IQN User Roles

Supplier firm roles can be granted to any user that is associated with a 'supplier organization' (i.e., a supplier account). These roles include roles that are granted to both suppliers and contractors.

Billing Submitter:

Users with this role have the ability to view and submit project based milestone invoice requests for approval from the buyer's billing approvers. Upon buyer approval, their firm will be paid for the milestone request.

Expense Report Creator:

This role is given to a contractor/resource by the supplier if the contractor can create his/her own expense reports application. In many cases, this role is automatically assigned to contractors when their Work Order becomes effective and they have been granted the ability enter expense reports.

File Upload Manager:

This role allows users to upload files using the upload file link on the dashboard tab (Only available if the currently selected business org has an upload directory specified). The intention of this role is to allow some users to upload data to an IQN FTP site. This role is rarely used, but can be used if a file transfer capability is not available and must be done via the system.

Organization Supplier Project Manager:

This role allows suppliers to respond to project agreements that are submitted to their firm. The suppliers can then review the buyer's request, submit and track resources on a project, and review invoicing and payment data for projects. This role allows the supplier to view all project agreements within their system organization structure, not only those that they are responsible for managing.

Resource:

Role given to candidates. This role only provides access to the individual's own profile and reporting on their transactions.

Supplier Account Representative (SAR):

The Supplier Account Representative is a supplier firm role responsible for viewing and managing contractor's time and expense for their supplier firm. This role has the capability to manage all resource assignments, view resource timecards & expenses, submit resource time & expense on behalf of their contractors (if applicable), and the capability to run role-related reports. This role is intended to help supplier firm's track and manage time/expense entry and payment processes for resources procured via the IQNavigator application.

Supplier Agent:

This supplier organization role has the capability to manage resources and their contract or direct hire assignments through the IQNavigator application. A Supplier Agent has the capability to create and maintain resource profiles to which the user with this role is explicitly assigned (i.e., those resource

profiles that the user is selected as the managing supplier agent for). Specific capabilities include: view and act on job opportunities, submit resources to job opportunities, manage his/her resource matches to job opportunities, ability to accept or decline work orders for his/her resources, manage his/her resource's assignments while on contract, and the capability to run role-related reports.

Supplier Firm Admin:

This is a supplier firm administrator role with the capability for maintaining their supplier account setup within the IQNavigator application. Capabilities include the ability to create/maintain users and their roles, and the ability to update the supplier profile.

Supplier Manager:

This supplier organization role is similar to a Supplier Agent super-user. This role has the capability to manage all resources, and their contract or direct hire assignments, through the IQNavigator application for the user's supplier firm. A Supplier Manager has the capability to create and maintain resource profiles across the entire supplier account. Specific capabilities include: view and act on job opportunities, directly submit resources to job opportunities, manage resource matches to job opportunities, ability to accept or decline work orders for all resources, manage resource's assignments while on contract, and the capability to run role-related reports.

Supplier Organization Invoice Manager:

This role gives a supplier access to view the invoice extract.

Supplier Organization Invoice Representative:

This role gives the supplier the ability to input an internal supplier tracking number on the invoice.

Supplier Project Manager:

This role allows suppliers to respond to project agreements that are released to their firm. The suppliers can then review the buyer's request, submit and track resources on a project, and review invoicing and payment data for projects.

Timecard Adjuster:

This role is given to a contractor/resource by the supplier if the contractor can create his/her own timecard adjustments in the application. In many cases, this role is automatically assigned to contractors when their Work Order becomes effective.

Timecard Creator:

This role is given to a contractor/resource by the supplier if the contractor can create his/her own timecards in the application. In many cases, this role is automatically assigned to contractors when their Work Order becomes effective.

Managing Firm Roles

Managing firm roles can be granted to any user that is associated with a MSP or IQNavigator partner organization. These roles are typically granted to allow MSP and Partner users the ability to act on and manage customer data.

Approval Workflow Administrator:

This is a role that allows a user to view, create, and maintain approval workflows within the customer account.

Assigned CAM:

The Customer Account Manager (CAM) is a role given to either an IQN representative or non-customer representative who will help facilitate the day-to-day procurement process for a buyer organization through the IQNavigator application, in addition to assisting the development of internal and application-specific hiring processes. The 'Assigned CAM' has the capability to source, procure, and manage contract and direct hire labor on behalf of hiring managers at a customer site. The Assigned CAM will only have access to requisitions and work orders to which they have been explicitly assigned. This role also has the capability to run role-related reports. The assigned CAM will do candidate screening if it is enabled.

CAM Approver:

The CAM Approver role is a role that complements the existing Assigned CAM and CAM Manager roles. This role allows users to approve objects including requisitions, work orders, and project agreements for the organizations to which the user is assigned. In addition, this role can create delegation rules on behalf of other users. This role can't approve timecards and expense reports.

CAM Manager:

The Customer Account Manager (CAM) is a role given to either an IQN representative or other non-customer representative who will help facilitate the day-to-day procurement process for a buyer firm through the IQNavigator application, in addition to assisting the development of internal and application-specific hiring processes. The CAM Manager has the capability to source, procure, and manage contract and direct hire labor on behalf of hiring managers at a customer site. Unlike the 'Assigned CAM', the 'CAM Manager' has access to requisitions and work orders across the entire customer account, regardless of whether they are explicitly assigned to them or not. This role also has the capability to run role-related reports. The assigned CAM will do candidate screening if it is enabled.

CWM Assigned CAM:

This is a managing firm role given to customer account managers that only have access to the CWM module- so no projects. This role has all the same rights and privileges to an assignment/ WO as the assigned CAM, but just on contingent labor.

Custom Report Administrator:

User with this role can create shared custom reports across all clients in a managing firm.

Enterprise Admin:

Users with the Enterprise Admin role have the ability to manage category hierarchies for a set of organizations.

Invoice Configuration Manager:

The invoice configuration manager role is a role that can be given to a managing firm user. This role must be used independently of any other role (a user cannot have this role and a CAM Manager for example). The invoice configuration manager role is able to access the buyer firm invoice configuration admin settings. These configuration settings define the front office invoicing rules and behavior for the business rules organization.

IQ Firm Admin:

This is a firm administrator role at the managing level (e.g. IQNavigator administrator) with the capability for setting up customers and suppliers in the IQNavigator application. Capabilities include the ability to set up agreements between buyer & supplier, ability to set up functionality configurations for buyer & supplier, and the ability to create/maintain users & roles within the IQN application.

Reports Admin:

This is a managing firm reports administrator role (e.g. IQNavigator reports role) that has the capability to run any standard or Ad Hoc report for buyers and suppliers within their managing firm (e.g. across different customers and suppliers).

Accounting Manager:

This role is specific to IQN and should only be given to Beeline staff users. It is used solely by IQN Customer Accounting.

Accounting Representative:

This role is specific to IQN and should only be given to Beeline staff users. It is used solely by IQN Customer Accounting.

Buyer Org User Roles

Buyer firm roles can be granted to any user that is associated with a buyer organization.

Expense Approver:

This buyer organization role has the ability to approve expense reports for those contractors that they are assigned via the assignment. Expense approvers only have visibility to those expense reports that they are explicitly assigned to review and approve.

Express Requisition/Assignment Manager:

This buyer organization role has the capability to source and manage resources through the IQNavigator application using the 'Express Requisition' form. Capabilities include creation and maintenance Express Requisitions. The user with this role may only access requisitions that he/she is explicitly assigned to (i.e., those requisitions that the user has created him/herself and is selected as the actor in the 'Hiring Manager' field or the 'Job Owner' field). Other capabilities include the ability to take specific job-related actions on the his/her own requisitions such as evaluation of candidates submitted to their requisitions, ability to view approval information & statuses related to their requisitions, ability to view work orders and amendments created in relation to his/her requisitions, ability to manage his/her contractor's assignments, and the ability to run role-specific reports. This role does not have the capability to take contractual actions on work orders.

Job/WO/EA/Projects Approver:

This is a buyer organization role that is assigned to users responsible for the approval process of requisitions (regular jobs or express requisitions), work orders, assignments, express assignments, targeted orders, amendments, project agreements, and project agreement change requests. Capabilities include the ability to approve or reject approval requests. In conjunction with this role, users must be assigned to approval workflows to receive an item submitted for approval.

Timecard Approver:

This buyer organization role has the ability to approve timecards for those contractors that they are assigned via the assignment. Timecard approvers only have visibility to those expense reports that they are explicitly assigned to review and approve.

Work Order & Assignment Manager:

This buyer organization role has the capability to procure and manage resources through the IQNavigator application, but does not create or manage requisitions. A Work Order & Assignment Manager has the capability to take contractual actions in regard to procuring resources as well as the management of a resource's assignments for those work orders/assignments they are specifically assigned to. Such activities include the ability to initiate offers, revise contractual work orders, terminate/complete agreements, create amendments to work orders, and manage the assignments of resources while on-boarded. Finally, this role also has the capability to run role-related reports. This role is often used in conjunction with the Express Requisition/Assignment Manager role to allow both requisition creation/management and Work Order/Assignment creation/management.

Project related:

Project Manager:

This role allows users to create and edit project agreements, as well as submit those agreements to suppliers for review and approval. The user can communicate with the supplier regarding the project, review and track resources on a project, and review invoicing and payment data for projects. This role can only create/manage those project related activities to which they are assigned (i.e., not project objects throughout the organization).

Billing Approver:

Users with this role have the ability to view and approve project milestone invoice requests as submitted by the supplier Billing Submitter.