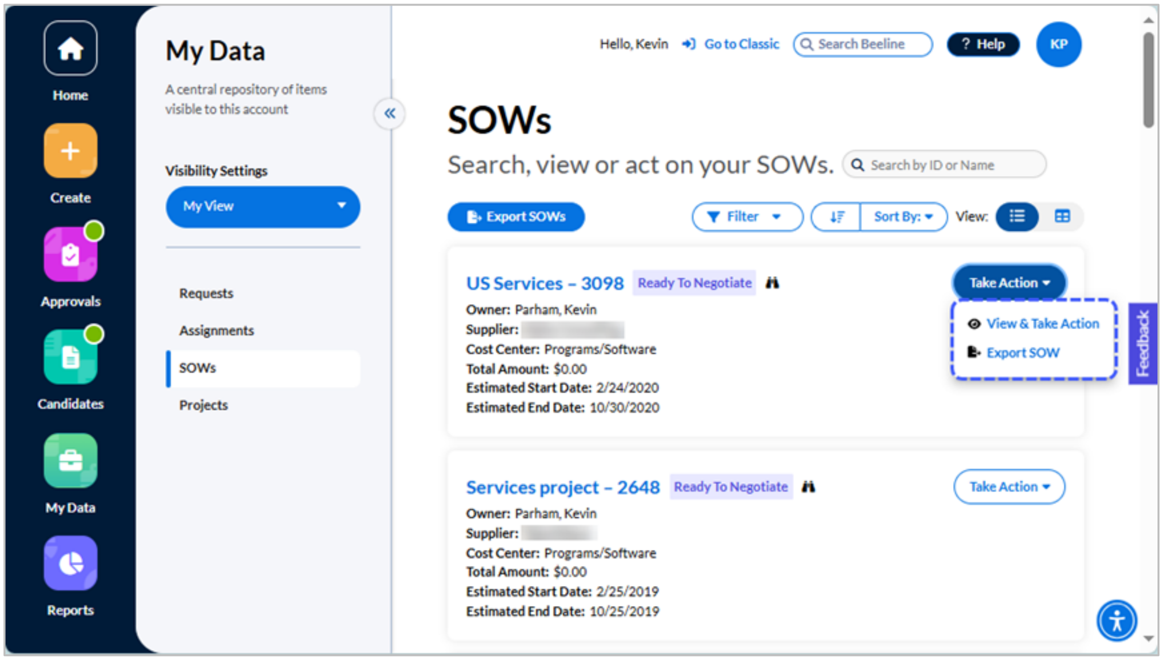
An assignment is "active" from the Start Date until its End Date. Either of those dates can be adjusted using the assignment amendment process, but the time period between those two dates will always determine the "active" status.

SOWs

The SOW (Statement of Work) is a phase of the Services Procurement solution used to scope out the terms and conditions of the proposed work Project. Once the terms and conditions are agreed upon between the client and the vendor, the SOW is promoted to an active Project. The Project is used to manage the terms and conditions detailed in the SOW.

◈ Card View

The Card View displays each record as a separate section (card). Cards are arranged in a scrollable list based on the default value or selected option set under the Filter and/or Sort By selection lists.

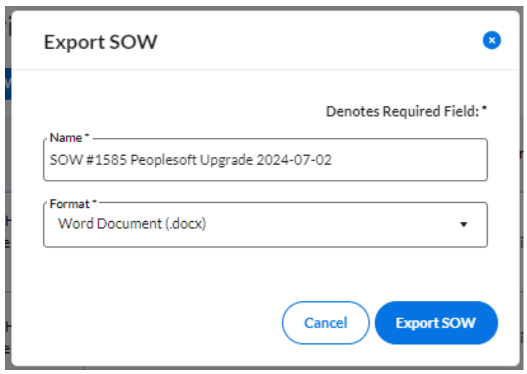


Each card displays summary information for a single SOW record. Click the hyperlinked SOW name - ID and the screen refreshes to display the SOW Dashboard with access to full details including the visual Process Graph. The current status of the SOW displays after the hyperlinked text. Hover over the binoculars icon (🔭) to view the Visibility information.

Other features include:

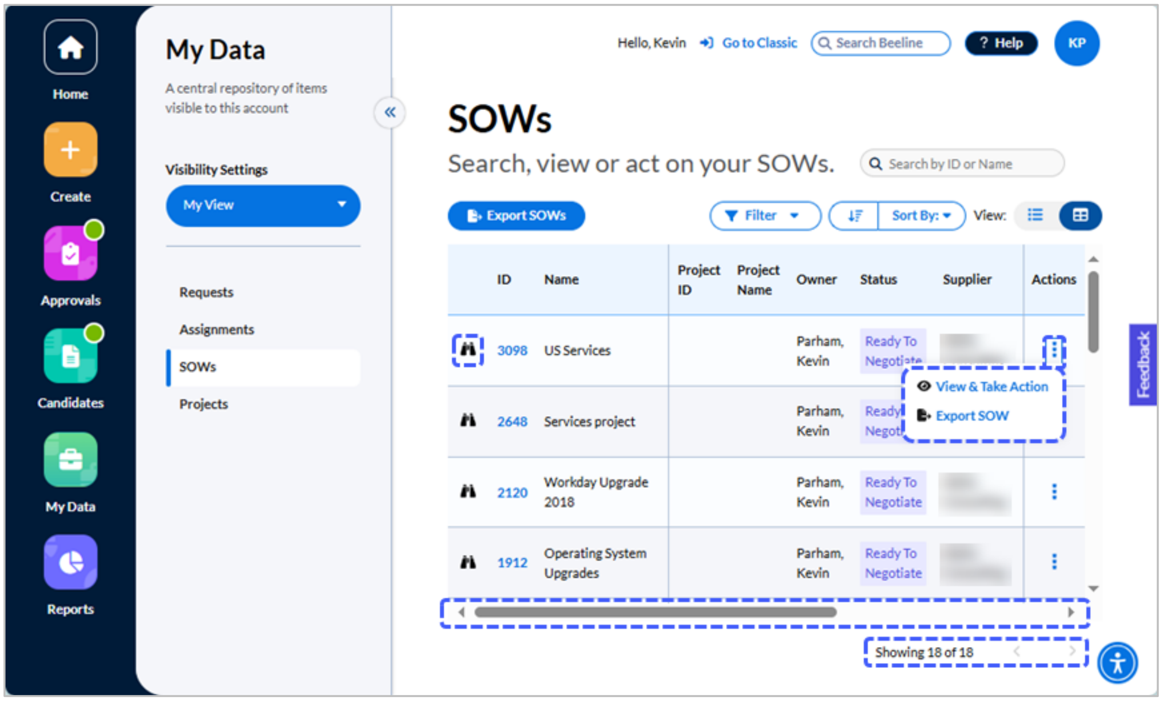
- **Search by ID or Name –** Use this search field when you want to retrieve a specific SOW by its ID number or Name. The default setting for this search field limits your results to SOWs that have been active within the prior 365 days. Use the Search Beeline field at the top of the screen to make unfiltered searches that include older records.
- **Filter –** Lets you select which records to display in your card list by status. Pick any combination (or limitation). Multiple statuses can be selected—remember to click Apply at the bottom of the list to activate your selection(s). The **Project End Date** filter at the top of the list is active by default to focus on active SOWs—if you need to include historical records in your search results, just uncheck this box. Be aware that your record retrieval time could be impacted if your program has a large inventory of SOWs!
- **Sort By –** Gives you the option to arrange your card list by SOW ID, Status, or Supplier. The arrow on the left will switch the display order from descending to ascending, click again to switch it back.
- **View** – Click the respective icon to easily switch from Card to Table View.

- **Take Action** – Click the button to reveal which action options are valid for the respective SOW. The standard options are View & Take Action and Export SOW.
- **Tally Numbers** – Scroll to the bottom of the screen to view the “Showing” text which indicates how many records are displayed out of how many total records are available. The standard display is 25 cards per screen. Click the “Load next ##” button to ADD more cards to your screen display. Repeat as needed if you want to create a list of ALL records that match your filter selections. Be aware that your system response time could be impacted if you create long lists!
- **Export SOWs** – Need to extract a list of your SOWs? A single click of the Export SOWs button and your SOW list is exported as a download in xlsx format.
- **Download SOW** – Need a copy of a specific SOW document? Click the “Export Sow” option on the Take Action menu to retrieve a copy of the SOW document in either docx, doc, or pdf format.



◈ Table View

The alternative display option is the Table View. This option lets you see more data by using less vertical space. Use this option to view content arranged in rows and columns like a spreadsheet, or to easily compare one record to another.



The Table View retains several of the features of the Card View. Click the hyperlinked ID number to navigate to the SOW Dashboard with access to full details including the visual Process Graph. The current status of the SOW displays as a column in the table. Hover over the binoculars icon (⛯) to view the Visibility information.

Other table features include:

- **Search by ID or Name –** Use this search field when you want to retrieve a specific SOW by its ID number or Name. This search field limits your results to SOWs that have been active within the prior 365 days. Use the Search Beeline field at the top of the screen to make unfiltered searches that include older records.
- **Filter –** Lets you select which records to display in your table by status. Pick any combination (or limitation). Multiple statuses can be selected—remember to click Apply at the bottom of the list to activate your selection(s). The Project End Date filter at the top of the list is active by default to focus on active SOWs—if you need to include historical records in your search results, just uncheck this box. Be aware that your record retrieval time could be impacted if your program has a large inventory of SOWs!
- **Sort By –** Gives you the option to arrange your table view by SOW ID, Status, or Supplier. The arrow on the left will switch the display order from descending to ascending, click again to switch it back.
- **View** – Click the respective icon to easily switch from Table to Card View.
- **Export SOWs** – Need to extract a list of your SOWs? A single click of the Export SOWs button and your SOW list is exported as a download in xlsx format.

Additional Table View features include:

- **Actions** is now a locked column locked on the right side of the table layout. Click the kebab icon (⁝) to reveal which actions can be taken on any given row. Use the Export SOW option in this selection list to export an **individual** SOW (doc, docx, or PDF format) or use the Export SOWs button located above the table to download the **list** of SOWs in xlsx format.

- **Tally Numbers** – The "Showing" text at the bottom of the screen indicates how many records are displayed out of how many total records are available. The standard display is 25 records (rows) per screen. Click the arrow symbol to change your table display to the next 25 records. Repeat as needed to cycle through ALL the records. Unlike the card view, the table view does not expand to display more than a 25 record max limit.
- **Horizontal scroll bar** -- The scrollbar beneath the table layout gives you full access to all columns for those who have screen dimensions not able to accommodate the full width of the table. The ID, Name, and Actions are locked columns and will always be visible.

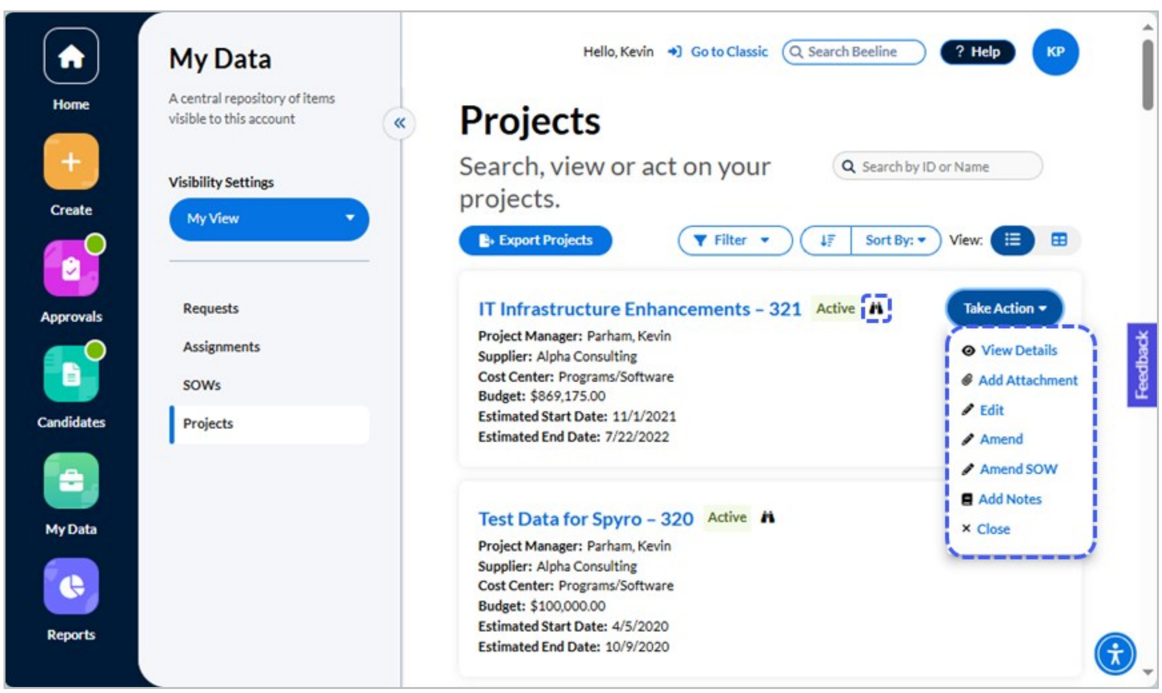
TIP: You can maximize your table layout space by hiding the **My Data** slide-out panel. Just click the slider button («) to hide it. Click it again at any time to restore visibility to the panel.

Projects

Once the terms and conditions are agreed upon between the client and the vendor, the SOW is promoted to an active Project. The Project is used to manage the terms and conditions agreed upon in the SOW.

◈ Card View

The Card View displays each record as a separate section (card). Cards are arranged in a scrollable list based on the default value or selected option set under the Filter and/or Sort By selection lists.



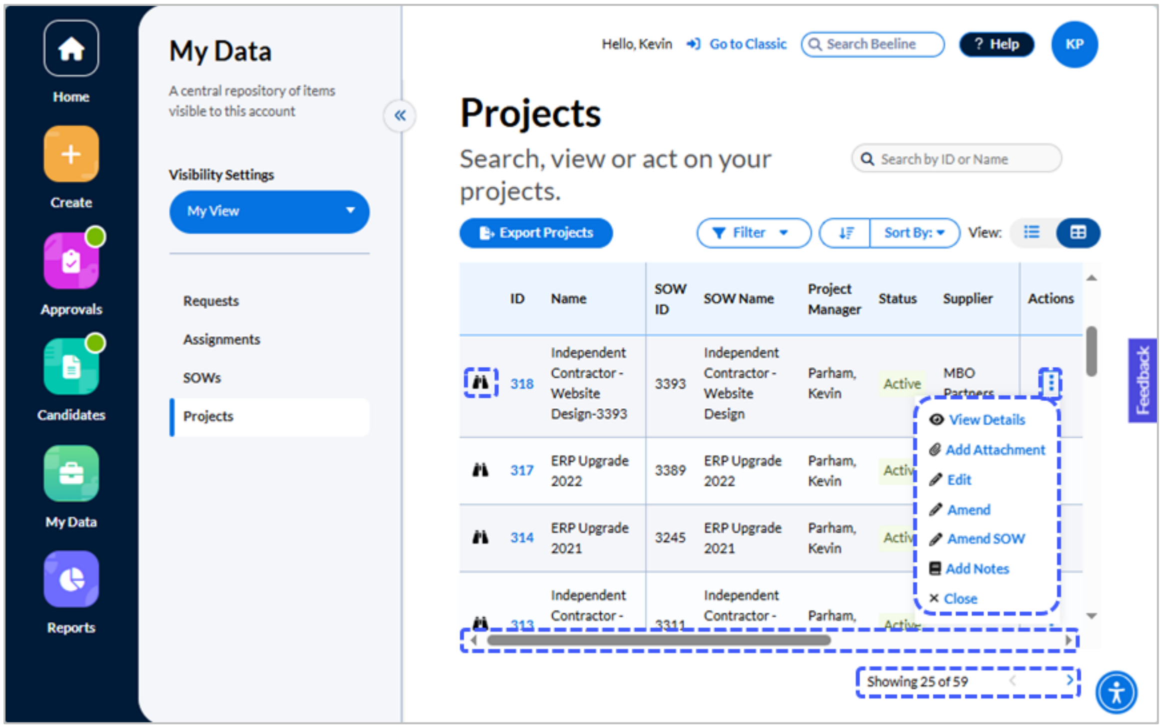
Each card displays summary information for a single Project record. Click the hyperlinked Project name - ID and the screen refreshes to display the Project Dashboard with access to full details. The current status of the Project displays after the hyperlinked text. Hover over the binoculars icon ( ) to view the Visibility information.

Other features include:

- **Search by ID or Name –** Use this search field when you want to retrieve a specific Project by its ID number or Name. The default setting for this search field limits your results to Projects that have been active within the prior 365 days. Use the Search Beeline field at the top of the screen to make unfiltered searches that include older records.
- **Filter –** Lets you select which Project statuses to display in your card list. Pick any combination (or limitation). Multiple statuses can be selected—remember to click Apply at the bottom of the list to activate your selection(s). The Project End Date filter at the top of the list is active by default to focus on active Projects—if you need to include historical records in your search results, just uncheck this box. Be aware that your record retrieval time could be impacted if your program has a large inventory of Projects!
- **Sort By –** Gives you the option to arrange your card list by Project ID, Project Name, Status, or Supplier. The arrow on the left will switch the display order from descending to ascending, click again to switch it back.
- **View** – Click the respective icon to easily switch from Card to Table View.
- **Take Action** – Click the button to reveal which action options are valid for that Project. The standard options are View Details, Add Attachment, Edit, Amend, Amend SOW, Add Notes, and Close.
- **Tally Numbers** – The “Showing” text visible when you scroll to the bottom of your screen indicates how many “cards” are displayed out of how many total records are available. The standard display is 25 cards per screen. Click the “Load next ##” button to ADD more cards to your screen display. Repeat as needed if you want to create a list of ALL records that match your filter selections. Be aware that your system response time could be impacted if you create long lists!
- **Export Projects** – Need to extract a list of your Projects? A single click of the **Export Projects** button and your Project list is exported as a download in xlsx format.

◈ Table View

The alternative display option is the Table View. This option lets you see more data by using less vertical space. Use this option to view content arranged in rows and columns like a spreadsheet, or to easily compare one record to another.



The Table View retains several of the features of the Card View. Click the hyperlinked ID number to navigate to the Project Dashboard with access to full details. The current status of the Project displays as a column in the table. Hover over the binoculars icon (🔭) to view the Visibility information:

- **Search by ID or Name –** Use this search field when you want to retrieve a specific Project by its ID number or Name. The default setting for this search field limits your results to Projects that have been active within the prior 365 days. Use the Search Beeline field at the top of the screen to make unfiltered searches that include older records.
- **Filter –** Lets you select which Project statuses to display in your card list. Pick any combination (or limitation). Multiple statuses can be selected—remember to click Apply at the bottom of the list to activate your selection(s). The Project End Date filter at the top of the list is active by default to focus on active Projects—if you need to include historical records in your search results, just uncheck this box. Be aware that your record retrieval time could be impacted if your program has a large inventory of Projects!
- **Sort By –** Gives you the option to arrange your card list by Project ID, Project Name, Status, or Supplier. The arrow on the left will switch the display order from descending to ascending, click again to switch it back.
- **View** – Click the respective icon to easily switch from Table to Card View.
- **Export Projects** – Need to extract a list of your Projects? A single click of the Export Projects button and your Project list is exported as a download in xlsx format.

Additional Table View features include:

- **Actions** is now a locked column on the right side of the table layout. Click the kebab icon (⋮) to reveal which actions can be taken on any given row. The Actions options change depending on the current status of the Project.

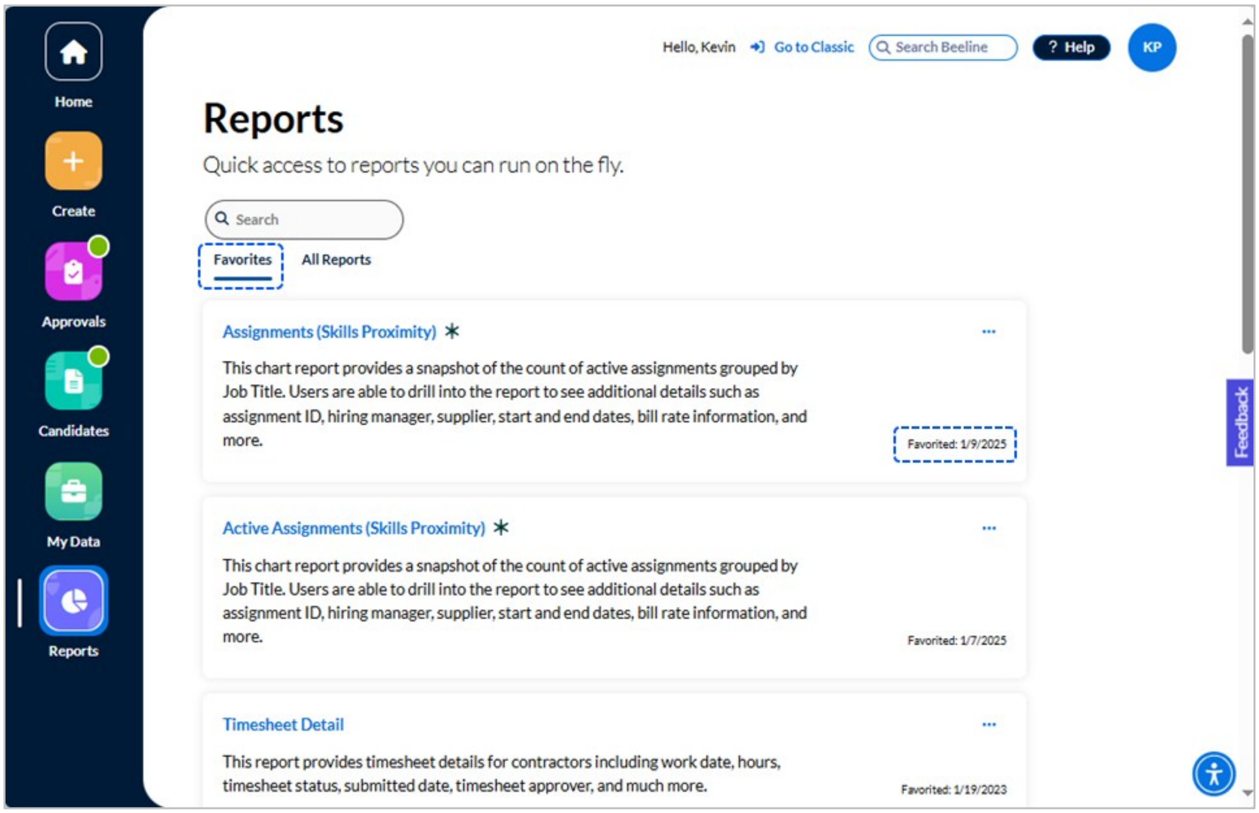
- **Tally Numbers** – Scroll to the bottom of the screen to see how many records are displayed out of how many total records are available. The standard display is 25 records (rows) per screen. Click the arrow next to the "Showing…" text to change your table display to the next (or previous) 25 records. Repeat as needed to cycle through ALL the records. Unlike the card view, the table view does not expand to display more than a 25 records max limit.
- **Horizontal scroll bar** -- The scrollbar beneath the table layout gives you full access to all columns if your screen dimensions are not able to accommodate the full width of the table. The ID, Name, and Actions are locked columns and will always be visible.

TIP: You can maximize your table layout space by hiding the **My Data** slide-out panel. Just click the slider button («) to hide it. Click it again at any time to restore visibility to the panel.

Reports

There are two tabs in the **Reports** app. One is a collection of reports you create yourself (**Favorites**) and the other is a list of system reports (**All Reports**). The Favorites list is unique to YOU. Any report listed under the "All Reports" tab can be saved to your Favorites list. From your Favorites list, you have the option to <Edit> the report if you want to modify it from the original (system created) version. The modified report can be saved as a new Favorite, shared with other platform users, or even set up as a scheduled report.

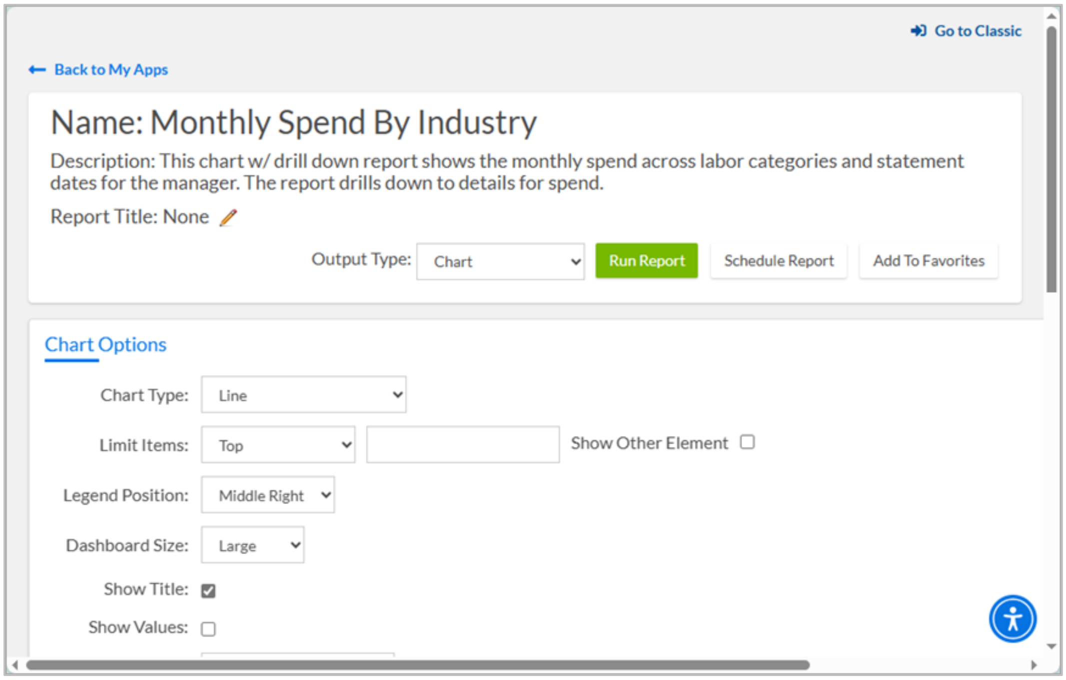
Favorites



Click the ellipsis (…) to reveal the options list. You can **Remove Favorite** or **Edit Report**. Removing a Favorite does not remove the original version from the "All Reports" list, only the copy you made. Notice that the Favorites list also displays the date the Favorite version of the system report was created. The asterisk icon (*) identifies those reports that are recommended by the Program Office

Edit Report

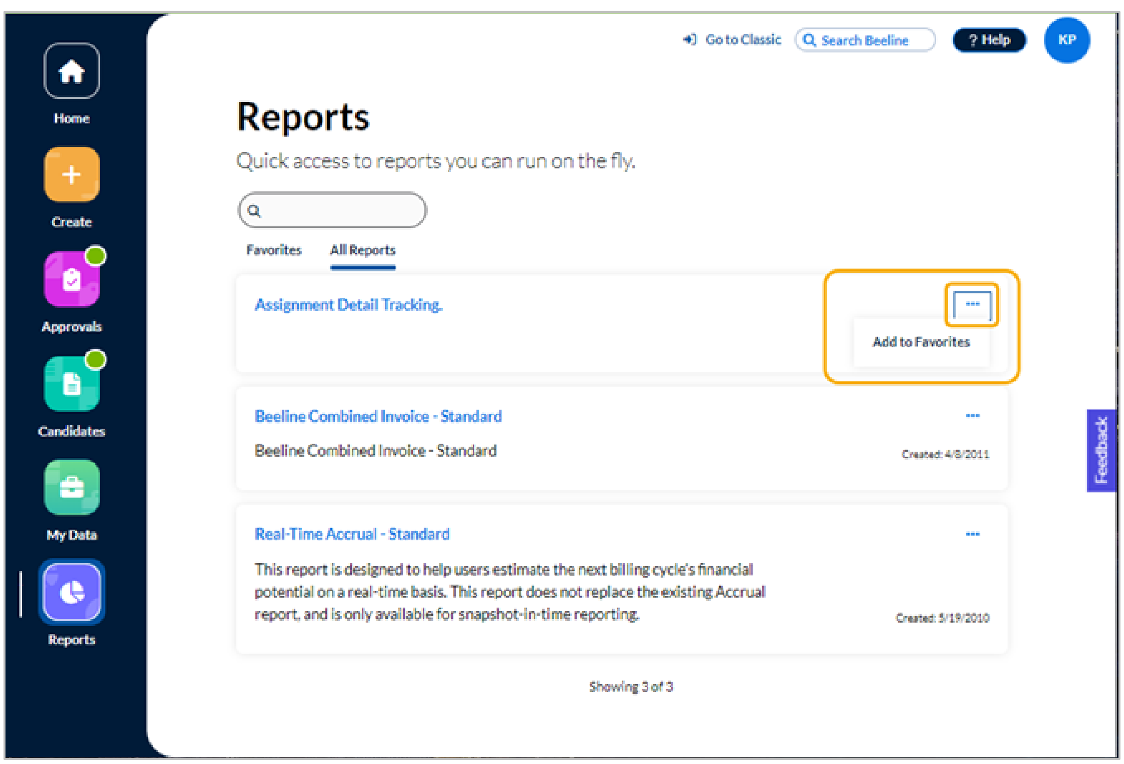
Click **Edit Report** and the system takes you directly to the Beeline Enterprise Report Builder. If you have never used Report Builder, take the time to click through the **Showcase Tour** to become familiar with the range of features and variety of tools. A collection of video tutorials for various reporting features is also available in the online **Beeline Help**. Click **← Back to My Apps** to return back to the Reports app when you're done.



All Reports

Click the ellipsis (…) to reveal the option to **Add to Favorites**. Click **Add to Favorites** and a copy of the report will then post in your Favorites list.

Click the report title to view any report. From the displayed report click **← Back to My Apps** to return back to the **Reports** screen.

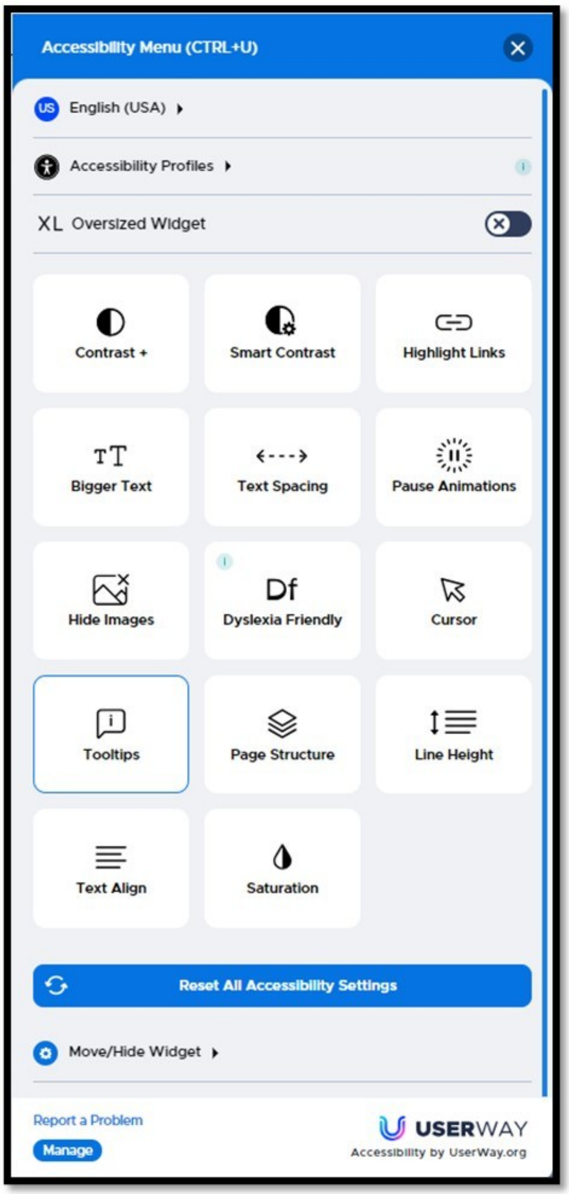


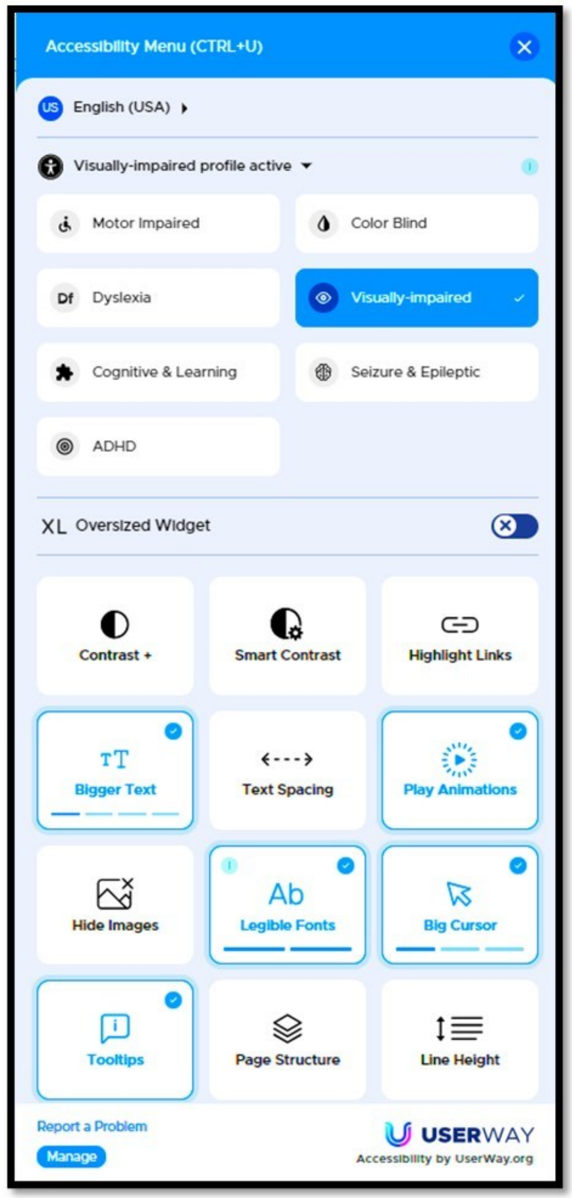
◈ Appendix

UserWay® Accessibility Widget

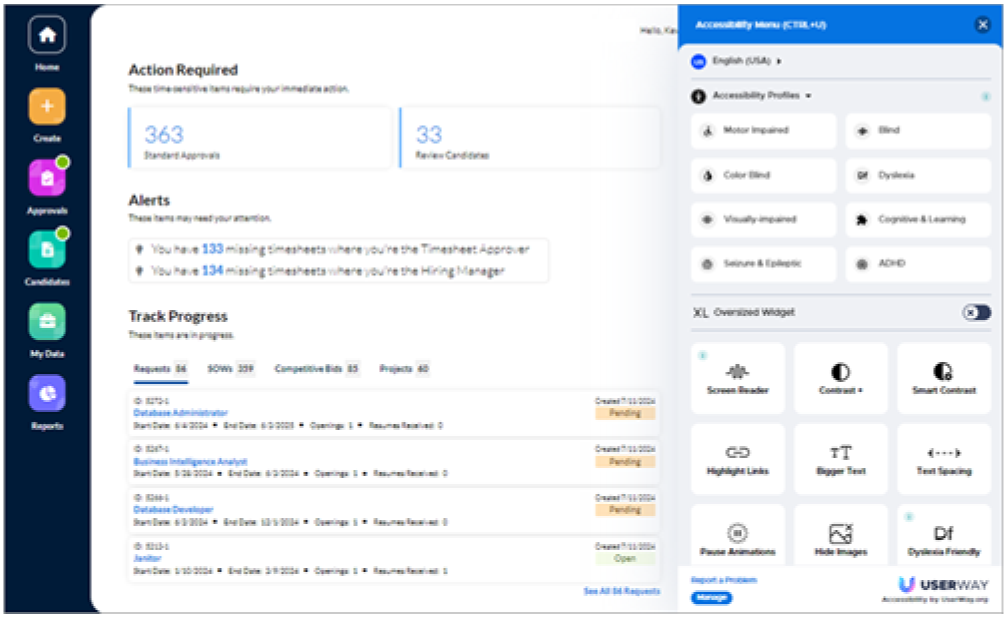
Users can personalize their Hiring Manager Experience using the features of the **UserWay Accessibility Widget**. This widget gives users the ability to adjust accessibility features and functionality to accommodate a variety of common disability profiles and to tailor settings to their personal preferences. The widget conforms with the latest Web Content Accessibility Guidelines (WCAG Level A and AA) and other global standards.

The widget's **Home** screen is displayed below on the left. It includes the option to select the language of choice in addition to other accessibility settings. The image on the right displays how the widget highlights options associated with a specific Accessibility Profile, in this instance those for Visually impaired.





To adjust the widget's settings to meet your specific preferences follow the instructions below:



1. **Access the Widget Settings:**
   - Click the widget icon located in the lower right-hand corner of your HMX screen to open the slide-out panel.
   - Click the X button located in the upper right corner of the slide-out panel to close the widget once you have made and saved your selections.
2. **Explore Available Options:**
   - Review the widget menu to become familiar with the various accessibility features and options.
   - Explore the available functions, such as text resizing, contrast adjustments, keyboard navigation, and more.
3. **Customize Features:**
   - Enable or disable specific features based on your preferences.
   - Adjust settings like font size, color contrast, and navigation shortcuts.
   - Reorder or hide certain features.
4. **Save Changes:**
   - Be sure to save your changes once you've customized the widget. The widget will now reflect your preferred settings across the application.
   - Please note: your selections are saved to your internet browser and not to the Beeline Enterprise application. If you use different browsers to access Beeline Enterprise, you may need to repeat your widget settings.