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# VMS Supplier 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 - Supplier Home Dashboard***

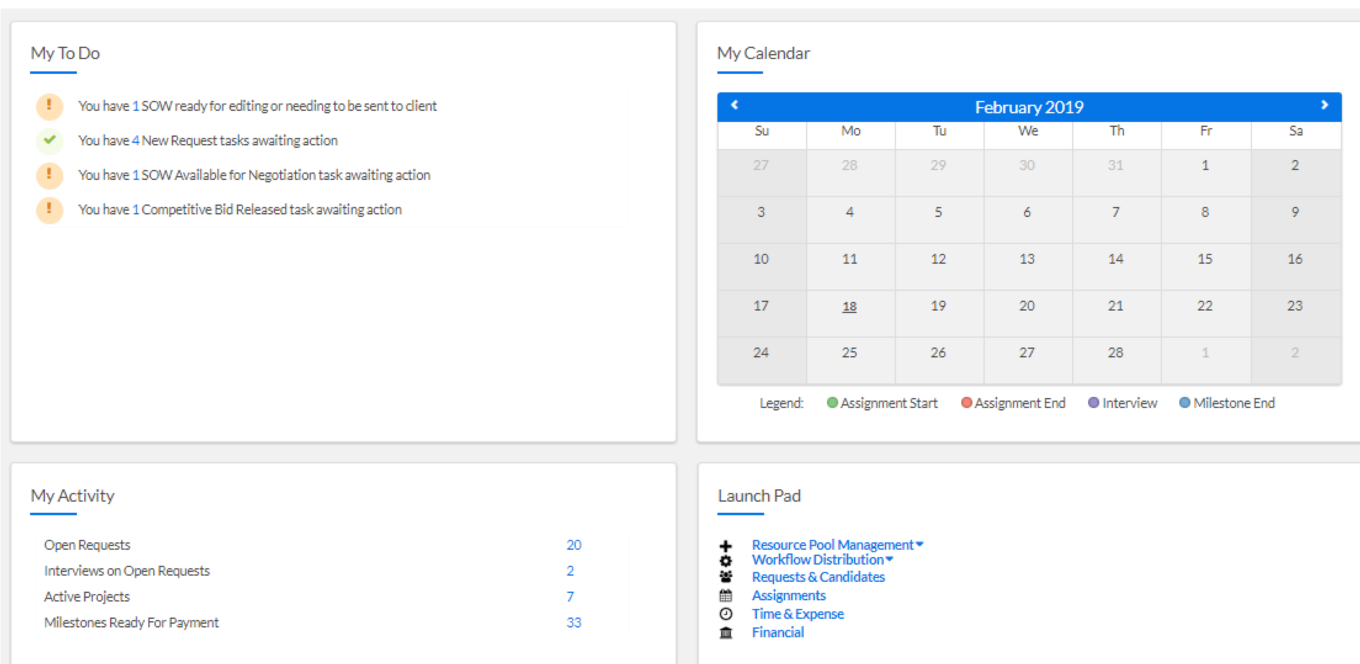
The Supplier Home Dashboard is comprised of four quadrants:

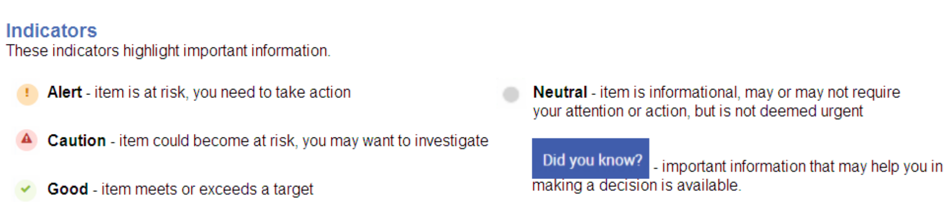
**My To Do**
This quadrant provides meaningful alerts to items requiring your action and informative notifications. These items contain an active link allowing a user to access detailed information and to take action.

**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.



# 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: Searching the System

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

### *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 3: 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.** | 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 4: 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 5: 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 |

# Section 6: Approve Amendment/Extension

### *Approving an Amendment or Extension*

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

| Step | Action |
|---|---|
| **1.** | From the Homepage, click **You have _ assignment – amendment or extension awaiting action** |
| **2.** | Click the **Action dropdown** of the request you would like to approve |
| **3.** | Click **Approve** |
| | You can click the View Details option to view additional information before approving or rejecting. |
| **4.** | An additional window will appear. Enter comments (if necessary) |
| **5.** | Click Approve |

### *Rejecting an Amendment or Extension*

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

| Step | Action |
|---|---|
| **1.** | From the Homepage, click **You have _ assignment – amendment or extension awaiting action** |
| **2.** | Click the **Action dropdown** of the request you would like to approve |
| **3.** | Click **Reject** |
| | You can click the View Details option to view additional information before approving or rejecting. |
| **4.** | An additional window will appear. Select a reason from the dropdown menu and enter comments. |
| **5.** | Click Reject |

# Section 7: 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 11$^{th}$ 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 |

# Section 8: Admin Functions

## *Reset Passwords*

Your specific setup is based on your company's configuration/visibility and may vary slightly from what is explained here.

| Step | Action |
|---|---|
| **1.** | Click the **Admin** drop-down |
| **2.** | Click User Administration |
| **3.** | Search for user that needs password reset |
| **4.** | Click directly on the user's name to check if the account is locked out. (If it is, click on Unlock Account). |
| **5.** | Click Reset Password. |

## *Deactivate/Reactivate User*

Your specific setup is based on your company's configuration/visibility and may vary slightly from what is explained here.

| Step | Action |
|---|---|
| **1.** | Click the **Admin** drop-down |
| **2.** | Click User Administration |
| **3.** | Search for user that needs to be deactivated or reactivated |
| **4.** | Click directly on the user's name. |
| **5.** | Click Edit. |
| **6.** | Click the box next to Active. A check in the box means they are active. A blank box means that are inactive. |
| **7.** | Click OK. |

## *Impersonate User*

Your specific setup is based on your company's configuration/visibility and may vary slightly from what is explained here.

| Step | Action |
|---|---|
| **1.** | Click the **Admin** drop-down |
| **2.** | Click User Administration |
| **3.** | Search for user that you need to impersonate. |
| **4.** | Click the box to the left of the user's name. |
| **5.** | Click Proxy. |
| **6.** | This will bring you directly into that user's view of their data. |
| **7.** | To stop the impersonation, click on the user's name in the upper right hand corner where it says Impersonating |

## *Add New Supplier User*

Your specific setup is based on your company's configuration/visibility and may vary slightly from what is explained here.

| Step | Action |
|---|---|
| **1.** | Click the **Admin** drop-down |
| **2.** | Click User Administration |
| **3.** | Click Add New |
| **4.** | Complete Required fields. (Read the FAQ at the top of the Add User Page for important user details.) |
| **5.** | Click OK. |
| **6.** | Confirm required fields. |
| **7.** | Click OK |