Product & Technology Training

Intelligent workforce solutions
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VMS Request to Onboard Guide

Contents

Welcome

Welcome to VMS Request to Onboard Guide.

Purpose

The purpose of this guide is to provide participants a broad overview of how to use the Beeline Vendor Management System (VMS). The guide 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

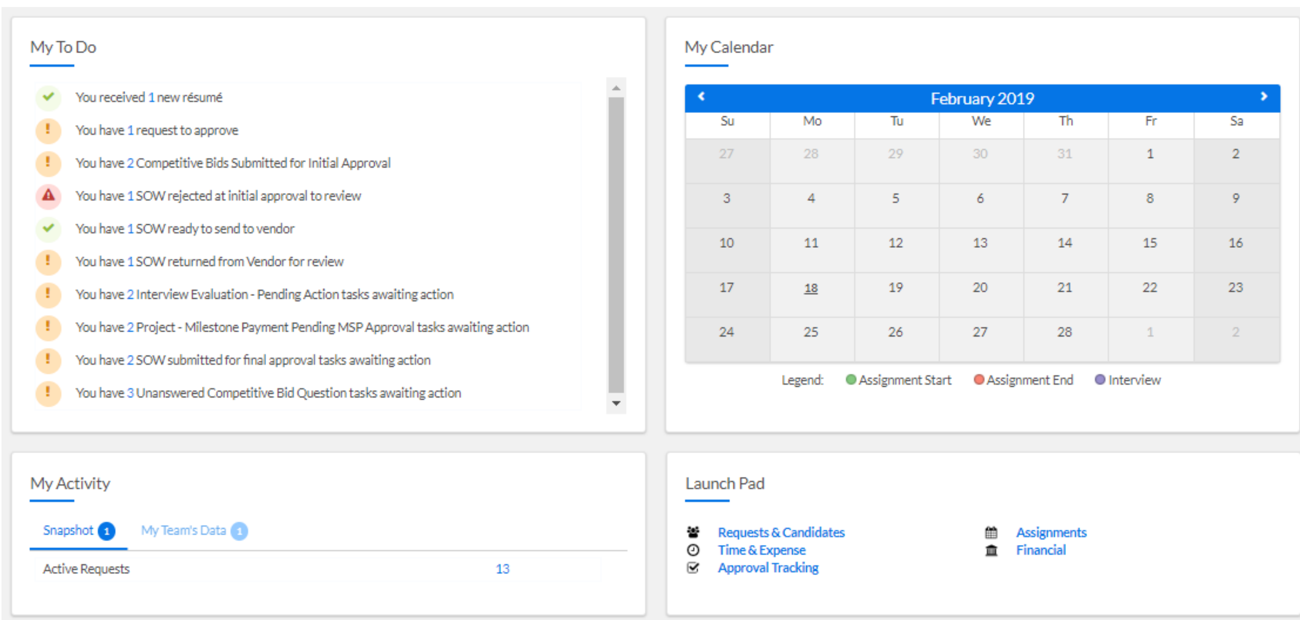
The Hiring Manager Home Dashboard is comprised of four quadrants:

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.

Homepage Overview - Supplier Home Dashboard

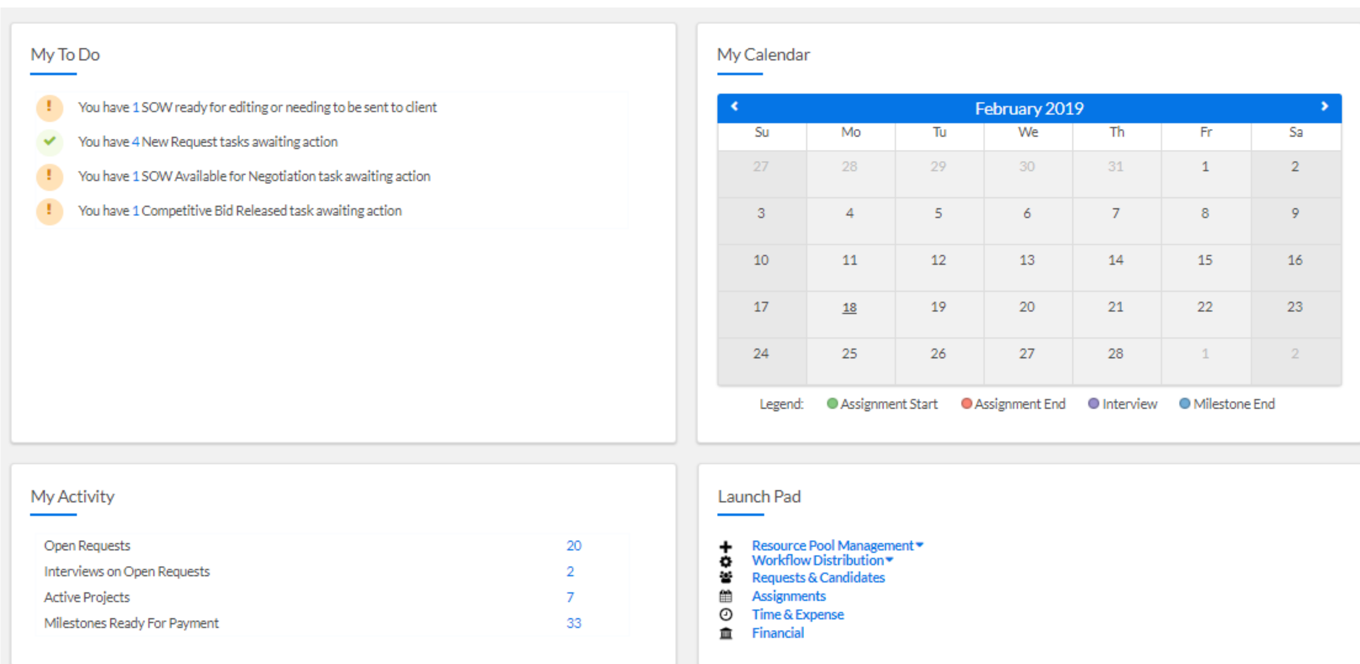
The Supplier Home Dashboard is comprised of four quadrants:

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 Supplier queries. Users can click the link for each query listed to review results that are specific to the supplier organization.

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



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Getting Started

Accessing the System

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

Section 1: 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 2: 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 3: Release to Supplier

Releasing a Request

Step	Action
1.	From the Program Office Homepage, click **Request – Ready for Release**
2.	Click the **Action dropdown** of the request you would like to release
3.	Click **View Details**
4.	The Release to Supplier window appears where you can view suppliers previously released to or you can select suppliers to release to. **Click "Add Item" to view the list of suppliers. Click the name of the supplier to have it added to the list to release to.**
5.	Click **OK**.

Section 4: Request Actions

Viewing a New Request

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

Step	Action
1.	From the Supplier Dashboard, click **New Request** located in the My To Do quadrant on the home page. The system will display a **Review Alerts** screen
2.	Click on the **Action dropdown** for the appropriate request. Click **View Details**
	The screen defaults to the Candidates tab. To view additional information you will need to select the appropriate tab

Tab	Details
Summary	Provides a quick overview of the request.
Details	Provides more detailed information of the request.
Candidates	Allows you to add candidates to the request and see previously submitted candidates.
Notes	Allows you to view notes that are associated with this request.

Adding a New Candidate

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

Step	Action
1.	Follow Steps 1-2 from Viewing a Request
2.	Click **Add Resource**
3.	Complete all required information
4.	Click **OK**. The system will return a confirmation message of "Your changes were saved.
	This action will only add the candidate to the resource pool. You must follow the next steps to submit the candidate to the request.
5.	Click **Submit Profile**. The system will display a **Submit Profiles** screen
6.	Complete all required fields and set rates in the Candidate information
	*All required fields will have an * next to the left of the field*
7.	Click **Submit**

Submitting Existing Candidates

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

Step	Action
1.	Complete Steps 1 and 2 from Viewing a Request.
2.	Click **Search Resource Pool**
	You can do one of two things. You can scroll down through all the candidates or you can narrow your search by entering in any of the search criteria
3.	Click the box next to the candidate name
4.	Click **Submit Profiles**
5.	Complete all required fields and set rates in the Candidate information
	*All required fields will have an * next to the left of the field*
6.	Click **Submit**

Section 5: Program Office Candidate Pre-Screen

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 Program Office 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.

3.	Based on candidate's qualifications, you can click to Qualify or Disqualify the candidate.
4.	Complete the information in the pop-up window.
5.	Click OK.
	Qualified candidates will go to the Manager for review.

Section 6: Candidate Review/Compare

Reviewing a Candidate from the Candidate List

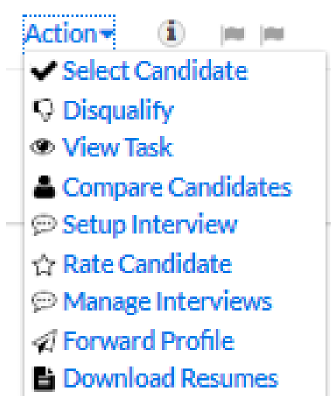
The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

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 iBubble 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.



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.

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.

Section 7: Program Office Submit an Offer

Submit an Offer

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

Step	Action
1.	From the Program Office Homepage, click the **Candidate – Ready for Offer**
2.	Click on the **Action dropdown** of the candidate you would like to view
3.	Click **Submit Offer**
4.	Click **Negotiate Rates**
5.	If satisfied with the supplier submitted rate, just click Save. If you wish to negotiate rates, click the box to Override rates.
6.	If Overriding the rate, enter in the new rate, then click Save.
7.	Click **Submit Offer**

Section 8: Accept Interviews and Offers

Accepting an 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 Supplier Homepage, click the **Candidate-Interview Requested**
2.	Click on the **Action dropdown** of the interview request you would like to view
3.	Click **Accept Interview**
4.	Click the drop-down arrow to display a list of the suggested interview times and select desired date/time.
5.	Enter comments as needed
6.	Click **Accept Interview**

Rejecting an 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 Supplier Homepage, click the **Candidate-Interview Requested**
2.	Click on the **Action dropdown** of the interview request you would like to view
3.	Click **Decline/Suggest Alternate Time**
4.	Enter comments indicating alternate dates and times
5.	Click **Decline/Suggest Alternate Time**

Accepting an Offer

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

Step	Action
1.	From the Supplier Homepage, click the **Candidate-Offer Pending**
2.	Click on the **Action dropdown** of the offer request you would like to view
3.	Click on **View Details**
4.	Click **Accept Offer**
5.	If there are any pending background checks you will need to complete them now by clicking **OK**. This will open the background checks to mark the box complete. Then click **OK**
6.	Click **Accept Offer**
7.	An additional window will pop up. Click **Accept Offer**

Rejecting an Offer

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

Step	Action
1.	From the Supplier Homepage, click the **Candidate-Offer Pending**
2.	Click on the **Action dropdown** of the offer request you would like to view
3.	Click on **View Details**
4.	Click **Reject Offer**
5.	Click the dropdown arrow to display a list of reasons and click the appropriate reason
6.	Click **Reject Offer**

Section 9: Program Office Onboard

Candidate Onboarding

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

Step	Action
1.	From the Program Office Homepage, click the **Candidate – Initiate Onboarding**
2.	Click on the **Action dropdown** of the candidate to onboard
3.	Click **Onboard.**
4.	Complete the required/optional information.
5.	Click **Onboard**.

Section 10: How to Search 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

Manage/Search

To use the Manage/Search:

Step	Action
1.	Click the Manage/Search drop-down arrow and select one of the following: **Assignments, Candidates, Requests, Resource Pool**
2.	Set the existing search parameters. Click **Search**. Detailed search results matching the set parameters display OR Browse through the list by clicking the arrows at the bottom of the page.

Section 11: 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 new end 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**
6.	Click **Next.** The system returns a **Terminate Assignment** screen for review
7.	Click **OK**

Section 12: Beeline Time and Expense

Entering Time on behalf of a contractor

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

Step	Action
1.	Click the **Search Timesheets** from the Simple Search down arrow
2.	Type in the Name of the contractor. Click directly on the name of that contractor to bring you into their view.
3.	Make sure you are on the Timesheet Tab.
4.	Review the Showcase Tour for additional timesheet information
5.	Complete the timesheet as needed
6.	Click Save Changes if additional information is needed. OR click Submit for Approval

Entering Expenses on behalf of a contractor

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

Step	Action
1.	Click the **Search Timesheets** from the Simple Search down arrow
2.	Type in the Name of the contractor. Click directly on the name of that contractor to bring you into their view.
3.	Click the Expenses Tab to go to the expenses section.
4.	Review the Showcase Tour for additional expense information
5.	Complete the expense as needed
6.	Click Save Changes if additional information is needed. OR click Submit for Approval

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 13: 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