Supplier: How to Submit a Candidate

This document provides supplier users with the steps necessary to submit a candidate for an open request. This guide is based on standard classic Beeline VMS configuration. Client-specific configurations may vary slightly from what is explained here.

To submit a candidate:

1. Log in to Beeline using your *user name* and *password*. Your Home dashboard appears.
2. Locate the request record to which you want to submit a candidate.
   - **If you know the request to which you want to submit a candidate:**
     Enter key information that identifies the request (e.g., Request Number, Job Position Title), in the Simple Search text box located above the Header Menu bar (make sure to set the category to Search Requests), then click the matching record link when it displays in your results list. The screen refreshes to display the full request record with the Summary tab active. Click **Candidates** to make it the active tab.
   - **If you want to review all open requests before you make a selection:**
     Click the *number* link within the alert sentence, "*You have # New Request tasks awaiting action*." in the **My To Do** quadrant on your home dashboard, the Review Alerts window appears with a list of all open requests. Click the Action dropdown arrow for the request you want to review, then, click **View Details**. The screen refreshes to display the full request record with the Candidates tab active.
3. Click **Search Resource Pool**. The Select Profiles to Submit screen displays. Scroll through the list or use Search Options to locate the resource you want to submit as a candidate.

If the candidate of your choice already has a profile record in the Resource Pool:

• Complete Steps 1-3 as detailed above.

4. Click the checkbox next to the resource name.

   You can click multiple checkboxes to submit multiple candidates at the same time. Be aware that candidate submission limits may have been set by the client. These restrictions can vary by labor category and/or request type.

   Take care when reviewing Resource Pool records. Is it possible that an individual's name has changed due to marriage or divorce? Try to avoid creating duplicate Resource records for the same individual. This can negatively affect both tenure and candidate history tracking. When in doubt, click on the resource name to view their complete profile record and use the edit option to make adjustments/updates if needed.

5. Click **Submit Profiles**. The Submit Profiles screen displays.
6. Complete the fields as indicated, required fields are indicated by an asterisk (*). Follow the prompts to complete the Rates section since data entry formats can vary by request type.
7. Click **Submit**. A status message displays to indicate your submission is successful and the Candidates section shows a line item for each candidate.

*If your submission was not successful, an error message displays to indicate any adjustments you need to make. Make the adjustments and click **Submit** again. Keep repeating this process until your submission passes the validation process.*

8. Click **Return** to go back to the Review Alerts window or click the client's logo above the Header Menu bar to return to your home dashboard.

If there is no profile record for the candidate of your choice:

• Complete Steps 1-3 as detailed above.

4. Click + Add New from the Select Profiles to Submit screen or + Add Resource from the View Job-Title – Candidates screen. The Add Candidate – Details screen displays with the Details tab as active.

*The importance of consistent data entry when creating Resource Pool records cannot be overstated. Develop standard protocols and enforce them! Avoid duplicate entries since they can negatively affect downstream system functionality such as resource matching, tenure tracking, candidate history, and budget-related reporting. For example: JOE SMITH, Joe Smith, and joe smith may be the same individual, but the system will accept these names as entered and could create a separate record for each version. If you copy/paste name entries from a third-party source, take care that the original does not include letters with diacritics. The system will accept the "copy" as entered and although the subsequent resource record can be selected/submitted, any name **search** will never generate a match since a standard English keyboard does not include diacritic letters and search results must be an **EXACT** match.*

5. Complete the Candidate information fields as indicated, required fields are indicated by an asterisk (*). Take care to follow the format prompts provided for any ID fields. These format requirements can vary from client to client.
6. Use the Add Item link in the Attachments section to include supporting documentation such as a resume.
7. Click **OK**. A status message displays to indicate, "Your changes were saved."

*If your submission was not successful, an error message displays to indicate the adjustments you need to make. Make the adjustments and click **OK** again. Keep repeating this process until your candidate profile passes the validation process.*

Once you have successfully created a candidate profile, you still need to submit the candidate to the request. Follow the steps below to submit your candidate.

9. Click **Submit Profile**. The Submit Profiles screen displays.
10. Complete the fields as indicated, required fields are indicated by an asterisk (*). Follow the prompts to complete the Rates section since data entry formats can vary by request type.

11. Click **Submit**. A status message displays to indicate your submission is successful and the candidate is added to the display list in the Candidates section of the request record.

*If your submission was not successful, an error message displays to indicate any adjustments you need to make. Make the adjustments and click **Submit** again. Keep repeating this process until your submission passes the validation process.*

12. Click **Return** to go back to the Review Alerts window or click the client's logo above the Header Menu bar to return to your home dashboard.