Product & Technology Training

Intelligent workforce solutions
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VMS Hiring Manager Guide

Contents

Welcome

Welcome to VMS Training.

Purpose

The purpose of this course is to provide participants a broad overview of how to use the Beeline Vendor Management System (VMS). The course will also demonstrate how to complete the most basic functions within the application.

Objectives

At the end of this module you will be able to execute the most common tasks using the Beeline application.

Using the Participant Guide

This Participant Guide will provide you with a step-by-step description of how to complete certain functionality within the Beeline application. You will be asked to complete several activities as part of the training. Please use the Participant Guide to help you complete these activities.

Note: Some of the displays and options may differ from what is illustrated in this guide, as Beeline displays and options vary according to user roles and configurations.

Standard Dashboards

Homepage Overview - Hiring Manager Home Dashboard

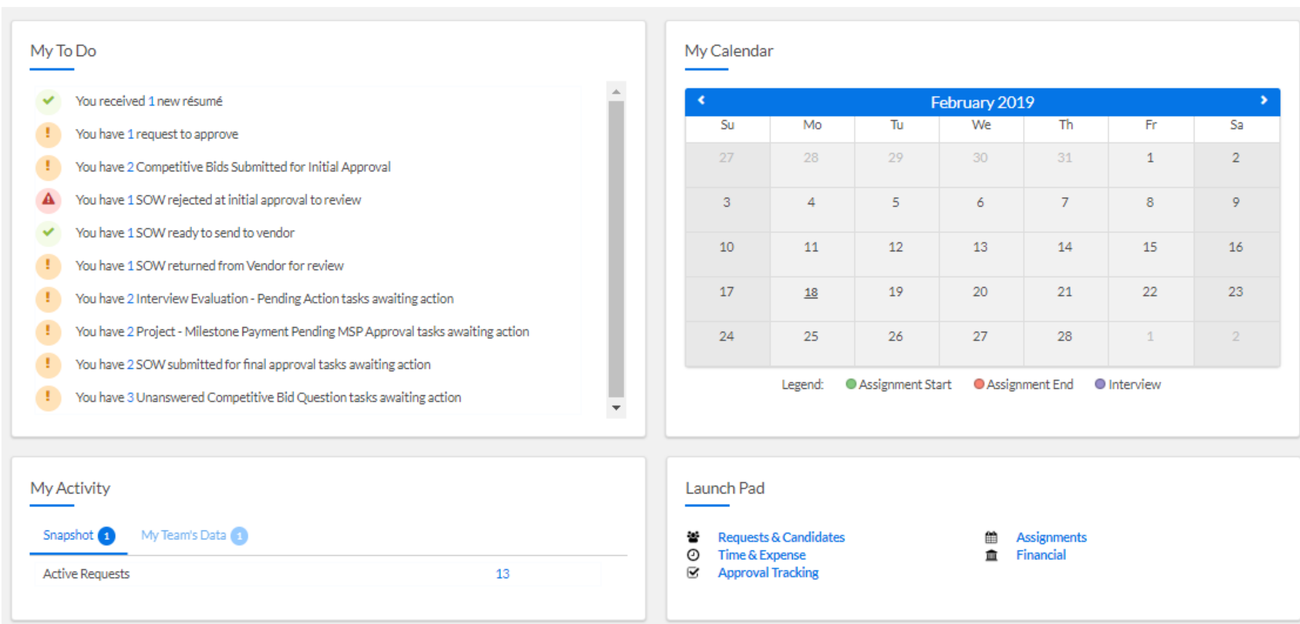
The Hiring Manager Home Dashboard is comprised of four quadrants:

My To Do
This quadrant provides meaningful alerts to items requiring your action and informative notifications. These items contain an active link allowing a user to access detailed information and to take action.

My Calendar
This quadrant contains a month view that highlights assignment start dates, assignment end dates, and scheduled interviews.

My Activity
This quadrant is a collection of the most popular Hiring Manager queries. Users can click the link for each query listed to review results that are specific to the user

Launch Pad
This quadrant includes quick links to additional dashboards specific to the items listed. These dashboards are comprised of list reports and charts.



Indicators
These indicators highlight important information.

Alert - item is at risk, you need to take action

Caution - item could become at risk, you may want to investigate

Good - item meets or exceeds a target

Neutral - item is informational, may or may not require your attention or action, but is not deemed urgent

Did you know? - important information that may help you in making a decision is available.

Section 1: Getting Started

Accessing the System

Step	Action
1.	Access the **Beeline Application** by using the training link that was provided to you
2.	Enter your **User Name**
3.	Enter your **Password**
4.	Click **Login** to access the **Beeline Application**

Section 2: Creating a Request

Create a Request

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

To create a new request:

Step	Action
1.	From the Hiring Manager Homepage, click the **New** menu drop-down arrow
2.	Click the **New Request** drop-down arrow to select a job title from a list of recently created requests or begin typing in the **Job Title** box to search for a job title by name or job description keyword. The auto suggestion/type ahead functionality recommends job titles that match what you type
	To review the job description and rate for a job title hover over the i-bubble
3.	Select a *job title* from the list of options. The Create Request screen appears
	To perform an enhanced job title search, click the Advanced Search link at the bottom of the list of suggested job titles. The Advanced Search allows a user to expand their search by job title, job class, industry, and job description keyword.
4.	Select a *position option* by clicking the respective option button
5.	Select the *position contacts* if they do not appear by default
6.	Click **Next**. The Create New Request: Update Details screen appears
7.	Complete all of the *required* (*) fields
8.	Click **Next**. The Create New Request: Submit for Approval screen appears
9.	Review the request details
10.	Click **Submit**. The Request Group Summary screen appears and displays, "Your Request Has Been Submitted."

Section 3: Searching the System

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Simple Search – Requests

To search for a request:

Step	Action
1.	Click the Search drop-down arrow and select **Search Requests** from the list
2.	In the Search box, enter all or a portion of the *request ID*, *job title*, or *hiring manager name*
3.	Click the **Request** from the list of suggestions. The Request Profile screen appears where you can view detailed information relating to this request in the four quadrants

Simple Search – Assignments

To search for an assignment:

Step	Action
1.	Click the Search drop-down arrow and select **Search Assignments** from the list
2.	In the Search box, enter all or a portion of the *assignment number*, *contractor name*, or *supplier*
3.	Click the **Assignment** from the list of suggestions. The Assignment Summary page appears where you can take action on this assignment or view any details

Simple Search – Candidates

To search for a candidate:

Step	Action
1.	Click the Search drop-down arrow and select **Search Candidates** from the list
2.	In the Search box, enter all or a portion of the *request ID*, *candidate name*, or *job title*
3.	Click the **Candidate** from the list of suggestions. The Candidate Detail screen appears where you can view candidate information and take necessary action

With Beeline's new Simple Search, as you type, the auto suggestion/type-ahead feature begins suggesting search results. For detailed search results, leave the box blank and click the icon. A screen appears which allows you to narrow your results or browse all items in the application

Section 4: Approve an Item

Approving a Request

Step	Action
1.	From the Approver Homepage, click **Request to Approve**
2.	Click the **Action dropdown** of the request you would like to approve
3.	Click **Approve**
4.	An additional window will appear. Enter comments (if necessary)
5.	Click Approve

Section 5: Candidate Actions

Reviewing a Candidate from the Candidate List

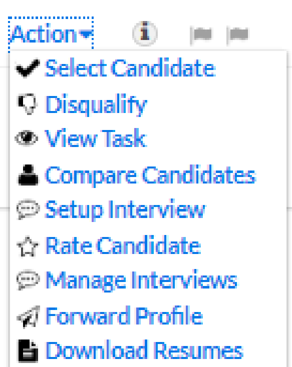
The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	From the Hiring Manager Homepage, click the **Number** link or the green **New** icon within the new resumes alert sentence. The Candidate Management Tool box opens.

2.	The columns of the Candidate Submission dialog box provide the user with information/links/icons
	• Click the **Request ID** link to navigate to the Request Profile screen.
	• Action dropdown allows you to take action on the candidate. Action options are based on the status of the candidate, the user's role, and the workflow configuration of the client.
	• Hover over the i-bubble icon for more information.
	• If a flag is provided for the candidate, a flag icon appears in this column. Hover over or click the flags to display alert, warning, or informational data.
	• Click the **Candidate Name** to navigate to the Candidate Details screen.
	• If a resume or other attachment is provided for the candidate, a document icon appears in this column. Click the icon to review the document.
	• Click the **Submitted Rate** link to view the rate card details.
	• If an interview is pending or scheduled, detailed information appears in this column:
	    ○ Click the **Setup Interview** icon to schedule an interview.
	    ○ Click the **Pencil** icon to add a scheduled interview to your calendar.
	• The History and Note column allows you to easily see if the candidate has any history or notes in the application. Click on the Blue link to review detailed information.

Candidate Action Dropdown

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.



Compare Candidates

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	From the Hiring Manager Homepage, click the **Number** link or the green **New** icon within the new resumes alert sentence. The Candidate Management Tool box opens.
	You can also access your candidate submissions by using the Search Candidates dropdown.
2.	Click the Action dropdown and click **Compare Candidates**
3.	The Candidate Compare screen appears with a snapshot view of each of your candidates for that request. Each candidate card provides the user with the same information/links/icons as on the Candidate Management Tool, but with some additional information. • If ratings are provided for the candidate, a star icon appears. Click the icon to review. • Click **View Detail** to view more information. • Click **Flip Card** to view candidate skills
4.	Filter: You can filter your candidates by Rate, Skills, Status, etc.
5.	Compare Bin: The compare bin allows you to compare multiple candidates in a side by side detail view. • To add a candidate to the bin, click **Add to Bin** on their card or **Drag and drop** the card into the bin. • Once all candidates are in the bin that you want to view, click Compare.

Setup Interview

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	From the Hiring Manager Homepage, click the **Number** link or the green **New** icon within the new resumes alert sentence. The Candidate Management Tool box opens.
2.	Click the Action dropdown and Click Setup Interview.
3.	Enter in the proposed date and time for your availability. To add multiple dates/times, click Add Item and repeat steps. Complete the additional fields in the pop-up window.
4.	Click Submit.

Rate a Candidate

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	From the Hiring Manager Homepage, click the **Number** link or the green **New** icon within the new resumes alert sentence. The Candidate Management Tool box opens.
2.	Click the Action dropdown and Click Rate Candidate.
3.	Select the number of stars by clicking on the star rating. The score will average based on ratings. 
4.	Click Complete Rating.

Send Candidate Profile

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	From the Hiring Manager Homepage, click the **Number** link or the green **New** icon within the new resumes alert sentence. The Candidate Management Tool box opens.
2.	Click the Action dropdown and Click Send Profile.
3.	Complete the requested information. De-select any information that should not be sent.
4.	Click Send.

Selecting a Candidate

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	From the Hiring Manager Homepage, click the **Number** link or the green **New** icon within the new resumes alert sentence. The Candidate Management Tool box opens.
2.	Click the Action dropdown and Click Select Candidate.
3.	Enter comments, such as Offer details.
4.	Click Select Candidate.

Disqualifying a Candidate

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	From the Hiring Manager Homepage, click the **Number** link or the green **New** icon within the new resumes alert sentence. The Candidate Management Tool box opens.
2.	Click the Action dropdown and Click Disqualify.
3.	Complete required fields in the pop-up window.
4.	Click Disqualify.

Section 6: Assignments

Amending

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	Click the **Simple Search** drop-down arrow and select **Search Assignments**
2.	Enter the assignment number, resource name, or supplier name in the search box
3.	Click on the assignment when it appears in the search drop-down
4.	From the Assignment screen click **Amend (**You can extend at the same time by selecting the **Extend** option**)**
5.	Click the box next to **Amend**. Enter an Effective Date; this is the date the amendment should start. (If you selected Extend, you will need to enter an extension date as well)
6.	Click **Next**
7.	Click the **Reason** drop-down arrow and select a reason and Enter a **Comment**
8.	Click the **Budget Adjustment** drop-down arrow and select appropriate budget information ❖ *Do Not Adjust Budget:* no additional budget is required for the amendment. ❖ *Adjust Budget Based on Amendment: System will automatically calculate additional monies needed for the amendment.* ❖ *Manually Increase Budget: Allows you to enter a specific amount needed for the amendment.* ❖ *Adjust Budget Decrease Only: Allows you to enter a specific amount needed for the budget decrease.*
9.	Select and change **Amendment** items as needed
10.	Click **Next.** The system returns a **Modify Assignment** screen for review
11.	Click **OK**

Extending

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	Click the **Simple Search** drop-down arrow and select **Search Assignments**
2.	Enter the assignment number, resource name, or supplier name in the search box
	You can also use the advanced search to find your assignment
3.	Click on the assignment when it appears in the search drop-down
4.	From the Assignment screen click **Extend**
5.	Click the **Reason** drop-down arrow and select a reason and Enter a **Comment**
6.	Select a **New Extension Date** by manually entering the date or clicking in the date box and selecting the date from the calendar.
7.	Click the **Budget Adjustment** drop-down arrow and select appropriate budget information ❖ *Do Not Adjust Budget:* no additional budget is required for the amendment. ❖ *Adjust Budget Based on Amendment: System will automatically calculate additional monies needed for the amendment.* ❖ *Manually Increase Budget: Allows you to enter a specific amount needed for the amendment.* ❖ *Adjust Budget Decrease Only: Allows you to enter a specific amount needed for the budget decrease.*
8.	Click **Next.** The system returns a **Modify Assignment** screen for review
9.	Click **OK**

Terminate/Cancel

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	Click the **Simple Search** drop-down arrow and select **Search Assignments**
2.	Enter the assignment number, resource name, or supplier name in the search box
	You can also use the advanced search to find your assignment
3.	Click on the assignment when it appears in the search drop-down
4.	From the Assignment screen click **Terminate/Cancel**
	Click the **Type** drop-down arrow and select the type
	Depending on the choice you select, you may need to fill in additional required fields
5.	Click the **Reason** drop-down arrow and select a reason and Enter a **Comment**
8.	Click **Next.** The system returns a **Terminate Assignment** screen for review
9.	Click **OK**

Section 7: Beeline Time and Expense

Approving Time

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	Log in to Beeline using your *user name* and *password*. The Hiring Manager Home page appears
2.	In the **My To Do** quadrant, click the *number* link within the alert sentence, "*You have X timesheets to approve*." The Timesheet Approval dialog box appears
3.	View detailed information by clicking the arrow to the left of the contractor's name for a selected period
4.	Review all information related to the timesheet
5.	To enter comments, click the icon in the comments column
6.	Click Approve or Reject. (Comments must be entered to complete a rejection)

Approving Expenses

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	Log in to Beeline using your *user name* and *password*. The Hiring Manager Home page appears
2.	In the **My To Do** quadrant, click the *number* link within the alert sentence, "*You have X expenses to approve*." The Expense Approval dialog box appears
3.	View detailed information by clicking the arrow to the left of the contractor's name for a selected expense period
4.	Review all information related to the expense report
5.	To enter comments, click the icon in the comments column
6.	Click Approve or Reject. (Comments must be entered to complete a rejection)

Section 8: Setup a Delegate

Setup a Delegate

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	Log in to Beeline using your *user name* and *password*. The Hiring Manager Home page appears
2.	Click the Preferences icon
3.	Click the Delegates tab
4.	Click Add New
5.	Search for the user by typing their name in the search box, or click the magnifying glass to do a more advanced search, and select the delegate's name.
6.	Select the start and end date for the delegation period. (NOTE: if the end date is left blank, the delegation period will not expire.)

7.	If your delegate will be responsible for approvals, click the allow approvals check box.
	• If allowing approvals, you will also need to select how the system will send notification
	    o No option will mean that the delegate receives no notifications for the approval.
	    o Yes option will mean they receive notifications at the same time as you.
	    o Only to Delegate option will mean only the delegate will receive notifications.
	• If allowing approvals, you can also determine the approval categories the delegate can perform.
	    o If limiting approvals, click the Limit Approvals box
	    o Double click the name of the categories the delegate CAN perform.

8.	If your delegate should be able to view the reports you can run, click the Allow Reports box.
9.	If your delegate should be able to impersonate your profile, click Allow Impersonation • Impersonation access will allow the delegate to be able to see exactly what you see, including data and action items. • If allowing impersonation, you can delegate out all roles by clicking Delegate All Roles or you can double click the individual role to allow the delegate to impersonate.

Section 9: Reports

Standard Reports

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	Click the **Report** drop-down arrow and click on the desired Standard report
2.	Select desired search criteria in the **Report Details** section
3.	Click **Create report**

Scheduling

Step	Action
1.	Click the **Report** drop-down arrow and click on the desired Standard report
2.	Select desired search criteria in the **Report Details** section
3.	Click **Schedule Report** and Schedule section will appear
4.	Select **Schedule Type**
5.	Select the desired dates and times based on the schedule type selected
6.	Click **OK**
7.	Click on the Scheduled tab to view any report that you have scheduled
	The application will save up to 10 reports. When you are ready to save the 11th report the first report that you have saved in the application will drop off

Ad hoc Reports

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	Click the **Report** drop-down arrow and click on the desired Ad hoc Report
2.	Select desired search criteria in the **Report Details** section
3.	Click **Create report**
4.	Enter the field that you want to select in the **Available** box. The system will narrow your choices based on what is entered
5.	Double click on the field name to move to the selected box. Selected items are the parameters for your report
6.	Add **conditions** and **sorts** as desired
7.	Click the drop-down **Output Type** and select the desired output type