IQNavigator Admin

Configuration Guide

Contents

Welcome to the IQNavigator Admin Configuration Guide

The purpose of this guide is to provide instruction on how to configure an organization structure in IQNavigator. This document will cover the various configurability options, what they are used for, and when they are typically used. The configuration options are listed in the order in which they should occur with respect to creating an organization structure. All of these configuration items address various points within the end-to-end continuum of contract labor procurement.

Wherever applicable, the following workflow diagram will be highlighted with respect to what step in the end-to-end process is being addressed.

PROCURE

Create Requisition → Obtain Approval → Supplier Sourcing & Candidate Submittals → Evaluate Candidates → Create Agreement → Obtain Approval → Supplier Accepts Agreement → On Board Contractor

MANAGE

Modify Agreement → Manage Assignment (Optional) → Submit Time / Expense → Approve Time / Expense → Invoice & Payment Processing → Off Board Contractor

← REPORTING →

Organization Concepts

Organization is the IQNavigator term for a customer. Each customer is represented in the IQN system by a buyer organization or a hierarchy of multiple buyer organizations.

Collections of hierarchies are grouped into managing firms. Each partner is typically given its own managing firm to allow it to administer and maintain all of its customers, and the suppliers supporting those customers, without granting access into data of others.

A hierarchy is the IQNavigator term for a collection of multiple organizations. Organizations are defined in the hierarchy as 'parent', 'child' and 'sibling' organizations.

Sample Organization Hierarchy
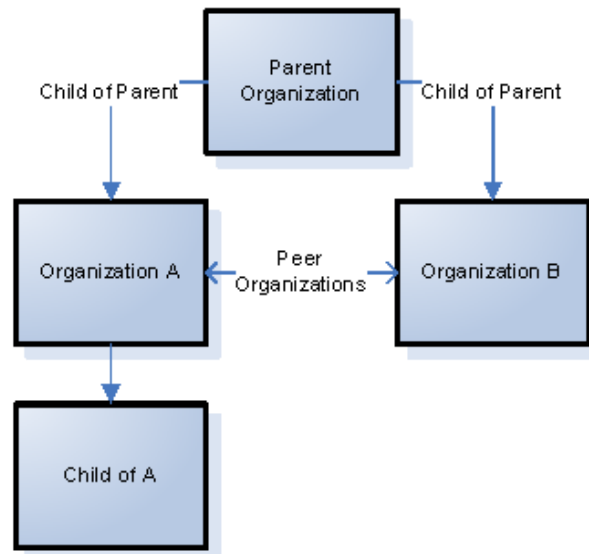
Business rules are configured at the individual buyer organization level to allow for complex process flows utilizing a single hierarchy of organizations.

Business rules are defined at the organization level but there are various configurations that can be shared across an entire enterprise.

An enterprise is defined as a single organization or a collection of multiple organizations which exist in a single hierarchy. There is typically one enterprise per customer.

Before an organization hierarchy can be defined in the IQN system it is assumed that the needs-assessment and discovery phase of the implementation is complete and the desired organization structure has been identified.

Buyer Organization Setup

Introduction

The purpose of this section is to outline the steps required in order to create a buyer organization in IQNavigator and to execute the initial business rules. These steps must be completed prior to being able to establish any business rules or system configurations for customers utilizing the IQNavigator application.

The following should be gathered and available before proceeding:

- Customer Name
- Primary Organization Address
- Notice Address
- Payments Address
- Invoice Detail Type
- On-site Email Address
- Locales

How to Create Buyer Organization

- Log in to the application as a firm administrator.
    - Typically, there is one firm admin user per managing firm. This user is initially created by IQNavigator and then transitioned to the partner for maintenance.
- In the Set Up tab, click **Accounts** or **Create Buyer Organization**.

- **Enter** the name of the organization.

  - □ The parent or 'enterprise' organization should always be created first. All children should be created after that organization by clicking the **create child organization** action button and blue go arrow.

- Click **save changes** to save the firm profile.

- From the **Set Up** tab select **Accounts**.

- Enter the name of the newly created organization into the **Search For** box and press **Enter** to execute the search.

- When the screen refreshes, locate your organization in the organization list.

- From the actions drop down menu, select **create business rules** and click the **go** arrow.

- The system will present a warning. Click **Continue**.

- The main buyer organization configuration screen will be presented in read only mode.

- At this time, all required fields should be entered and then saved to the database. It is recommended that all non-required configuration settings are skipped at this time so the buyer organization can be saved to the database before the user is timed-out due to inactivity.

  - □ Complete the **Business Information Address** section
  - □ Select the appropriate **Invoice Detail** types

- □ Complete the **Notice Address** section

- □ Complete the **Payments Address** section

- □ Enter the **Misc. On-Site Email Default**

- □ Select the appropriate locales in the **Allowable Locale(s)** section

- In the **Supplier Organization Service Agreements** section will be a list of all supplier organizations in the managing firm. Select all applicable supplier organizations and click the **add agreement** button. This is the first step in creating the buyer-to-supplier relationship.

- Click the **save** button to commit the buyer organization to the database. Once the buyer organization has been saved, the buyer organization summary screen will be displayed in read-only summary mode.

Master Service Agreement (MSA)

The MSA is used to activate the supplier organization. Only one MSA will need to be executed for the lifetime of the organization.

How to Configure

At the bottom of the Buyer Firm Profile summary screen in the MSA section click the **add version** button.

MSA Identifier – This identifier is used to differentiate between the versions of the MSA. No functionality is driven off of this ID.

Effective Date – This is for information purposes only and should be used to capture the date at which the supplier is going active in the system.

Buyer Statement of Work (BSOW)

The BSOW is used to capture currency and management fee details for the buyer organization that will apply to all supplier organizations transacting with the buyer organization.

At the bottom of the Buyer Firm Profile summary screen in the Buyer Organization Statement of Work section, click **Add Version**. The BSOW editor will be displayed.

Configurations:

Setting	Function	Use
SOW Identifier	This is used to differentiate between the various versions of the BSOW	Typically a simple numbering scheme is used i.e. BSOW v.1, BSOW v.2, etc. No functionality is driven off of this identifier.
Staffing Type	Possible Values: Contract – This enables the contingent workforce module of the application. Direct Hire - This enables the direct hire module of the application. Project – This enables the project module of the application.	Contract should be selected when the organization will be managing contract and temporary labor. This option should always be enabled except in rare cases. Direct Hire – This is legacy functionality in use by older IQN customers. This option should not be enabled without consulting with IQNavigator. Project – This should only be enabled when Projects will be in use. Enabling this will allow for the assignment of additional user roles as well as a new tab in the UI.
Allowable Currency Units	The specified currencies will be available for selection on various transactions throughout the application.	Selection of currencies is dependent upon the nature and location of the implementation. Typically, a customer will have restrictions on the supported currencies and those restrictions should be represented here.
Time Entry Method	Used to determine the method of contractor time entry.	FrontOffice Time Entry should always be selected. Back Office Time Entry is available to support legacy customers only.
Expense Entry Method	Used to determine the method of contractor expense entry.	FrontOffice Expense Entry should always be selected. Back Office Expense Entry is available to support legacy customers only.

Setting	Function	Use
Invoicing Location	Used to determine the method of invoicing.	FrontOffice Invoicing should always be enabled. BackOffice Invoicing is available to support legacy customers only. **Prior to executing the BSOW notify IQN of the invoicing method selected.**
Transaction Fee	Used to specify a buyer side management fee that is applied to financial transaction in the system.	This setting is typically used to capture revenue for IQNavigator or for an IQN partner. A buyer side management fee will add a specified amount or percentage to each transaction in the system. For example, a 3% buyer side management fee applied to a bill rate would increase the bill rate by 3%. The difference between the bill rate and the adjusted bill rate could be captured on an invoice feed. Multiple fees per BOSW can be specified by clicking the 'add new' button.
Hourly Assumption Table	This is used for information purposes to capture the number of hours in a standard day, week, etc. This field is not required.	No functionality is driven off of these fields.
Overtime Definition	This is used to capture the organization's standard definition of overtime for information purposes only. This field is not required.	No functionality is driven off of this field.
Overtime Premium	This is used to capture an overtime premium percentage for information purposes only. This field is not required.	No functionality is driven off of this field.

Setting	Function	Use
Overtime Discount	This is used to capture an overtime discount percentage for information purposed only. This field is not required.	No functionality is driven off of this field.
OT/DT Rule Definition	This field is used to define any applicable OT/DT rules. This field is not required.	Rules defined here will be applied to a work order.
Entity Bonus Transaction Fee	This field is used to capture a buyer side management fee that will be applied to all Bonus transactions. This field is not required unless bonuses are subject to the buyer side management fee.	This field is typically only configured when buyer side management fees are being used to capture revenue and bonuses have been identified as transactions to which the fee should apply. Oftentimes even when a buyer side fee is in place the fee does not apply to bonuses.
Contract to Hire Conversion Fee	This is used to support legacy customers and should not be enabled.	NA
Supplier Organization Placement Fee	This is used to support legacy customers and should not be enabled.	NA
System Transaction Fee	This is used to support legacy customers and should not be enabled.	NA
Managing Firm Transaction Fee	This is used to support legacy customers and should not be enabled.	NA
Direct Hire Fees	This is used to support legacy customers and should not be enabled.	NA

Setting	Function	Use
Project Fees – Entity Transaction Fee	This is used to capture buyer side management fees that apply to milestone based Projects transaction. This setting is used to capture revenue for IQN or an IQN partner. This transaction fee will add a percentage to each milestone based transaction in the system.	Customer specific.
Rate Table Management Fees – Transaction Fee	This is used to capture buyer side management fees that apply to transactions associated to project rate tables This setting is used to capture revenue for IQN or an IQN partner. This transaction fee will add a percentage to each rate table based transaction in the system.	This fee can apply when there is a full service MSP run by IQN where there is extensive rate table management required for Projects.

Create Super User

A super user with all system roles is required in order to facilitate organization setup.

1. Log in to the application as a firm admin user.

2. From the Set Up tab, select **Accounts.**

3. Search for the organization in which you would like to create a super user.

4. From the actions drop down menu select **view staff**. This will bring up the staff list for the organization.

5. Click the **create user** button.

6. Complete the user's **Personal Contact Inf**.

   For the super user, generic information can be entered here.

7. Click the **save** button to commit the user to the database.

8. The staff list will be displayed once the save is complete. From the staff list, select **create login** from the **Config User Acct** drop-down.

9. Enter a **username** and **password** for the super user.

   Passwords must be at least 8 characters long and must contain at least one number.

   Note: Organizational level roles allow visibility into all transactions across an organization and also grant access to update and approve any transaction within that organization. Review the **User Role Recommendations** section below for recommended roles for specific user accounts.

   Grant the user the following roles for contingent labor organizations:

   - Buyer Organization Executive
   - Client Firm Admin o Organization Assignment Manager
   - Hiring Manager
   - Targeted Order Manager
   - Express Requisition/Assignment Manager
   - Job/WO/EA/Project Approver
   - Work Order and Assignment Manager

   Grant the user the following roles for consulting/project based organizations:

   - Buyer Organization Executive
   - Client Firm Admin
   - Organization Assignment Manager
   - Project Manager
   - Project Evaluator
   - Job/WO/EA/Project Approver
   - Billing Approver

10. Click the **save changes** button. The user account will be saved to the database and is ready for use.

Create Standard User

Follow these steps to create a manager-type user with the standard set of roles. This user is required to facilitate data entry tasks.

1. Log in to the application as a firm admin user.
2. From the Setup tab select **Accounts**.
3. Search for the organization in which you would like to create a standard manager-type user.

4. From the actions drop down menu select **view staff**. This will bring up the staff list for the organization.

5. Click the **create user** button

6. Complete the user's **Personal Contact Info**.

7. Click the **save** button to commit the user to the database.

8. The staff list will be displayed once the save is complete. From the staff list select **create login** from the **Configure Account** drop down.

9. Enter a **username** and **password** for the super user.
   Passwords must be at least 8 characters long and must contain at least one number.

   (Review the **User Role Recommendations** section below for recommended roles for specific user accounts.)

   Grant the user the following roles for contingent labor organizations:

   - Express Requisition/Assignment Manager

   - Timecard Approver

   - Expense Approver

   - Job/WO/EA/Project Approver

   - Work Order and Assignment Manager

   Grant the following user roles for consulting/project procurement organizations:

   - Project Manager

   - Project Evaluator

   - Job/WO/EA/Project Approver

   - Work Order and Assignment Manager

   - Billing Approver

   - Timecard Approver – when utilizing consultant timecard payment requests

10. Click the **save changes** button. The user account will be saved to the database and is ready for use.

User Role Recommendations

This table contains recommended roles for specific user accounts.

Customer Account Managers (Managing Firm Account)	Internal Staff & Partners

Recommended Roles	Approval Workflow Administrator, CAM Approver, CAM Manager, Custom Reports Administrator, CWM Assigned CAM, Proxy, Reports Administrator
Customer Account Managers (Buyer Firm Account)	Internal Staff & Partners
Recommended Roles	Worker Administrator, Job/WO/EA/Project Approver, Proxy
Comment	A buyer firm level account should only be created for Customer Account Managers when the "Worker" tab has been enabled and they need access to it.
Buyer Executives (Buyer Firm Account)	Customer staff who need enterprise level access for reporting purposes
Recommended Roles	Buyer Organization Executive, Proxy
Hiring Managers (MSP) (Buyer Firm Account)	Customer staff who participate in the contingent labor RtP process on MSP managed accounts
Recommended Roles	Time and Expense Approver, Requisition Approver, Express Req/Assignment Manager, Work Order/Assignment Manager, Job/WO/Project Approver, Proxy
Hiring Managers (VMS+) (Buyer Firm Account)	Customer staff who participate in the contingent labor RtP process on accounts with no MSP

Supplier Organization Setup

Introduction

The purpose of this section is to outline the steps required in order to create a supplier organization in IQNavigator and to execute the initial business rules. These steps must be completed prior to being able to establish any business rules or system configurations for customers utilizing the IQNavigator application.

Create Supplier Organization

1. Log in to the application as a firm administrator.

   Typically, there is one firm admin user per managing firm. This user is initially created by IQNavigator and then transitioned to the partner for maintenance.

2. From the Set Up tab select **create supplier organization** button.
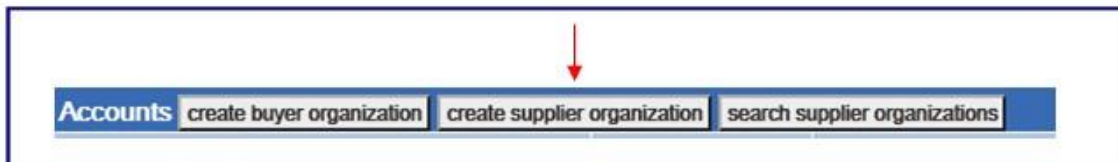
3. **Enter** the name of the organization.

   The parent or 'enterprise' organization should always be created first. All children should be created after that organization by selecting the **create child organization** action button and blue go arrow.

4. Click **Save Changes** to save the firm profile.

5. From the **Set Up** tab select **Accounts**.

6. Enter the name of the newly created organization into the **Search For** box and hit **enter** to execute the search.

7. When the screen refreshes find your organization in the organization list.

8. From the actions drop down menu select **create business rules** and click the **go** arrow.

9. The system will present a warning. Click the **continue** button. The main supplier organization configuration screen will be presented.

10. Complete all required fields and save. It is recommended to skip all non-required configuration settings for now so the buyer organization can be saved to the database before you are timed-out due to inactivity.

- Complete the **Business Information** address field and phone number fields.

- Complete the **Notice Address** section.

- Complete the **Payments Address** section.

- In the **Functionality** section, select the desired value from the **Unique Resource ID Required Default** drop down menu.

- In the **User Configuration** section, select the desired locale(s).

- In the **User Configuration** section, select the appropriate IQUniversity locale(s). The selected locale(s) should match in both these sections.

11. Click **Save changes** at the bottom of the screen. The supplier organization will be saved to the database.

Master Service Agreement (MSA)

The MSA is used to activate the supplier organization. Only one MSA will need to be executed for the lifetime of the organization.

How to Configure

At the bottom of the Buyer Firm Profile summary screen in the MSA section, click **Add Version**.

- **MSA Identifier** – This identifier is used to differentiate between the versions of the MSA. No functionality is driven off of this ID.
- **Effective Date** – This is for information purposes only and should be used to capture the date at which the supplier is going active in the system.

Supplier Statement of Work (SSOW)

The SSOW creates the relationship between the buyer and supplier organization in IQN as well as defined any additional management fees that were not captured on the BSOW. Because the SSOW is unique at the supplier level, each supplier can have different management fee configurations. SSOWs are also used to enable assignment payment requests.

1. From the Supplier Firm Profile summary screen, click the **edit** button. The Supplier Firm Profile configuration screen is displayed.
2. Scroll to the bottom of the page and locate the **Buyer Organization Service Agreements** section.
3. Locate the desired buyer organization in the list of organizations.
4. Highlight the organization and select the **add agreement** button.
5. Click the **save changes** button.
6. At the bottom of the Supplier Firm Profile summary screen in the **Buyer/Supplier Agreements** section click the **add version** button. The **SSOW editor** will be displayed.

How to Configure

Setting	Function	Use
Create Supplier Agency SOW From Template	By selecting an available contract template, the fields of this SSOW will be pre-populated in accordance with the data entered on the contract template. For more information, see the "contract templates" worksheet.	Use contract templates to minimize time spent on creating SSOWs.
SOW Identifier	The SOW Identifier is used to differentiate between different versions of the SSOWs.	Typically a simple numbering scheme is used i.e. SSOW v.1, SSOW v.2, etc. No functionality is driven off of this identifier.
Customer Internal Supplier Organization ID	The value entered here integrated to the billing system and is available on the invoice.	This field does not drive any functionality. It is for invoicing and reporting purposes only.
Customer's Supplier Organization Remit To Code	The value entered here integrated to the billing system and is available on the invoice.	This field does not drive any functionality. It is for invoicing and reporting purposes only.
Customer's Supplier Organization Payment Terms Code	The value entered here integrated to the billing system and is available on the invoice.	This field does not drive any functionality. It is for invoicing and reporting purposes only.

Setting	Function	Use
Customer's Vendor Contract #	The value entered here integrated to the billing system and is available on the invoice.	This field does not drive any functionality. It is for invoicing and reporting purposes only.
Staffing Type	Possible Values: Contract – This enables the contingent workforce module of the application. Direct Hire - This enables the direct hire module of the application. Project – This enables the project module of the application.	Contract should be selected when the organization will be managing contract and temporary labor. This option should always be enabled except in rare cases. Direct Hire – This is legacy functionality in use by older IQN customers. This option should not be enabled without consulting with IQNavigator. Project – Used when an organization will be managing consulting based work in the application. This allows the customer to enable billing against milestone based work or time and materials based work.
Effective Date	Used to capture when the terms of the SSOW are effective.	This field does not drive any functionality; it is used for information purposes only.
Time Entry Method	Used to capture the Buyer Organization's time entry method. Defaults from buyer organization	This field drives where the timecard entry takes place within the buyer organization.
Expense Entry Method	Used to capture the buyer organization's expense entry method. Defaults from buyer organization setup.	This field drives where the expense entry takes place within the buyer organization.
Invoicing Location	Used to capture the buyer organization's IQN invoicing location. Defaults from buyer organization setup.	This field drives how the invoice is created.
SOW Type	Indicates SOW Type	NA
Front Office Invoicing Conversion Date	Indicates Front Office Conversion Date	NA

Setting	Function	Use
Preferred Supplier	Setting under review	NA
Contract Management Fees – Entity Transaction Fee	Used to capture a buyer-side management fee.	Buyer side management fees are applied on top of the transaction bill rates. A buyer side management fee of 3% will add 3% on top of the bill rates. Buyer side management fees can also be defined on the BSOW. If buyer side management fees are defined on both the BSOW and the SSOW both fees will be applied to all transactions.
Supplier Organization Transaction Fee	Used to capture a supplier side management fee.	Supplier side management fees are taken from the transaction bill rates. A supplier side transaction fee of 3% will reduce the bill rates by 3%
Overtime Definition	Enter how many units per work period define the OT threshold	NA
Overtime Premium	This is used to capture an overtime premium percentage for information purposes only. This field is not required.	No functionality is driven off of this field.
Overtime Discount	This is used to capture an overtime discount percentage for information purposed only. This field is not required.	No functionality is driven off of this field.
OT/DT Rule Definition	Allows ability to add a new OT/DT rule.	

Setting	Function	Use
Buyer Organization Bonus Transaction Fee	This field is used to capture a buyer side management fee that will be applied to all Bonus transactions. This field is not required unless bonuses are subject to the buyer side management fee.	This field is typically only configured when buyer side management fees are being used to capture revenue and bonuses have been identified as transactions to which the fee should apply. Oftentimes even when a buyer side fee is in place the fee does not apply to bonuses.
Supplier Organization Bonus Transaction Fee	This field is used to capture a supplier side management fee that will be applied to all Bonus transactions. This field is not required unless bonuses are subject to the supplier side management fee.	This field is typically only configured when supplier side management fees are being used to capture revenue and bonuses have been identified as transactions to which the fee should apply. Oftentimes even when a buyer side fee is in place the fee does not apply to bonuses i.e. bonuses are exempt transaction.
Work Order Payment Request Allow payment requests?	This is used to enable the creation of assignment payment requests for the supplier organization.	Assignment payment requests allow a supplier to request ad-hoc payment against an assignment at any time.
Payment Type	Used to define the payment request types that are available for selection by the supplier when creating a payment request.	At least one type must be selected if payment requests are enabled.
Create Custom Work Order Payment Request Type	Used to create customized payment request types	Custom payment request types should only be created if the desired type is not already created in the list of available choices. Duplicates should not be created.
Project Agreement Payment Requests - Allow Payment Request?	Used to indicate yes or no	NA
Project Agreement Payment Request Type	Used to define the payment request types that are available for selection on any project agreement.	At least one type must be selected if project agreements are enabled.

| Setting	Function	Use
Create Custom Project Agreement Payment Request Type	Used to create customized payment request types	Custom payment request types should only be created if the desired type is not already created in the list of available choices. Duplicates should not be created.
Allow Suppliers to Override VAT on Payment Request	Used to allow override of VAT upon submittal of payment request.	When set to 'Yes' this setting to allows the supplier to override the application of VAT to a resource rate table payment request. The supplier must be configured to calculate VAT, and you should review this process with customer accounting before making this configuration change as it has implications to invoicing.
Direct Hire - Supplier Organization Placement Fee	This is used to support legacy customers and should not be enabled.	NA
Direct Hire - System Transaction Fee	This is used to support legacy customers and should not be enabled.	NA
Direct Hire - Managing Firm Transaction Fee	This is used to support legacy customers and should not be enabled.	NA
Projects – Supplier Agency Transaction Fee	This is used to capture supplier side management fees that apply to a Projects transaction.	See: Projects Procurement section.
Projects – Entity Transaction Fee	This is used to capture buyer side management fees that apply to a Projects transaction.	See: Projects Procurement section.
Enable Services Rate Table	This is used to enable the Rate Table functionality in the Projects module.	See: Projects Procurement section.
Rate Table Transaction Fee	This is used to capture buyer side management fees specific to a rate table line.	See: Projects Procurement section.
Excess Liability Insurance Required	This field is for information purposes only.	No functionality is driven off this field.

Setting	Function	Use
Amount of Excess Liability	This field is for information purposes only.	No functionality is driven off this field.
Expiration of Excess Liability	This field is for information purposes only.	No functionality is driven off this field.

Requisitions

Introduction

Requisitions are an essential tool in the process of procuring Contract Labor within IQNavigator and the first step in the end-to-end continuum of contingent workforce management. Requisitions can be configured to match existing client contract labor processes or to enhance the process needed to procure a contract labor resource. This section will review the different configuration settings that may be enabled for Job Requisitions.
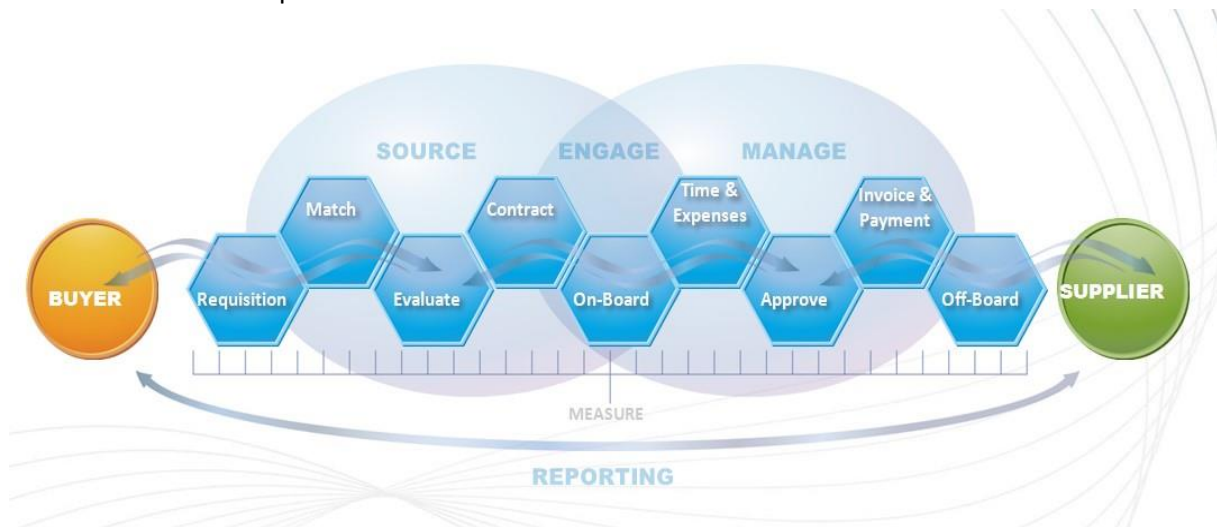
Job Requisition configuration contains setup steps in the following areas of the application. This presents the most useful order for setup of Job Requisitioning configurations:

1. Selections on the Buyer Firm Profile
2. Selections on Procurement Workflows
3. Job Level and Job Category
4. Job Template
5. Rate Card Identifier
6. Rate Card

Customers often have different requirements with respect to what types of requisitions they need based on service industry being supported, fast-pathing needs, sourcing scenarios, and various other unique differences.

Buyer Firm Profile Settings: Job Requisition Business Rules

Job Requisition details must be defined on the Buyer Firm Profile. These questions about different pieces of functionality all pertain to the Job Requisition. Below are the settings on the Buyer Firm Profile to answer regarding Job Requisition configuration.

Job Requisitions	
Ability to create/update buyer organization job templates:	Only Buyer Organization Admin users (client firm admin, CAM)
Allow Job's position to be reused when a Work Order is Completed?	No
Allow Job's position to be reused when a Work Order is Terminated before the Resource was On-Boarded (No Show)?	Yes
Allow Job's position to be reused when a Work Order is Terminated after the Resource was On-Boarded?	No
Trigger to close a Job:	Manual
Start Date Required on Jobs:	Yes
Lock Rates on Jobs Created from a Buyer Organization Job Template:	No
Display Hiring Manager and Job Owner Names & Contact Information to Supplier Organizations on Job Requisition:	No
Display all Cost Allocation Codes to Supplier Organizations on Job Requisition:	No
Send notification of changes in a Requisition upon:	Increase in economic value of a requisition
Position Calendar Default Week Ending Day:	Saturday
Display Pay Rate to HM/ERM:	No
Display Supplier Information to HM/ERM:	No
Show Supplier Diversity Info in Alternate UI:	No
Display Schedule Interview Action to HM/ERM:	Yes
Display job level and category filters on express requisitions?:	Yes
Allow date range for Job Requisition duration:	Yes
Allow Job Creation Without Using Templates:	No
Required Cost Allocation Codes on Job Requisitions ⓘ:	○ None ◉ Cost Allocation Code 1 ○ Cost Allocation Code 2 ○ Cost Allocation Code 1 and Cost Allocation Code 2
Display years of experience on job requisition:	No
Allow User to Edit Job Title on Requisitions and Assignments:	No
Lock Fee Classification on Jobs/WOs/WOAs/EAs Created From Job.:	No
Require the selection of Project Agreement on Job Requisitions:	No
Enable Previous Jobs on Create Requisition Screen:	No

How to Configure

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. The Managing Firm Administrator has access to manage and

configure more features/options on the Buyer Firm Profile for this buyer organization than does the Buyer Firm Administrator for this same buyer organization.

Selecting the **edit** action for the Buyer Firm Profile will take you to the editable account information screen. This screen contains General Business Information, Address & Contact Information, and general system functionality settings that will apply to all users within this organization.

Job requisition options give the ability to add additional configurations based on the customers' needs. *Note: Certain options must be used in conjunction with one another*.

- **Ability to create/update buyer organization job templates** give either all users or only admin type users the ability to create/update company-wide job templates. This option helps companies have controls on the templates the managers are using. If the option is marked as org unit admin users only, the managers will be able to utilize the template and make changes to the job requisition, but not have the ability to change the generic template.

- **Allow Job's position to be reused when a Work Order is completed** – In order to use this option, the setting of *Trigger to close a Job* must be set to manual. The system will not re-open a job that has been completed or cancelled.

- **Allow Job's position to be reused when a Work Order is terminated before the Resource was On-Boarded (No Show)?** – This option is very helpful in cases of No Show's. They system will restore the previous job matches so the manager does not have to start the job process over.

- **Allow Job's position to be reused when a Work Order is terminated after the Resource was On-Boarded?** – In order to use this option, the setting of *Trigger to close a Job* must be set to manual. The system will not re-open a job that has been completed or cancelled.

- **Trigger to close a job –** This option allows a job to be closed manually by the hiring manager, or can be set to automatically close once all work orders become effective.

- **Start Date Required on Jobs** – This option allows for an organization to say if the manager has to enter the start date onto a job requisition. When marked as 'yes', this helps the supplier organization know when the job is set to start. If marked as 'no', the suppliers might reach out to the managers asking for the specific information.

- **Lock Rates on Jobs Created from a Buyer Organization Job Template** – This option allows a customer to have greater control over the rates listed on the job templates. If this option is marked as 'yes' the manager will not be able to change the rate on the job from the rate listed on the job template.

- **Display Hiring Manager and Job Owner Names & Contact Information to Supplier Organizations on Job Requisition** – This option allows for an organization to allow the suppliers to see the name and contact information for the hiring manager and the job owner in the system. For any item not selected the supplier will see stars (****) where the managers name and/or contact information would be listed.

- **Display all Cost Allocation Codes to Supplier Organizations on Job Requisition** – If an organization would like the suppliers to see the customers costing information, then this option should be marked as 'yes'.

- **Send notification of changes in a requisition upon** – If a customer is not utilizing the approval functionality, but would like a contact to be notified each time a job has an increase in the number of positions, or if the economic value has increased this functionality should be utilized. If this functionality is to be used, the user will have to associate notification recipient on each user's profile.

- **Position Calendar Default Week Ending Day** – If utilizing the Daily Procurement workflow, this will change the calendar display to reflect the customer's week ending day.

- **Display Pay Rate, Supplier Information, And Schedule Interview Action To HM/ERM -** The standard configurations are Yes. Selecting Yes will allow managers to view pay rate information and schedule interviews with submit contract labor resources. Selecting No will prohibit managers from viewing this information.

- **Show Supplier Diversity Information to HM/ERM** – Setting currently under review.

- **Display job level and category filters on express reqs? –** This setting is useful when there are a lot of job templates created for an organization. It allows requisition creators to search by job level or category for the correct template instead of searching through the entire list of templates. Selecting Yes on this gives the users the search tool option. Selecting No requires the users to search through the entire list of templates.

- **Allow date range for Job Requisition duration -**Selecting Yes on this setting provides users with 2 fields on the requisition that defines the date ranges of the job. Selecting No forces the user creating the requisition to enter a single time period in regards to the job duration. The standard configuration is Yes.

- **Allow Job Creation Without Using Templates –** Selecting Yes will allow users to create jobs via the multi-tabbed job. This setting is not recommended. Selecting No will require users to create all jobs from templates which is a more efficient process.

- **Required Cost Allocation Codes on Job Requisitions -** This setting controls whether or not Cost Allocation Codes must be selected on Job Requisitions for this organization. If 'None' is selected no Cost Allocation Codes will be required. If any other option is selected then users will be forced to add at least one Cost Allocation Code 1 and/or #2 when creating a job requisition.

- **Display Years of Experience on Job Requisition –** This setting allows organizations to hide the years of experience field in the skills and roles section of the job requisition.

- **Allow User to Edit Job Title on Requisition and Work Order Details –** Selecting No will ensure consistency of job titles across the organization when a job is created from a template. Selecting Yes will allow each hiring manager to edit the job title on any requisition as they see fit.

- **Lock Fee Classification on Jobs/WOs/WOAs/EAs Created From Job** – Selecting Yes will allow the user to edit specific fee classifications on the job templates, work orders and assignments. Selecting No will prevent the fee classifications from being edited and they will default from the job requisition.

- **Require the selection of Project Agreement on Job Requisitions** – Selecting Yes will require the user to select a project agreement name on the job requisition. Selecting a project agreement name will allow an umbrella project agreement to be created for multiple work orders. Selecting No will not require that a project agreement name is selected on the job requisition. The user will still be able to create a project agreement if one is chosen, but the field will not be required in order to save the job.

- **Enable Previous Jobs on Create Requisition Screen** – Allows users to build new requisitions using copies of previous requisitions, helping them save time.

Buyer Firm Profile: Rates Business Rules

Job Requisition details such as Rates or Rate Card settings must be defined on the Buyer Firm Profile. These questions about Rates on the Buyer Firm Profile are the second group of items to answer regarding Job Requisition configuration.

How to Configure

Selecting the **buyer organization name** hyperlink from within the **View Accounts** list will take you to the **Buyer Firm Profile** for this account. Selecting the **edit** button will take you to the editable account information screen. Scroll down to the "Rates" section.

- **Rate Default Display** – This setting controls the way rates appear on Job Requisitions. You may set the rate display default to **minimized**: shows minimum & maximum rate fields only, or to **maximized**: shows all 9-12 independent rate fields (pay, markup, bill rate for all rate identifiers).

- **Lock Rate Default Display on Job Requisitions** –This setting controls the ability to set the default rate display on job requisitions so it will not be editable to the user. Selecting **Yes** will prohibit

managers from adjusting the rate display. Selecting **No** allows the user to determine the rate display if they so choose.

- **Allow users to amend 'Mark Up' rates on work orders and targeted orders?**
- **Hide Rate Information from Selected Roles –** Selecting specific roles will hide the particular data from the users selected.
- **Limit Supplier Rate Visibility to Pay Rate Only –** If No is selected the supplier will be able to view pay rate and bill rate. If Yes is selected the supplier will be able to view pay rate only.
- **Hide Estimated Costs Data –** Selecting Yes will hide budget information from suppliers. This field was designed to limit suppliers from seeing any large service provider fees.
- **Hide Salary Data –** Selecting Yes will hide salary data from the supplier.
- **Always Calculate Markup –** If Yes is selected the markup will automatically be calculated when the pay rate and bill rate are populated. If No is selected the markup will need to be input manually.
- **Enabled Conversion Rates –** Selecting 'Inherit from Parent Organization' will default the currency conversion rates from the parent organization. Selecting 'Define My Own' will allow the user to define specific currency conversion rates for that buyer organization.

Procurement Workflow Settings

Procurement Workflows control different hiring processes/paths for any designated group of job templates in the system. To configure, you will need to access the "Procurement Workflows" list page from the Account Information page.

Procurement Workflow configurations consist of the main "edit procurement workflow" page, the "edit layout" page, and the "edit work period definition" page.

Each organization will automatically have a System Default Workflow in place, which is used for the traditional non-recurring job requisition and typical path of buyer user creating an agreement and supplier needing to accept the terms/conditions of that agreement.

Why Configure

The need for different hiring processes within the application can sometimes be required within the same organization. The need to support various processes should not be the sole reason for creating a separate business rule organizations in the organization structure. Therefore, IQNavigator has

addressed this need through procurement workflows. Additionally, companies can also have various business rules and settings that may apply to specific types of requisition & agreement transactions, and this can only be accomplished by associating some type of grouping to these transactions, through procurement workflows.

Create New Procurement Workflow: Introduction

The Procurement Workflow creation screen is where the workflow rules and various system settings are specified, and any transactions associated to this procurement workflow in the application will follow these rules and settings.

- Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account.
- Select the **Procurement Workflows** action button. The system will present you the Procurement Workflow List screen.
- Select **create** action button in the **Procurement Workflow List** screen, the system will present you the Procurement Workflow creation editor.
- **Procurement Workflow Name** – each procurement workflow must have a unique name to identify it. Required Field.
- **Templates** – this information is systematically updated once you apply job templates to a procurement workflow (see Job Template creation section).

Create New Procurement Workflow: Workflow Rules

Next specify the **Workflow Rules** for this procurement workflow. The workflow rules will define the requisition & agreement type utilized, as well as the workflow tied to the requisition & agreement – the workflow defines what steps the transaction will be required to go through.

Requisition Types:

- **Daily Fill Requisition** - provides ability to request and manage day laborers where there is no commitment for an assignment greater than one day.
- **Recurring/Standing Long Term Requisition** - provides ability to request and manage groups of resources on a staggered basis. Assignments will typically be greater than one day in duration.
- **Non-recurring Long Term Requisition** - provides ability to request and manage resources for a set period of time, typically greater than one day in duration. This is the standard requisition type.

Workflows:

- **Workflow 1** – the supplier organization initiates agreement creation upon the resource submittal. (Utilized for fast-pathing because no back and forth negotiate is required).
    - Express Assignments are the agreement type utilized

- **Workflow 2 -** the buyer organization initiates agreement creation and supplier organization review & acceptance is not required. (Utilized for fast-pathing because no back and forth negotiation is required).

  □ Express Assignments are the agreement type utilized

- **Workflow 3 –** the buyer organization initiates agreement creation and supplier organization acceptance is required. (Utilized for typical hiring processes that facilitates negotiation between the buyer and supplier).

  □ Work Orders/Assignments are the agreement type utilized

- **System Default Procurement Workflow** – *rules are not editable, settings are*

  □ Non-recurring Long Term Requisition → Workflow 3

- User Defined configurations allowed

  □ Daily Fill Requisition → Workflow 1

  □ Daily Fill Requisition → Workflow 2

  □ Recurring/Standing Long Term Requisition → Workflow 1

  □ Recurring/Standing Long Term Requisition → Workflow 2

  □ Non-recurring Long Term Requisition → Workflow 3 (*At this time WF3 can ONLY be applied to the non-recurring requisition*)

	Non-Recurring (Express Req. or Regular Job)	LT Recurring (Express Req.)	Daily (Express Req.)	Work Order	Express Assignment ⊿Daily = 1/resource/job/ Submittal ⊿LT = 1/resource/job	Amend.	EA Change (no supplier accept)
WF #1 – Supplier Initiate	×	×	×		×		×
WF #2 – Buyer Accept	×	×	×		×		×
WF #3 – Supplier Approve	×			×		×	

Groupings/Examples:

Daily Express Requisition - provides ability to request and manage roster for day laborers where there is no commitment for an assignment greater than 1 day.

- Workflow 1 Benefits (Supplier/MSP Creates Agreement)

    o Manage variable resources

    o Ability to produce a daily resource roster (position calendar)

    o Allow for business & resource fluctuations

- Workflow 2 Benefits (Buyer Creates Agreement)

    o Same benefits as WF1, and

    o Allows buyer to evaluate resources and make final determination. Examples:

        - Highly qualified resources (i.e. nurses)
        - Scenarios with multiple suppliers providing resources & customer wishes to review rates and/or qualifications

Recurring Express Requisition - provides ability to request and manage groups of resources on a staggered basis. Assignments will typically be greater than one day in duration.

- WF1 Benefits (Supplier/MSP Creates Agreement)

- Mimic manufacturing/light industrial ramp cycle

- Provide consolidated reporting on one requisition over a period of time

    o Fill metrics by ramp period

    o Position statistics by ramp period

    o Overall requisition history

- WF2 Benefits (Buyer Creates Agreement)

    □ Same benefits as WF1, and

    □ Allows buyer to evaluate resources and make final determination. Examples:

        ▪ Highly qualified resources (i.e. nurses)
        ▪ Scenarios with multiple suppliers providing resources & customer wishes to review rates and/or qualifications

Create Procurement Workflow: Workflow Settings

Aside from establishing the Workflow Rules (as described in the previous page), there are particular settings that can be applied to a procurement workflow which will ensure that every transaction that exists for this workflow will be subject to these various settings, examples are:

- **Resource Submittal Details** – determines whether the supplier has the ability to submit details (like a submittal comment) when submitting a candidate to an opportunity. This field works in conjunction with work order options to allow the default rate to be from the supplier submittal screen. If this is disabled and the work order option is set to pull from the supplier submittal, there will be problems.
- **Enable Rate Treatments:** Rate treatments support workflow 1, 2, and 3 for both recurring and non-recurring.
- **Rate Treatment Submittal Details** – when rate treatments are enabled, this setting determines whether the supplier has the ability to submit specific rate treatments in addition to standard rates.
- **Hide Rate Card Rates from Suppliers**– selecting Yes will hide rate card rates from suppliers on the work order/assignment page
- **Display Hiring Manager, Timecard Approver, Expense Approver, and Duration to Contractor**? - selecting yes will display these data elements to contractors.
- **Allow users to create Assignments with a rate exceeding the greatest Rate Card rate? (for work orders)** - When configured, this feature will not allow the supplier or hiring manager creating a Requisition or Work Order/Assignment to exceed the maximum established rate.
- **Allow supplier to select tax rules when submitting resource** - To utilize the functionality to allow the supplier organization to select a tax rule when submitting a resource, tax rules must be enabled for the buyer organization. This setting applies to Workflow 3 Requisitions and Work Orders only. This functionality is utilized for Canada and the UK currently.
- **Default displays of hiring manager** – 2 fields (on requisition & on targeted order) - logged in user or user listed on job template.
- **Calculate Estimated Labor/Budget Based On** – Calendar or business days
- **Calculate Estimated Labor/Budget Using** – Bill rate or adjusted bill rate
- **Display Adjusted Bill Rate to Entity Users**– Enabling this setting will make the adjusted bill rate (which include contract fees) visibility to buyer organization users.
- **Display Reimbursement Rate to Supplier Agency Users** – Enabling this setting will make the reimbursement rate visible to supplier organization users. When supplier fees are enabled, the system will calculate the percentage on the bill rate and display what the bill rate is (adjusted) after the fees are taken into account.

- **Assignment Tax Configuration –** This setting allows you to specify the tax configuration on contracts.

- **Calculate Estimated Labor/Budget with a default markup** – apply markup %, if applicable.

- **Display the Assignment Budget/Estimated Amount fields to Suppliers –** selecting No will hide the assignment budget from the supplier.

- **Allow additional Tax Percentage field on Requisitions:** The Estimated Tax Percentage will indicate any additional value to be calculated on the requisition for anticipated taxes.

- **Allow user to define the number of hours worked per week for the labor budget calculation** Selecting Yes will allow the user to define the number of hours in the work week. The system calculation defaults to 40 hours.

- **Allow Rate Ranges on express requisition transaction rates** – Ranges must be enabled if rate ranges will be used on rate cards

- **Requisition Approval Criteria** – this setting defines which attributes drive re-approval of the requisition when they are modified after initial approval is granted.

- **Allow Supplier Distribution Override on Jobs with this Workflow by** – Selection can allow all users, or Requisition Supplier Manager and CAMs ONLY to override distribution rules.

- **Enable Assignment Admin to act on Work Order and Assignment Details –** The individual must have the role of "Assignment Administrator" and be selected on an assignment as an Assignment Administrator to be active. If the user is removed from the assignment, they will no longer be able to act in the Hiring Manager role.

- **Bypass initiate page when creating assignments (only applies to Daily Fill Requisition/Workflow 2)** – If utilizing a daily requisition and the Buyer Initiate workflow, the initiate Express Assignment screen can be bypassed by using this setting. When creating the assignment, the system will take the information from the job requisition, the rate card and the supplier submittal to populate all of the required fields on the assignment.

- **Allow suppliers to remove dates on daily fill express assignments**? – This gives the supplier additional functionality to be able to remove dates from the calendar function.

- **Allow suppliers to overfill/overfill Options**: If a customer would like to set a tolerance of how far over the number of requested positions a supplier can fill. This can be done by specific number or percentage.

- **Hide Rate Types:** This setting provides the ability to hide rate types on a respective object, such as a requisition or assignment. This will help guide users creating these types of objects to enter rate types that are meaningful for the procurement workflow selected. This configuration is constrained on procurement workflow so that all rate types may be set up on the rate card, but hidden on the object.

- **Require Rate Details On Resource Submittal** – if yes, specify which rates fields are required.

- **Restrict Resource Submittal** – This setting allows the buyer organization to limit the number of candidates submitted per supplier organization against each job requisition or against the number of positions available on a job requisition.
- **Calculate Maximum Resource Submittal From** – Total Submitted or Active Submitted. Active Submitted will allow a supplier organization to submit additional candidates if they change the status of a submitted resource to 'not interested in position'. Total Submitted will not allow a supplier organization to submit additional candidates to a job requisition once they reach their maximum, regardless of status.
- **Enable Candidate Screening** - Enabling candidate screening will prevent candidates from reaching hiring managers until screening has taken place. Screening can be done by the assigned CAM, CAM managers, or buyer organization assignment managers.

- **Interview Email Sender/Interview Email Recipient**– The default 'from' address can be selected as the Creator of the request, the Hiring Manager listed on the Job Requisition, or the CAM associated to the Job Requisition or the account.
- **Allow the Project Agreement and Project Outline associated to an Assignment to be edited after initial association with a Project Agreement** – Selecting Yes will allow project agreements and outlines to be edited at any time.

- **Allow Rate Type Changes on Work Orders? –** Enabling this setting allows users to amend the Rate Type (e.g. hourly vs. daily vs. monthly) on contracts.
- **Enable Multi-Currency Submittal and Work Order Creation? –** When this setting is enabled each supplier resource submittal will have the option to specify contractor rates in each of the buyer organization enabled currencies. Multi-currency resource submittals will then require that the hiring manager create one work order per enabled currency.
- **Source Method Values –** This setting allows you to specify the available values that appear in the Source Method field on new contracts.
- **Require Source Method Field –** Enabling this setting will make the Source Method field required on contracts.
- **Source Method Available To –** This setting allows you to specify if you only want the CAM to have visibility on the Source Method field, of if you want buyer organization users to also have visibility.

Create Procurement Workflow: Position Calendar Configuration

The calendar configuration allows an organization to see the data necessary within a position calendar. This setting only needs to be configured if the Daily procurement workflow is being utilized.

Create Procurement Workflow: Time Settings

When utilizing the enhanced time entry functionality, the procurement workflow can be set for specific time settings.

- **Number of calendar days past a timecard weekending date and Assignment end date a timecard can be submitted** – determines the last day that a timecard may be submitted.

- **Number of calendar days past a timecard weekending date and Assignment end date a timecard can be adjusted** - determines the last day that a timecard may be adjusted.

- **Number of calendar days past an Assignment end date an expense report can be submitted** - determines the last day that an expense report may be submitted.

- **Number of hours between timecard approval request notification reminders** – determines when timecard approval notification reminders go out.

- **Number of hours between expense report approval request notification reminders** – determines when expense report approval notification reminders go out.

- **Duplicate Timecard Warning** – establishes rules for duplicate timecard warnings to approvers.

- **Duplicate Timecard Validation** – determines whether a duplicate timecard generates a warning when submitted, or submittal is prevented on a potential duplicate timecard.

- **Budget Threshold Notification Percentage** – set the numerical percentage for budget threshold warning.

- **Allow suppliers to initiate express assignment updates?** – If marked as 'yes' the supplier will be able to initiate express assignment changes. An email will be generated to the manager when updates are made. If the company has approvals enabled, the first approval will go to the hiring manager listed on the work order.

Create Procurement Workflow: Alerts

If enabled, Alerts can be seen in the Approvals list if the Approvals list is also configured to display them. This is the section where the alerts themselves are enabled and display text can be changed.

- Duplicate Submittal

- Budget Threshold Alert Percentage

- Budget Threshold Met or Exceeded

Create Procurement Workflow: Supplier Org-Initiated Agreements

Some companies ask the suppliers to act on their behalf with respect to creation of agreement changes/modifications. Rather than giving the supplier a login to the buyer side, there is functionality that allows them to do certain functions on behalf of the buyer with their supplier login. With these

settings, the supplier may only initiate agreement changes, but not the original agreement creation. These settings are determined on a procurement workflow by procurement workflow basis.

Allow suppliers to initiate amendments? – If marked as 'yes' the supplier will be able to initiate amendments to a work order. An email will be generated to the manager when updates are made. If the company has approvals enabled, the first approval will go to the hiring manager listed on the work order.

Allow suppliers to initiate express assignment updates? – If marked as 'yes' the supplier will be able to initiate express assignment changes. An email will be generated to the manager when updates are made. If the company has approvals enabled, the first approval will go to the hiring manager listed on the work order.

Create Procurement Workflow: Edit Requisition Layout

The layout of requisitions associated with a procurement workflow can be edited by selecting the "create requisition layout" or "edit requisition layout" option in the "Actions" column on the Procurement Workflow list view:

The requisition layout editor allows you to drag and drop available fields in the left hand pane into the layout of chosen fields to the right. Similarly, chosen fields can be removed by dragging and dropping them back into the available fields section:

Field options will vary, depending on the requisition type/agreement type you select and whether or not any customer defined fields (CDFs) have been created and specifically associated with requisitions.

Examples of standard fields include Hiring Manager name, # of Positions, anticipated Start Date, etc.

Best practices have been devised for the layout editor, discussing which fields should/should not be selected in a standard staff augmentation, and can be found in the System Configuration Best Practices Workbook.

Create Procurement Workflow: Edit Work Period Definition

Work period definition associated with a procurement workflow can be edited by selecting the "edit work period definition" option in the "Actions" column on the Procurement Workflow list view:

Each customer will initially be configured with work period definitions that match the previous standard configuration – 8 hour work days, 40 hour work week. If a client works on a different standard, it should be noted using this setting. Customers utilizing monthly rates but who wish to track time in hours will be able to take advantage of the monthly rate requisitions, work orders and full invoicing support while still capturing and reporting time worked in hours.

Note that monthly rate support in invoicing is automatically enabled when monthly rates are enabled. Existing invoice extracts may require modification if a client wishes to enable monthly rates. Please work with Optimization Services when enabling monthly rates.

Job Level/Job Category

Job Levels and Categories are a way to parse and report on transactional data by specific categorizations. Levels and Categories can be used as reporting elements, and can also be used as filters for specific data in the application. For example, when creating a requisition or targeted order in the system, pre-defined requisition titles can be filtered by various levels/categories using this feature. Job Level and Category is first selected on a requisition, and this categorization of the requisition is carried through to the assignment.

The IQNavigator application includes a pre-defined list of job levels and categories, but organizations can maintain a customized list. The levels and categories that appear on system transactions can be

configured. New levels and categories can also be added. (Your IQNavigator Point of Contact can assist you with adding new levels and categories).

Why Configure

A customer may want configure job level and category values to what is common nomenclature or categorizations used within their company. Because these are reportable and segregate-able values, these will be visible and selectable by end users in the application.
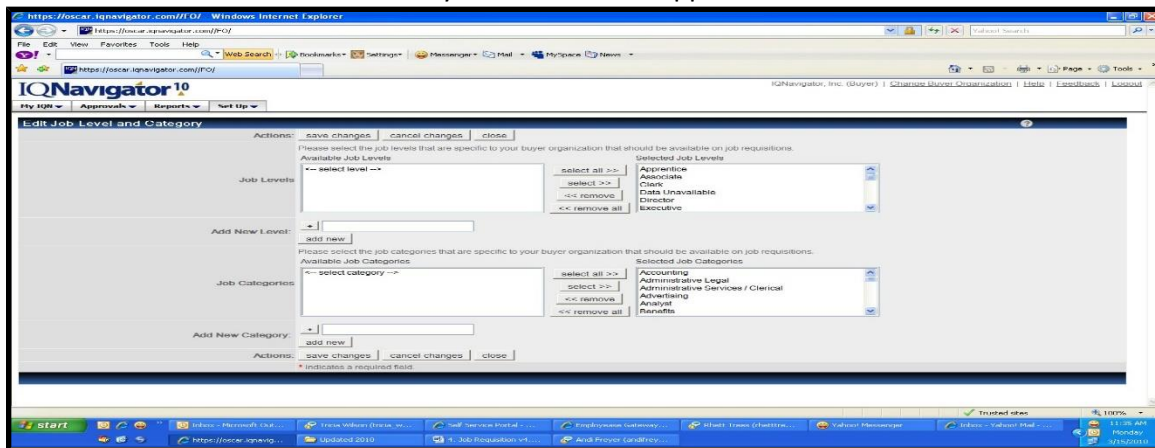
How to Configure

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account.

Select the **Job Level and Category** action button in the **Buyer Firm Profile** screen, the system will present you the job level and category configuration screen.

1. Select or de-select levels and categories that are specific to the organization; e.g. what is necessary for reporting/tracking purposes and/or filtering of transactional data in the system.
2. Add new levels and/or categories by entering new values in the **Add New Level** and **Add New Category** fields. Then select **add new** button.
3. Save the selections by selecting **save changes,** or select **cancel changes** to discard.

Examples

See IQNavigator default list in the application.

Job Templates

Templates simplify the process of creating a commonly used job requisition by entering the majority of the requisition information on the template, which will default onto any requisitions created from this template. This eliminates the need to create a job requisition from scratch each time there is a new opportunity. **My Job Templates** are only visible and usable by the individuals that created them, and

Buyer Organization Job Templates can be viewed and used by all system users within the organization. Because of the ability to default values, Job Templates are required for some types of requisitioning. For example, any express requisitioning requires the use of job templates and rate cards together for the ability to quickly create the requisition form.

This section of the document addresses the need to create job templates, as a critical part of the process of configuring job requisitions.

Why Configure

If a customer is utilizing express requisitions, and most are because of the ability to utilize pre-negotiated rates from rate cards, then job templates are required. Job Templates go hand in hand with Rate Cards. Job templates must be created in order to be leveraged for rate cards and express requisitioning.

Create Job Template

First, job templates must be created before any Rate Cards or subsequent Express Requisitions can be created. When creating a template, enter information about the requisition in all tabs of the Job Template Detail window, paying particular attention to the required fields noted by red text.

1. Select the **job templates** sub-menu option from within the **Jobs** tab.
2. Select **Buyer Organization Job Templates** from the **Filter** drop-down list. Only organization templates can be leveraged for rate cards & express requisitions.

   Note: **My Job Templates** are only visible and usable by the end user that created them.
3. Select **create template** action in the blue header bar to create a new template, or select **clone** to clone an existing template in the drop-down list located in the **Actions** column, click on the blue go arrow.

Rate Card Identifier

Rate Card Identifiers are a way to categorizing rate cards based on some meaningful identification to your company (e.g. location-specific: regions, city/states, national vs. international; dating-specific: year, quarter, month; shift-specific: shift x/y/z, morning shift, evening shift; etc.).

NOTE: If utilizing an Assigned CAM to create express requisitions, the Assigned CAM will need to be associated with the rate card identifier. If this step is not taken, the Assigned CAM will not be able to create an express requisition. Also, the Assigned CAM will only have visibility to the rate card identifier they are listed on.

Why Configure

If a customer is utilizing express requisitions, and most are because of the ability to utilize pre-negotiated rates from rate cards, then a way to identify the rate cards is required. Rate Card Identifiers must be created prior to Rate Cards.

How to Configure Rate Card Identifiers

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account.

1. Select **rate card identifiers** action button in the **Buyer Firm Profile** screen, the system will present you the Rate Card identifier list screen.
2. New Rate Card Identifiers may be created by selecting **create new** action on this screen.
3. Existing Rate Card Identifiers may be edited or deleted by selecting the **edit** or **delete** action associated to an individual Rate Card Identifier.
4. Select **close** to close the screen when completed.
5. Rate Card Identifiers must be set up before rate cards can be created.

6. Rate Cards and Rate Card Identifiers may be edited at any time, including deletion of a Rate Card Identifier. When Rate Card Identifier's are edited this has immediate effects/updates on the associated Rate Card.

Regions, city/states, national vs. international, year, quarter, month, morning shift, evening shift, etc.

Rate Card

Rate cards provide the ability to establish and maintain a set of agreed upon bill rates, mark-ups and payrates that have been pre-negotiated with your suppliers and based on pre-defined criteria. Rate cards are a means for grouping pre-negotiated rates for your Supplier(s) based on a Job Title, Rate Card Identifier & specific Rates all being in common. Each row on the Rate Card Table (see screenshot below) represents an individual rate card.

Because these rates are pre-negotiated, they are captured in the administrative layer of the IQNavigator system, and will be defaulted on applicable transactions created in the system (such as requisitions and agreements) at the time they are created.

Why Configure

Many customers already use some type of internal rate carding process within their organization (possibly termed something else), and this tool is a way to capture that data in the IQNavigator system.

- Rate Card functionality may only be enabled by a Managing Firm Administrator, as this setting has significant impacts to other features & settings in the application. Buyer Firm Administrator role does not have access to this functionality.

- If Rate Card functionality is enabled on the Buyer Firm Profile (Rates section), this ensures that the pre-negotiated Rate Card rates that are set up to specific Job Title, Supplier & Identifier criteria will be defaulted on the system transactions (Requisitions and Work Orders/Assignments).

- If Rate Card functionality is enabled on the Buyer Firm Profile (Rates section), Express Requisition type requisitions will be made available to the buyer firm users, which is a quick requisition

form. If enabled, Rate Card rates can also be applied to Targeted Orders by the buyer firm user.

- If Rate Card functionality is disabled on the Buyer Firm Profile (Rates section), Rate Card table & Rate Card Identifiers will not be available to the Buyer Firm Admin or other users with access to these screens, and the following Rate Card slides will not apply to your account.
- The following Rate settings impact how rate card values will display on the express requisitions.
  - □ Rates Minimized/Expanded
  - □ Allow Editable Markups
  - □ Lock Rate Default Display on Job Requisition

How to Configure Rate Cards

Selecting the **buyer organization name** hyperlink from within the **View Accounts** list will take you to the **Buyer Firm Profile** for this account.

- Select **rate cards** action button in the **Buyer Firm Profile** screen, the system will present you the Rate Card rate table screen.
- New Rate Cards may be created by selecting **create new** action on this screen.
- Existing Rate Cards may be edited or inactivated by selecting the **edit** or **inactivate** action associated to an individual Rate Cards on this screen.

- By selecting create new or edit, the system will present the rate card setup screen.

  The rate card setup screen is a two screen wizard. The first screen requires one or more Job Titles to be selected and one or more Suppliers to be selected. This designates that for the compensation rates input in the second screen (next page) the rates will be applied to system transactions (requisitions and agreements) that meet the Job Title, Rate Card Identifier and Supplier criteria.

- **Use Factors -** You may specify to use Factors or not in creating the rate card rates. Using Factors provides a means for auto-calculating the rate card rates based on a multiplication by a factor number you input.

- **Use Ranges -** You may specify to use rate ranges or not in creating the rate card rates. If using ranges, the rate card rates will actually be captured in a range format and be defaulted as such on the system transactions (requisitions and work orders/assignments).

- **Status –** set the status of the rate card to active for use of it, or inactive to inactivate it for future transactions.

- **Currency –** set the applicable currency for these rates

- **Job Title –** select from a list of job template titles to make applicable to this rate card (Note: If using Rate Cards for your organization(s), you will need to first create Organization Unit Job Templates (see the Job Templates section) and make them available to rate cards.

- **Supplier Organizations** – select the supplier(s) that are subject to this rate card.

  The second screen on the Rate Card Setup wizard will be displayed according to the Factors & Rate Ranges selections you have made. You may select both features. In this example, we are not using Factors to calculate the compensation rates, nor using Rate Ranges. These two examples are highlighted in the upcoming slides.

Compensation

No rates are required to be input on this screen. If a rate field is left blank, this rate field will also default to blank on system transactions (requisitions and agreements). You may specify rates in the appropriate fields wherever rate values have been pre-negotiated. For example: some customers may only negotiate set mark-ups with their suppliers and therefore would only specify the mark-up rates on this screen, where some customers may only negotiate set bill rates, etc.

- Within one rate row, you may specify a value in one rate field and will not be required to enter the rates in the other two rate fields.
- Within one rate row, if you specify a value in two rate fields, the system will prompt you to select the calculate action to calculate the remaining rate field based on the other 2 values provided.
- Within one rate row, if you specified a value in three rate fields, the system will also re-calculate the bill rate when user clicks 'calculate' button.

Matches

Matching in the IQNavigator application is the term used for the candidate submittal against a job requisition, e.g. a 'match' to the requisition on specific criteria that is being requested. The IQNavigator matching functionality allows buyer and supplier organization users more visibility into candidate work history, qualifications, and tracking. Specifically, Match Alerts are a way to notify the buyer user of key information about a candidate submittal that may influence whether the hiring manager procures that individual or not. There are some additional settings that can be configured on the procurement workflow to drive supplier requirements with respect to submitting candidates, on a workflow-by-workflow basis.
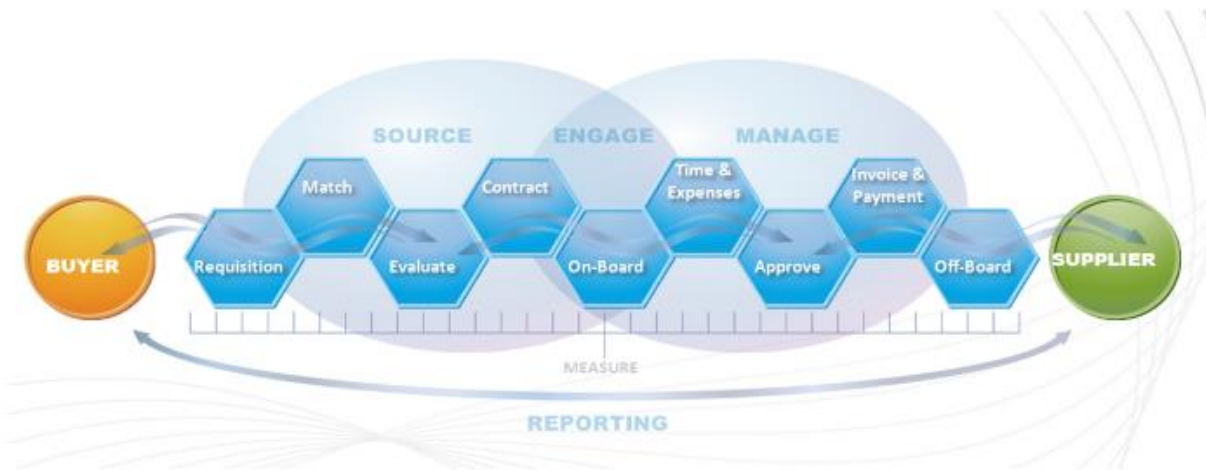
Why Configure

The benefit of using Match Alerts allows hiring managers to make better selection choices based on all available historical information pertaining to the resource. Match Alerts can be enabled or disabled, and configured to a company's specific terminology. Additionally, if Match Alerts are enabled, a Unique Resource ID must be required as well by supplier organizations submitting candidates to be able to uniquely identify and track that specific candidate.

Match Alert Settings

The ability to set up various alerts indicating the contingent worker's history and your own naming convention for these alerts. These alerts will be displayed to managers on a candidate submittal screen (match screen) when this candidate is subject to one of these alerts. Match Alert examples include, past assignments at the company, past positive or negative performance evaluations at the company, duplicate submittal to the same opportunity, and certification expirations.

Unique Resource ID

If required, this setting allows contractor work history and other historical data to be tracked in the application. Unique Resource ID options include, social security number, national insurance ID, driver's license, visa, or a customized number specific to the supplier firm (i.e., birth-date, last four #s of SSN). The supplier organization submitting any candidates to job opportunities are responsible for entering a unique resource ID. This is the driver for the match alerts functionality.

Consistency of this data collection ensures the Match Alerts functionality to perform. The suggested format of the unique resource ID is to collect the social security number (for U.S. based suppliers) and/or Visa (for international suppliers). This way, the match engine can search all candidates across multiple supplier firms in the application.

Procurement Workflow Settings Related to Matching

There are specific procurement workflow settings that tie to supplier requirements when they are submitting candidates to job opportunities. These requirements are driven by the buyer side and are used to generate more match information about the candidate being submitted. These settings are:

- Enabling Resource Submittal details, and

- Requiring Rate Details on Resource Submittal

How to Configure: Unique Resource ID

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Choose the **edit** button in order to update/modify this profile for the Buyer Organization. Navigate to the **Match Alerts** section of this screen.

- **Require Unique Resource ID for Supplier Organizations -** This setting will reinforce the supplier's use of the Unique Resource # and is the driver for being able to collect past match data for use in generating match alerts. If your organization would like to enable Match Alerts (see the next section), this field must be set to Yes for Match Alerts to function.
- **Unique Resource ID Types –** This setting allows the buyer organization to specify list of available Unique Resource IDs when the supplier creates a new resource. If the unique ID is required at least one ID type must be selected.

How to Configure: Match Alerts

- On the Buyer Firm Profile, in the **Match Alerts** Section check the **Enable** option for each alert and enter the **Alert Text** you wish to display to end users.
  - o **Duplicate Submittal** – alerts when the same resource is submitted by more than one supplier for the same job opportunity.
  - o **Previous Assignment** – alerts when a resource has performed previous service/assignment for a hiring manager within the buyer organization(s)
  - o **Positive Evaluation** – alerts when a resource (with a past assignment within the buyer organization(s)) received a positive evaluation
  - o **Negative Evaluation** - alerts when a resource (with a past assignment within the buyer organization(s)) received a negative evaluation
    - ▪ The evaluation question used to determine positive or negative evaluation is - "Would you recommend this resource for another position within your company?" If the answer is 'yes', the resource gets a positive evaluation, if the answer is 'no', the resource gets a negative evaluation. Additionally, if the reason code 'Do Not Re-hire' is selected upon Termination of a work order, this too will trigger a negative evaluation for that resource.
  - o **Certification Expiration** – if a manager requires certain certifications of candidates, and a particular candidate's certification is expired or due to expire

Enforce Do Not Rehire: Alert functionality will track against previous resource assignments (if the Alerts are enabled mid-stream). Alerts will track against matches created when the Resource Profile has been submitted previously, regardless of whether the Alerts functionality was previously enabled or not. However, if the representing resource profile is different (i.e. different supplier or same supplier but they created a new profile), the system can only track against the Unique Resource ID#. So if there is no previous Unique Resource ID# collected in regard to a match record or assignment record, the system will not be able to track against it.

How to Configure: Procurement Workflow for Submittal Details

Refer to the **Procurement Workflow Settings** content in the **Job Requisitions** section of this document for details on how to create/edit Procurement Workflows.

Workflow Settings section

- **Resource Submittal Details** – (Defaults to Enabled) Determines whether the supplier gets to the ability to submit details (like a submittal comment) when submitting a candidate to an opportunity. This field works in conjunction with work order options to allow the default rate to be from the supplier submittal screen. If this is disabled and the work order option is set to pull from the supplier submittal, there will be problems.

How to Configure: Procurement Workflow for Requiring Rate Details on Resource Submittal

Refer to the **Procurement Workflow Settings** content in the **Job Requisitions** section of this document for details on how to create/edit Procurement Workflows.

Workflow Settings section

- **Require Rate Details on Resource Submittal** – (Defaults to No) Determines whether the supplier is required to enter rates per candidate submittal to job opportunities. By choosing Yes, the user is required to enter the applicable rate types below.

Examples

Light Industrial/Manufacturing Example

Match Alerts are not typically used in the light industrial environment due to the high volume of workers, short-term work assignments and less need to track employment history. Also, requiring a Unique Resource ID may or may not be used in this type of procurement. Typically, it is a good idea to track the workers with a Unique Resource ID for audit-ability and reporting purposes.

Additionally, using daily fill requisitions assists in speeding up the procurement process; therefore, worker evaluation may not be as thorough as with the other workflow options.

Professional/Technical Example

The Match Alerts are more often used in the professional/technical type of scenario. These assignments typically last longer than one day, therefore work history and contractor time limits can be easily maintained and tracked.

The evaluation of contractors occurs more frequently and thoroughly in these scenarios when the hiring manager is looking for a lower volume of workers and specific skill sets. Therefore, it is more common to use the Match Alerts functionality.

Create Contract (Work Order/Assignment)

Once the decision has been made to procure a contingent worker for a contract labor need, an *agreement* must be created in the application. This section will discuss the initial administrative configurations necessary to create agreements (work orders/express assignments) and the associated contractor assignment details in the application.

Work Orders and/or Express Assignments are the electronic agreements between the Buyer and Supplier firms holding the terms of each individual contracted position. The terms *contract*, *work order*, and *assignment* can be used interchangeably depending on the procurement workflow set up for the buyer organization.
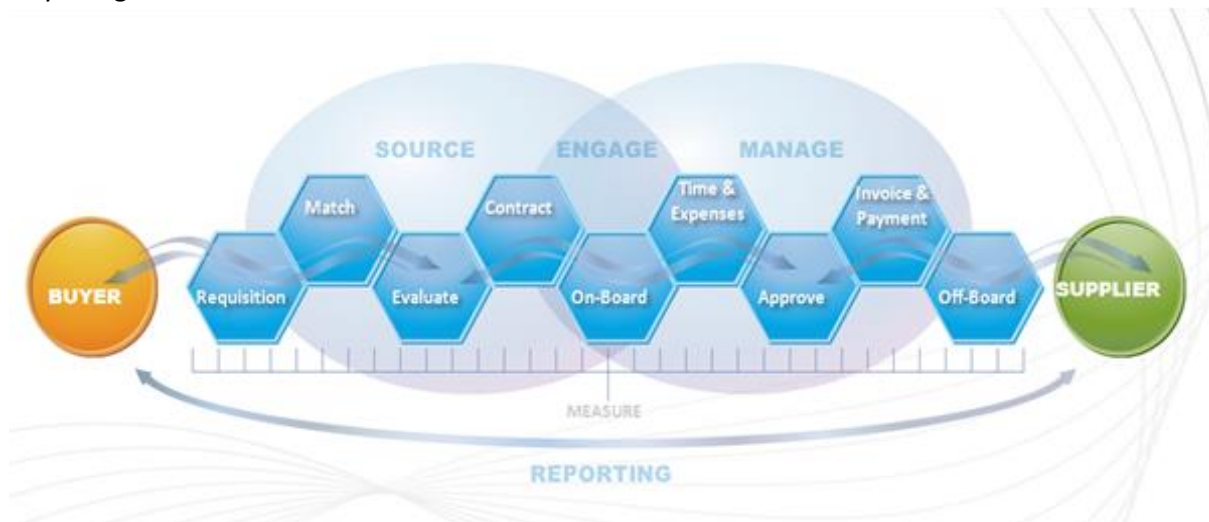
Why Configure

Contract set up options give the ability to add additional configurations based on the customers' needs. Customers often have different requirements with respect to the types of service industries being supported, and this in addition to procurement workflows utilized, will drive what types of agreements are utilized in the application.

Contractual Changes - Changes to any of the contractual terms (e.g. start/end date, bill rate) on a Contract require an Amendment. The Amendment is a restatement of the contractual terms and would require the same approval/acceptance steps as a new contract.

Non-Contractual Changes - There are less stringent terms with respect to segregating the contractual details and a formal amendment process. The system will still determine and allow for approval/ acceptance steps to be tied to the contract however, based on whether the contractual terms are

edited or not. Modifications to contracts that are not contractual (e.g. timecard approver name) do not require approval.

Targeted Assignment – Gives buyer firm the ability to track contractors within the IQNavigator application that do not follow the traditional work order assignment/ workflow. These are contractors who are employed by the customer, but they are not going through the requisition, matching, or invoicing process in the system. A targeted assignment is not sent to the supplier for matching and acceptance; there is no supplier interaction. A targeted assignment is created without a bill rate or budget, and no time/ expenses are submitted against the assignment. The contractors themselves will not have access to IQNavigator.

Contractor Time Limits - Ability to set up Length of Stay rules regarding your organization's contractor assignments, which will trigger an alert when individuals in your organization try to create agreements for contractors who have exceeded the length of stay rules.

How to Configure: Work Order & Assignment Business Rules

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Choose the **edit** button in order to update/modify this profile for the Buyer Organization. Navigate to the **Work Order & Assignment** section of this screen.

Work Order & Assignment	
Resource Evaluations:	Complex
Targeted Order:	Enabled
Allow creation of Targeted Orders without Rate Cards?	Yes
Headcount Tracking Assignment:	Enabled
Allow Expense Entry	Yes
Allow users to submit payment requests?	Assigned CAM/CAM Manager, Supplier
Estimated Labor Field on Work Order/Amendment:	System Calculated Budget
Allow Archived Work Orders to be amended for how many days after the archive event:	0
Default rates on work order from job requisition/rate card or supplier organization resource submittal:	Supplier Organization Resource Submittal
O.OO Bill Rate Warning on Agreement Creation	Disabled
Allow daily rates on jobs, work orders:	No
Allow weekly rates on jobs, work orders:	No
Allow monthly rates on jobs, work orders:	No
Allow annual rates on jobs, work orders:	No
Limit effective date entry by hiring managers on amendments?	Allow unrestricted effective dates on work order and express assignment amendments
Display Supplier Reference Number Field on Assignment Payment Request Editor:	No
Display Supplier Reference Date Field on Assignment Payment Request Editor:	No
Display Supplier Reference Flag Field on Assignment Payment Request Editor:	No

- **Resource Evaluations** – If this option is marked as 'Mandatory', a work order/express assignment cannot be off-boarded (completed/terminated) until a performance evaluation is completed for the individual contractor. (Refer to Resource Evaluations section of this document for setup details)

- **Targeted Order** – This option enables an organization to allow targeted orders. A targeted order skips the requisitioning step and sends the agreement request directly to a specified supplier. This functionality is used when there is a known resource or supplier for the contracted work

and the sourcing step is not necessary. Only users with the targeted order manager role can perform this function.

- **Allow creation of Targeted Orders without Rate Cards**? - Enabling this setting allows applicable users to create targeted orders without associating them to rate cards.

- **Headcount Assignment/Targeted Assignment** – This option enables an organization to track contractors within the IQNavigator application that do not follow the traditional work order assignment/ workflow. These are contractors who are employed by the customer, but they are not going through the requisition, matching or invoicing process in the system. A targeted assignment is not sent to the supplier for matching and acceptance- there is no supplier interaction. A targeted assignment is created without a bill rate or budget, and no time/ expenses are submitted against the assignment. The contractors themselves will not have access to IQNavigator.

- **Allow Expense Entry –** This option allows for expense entry on a work order/express assignment. If this option is marked as 'yes', the option for expenses will be determined on a work order by work order basis. If it is marked as 'no' the selection of expenses will not be available across the entire organization.

- **Allow users to submit payment requests?** – Select whether the Assigned CAM/CAM Manager, the Supplier, or both are able to submit payment requests when the payment request functionality is turned on through the Statement of Work.

- **Estimated Labor Field on Work Order/Amendment** – This field allows an organization to either have the system calculate the Estimated Labor field or have the user enter a manually calculated budget. If the system calculates the budget, it is a calculation based off Total number of positions, Length of job/assignment (based off 2080 annual hours) and bill rate. If a rate range is used on a job, the calculation will be off the higher rate of the rate range.

- **Allow Archived Work Orders to be amended for how many days after the archive event** – Once an agreement has been completed or terminated it moves to the archived work order list. This option allows for an amendment to occur once the work order has been completed or terminated. Once the number of days listed in the option has passed, the work order can no longer be changed in any way.

- **Default rates on work order from job requisition/rate card or supplier organization resource submittal** – When an agreement is created, rates will default onto the creation screen. This option determines where the rates are defaulting from. If a customer wants to keep tight controls on their rates, they might want to keep this option as default rates from the job requisition. If they want the rate the supplier bid for the position to be the starting default rate then the selection of supplier organization resource submittal needs to be selected. The manager will have the ability to update the rate no matter which option was selected.

- **0.00 Bill Rate Warning on Agreement Creation** – This option will provide a warning if an agreement is being created with a $0 bill rate.

- **Allow Daily rates on work orders** – if enabled, this will allow for selection of daily rates on the Work Order.

- **Allow Weekly rates on work orders** – if enabled, this will allow for selection of weekly rates on the Work Order.

- **Allow Monthly rates on work orders** – if enabled, this will allow for selection of monthly rates on the Work Order.

- **Allow Annual rates on work orders** – if enabled, this will allow for selection of annual rates on the Work Order.

- **Limit Effective Date Entry by Hiring Managers on Amendments –** This setting applies to hiring managers. Buyer Organization Executive and Buyer Organization Work Order Managers will be able to enter past dates regardless of the setting selected.

- **Display Supplier Reference Number Field on Assignment Payment Request Editor –** This field can be specified as optional or required for suppliers to enter internal reference numbers when submitting a payment request.

- **Display Supplier Reference Date Field on Assignment Payment Request Editor-** This field can be specified as optional or required for suppliers to enter the date when submitting a payment request.

- **Display Supplier Reference Flag Field on Assignment Payment Request Editor -** This field can be specified as optional or required which will flag the supplier payment request. The field label is customer-defined the values are a Yes/No radio button. The flag's value can be provided on the invoice.

- **Display Supplier Reference Amount 1 Field on Assignment Payment Request Editor -** This field can be specified as optional or required for suppliers to enter a reference amount when submitting a payment request.

- **Display Supplier Reference Amount 2 Field on Assignment Payment Request Editor -** This field can be specified as optional or required for suppliers to enter a reference amount when submitting a payment request.

- **Default Actual End Date when completing or terminating work orders or assignments** – If Planned End Date is chosen, when completing/terminating a Work Order or Express Assignment the field will default to the end date previously specified on the agreement. If none is chosen, the field will be left blank for the user to fill in.

- **Combine approve and submit actions on work order payment requests** – When enabled Yes, this option will submit the payment request for invoicing upon approval.

- **Display job level and job category filters on targeted orders** – This setting allows hiring managers to filter the available job title/rate card titles when creating a targeted work order.

- **Track budget by labor and expenses** - When set to Yes, the system will display and track the work

  order transactions and remaining budget by labor and expenses. When payment request management is enabled as well, the system will enforce the management at the labor and expense level. This setting is NOT recommended for customers who are configured for system calculated labor as that value will not include overtime. In addition, this setting cannot be enabled when the customer has configured View Assignment Estimated Total Spend.

- **Enable Payment Request management** - This configuration will prevent the transaction type selected from being approved if it exceeds the associated assignment's remaining budget.

- **Enable Payment Request management at transaction submission** - This configuration will prevent any payment request from being submitted if it exceeds the associated assignment's remaining budget.

- **View assignment estimated total spend** – This setting allows a buyer side user to see the total spend amount that has been billed against a work order/assignment.

- **Include tax, discount, and fee rebate transactions in assignment estimated total spend**

- **Allow negative payment requests** – This can be enabled for CAM users or Supplier Accounting Representatives.

- **Allow Hiring Mangers to complete or terminate assignments** – If disabled, only the CAM will have access to change the status of an assignment.

- **Generate Missing Timecard Notifications**- When this configuration is set to yes, the user can configure each WO/TO/EA to receive missing timecard notifications. The notifications are sent every Monday to the recipients enabled on the notifications business rule for all missing timecards over the previous 4 week period.

- **Prevent Timecard Entry Prior to** – Timecard entry will be restricted prior to the date entered

- **Restrict Rate Changes Prior to**– Rate changes will be restricted prior to the date entered

- **Display Contractor Effectiveness Rating on Assignment Completion/Termination** – Enabling this configuration will give the Hiring Manager the option to rate the level of effectiveness of a particular contractor on a work order.

- **Enable Supplier Organization Work Order Data Entry –** This setting will allow applicable users within selected supplier organizations to make modifications to contract data that do not have to be initiated by the buyer firm.

How to Configure: Contractor Time Limits

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Choose the **edit** button in order to update/modify this profile for the Buyer Organization. Navigate to the **Contractor Time Limits** section of this screen.

- **Would you like to track contractor time limits? – (**Defaults to No) Choosing Yes, allows the organization to track contractor work period and time limits. If this is enabled warnings will be given to a user when a contractor is approaching the limits set within the organization. This warning appears when creating a work order, creating an amendment or creating an express assignment.

- **Time Limits** – set the length of stay time limit criteria as mandated by the customer.

How to Configure: Procurement Workflow Assignment Layout

The layout of assignments associated with a procurement workflow can be edited by selecting the "create assignment layout" or "edit assignment layout" option in the "Actions" column on the Procurement Workflow list view:

The requisition layout editor allows you to drag and drop available fields in the left hand pane into the layout of chosen fields to the right. Similarly, chosen fields can be removed by dragging and dropping them back into the available fields section:

This functionality is based on the configurable requisition and project agreement layouts that have already been implemented. The system will support the ability to configure layouts at the procurement workflow level and will support distinct layouts for Workflow 1 and 2, Workflow 3 and Headcount Tracking Assignments.

The layout designers include all of the existing customizable layout functionality including drag and drop field positioning, field labeling, the ability to set fields as required/optional, and layout preview. The default layouts will include all available assignment elements, even those that may be contingent upon other organization configurations to be visible to the end user. For example, Assignment Administrator will appear in the default layout, however, it will only be rendered if the supporting Buyer Firm Profile setting is also enabled.

The workflow 3 assignment layout includes Contractual and Non-Contractual sections, similar to the existing Project Agreement layout screens. A contractual field cannot be moved into the non-contractual section and vice versa. Contractual fields require amendments to edit while non-contractual fields do not.

Field options will vary, depending on the requisition type/agreement type you select and whether or not any customer defined fields (CDFs) have been created and specifically associated with requisitions. Examples of standard fields include Hiring Manager name, # of Positions, anticipated Start Date, etc. Best practices have been devised for the layout editor, discussing which fields should/should not be selected in a standard staff augmentation, and can be found in the System Configuration Best Practices Workbook.

Timecards, Expense Reports, Payment Requests and Bonuses

This section covers the four inputs to an invoice – timecards, expense reports, payment requests and bonus processing. Prior to setting up these sections, the invoicing requirements need assessment. A thorough understanding of the invoicing requirements is necessary, including weekending dates, time entry methods, allowable expense types, relevant time and expense policies, and will other non-expense type payment requests or bonuses be allowed for suppliers and if so what types.
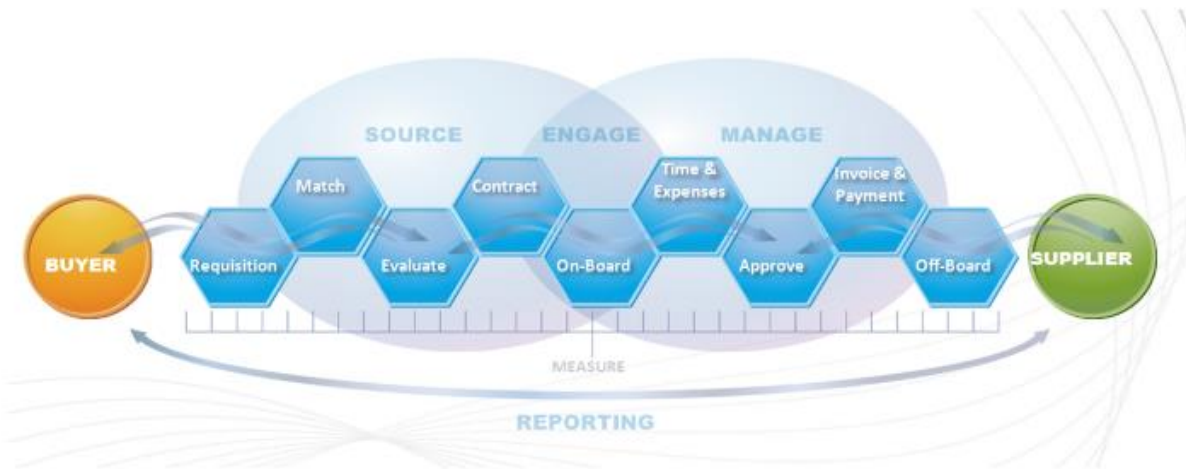
Why Configure

Customers often have different requirements with respect to what types of expenditure processing they need, based upon the service industry being supported, the location of work, and other various criteria. Because of this, IQNavigator has built infrastructure to support these variables. There is an abundance of options available to the customer with respect to how they can define their expenditure entry (timecards, expense reports, payment requests, and bonuses) which all tie back to the overall invoicing process and requirements.

Timecards

How to Configure: Time Entry Week Ending Day

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Choose the **edit** button in order to update/modify this profile for the Buyer Organization. Navigate to the end of the **Business Information** section of this screen.

- **FO Time Entry Week Ending Day -** This setting will mandate the week ending day for all timecards created for this organization. Once set, this field cannot be changed without technical assistance.
    1. Select the value from the drop-down (Sun, Mon, Tues, Wed, Thurs, Fri, or Sat).

2. The time entry week ending day is simply the last day of a calendar week for the buyer organization. If multiple week ending days exist within a buyer organization, separate buyer organizations must be created to accommodate.

How to Configure: External Data Sources for Time

Navigate to the **Integration** section and **Upload File Directories** section of the editable Buyer Firm Profile screen.

- **Enable IVR -** IVR (Interactive Voice Response) can be enabled for contractor time entry via the phone. This setting requires technical integration assistance by IQNavigator; work with your IQN point of contact should you have this requirement. Be aware, IVR has a cost associated to it on a per timecard basis.

- **Time Feed Upload Directory –** If utilizing a time feed, the file directory path is specified here. This setting requires additional technical integration assistance by IQNavigator as well.

How to Configure: Procurement Workflow Settings for Time Entry

There are several settings on the procurement workflow screen that should be configured to set up time entry processing.

How to Configure: Timecard Templates

When enhanced time entry functionality is utilized, timecard templates may be established to address different timecard entry types (different display of timecard rows, daily timecards, time in/time out timecards, etc.) outside of the default timecard format. If utilizing IVR, these templates will not need to be setup.

It is possible to add Customer Defined Fields (CDFs) to the timecard template. These can be configured at the timecard line and timecard header level. Data collected from the CDFs can be reported on.

Selecting the **buyer organization name** hyperlink from within the accounts list will take you to the **Buyer Firm Profile** for this account. Choose the **timecard templates** action button to create new timecard templates.

- To create a new timecard template, select **create timecard template** action within the timecard templates list.

- To edit an existing timecard template, select **edit** action associated to the timecard template you wish to change, or select the timecard template name hyperlink.

- To preview the format of an existing timecard template, select **preview** action associated to the timecard template you wish to view.

- **Template Name** - Give the Timecard Template a unique name.

- **Template Description** - optional.

- **Time Period** – defaults to weekly at this time.

- **Rate Type –** this will either be hourly or daily. If you have a daily template, the contractor will have a check box for the day worked, and not enter the number of hours worked, only that they worked that day.

- **Time Collection Format** – The format of the template can be one of 2 options – Regular hours or time in/time out lunch.

- **Timecard Orientation -** Row vs. column display of days.

- **Billable Rate Identifiers** - Regular Hours, Overtime Hours, Double Time Hours.

- **Time Entry Increment** - Whole Hours, Tenths of Hour, Quarter Hours, As Entered.

- **Data to be Displayed on Timecard** – all items selected will be displayed as columns on the timecard. There are certain defaults that can't be changed (like Days & Dates column & Assignment # column).

- **Cost Allocation Code Rules** –

  □ **At Timecard Entry** - The user entering time (either the contractor or supplier accounting representative) is able to select the cost allocation code at time of entry. The approver is not able to change the selected values.

- □ **At Both Timecard Entry and Approval** - The user entering time can select the cost allocation code & the approver can override the selection. The approver is able to allocate the time entered on the timecard across all CACs currently selected on the assignment. If the approver updates the selected CACs, the system does not allow him/her to increase/decrease the total number of hours entered on the timecard.
  - □ **Subtotals by Cost Allocation Code** – designate whether the timecard should display subtotals or not.

- **Show Pay Rates to Contractors** – Yes or No

- **Display Total Timecard Amount –** Yes or No

- **Allow Document attachments** – Yes or No

- **Buyer Organization Unit** – this configuration item allows the template to be shared across multiple organization units in an enterprise. Reduces need to duplicate.

Printed Template:

Printed Timecard – IQNavigator Standard will print the timecard as it is viewed in the application. The customer defined option allows for an output template to be attached further defining the format of the printed timecard. The output format can be attached as an HTML, PDF, or Excel document.

Timecard to Template Association Rules

If an organization chooses to use multiple templates, this section addresses identification of rules for the system to determine when/which template to use when a timecard is submitted.
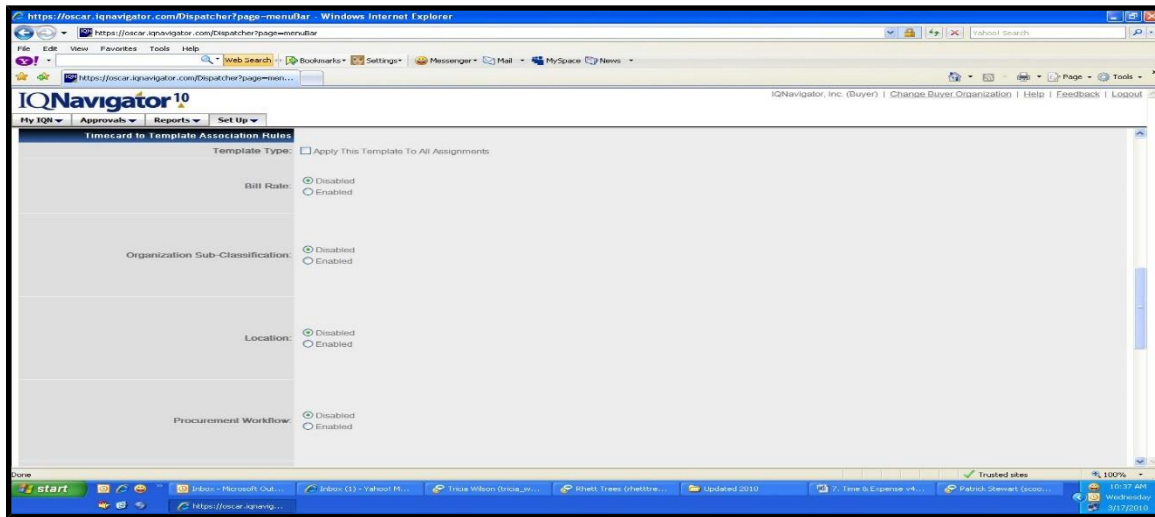
- **Template Type** – This template can be applied to all assignments (and therefore all timecards), which will make all other rules irrelevant. If selected, all other rules will be undefinable.
- **Bill Rate** – If enabled, can specify what rates on assignment trigger the use of this timecard template. (As shown)
- **Department** – If enabled, can specify what departments on assignment trigger the use of this timecard template. (As shown)
- **Location –** If enabled, can specify which locations on an assignment will trigger the use of this timecard template.
- **Others** (not shown) **–**

  - □ Procurement Workflow
  - □ Project Agreement
  - □ Project Outline Identifier
  - □ Rate Identifier
    - ▪ Rate Type
    - ▪ Supplier
    - ▪ Project Agreement Express Assignment
- Save the selections by selecting save, or select cancel to discard.

Examples

Within particular locations that have government regulations on the entry of time (for example: California), the Time In/Time Out type timecard template could be utilized.

For Light Industrial/Manufacturing scenarios a possibility could be the use of daily entry timecard templates.

Professional /Technical scenarios would probably utilize standard time entry type timecard templates, but the display of hours via column or rows could change on a customer by customer preference.
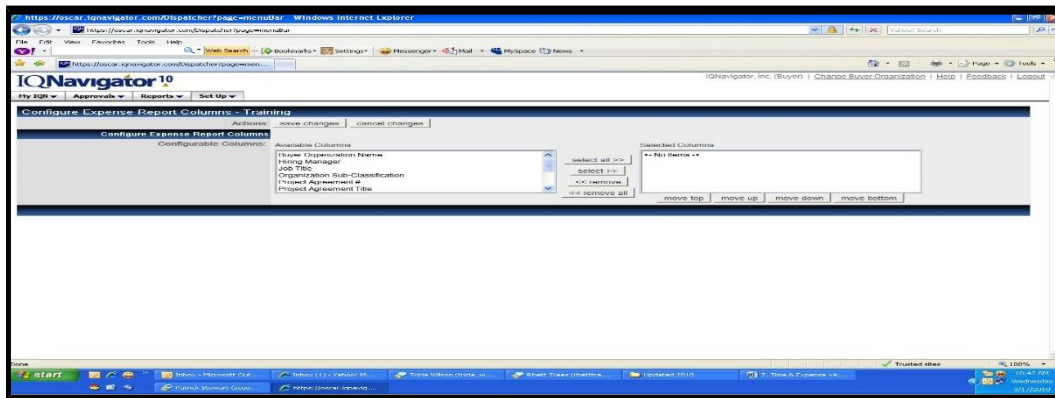
Expense Reports

There are several settings that can be configured within a buyer organization to address expense entry processing. Expense Report columns that display on an expense report can be set up to customer requirements. Various Expense Types that appear on expense reports can be configured to customer-specific expenditures. Additionally, Expense Policies can be established.

How to Configure: Expense Report Columns

Columns can be configured on expense reports if Enhanced Expense Reports are being utilized. These are the columns that the contractors and approvers see when they are entering/approving expense reports.

Selecting the **buyer organization name** hyperlink from within the <u>accounts </u>list will take you to the **Buyer Firm Profile** for this account. Choose the **configure expense report columns** action button to modify the expense report list screen display.

- To add a column to an expense report, highlight the item in the **Available Columns** select box and select it over to the **Selected Columns** select box.
- Items can be rearranged in the order of appearance on the expense report by moving the item up or down using the **move top**, **move up**, **move down**, and **move bottom** buttons.
- Save the selections by selecting **save changes,** or select **cancel changes** to discard.

How to Configure: Expense Types

IQNavigator Expense Type values are based on typical expenditure types. Nine standard Expense Types appear by default. These are occasionally edited based upon the needs of the specific buyer organization. If a customer has unique requests, the default expense types can be edited (renamed and the type of expenditure changed).

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Choose the **expense types** action button to modify the expense types allowed for this organization.

- To edit any expense types click on the expense type name hyperlink or choose **edit** from the **Actions** column and blue go arrow. The expense type name, description, and type can be edited. The expense type can also be set to Active or Inactive.
- To inactivate an expense type for this organization, select the **inactivate** action and blue go arrow in the **Actions** column.

How to Configure: Expense Policies

Because expense reports are contractor and/or supplier initiated, often customers may have requirements with respect to the allotted amount of expense type that can be reimbursed. Rules can be created for expenditure items that validate the contractor/suppliers input of that expenditure. For example, if the buyer wants to put a maximum amount a contractor can input for an expenditure item, it is configured here. Expense policies can be useful if the buyer organization has specific business rules regarding certain expenditure types.

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Choose the **expense entry policies** action button to create/modify expense policies for this organization.

- Select **create expense entry policy** action button to create a new policy.
- To edit an existing expense policy click on the expense type name hyperlink or choose **edit** from the **Actions** column and blue go arrow.
- To inactivate an existing expense policy for this organization, select the **inactivate** action and blue go arrow in the **Actions** column.
- To view history for an existing expense policy, select the **view history** action and blue go arrow in the **Actions** column.

- **Expense Entry Policy Effective Date** – specify a date in which the policy will become effective in the application.

- **Expense Entry Policy Name** – give a unique name for this policy.

- **Expense Entry Policy Purpose** – description of the policy; not required.

- **Expense Type** – select from a list of expense type values for this organization.

- Select **add rule** action button to apply a rule to this policy (more than one rule can be applied, so long as they are not conflicting rules).

- In the rules section, enter the **currency** and the **maximum amount** the contractor can expense for that specific expense type and then select **locations:**
    - The rule can be applied to all locations, or location(s) may be individually selected.

- Select **delete** action button to delete a rule applied to a policy.

- Save the selections by selecting **save,** or select **return to list** to discard.

Examples

Hotel charges cannot exceed a particular maximum amount per city location.

Payment Requests

Payment Requests allow suppliers to submit various requests for payment on miscellaneous expenditures (not meant to be captured on timecards or expense reports). Payment Requests are associated to agreements (work order assignments/express assignments) in the application and are submitted with respect to those agreements by the supplier. Additionally, payment requests allow transaction fees to be calculated on the request, whereas expenses do not (expenses are a pass through). Bonus functionality is a buyer-driven request and therefore does not hold the same purpose that expenses do. You can establish various payment request settings on the Buyer Firm Profile, and capture payment types and fees on the statement of work between the buyer and supplier organization.

How to Configure: Payment Request Business Rules

Refer to the **Create Contract: How to Configure Work Order** section in this document for details on configuring Payment Request Business Rules.

How to Configure: Payment Requests on SOW

Each allowable payment request item must be configured on the Supplier Statement of Work (SOW) with the buyer organization. Applicable transaction fees and mark ups are also established on the SOW. In order to enable payment requests in the application, the setting must first be enabled for the specific supplier on the SOW, therefore requiring a new SOW to be executed with that supplier if there is an older version SOW already executed that does not have it enabled.

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Navigate to the Buyer/Supplier **Agreements** section of the read-

only Buyer Firm Profile screen at the bottom of the screen (no need to edit the Buyer Firm Profile).

- Select to **add version** associated to the supplier in which payment requests should be enabled. (Refer to the **Supplier Organization Setup** section in this document for procedures on creating & executing the SOW)

Work Order Payment Requests section:

- **Allow payment request?** - Select the Yes radio button if the supplier will ever be allowed to submit a Payment Request, otherwise leave the value as No.
- **Payment Type** - Select all applicable payment types from the list by highlighting the payment type and clicking **select >>**. If a particular type is not in the list, it can be created using the Create Custom Payment Type option. Once selected, the system will display the payment request fees section.
- **Create Custom Payment Type** – a customer defined payment type may also be added in this field by inputting the value and selecting **add new** button.
- **Payment Type Fees section(s) -** Configure the Markup, Buyer Organization Management Fee and/or the Supplier Organization Management Fee based upon the contractual terms of the engagement. Fees may be captured in percentages or flat fee values. Also, a minimum fee can also be designated, if applicable.
- Select the **Delete** checkbox and the **delete** action to remove a fee section.

Examples

Common Scenarios:

- Bonus type expenditures that are initiated by the supplier side, rather than buyer side, and may be subject to a management transaction fee. These types of bonus expenditures are the only kind that can capture a management transaction fee and are subject to internal buyer-side approval process since it's requested (initiated) by the supplier.
- Sales Taxes – because internal buyer-side approval can be leveraged and the supplier initiates the request.

- Any other kind of miscellaneous expenditure that is payable by the buyer but usually initiated by the supplier: Drug Test Reimbursements, Background Check Reimbursements, Applicant (Job) Testing, etc.

Bonus Processing

A Bonus is a buyer-initiated request for additional payment to be made to the supplier. Bonuses can have a supplier markup added, but is a 'pass through' cost to the managing firm. Bonuses do not need to go through any approval paths in order to be available to be invoiced. Bonuses should be utilized when the fees are a pass through, and initiated by the buyer – i.e. Attendance bonus.
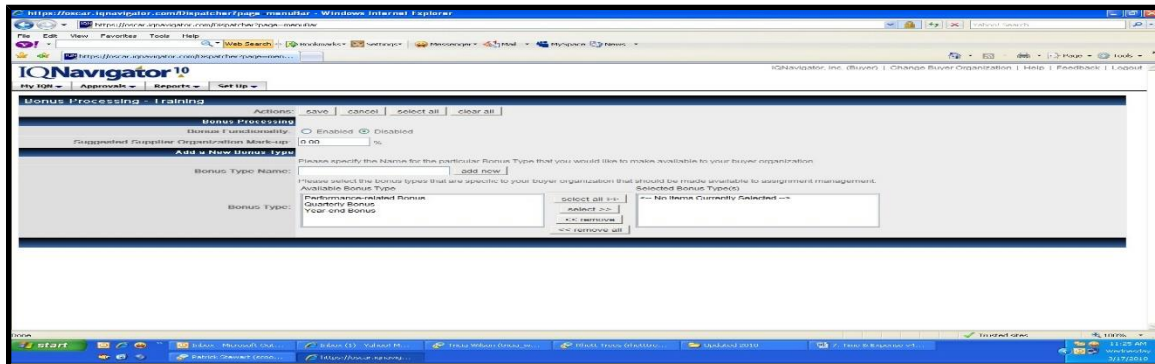
How to Configure: Bonus Business Rules

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Choose the **bonus processing** action button to enable and configure bonus types for this organization.

Bonus Processing

- **Bonus Functionality –** Enable or Disable the Bonus Processing functionality (defaults to Enabled)

- **Suggested Supplier Organization Mark-up** – Add a supplier-side markup percentage, if applicable. Notice: there are no management fees captured on bonuses.

Add a New Bonus Type

- **Bonus Type Name** – Add a new bonus type by inputting the bonus value and selecting **add new** button.

- **Bonus Type -** Select the bonus types that are allowable to the supplier(s). Pre-defined bonus types are:
  - □ Quarterly Bonus
  - □ Year-end Bonus
  - □ Performance-related Bonus

- Save the selections by selecting **save,** or select **cancel** to discard.

Examples

Common Scenarios

Any buyer-initiated bonuses that do not require an internal approval process and are considered 'passthrough' with respect to transaction fees. For example: Performance Bonuses, Attendance Bonuses, Completion Bonuses, Work Incentives, etc.

Approvals & Approval Workflows

Approval Workflow is the routing of a system transaction through a predefined approval process with predefined approvers in that approval chain that are designated either manually or via rules. This section includes approvals and approval workflows in the IQNavigator system.

IQNavigator offers two major types of approval workflows:

- Named approval workflows

- Rules-based approval workflows (RBAW)
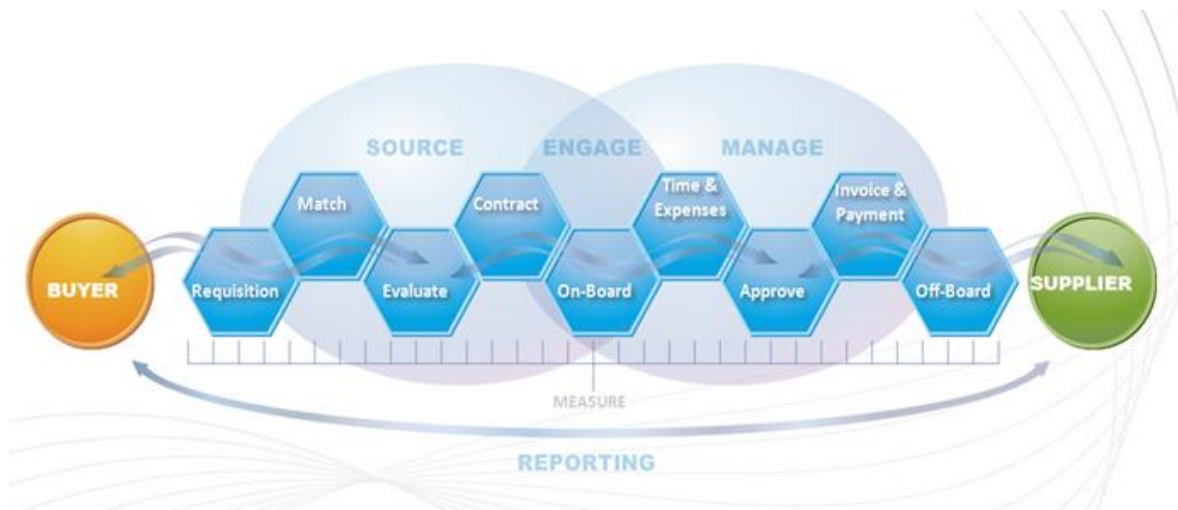
Approval Types

Approvals can be applied to the following system activities in IQNavigator:

- Contract Labor
  - Job Requisition
  - Assignment
  - Work Order/Amendment
  - Timecards
  - Expense Reports
  - Payment Requests

- Projects/Consulting Services
  - Project RFx
  - Project RFx Version
  - Project Agreement
  - Supplier Project Resource Proposal
  - Milestone Invoice

Approval Workflow: Named users and/or rules that specify/determine the chain of the approvers for an approvable object, of a particular approvable type, that is submitted for approval.

Approvable Type: The type of business transaction or system object that can be approved, e.g. job requisition, work order, project agreement, milestone, or timecard. When a user submits a job requisition for approval it is said to be of approvable type 'job'. Similarly, a work order is said to be of approvable type 'work order'.

Approvable/Approvable Object: An object in the IQNavigator system that can be submitted for approval. Job requisitions, work orders, timecards, expense reports, etc. can all be referred to as 'approvables'.

Named-User Approval Workflows

A named-user approval workflow is one that contains one to many users in a prearranged linear order, for example:

> John Smith
> Jane Roberts
> David Jones

When an approvable item is submitted to this workflow it is first sent to John Smith. When John Smith approves, the item is sent to Jane Roberts. When Jane Roberts approves it is sent to David Jones. Only once David Jones approves the item is it marked as approved. If any one of the users in the approval workflow rejects the item, it is marked as rejected and is not sent to users that occur after that user in the workflow.

Named-user approval workflows can be associated to multiple approvable types (Assignment, Expense Report, Job Requisition, Milestone Invoice, Payment Request, Project Agreement, Project RFx, Project RFx Version, Supplier Project Resource Proposal, Timecard, Work Order, and Work Order Amendment). If a particular workflow is associated to, for example, timecards it can only be selected in the timecard approver drop-down field on objects that require a timecard approver to be selected such as an assignment. When a timecard is then submitted against an assignment it is sent to the approver(s) specified in the approval workflow selected.

Named-user approval workflows can be inactivated when they are no longer needed. Only active workflows can be selected on as the approval workflow on an approvable object.

Rules-Based Approval Workflows (RBAW)

A rules-based approval workflow is one that allows an organization to specify rules or logic so that when an approvable object is submitted to that approval workflow the system will dynamically determine the approvers who will be responsible for approving the object. The logic enforced will

reference some characteristic of the associated object to identify which users are required to approve.

Rules-Based Approval Workflows (RBAWs) require XML statements that would identify the logical steps the system must take when an object is submitted for approval. Therefore, some development work is required to establish these rules. If the customer wishes to leverage Rules-Based Approval Workflows, an IQNavigator SOS incident needs to be entered with the rules they would like to follow as early in the implementation as possible. An SOS incident can be created by emailing iqcustomerservice@iqnavigator.com. Please identify the customer and the rules that are being requested. XML will need to be written and tested as a part of the implementation of rules based approvals.

Rules-based approval workflows are powerful as they allow an organization to maintain only a few workflows rather than having a different named-user approval workflow for every possible combination of its approvers.

Rules-based approval workflows can be associated to multiple approvable types (Assignment, Expense Report, Job Requisition, Milestone Invoice, Payment Request, Project Agreement, Project RFx, Project RFx Version, Supplier Project Resource Proposal, Timecard, Work Order, and Work Order Amendment).

Examples

- Ability to follow the organization's 'reports to' chain. IQNavigator allows organizations to specify, on each user account, the user's 'reports to user' (e.g. manager). If this type of rule is specified the approvable object follows a chain of users based on the user selected as the object's hiring manager. For example, if John is the hiring manager for a work order that he submits for approval, IQNavigator would first send the work order to John's manager Jane for approval. Then, when Jane approves it would be sent to her manager, David. The system must have a rule that identifies a stopping point (e.g. the 'final approver') based on:

  □ A user's title – for example, follow the reports to chain until a user with the title of Vice President is reached. When this user approves, the approvable object's status is set to 'approved'.

  □ The approvable object's economic value – for example, if the object's value is less than a specified amount a user with the title of Vice President is the final approver, if it is more than that amount a user with the title of Executive Vice President is the final approver.

- Ability to select approvers based on the value in a particular field.

- Ability to find approvers according to the cost allocation code selected on the approvable object. These approvers are the users specified as having an 'approval relationship' to a value in the 'category hierarchy' associated to the selected costs allocation code.

- Ability to include named users.

- Ability to combine multiple rules into a large, complex rules-based approval workflow.

Example #1:

1. If the value in the 'Budgeted Expenditure' customer defined field on the job requisition is:
    a. Set to 'No', route the job to a named user in the organization's procurement organization
    b. Set to 'Yes', go to step 2
2. Route the job requisition to its hiring manager's manager
3. Once the approver in step 2 approves, route the job requisition to the first approver's manager (e.g. follow the organization's 'reports to' chain)
4. Continue up the 'reports to' chain until a user with the title of 'VP' is reached
    a. Determine if the job's economic value is < 500,000.00 USD
5. If <500,000.00 USD the job is approved after step 4
6. If > 500,000.00 USD route the job to the VP's manager (e.g. an EVP or SVP)
7. Approval workflow ends.

Example #2:

1. Route the work order to a named user in the procurement organization
2. Route the work order to its cost center's (in this case cost center is the cost allocation code on the work order) designated approver
    a. Determine if the work order's economic value is < 500,000.00 USD
3. If < 500,000.00 USD the work order is approved after step 3
4. If > 500,000.00 USD, route the work order to its cost center's designated financial approver (a higher level approver in the organization's cost center hierarchy)
5. Approval workflow ends.

How to Configure: Approvals Business Rules

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Choose the **edit** button in order to update/modify this profile for the Buyer Organization. Navigate to the **Approvals** section of this screen.

The buyer organization profile includes a number of basic approval settings. These settings can be found in the 'Approvals' section of the user interface. The following document outlines these configuration settings and steps.

Configuration Setting	Description	When to Utilize
Enable Rules-based Approval Workflows (Yes/No)	Rules based approval workflows are utilized when approvals are driven by dynamic logic based on characteristics defined as part of the approvable object.	See *Rules Based Approval Workflow (RBAW)* section for further details.
Minimum Number of Approvers Per Named-User Approval Workflow	Defines the minimum number of approvers required for named approval workflows.	If approvals are required on any object this number must be greater than zero. If approvals are not required zero approvers may be defined.
Require Job Requisition Approvals	Use this setting when the organization requires that requisitions are approved prior to being shared with the vendor population.	Utilized when an organization requires internal Requisition approval.
Require Express Assignment Approvals	Use this setting when the organization requires that Express Assignments are approved internally.	Utilized when an organization requires internal Express Assignment approval.
Require Headcount Tracking Assignment Approvals	Use this setting when the organization requires that Targeted Assignments are approved internally.	Utilized when an organization requires internal Targeted Assignment approval.

Configuration Setting	Description	When to Utilize
Requires Project Agreement Approvals	Use this setting when the organization requires that Project Agreements are approved internally.	Utilized when an organization requires internal Project Agreement approval.
Require Project RFx Approvals	Use this setting when the organization requires that Project RFxs are approved prior to being shared with the vendor population.	Utilized when an organization requires internal RFx approval.
Requires Work Order/Targeted Order Approvals	Use this setting when the organization requires that Work Order and Targeted Orders are approved internally.	Utilized when an organization requires internal Work Order approval.
Send additional email on request for Work Order approval?	Use this setting when the organization requires additional approval notifications.	Utilized when an organization would like additional notifications sent to advise of pending approvals.
Enable Additional Amendment Approval Values	Use when the work order amendment should be sent for approval regardless of the impact to the current approved economic value.	Utilized when an organization would like all amendments to receive internal approval regardless of the changes made to the agreement.
Select Transaction Type for Auto Release on Approval (Project RFx, Project Agreement, Work Order, WO Amendment, Project Change Request, Job Requisition)	In the IQNavigator system, some objects have to be 'released' to the vendor after they are approved. This allows for review prior to vendor approval.	Use this setting to bypass the 'release' step for any of the following objects: Job Requisition, WO, WO Amendment, Project RFx, Project Agreement, and Project Change Request.

Configuration Setting	Description	When to Utilize
Require Work Order Approval Regardless of the Job Requisition's Approved Economic Value	This setting is utilized when both requisition and work order approval are enabled. If a requisition is approved for a specific amount and the associated work order does not exceed that amount, the system can bypass the work order approval process.	Use this configuration when the Work Order does not require approval if it does not exceed the amount approved for a requisition.
Require Express Assignment Approval Regardless of the Job Requisition's Approved Economic Value	This setting is utilized when both requisition and express assignment approval are enabled. If a requisition is approved for a specific amount and the associated express assignment does not exceed that amount, the system can bypass the express assignment approval process.	Use this configuration when the Express Assignment does not require approval if it does not exceed the amount approved for a requisition.
Require Headcount Tracking Assignment approval only when extending duration	You may choose yes or no for this setting.	NA
Allow Editable Approval Workflow on Amendments	When work order approval is enabled, the system requires approval of amendments if those amendments exceed the previously approved Work Order value. This setting allows organizations to allow their users to be able to change the approval workflow from the original Work Order approval workflow.	Use this setting when using named Work Order approval workflows and the organization wants to allow their users to change the original approval workflows when creating amendments.

This setting should be set to No when using rules based approval workflows for Work Orders. |

Configuration Setting	Description	When to Utilize
Allow Submission of work order for approval when work order does not require approval?	In some cases, a Work Order may be created or amended and not require approval because it does not exceed a previously approved economic value. This setting allows for users to submit for approval when approval is not required (i.e. when the Work Order does not exceed the previously approved economic value).	This is not often used. However, it has been used when the approval submittal triggers some type of integration or feed of data into another system.
Approvers allowed to add notes to approval transactions	This setting allows approves to add notes to specific approval objects that support notes.	Utilize when the organization wants the approvals to provide notes or comments when approving.
Prohibit users from selecting themselves as a member of an approval workflow	When using named approval workflows, this setting forces a user to select an approval workflow that does not include them.	Utilize when the organization wants to prevent users from approving objects they have created.
Enable Approval Spend Limits	If the approval process requires specific rules regarding spend level approvals (e.g. specific users have specific levels of authority).	Used when the organization has specific rules for approval authority and the amount different users can approve.
Default Display of Approval Workflows on Transactions	Always set to display All	Always set to display All
Display Match Alerts on Work Order Approval	The system can indicate alerts for candidates when they are submitted, such as duplicate submittals, or those that have had a previous assignment with the organization. Utilize this setting if the approver should see those alerts.	This is typically used if the approver is required to do some evaluation of the candidate at the time of approval.
Work Order/Express Assignment Approval Workflow Display	End user can view either the workflow name, or the workflow name and all approvers in a workflow.	This can be updated depending upon whether the organization allows visibility into the specific approvers.

Configuration Setting	Description	When to Utilize
Auto-Create timecard approval type workflow upon creation of timecard approver user	Timecard approval workflows are often named workflows. Additionally, there are often a high number of these workflows. To eliminate manual creation of the workflows, the system can be set up to automatically create timecard type approval workflows when any user is given the role of timecard approver.	Use this setting when named approval workflows are being utilized. Do not use this setting is timecard approval is not taking place in the IQNavigator system.
Timecard Approval Workflow Display (Display Timecard Approver, Display Timecard Approval and Timecard Approval Workflow)	This setting is used to show either one or two fields on a Work Order Assignment or Express Assignment. The system can show Timecard Approver or Timecard Approver and Timecard Approval Workflow.	Typically, this setting is set to only display the Timecard Approver. This then displays all users with the timecard approver role on an assignment for selection to approve timecards. In some cases if a rules based approval workflow is used, the system would display both the timecard approver and the timecard approval workflow. In this case, the approval rule would be set up to include the timecard approver as well as an additional approver(s) identified via
Default Display of Approval Workflows on Transactions	Always set to display All	Always set to display All
Display Match Alerts on Work Order Approval	The system can indicate alerts for candidates when they are submitted, such as duplicate submittals, or those that have had a previous assignment with the organization. Utilize this setting if the approver should see those alerts.	This is typically used if the approver is required to do some evaluation of the candidate at the time of approval.

Configuration Setting	Description	When to Utilize
Work Order/Express Assignment Approval Workflow Display	End user can view either the workflow name, or the workflow name and all approvers in a workflow.	This can be updated depending upon whether the organization allows visibility into the specific approvers.
Auto-Create timecard approval type workflow upon creation of timecard approver user	Timecard approval workflows are often named workflows. Additionally, there are often a high number of these workflows. To eliminate manual creation of the workflows, the system can be set up to automatically create timecard type approval workflows when any user is given the role of timecard approver.	Use this setting when named approval workflows are being utilized. Do not use this setting is timecard approval is not taking place in the IQNavigator system.
Timecard Approval Workflow Display (Display Timecard Approver, Display Timecard Approval and Timecard Approval Workflow)	This setting is used to show either one or two fields on a Work Order Assignment or Express Assignment. The system can show Timecard Approver or Timecard Approver and Timecard Approval Workflow.	Typically this setting is set to only display the Timecard Approver. This then displays all users with the timecard approver role on an assignment for selection to approve timecards. In some cases if a rules based approval workflow is used, the system would display both the timecard approver and the timecard approval workflow. In this case, the approval rule would be set up to include the timecard approver as well as an additional approver(s) identified via the rules based approval workflow.
Auto-Create timecard/expense approval type workflow upon creation of expense approver user	Timecard/Expense Report approval workflows are often named workflows. Additionally, there are often a high number of these workflows. To eliminate manual creation of the workflows, the system can be set up to automatically create expense report type approval workflows	Use this setting when named approval workflows are being utilized. Do not use this setting is expense reports are not entered in the IQNavigator system.

Configuration Setting	Description	When to Utilize
	when any user is given the role of time and/or expense report approver.	
Expense Approval Workflow display (Display Timecard Approver, Display Timecard Approval and Timecard Approval Workflow)	This setting is used to show either one or two fields on a Work Order Assignment or Express Assignment. The system can show Expense Approver or Expense Approver and Expense Approval Workflow.	Typically this setting is set to only display the Expense Approver. This then displays all users with the Expense Report approver role on an assignment for selection to approve Expense Reports. In some cases if a rules based approval workflow is used, the system would display both the Expense approver and the expense approval workflow. In this case, the approval rule would be set up to include the expense approver as well as an additional approver(s) identified via the rules based approval workflow.
Require CAC 1 Addition Approval	The system can enforce requiring approvals based on a cost allocation code addition (i.e. when a new cost allocation code is added, which may change accounting codes costs are allocated against). This setting allows the organization to enable approvals when the addition of a value to the cost allocation	This is used when an organization requires approval when costs are moved from one cost allocation to another. This is typically used in conjunction with not allowing overlapping date ranges for which those cost allocation codes
Inherit Approval Workflows from parent organizations	This setting allows an organization to utilize the approval workflows established at a parent organization. The goal of this setting is to reduce the maintenance of approval workflows when multiple organizations use the same approval workflows.	When an organization structure includes multiple organizations that leverage the same set of approval workflows.

Configuration Setting	Description	When to Utilize
Milestone Invoice Approval Method (Approval Workflow Approvers, Manually Selected Billing Approvers)	This setting is specific to project agreements, not contract labor. Milestone invoices are the invoices that are submitted against a fixed price project agreement. These milestones are associated to approval workflows which can either be selected based on a list of all users with the Billing Approver role or the approval workflows can be identified as specific workflows defined when creating approval workflows.	This setting is utilized when project agreements are utilized. If the organization wants to have the list of available approval workflows from a set of predefined workflows the Approval Workflow Approvers setting would be selected.
Enable Approval Reviews	Approval reviews allow users that are receiving approval requests forward those request to other users to review and provide feedback. This is not the same as delegation as the review is simply the ability to provide feedback to the approver, not actually approve on behalf of the approver. See next section of document for more information about this setting.	This setting would be utilized when approvers want to utilize the system to forward approval request to other users to gather feedback.

Configuration Setting	Description	When to Utilize
Approval Types Allowed for Delegation	Allows customers more control over what objects in the system their users can delegate for approval.	Customers may only want to allow their users to delegate approval for timecards and expense reports, but not for requisitions. This feature allows this con figuration to be established on an organization basis.

Configuration Setting	Description	When to Utilize
Allow Timecard Approvers to Modify CAC	Modification of CAC on timecard approval allows the approver to reallocate hours against CACs, whether they are defined on the associated assignment or not.	There are two settings for this. This one should always be no. If yes, the individual approver can add ANY CAC in, and it still doesn't add that CAC to the assignment. The reason why we want this as no is because we don't want to allow tc approvers to choose unapproved CACs. The second setting that relates to timecard approver selection of CACs is on the "Timecard Template" page. Ensure that both configuration settings are aligned.

A Closer Look at: Approval Reviews

Approval review can be enabled in the IQNavigator system. This allows users that receive a request for approval to forward that request to another user with the goal of reviewing and providing feedback on the approval request. For example, a timecard approver may send a timecard to another user for review to confirm that the contractor actually worked the hours specified. The review process does not allow the user that is reviewing the approvable to approve or reject the request, they simply have the ability to review and provide notes in regard to the request for approval.

- Buyer-side users can retract approvable objects with the following approvable types:

- o   Jobs Requisitions
- o   Work Orders
- o   Express Assignments
- o   Project Agreements
- o   Project Agreement Change Requests
- o   Project RFx

- • Supplier-side users can retract approvable objects with the following approvable types:

  - o   Project Milestone Invoices
  - o   Project Resource Requests
  - o   Expense Reports
    - ▪ Both contractors and supplier account representatives can retract a timecard or expense report approval request

  - o   Timecards

    - ▪ Both contractors and supplier account representatives can retract a timecard or expense report approval request

- • When an approvable object is successfully retracted from the approval process the following users are notified via a notification email:
  - o   The approver at the time of retraction.
  - o   The user that retracted approval.
  - o   The user that originally requested approval (if not already notified)
  - o   The organization's CAM Managers and Assigned CAMs where applicable.

- • Users with an 'organization level' role such as the 'Organization Assignment Manager' can retract any approvable object in the system. Users with a role such as 'Hiring Manager' can only retract approvable objects where they are listed as the object's hiring manager.

How to Configure: Approval Workflows

Named-User Approval Workflows

Selecting the **buyer organization name** hyperlink from within the accounts list will take you to the **Buyer Firm Profile** for this account. Choose the **approval workflows** button in order to create or modify approval workflows. The system will present a list of approval workflows, the type, the approver sequence for each workflow, and the status of the workflow.

- Select the **add approval workflow** button to create a new approval workflow.

- Select the approval workflow name hyperlink or **edit** action to edit an existing approval workflow.

- **Approval Workflow Name** – Specify a unique name (required).
- **Notification Email Address** - If applicable, system will copy this email address on any approval notifications routed with respect to the approval chain. (not required).
- **Approval Workflow Type** - Select the applicable transaction types that this approval workflow would apply to, then select the refresh icon ( ). The system will present the applicable approver users for this approval type in the **Approvers** section.
- Choose approver(s) to add to the approval chain and **select** over to the Selected Approval Workflows select box.

- - □ The system will only populate this field with approvers that have the appropriate role (e.g., a user with only the timecard approver role will not populate this field if the Approval Workflow Type of Expense Report is selected).
    - □ Designate the sequence of approvers in the workflow utilizing the **move top**, **move up**, **move down**, and **move bottom** buttons.
  - Save the approval workflow by selecting **save changes,** or **cancel changes** to discard.

Rules-Based Approval Workflows (RBAW)

From the Approval Workflows list screen, select **add rules-based approval workflow** button to create a new rules-based approval workflow.

Rules based approval workflows allow for the same field selections as a normal approval workflow. However, it includes the following additional fields: Responsibility Name, Approver, and Approval Workflow XML Definition. The Responsibility Name and Approver fields allow for named approvers to be identified in the Approval Workflow XML Definition with a specific responsibility and associated approver. For example, John Smith is a named approver who is always the first approver from the procurement group. The responsibility in the XML Definition may be "procurement approval" and John Smith is selected to be associated to that responsibility. The field Approval Workflow XML Definition is freeform space for additional XML rules to be specified that control the approval rules. Upon saving, the system will validate that the XML is properly formatted, although the system does not validate that the rules will actually work as intended. The development of XML approval rules is typically completed by IQNavigator and then tested during the implementation test cycle.

How to Configure: Approval Spend Limits

If Approval Spend Limits have been enabled on the Buyer Firm Profile, the User Creation screen will now have an Approval Spend Limit designation field. If enabled the system will validate, when an approvable object is submitted for approval, that at least one user in the object's selected approval workflow has a spend limit that is equal to or higher than the object's economic value. If no user in the workflow has a high enough spend limit, the object cannot be submitted to that approval workflow.

- **Approval Spend Limit** – allows you designate an approval authorization level for this user.

Other Approval-Related Functionality

Approval Delegation

IQNavigator's approval delegation functionality allows users to create delegation schedules that delegate their approval responsibility to another authorized user for a specified period of time. Please note, approval delegation is not a configuration item, but it is referenced here as a useful system feature with respect to approvals; refer to the training job aids for end user steps related to this functionality. Approval delegation includes the following features:

- Ability for any user with either approver roles to create a delegation schedule.

   o   These users can only create delegation schedules for themselves, not for other users.
- Ability to specify the approvable types that the delegation schedule is for. Available approvable types include:
   - Assignment (including Express Assignments)
   - Expense Report
   - Job Requisition
   - Milestone Invoice
   - Project Agreement
   - Timecard
   - Work Order
- Ability to specify the delegation schedule's start and end dates.
   - Start dates can be the in the past or the future.
   - End dates must be in the future.
   - Delegation schedules are effective from 12:00:01 am (0:00:00) on their start date to 11:59:59 pm (23:59:59) on their end date.

- Ability to select the approver who approval responsibility will be delegated to. The list of available users will depend on the approvable types selected for the delegation rule. (only users with the appropriate roles to approve the types selected will display, for example a user with the timecard approver role cannot be selected as a delegate for expense reports)
  - The system does not take a user's spend limit into account when determining the list of available delegates.
- Ability to specify if the delegation schedule will be used once or will recur on a regular schedule.
  - One-time delegation schedules can be reused by changing the start and/or end dates.
  - Recurring delegation schedules allow users to specify that the delegation schedule will, for example, take affect every other Friday.
- Ability for the user creating the delegation schedule to specify if the original approver should be copied on approval notification emails while the delegation schedule is in effect.
- Ability to activate and inactivate the delegation schedule.
- When the user saves the delegation schedule the system includes validations to prevent users from creating delegation schedules where a 'loop' of approvers would occur. For example, the system would prevent John from delegating his timecard approval responsibility to Jane for a particular time period if Jane, for some or all of that same time period, had already delegated her timecard approval responsibility to John.
- Users that have one of the 'org unit' approver roles (e.g. 'Org Unit Timecard Approver, 'Org Unit Job/WO/EA/Project Agreement Approver') can set up delegation schedules on behalf of other users. This functionality is useful when an approver is out of the office but didn't set up a delegation schedule prior to leaving.
- When a delegation schedule's start date is reached the system will move any unapproved approvable objects in the delegating user's queue to the delegate's queue.
  - If the start date is in the past when the delegation schedule is saved all unapproved approvable objects in the delegating user's queue are immediately moved to the delegate's queue.
  - The delegate will not receive any notifications that this has occurred.
- Once the delegation schedule is in effect any new approvable objects that are submitted to the delegating user for approval are immediately routed to the delegate for approval.
  - The delegate will receive a notification for any newly submitted approvable object.
  - If configured on the delegation schedule, the delegating user will be emailed a copy of any approval notifications.

- The delegate can then approve or reject just as if they were the original approval. The system will record each approvable object's 'actual' approver, e.g. it will show that the delegate, not the delegating user, approved.
- When the delegation schedule ends (reaches its end date), any unapproved approvable objects in the delegates queue will be transferred back to the delegating user for approval.

Approval Retraction

IQNavigator's approval retraction functionality allows users to request that an unapproved approvable object be retracted (removed) from the approval process. Please note, approval delegation is not a configuration item, but it is referenced here as a useful system feature with respect to approvals; refer to the training job aids for end user steps related to this functionality. This functionality includes the following features:

- Only approvable objects in the 'approval pending' state can be retracted.

- Ability to retract an approval by first locating the approvable object on its associated list screen and then viewing the object's summary and selecting the 'retract' button.

  □ For example, to retract a work order approval request a user first finds the work order on the work order list, selects to view the work order's summary, and then clicks retract.
- Ability to specify the reason the approvable object is being retracted.
  □ Default reason codes are:
    - Error correction required
    - Approval no longer required
    - Project on hold
    - Incorrect approver selected
    - Other (free form text box)
- Ability to specify, on the buyer and Supplier Firm Profile, custom reason codes for each approvable type.
- A reason for retraction is required before an approvable object can be retracted.

Approval Roles

- Ability to give a buyer-side user one or more of the following roles:
  o Org Unit Job/WO/EA/Project Approver – this user can approve (or reject) any job, work order, express assignment, or project-related (e.g. project agreement, project RFx) for the

organization they are assigned to. When a user with this role approves an approvable object it is routed to the next approver in queue to approve the object.

- o Org Unit Timecard Approver – this user can approve (or reject) any timecard for their organization. When a user with this role approves an approvable object it is routed to the next approver in queue to approve the object.
- o CAM Approver – this user can approve (or reject) any job, work order, express assignment, or project-related (e.g. project agreement, project RFx) for the organization they are assigned to. When a user with this role approves an approvable object it is routed to the next approver in queue to approve the object. CAM Approvers can't approve timecards.

Miscellaneous Configurations

The following section discusses various setup steps that typically occur during the setup of a customer account, but are not considered essential to the core account setup.

Related to Requisitions

The requisitioning process includes many features within IQNavigator that can be configured to meet the client's requirements. Although very valuable, these miscellaneous administrative configurations are considered extraneous steps in the setup of a customer account, and therefore are not included in the first key processes for a *standard* customer configuration. However, these steps are worth reviewing in the overall customer configuration setup processes and in some cases are often requested by the customer:

1. Distribution Lists
2. Supplier Tiering Rules
3. Assets
4. Cost Allocation Codes (CACs)
5. Performance Evaluation
6. On-Boarding Checklist
7. Rate Identifiers
8. Rate Uplifts
9. Shifts

Distribution Lists

A supplier distribution list is the ability to group a set of suppliers together, based on the client's criteria for defining that grouping. When creating a requisition, the distribution list(s) can easily be selected by the user minimizing the need to individually select each supplier organization on a one by one basis every time on the requisition.

Why Configure

Supplier organization distribution lists are typically leveraged for the use of supplier tiering functionality. Organization supplier distribution lists must be set up prior to the creation of distribution rules (supplier tiering).

How to Configure: Distribution Lists

Organization Distribution Lists are made available to all users within an organization and any non-business rule organizations units that inherit this org unit's functionality and settings. The Managing Firm Administrator does not have the ability to set up supplier organization distributions lists. A buyer-

side role, such as Client Firm Administrator, must create the lists. Personal supplier distributions list can be created by any buyer-side user, but cannot be made available organization-wide.

- Organization Distribution Lists are required in order to establish Supplier Tiering Rules.
- Only users with the Client Firm Admin role can create Organization Distribution Lists (via the My IQN tab)

Log into the end user account for a user with a Client Firm Administrator role and select the **distribution lists** sub-menu link from within the **My IQN** tab.

- Select create organization distribution list action.
- Distribution List Name - Specify a unique distribution list name.
- Description – Provide a description if valuable.
- Supplier Organizations - Select the applicable supplier(s) for this list by highlighting the supplier(s) name in the Available Supplier Organizations select box and selecting over to the Selected for Distribution select box.
- Use the search supplier organizations feature to help you search for suppliers by specific criteria.
- Save the supplier distribution lists by selecting save, or cancel changes to discard.
- You may edit or delete existing supplier distribution lists by selecting the applicable action associated to the list.

In the Distribution Lists screen

You must specify whether an organization distribution list should be made available to all users on requisitions or not by checking the **make available on job requisitions** box and selecting **save changes**. This feature must be selected to use the list for supplier tiering purposes.

Examples

The most basic example is where a customer may group supplier organizations by the type of resources they provide, e.g. "IT Suppliers", "MWDVE Suppliers", "Admin/Clerical", etc.

A more common example is where customers are leveraging this functionality to build supplier tiering functionality. In this example, the distribution lists are created first, then the tiering rules are built (see below) to define when and which suppliers a requisition is released to on an automatic 'tiering' basis. An example of the distribution lists created in this scenario may be "Tier 1", "Tier 2", and "Tier 3", or "Preferred Vendors", "Secondary Vendors", etc.

The above screenshot displays how the Supplier Organization Tiering is applied to the requisition. Also displayed are the supplier(s) contained in the distribution: those that currently have the opportunity, and those (which distribution) is due to get the opportunity next and when.

Supplier Tiering Rules

If an organization has requirements about distribution of requisitions to suppliers, automatic supplier distribution rules may be set up which will apply to all requisitions that meet the criteria specified. Based on the criteria set up for a requisition type, the system will automatically distribute requisitions (express requisition and regular) to a specified set of suppliers either after a certain amount of time has passed or a specified amount of time prior to the start date of the job.
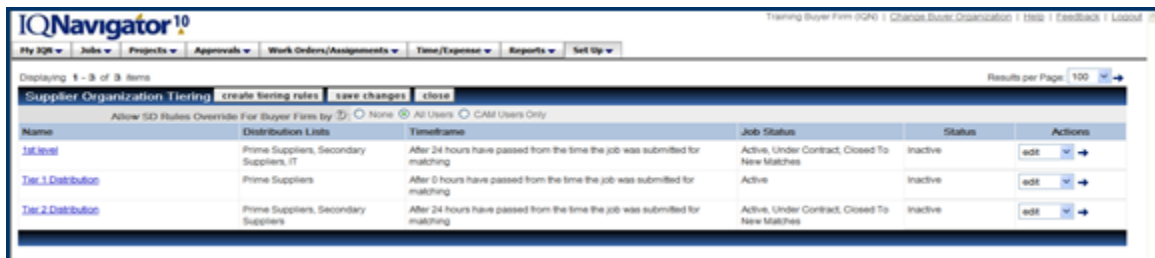
Why Configure

This functionality meets frequent customer requests for the application to mimic an internal distribution process that is typically already in place for a customer. Or in some cases the customer has the desire to setup up tiering rules for leveraging use of their preferred vendors more.

How to Configure: Supplier Tiering Rules

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Choose the **supplier organization tiering** button in order to create or update the tiering rules. The system will present you the Tiered Supplier Organization Distribution Rules screen.

> **Allow SD Rules Override For Buyer Firm by** – Designate whether all buyer users or CAM users only have the ability to override these rules when creating a job requisition, then **save changes**.
>
> New Tiered Supplier Distribution Rules may be created by selecting **create tiering rules** action on this screen. Existing Tiered Supplier Distribution Rules may be edited, deleted, or activated/inactivated by selecting the **edit**, **delete, activate, or inactivate** action associated to an individual rule.

The Tiered Supplier Distribution Rules configuration screen allows end users to set up the name, distribution timeframe, and criteria of a job requisition type that is subject to the distribution rules. ● **Name** – Designate a unique name for the tiering rule.

- **Timeframe** - Designate when the grouping of suppliers subject to the criteria you've set up is scheduled to get the requisition. Based on two options:
    - Hours after the job has been submitted

- Hours prior to the job's start date

Selecting "Exclude weekends from defined hours when calculating distribution time" will provide greater flexibility in supporting business process when requisitions are submitted late in the week. For example, if the requisition is released on Friday to the first set of suppliers and the second set of suppliers is scheduled to receive the requisition 48 hours later, the system will send the requisition to the second supplier on Wednesday instead of Monday - skipping the 48 hour weekend.

- **Job Type** – Select the requisition type(s) that are applicable to this tiering rule.
- **Job Category** - Select the job category(s) specified on requisition that are applicable to this tiering rule.
- **Geographic Coverage** - Select the location(s) specified on requisition that are applicable to this tiering rule.
- **Job Priority** – Select whether Critical and/or Normal path requisitions are applicable to this tiering rule.
- **Job Status (not shown)** - Select the job statuses that are applicable to this tiering rule.
- **Distribution Lists (not shown)**- Select the distribution list(s) that are applicable to this tiering rule.
- Save the rule by selecting **save**, or **return to list** to discard.

Tiering Rule Impacts to Requisition

Any job requisitions (regular or express requisition) that do not meet the criteria of this distribution rule will not be subject to the rule. Therefore, if all requisitions must undergo the same distribution rules, you must select all applicable criteria.

A job requisition with supplier tiering rules applied would look like this in the Supplier Organizations section of the job (where the user selects which supplier to submit the requisition to):
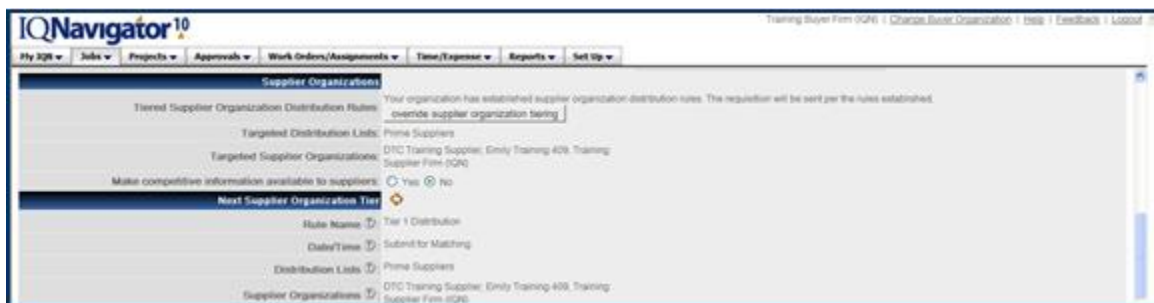
This displays which supplier distribution (including the individual suppliers in that distribution) currently has the opportunity, and which distribution is due to get the opportunity next and when.

How to Configure: Supplier Tiering Impacts on Procurement Workflow

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Choose the **procurement workflows** button in order to modify the procurement workflow

- **Allow Supplier Distribution Rules Override on Jobs with this Workflow by** - This setting controls what user role can manage the Supplier Organizations that requisitions will be distributed to.
  - **Express Requisition Supplier Manager and CAM users only** selection will allow these users access to manually select the supplier organizations on the requisition. The managers creating the requisition will not be able to manually select the supplier organizations.
  - **All Users** will allow any user to dictate what supplier organization the requisition will be sent to.

Examples

Tiering Rules may be created to address various customer scenarios, usually addressing a customer's internal processes/procedures. Common scenarios are: the customer may have tiers of suppliers/vendors that they work with to leverage volume discounts or better pricing, the customer may have a requirement to give opportunity to disadvantaged suppliers first, etc. Examples: Tier 1-3; Preferred Vendors/Secondary Vendors; etc.

Related to Assignment Management

Assignments are transactions in the application that track information about a contractor's work details at a customer site, for example Cost Allocation Codes, Work Location, Timecard Approver, Expense Approver, etc. The term 'Assignment Management' is a generic term used to describe the on-going management of the contractor's assignment details at a customer site. Sometimes this can include both contractual terms and non-contractual terms (in the case of express assignments that group both onto one form). The purpose of this section is to explain miscellaneous configurations that impact what end users have access to on the Assignment.
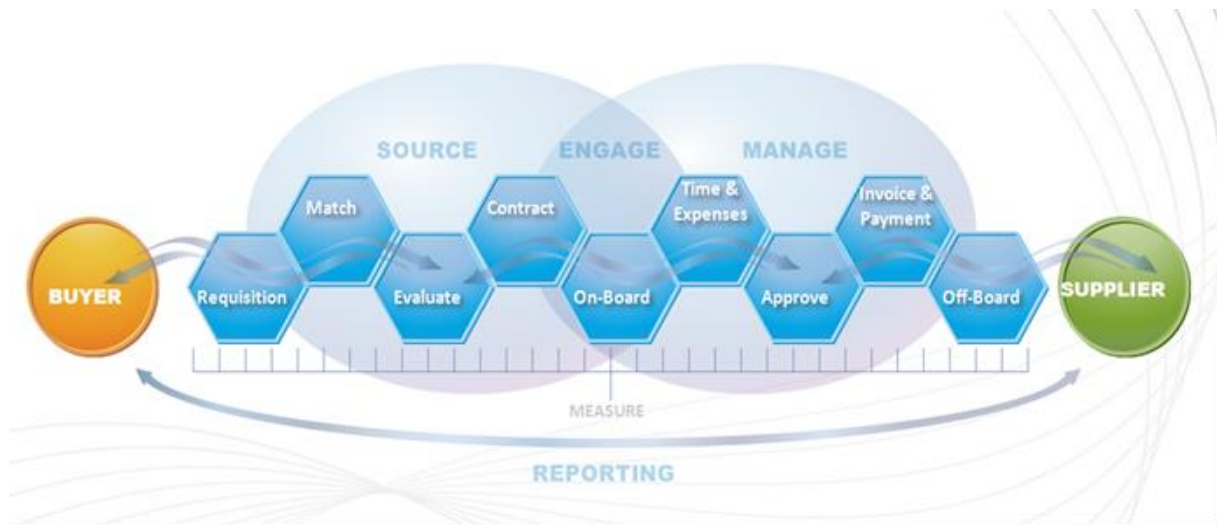
Why Configure

There are many features on an Assignment that can be utilized by customers, but not all customers will use the functionality in the same way, and not all customers will utilize all features. Therefore, IQNavigator provides the ability to configure Assignment features to meet customer needs.

Assets

If a client chooses to track assets that are allocated out to its contractors, a list of assets may be designated in the application that is applicable to the organization. These assets will be made available to the buyer users creating/maintaining the contractor's assignment in the system. The buyer user may select which ones he/she has allocated to the contractor, based on the list of available assets designated here.

Why Configure

Clients who want to track the procurement process as well as manage the assets given to the contractors may use IQNavigator's system to facilitate both. If a customer has its own internal tracking tool (like a facilities management application), then most likely the customer will not use IQNavigator to track assets.
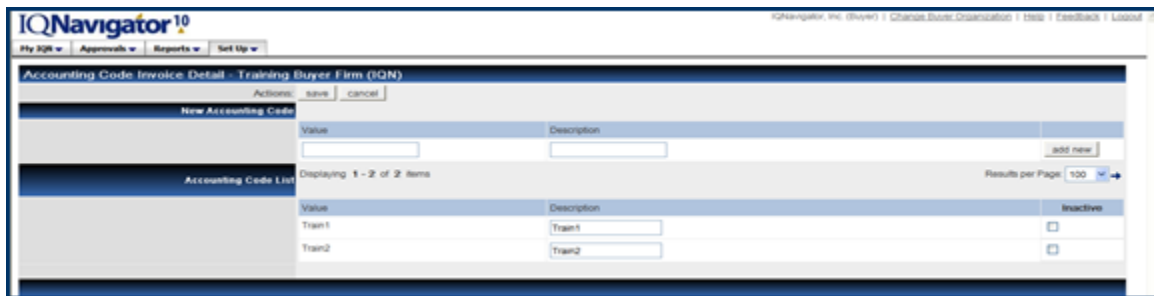
How to Configure

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Select the **asset assignment** action button in the Buyer Firm Profile screen, the system will present you the **Asset Assignment** configuration screen.

- The screen will default with a list of IQNavigator-specified Assets (all selected).

- Remove Assets that are not applicable by highlighting the Asset name and selecting **remove** action to move the Asset from the **Selected Assets** select box to the **Available Assets** select box.

Add a New Asset

- **Asset Name** - If there are specific asset(s) not available to you for selection, you may simply add a new one by inputting the new asset name and selecting **add new** button.
- Select the **save** button when you are ready to save the list of assets you have designated for this organization.

Examples

Any type of Asset can be tracked on a contractor's assignment, and can be checked out and checked in against that assignment. Common examples are:

- Computer/Lapto
p • Security Access
- Keys
- Network Access

Cost Allocation Codes & Invoice Details

Cost Allocation Codes

Cost Allocation Codes (CACs) are fields that map to the clients internal accounting charge codes, designating what charge codes a contractor can bill his/her time against, based on whatever the buyer firm user has designated for that contractor on his/her assignment or project's billing event in the IQNavigator system. CACs are also used for reporting purposes.

Invoice Details

For your client's organization, the Invoice Detail type has been designated on the Buyer Firm Profile (example: Accounting Code), which drives the invoice detail reference number on the IQNavigator invoices as well as reporting. During the implementation phase, work with the IQNavigator Point of Contact to determine how this should be defined.

Why Configure

Cost Allocation Codes can be structured to match the client's existing accounting structure. This will help meet reporting needs, invoicing needs, and to support possible client integrations.

How to Configure: CAC-Related Business Rules

Selecting the **buyer organization name** hyperlink from within the accounts list will take you to the **Buyer Firm Profile** for this account. Selecting the **edit** action for the Buyer Firm Profile will take you to the editable account information screen. Navigate to the **Job Requisition** section.

- **Required Cost Allocation Codes on Job Requisition** – This setting controls what accounting data needs to be included in the requisition, if any. Depending on how the client structures the Cost Allocation Code (CAC) lines, the settings may vary.
  - □ None – select this setting if the client does not want to require the hiring managers to include accounting details on the requisition.
  - □ Cost Allocation Code #1 – select this setting if the client only wants to require cost codes that are included in CAC#1 on the requisition.
  - □ Cost Allocation Code #2 – select this setting if the client only wants to require cost codes that are included in CAC#2 on the requisition.
  - □ Cost Allocation Code #1 and Cost Allocation Code #2 – select this setting if the client wants to require all cost codes that are included in the 2 CAC strings on the requisition. Note – Additional and more detailed CAC settings can be specified on the Cost/Invoice Detail screen (next section).

How to Configure: Cost Invoice Details

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Select **Cost Invoice Details** action button in the Buyer Firm Profile screen, the system will present you the Cost/Invoice Details configuration screen. In this screen, you can:

- Designate Invoice Detail values that are available to the buyer firm users in this organization for selection on system transactions.
- Designate CAC segments and values that are available to the buyer firm users in this organization for selection on system transaction and billing events.
- Define any miscellaneous business rules regarding CAC values & validation.
- Share CAC values with any other business rule organizations in this organization's hierarchy in the IQNavigator system.
- Allow interdependencies between CAC segment values.
- Define "mutually exclusive" segments where one segment of the grouping can be specified and once one of these segments is specified the remaining segments in that group should not be specified.

For example: CAC 1.1, 1.2 and 1.3 are enabled for a customer and are part of the mutually exclusive grouping. When creating a Requisition/Work Order/Assignment/Project Agreement in the system the end user can specify only one of these three segments in a CAC string. The system must prevent the user from selecting more than one segment within the group.

Note that Mutual Exclusivity is off by default.

Invoice Details:

This screen is where you input the values for the selected invoice detail, which will be made visible for selection on the contractor's assignment.

- From the Cost/Invoice Details screen (previous screenshot) select the **edit** button to the right of the invoice detail type this organization will be using, the system will return the Invoice Detail maintenance screen. In this example, we have chosen Accounting Code as our invoice detail.
- Input the invoice detail **Value** and **Description**, then select the **add new** button.
- You may edit the Description at any time.
- Once an invoice detail Value has been created and saved, you may only inactivate it if you no longer want it available for selection.
- The system will validate duplicate entries, so if you try to add an invoice detail that has the same value as another, the system will not save the duplicate entry.

Cost Allocation Code Segment Definitions:

There are two different CAC strings provided, containing five different segments each – so ultimately you can define up to 10 different cost allocation segments. Note: on a system transaction like contractor's assignment or project billing event, a buyer user can designate an infinite number of CAC strings that a contractor can charge his/her time to.

- Each CAC segment and it's definitions are defined independently, including:
  - □ Segment Title
  - □ Status: Optional, Required, or Disabled
  - □ Entry/Selection: Drop-down, search field, or read only/system generated
  - □ User allowed to free-form enter their own value
  - □ Display descriptions to end users
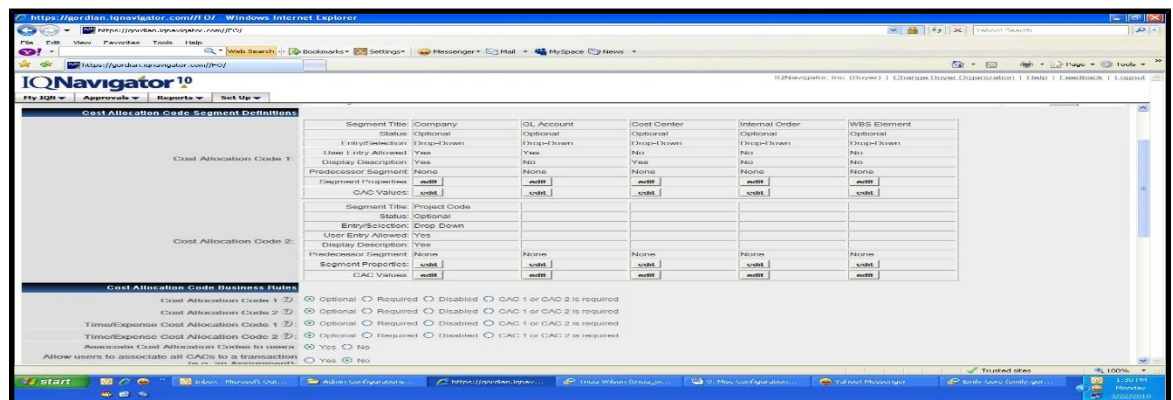
Note: the **specify CAC defaulting** action is specific to setting up defaulting rules for Project Payment Requests and therefore is not in scope for this administrative configuration document.

To create a new Cost Allocation Code (CAC) segment or edit an existing one, first select the **edit** button in the **Segment Properties** row. The Cost Allocation Code Segment definition screen will display.

- Enter the Segment Title
- This segment is - Designate whether this Segment will be 'optional' or 'required' for selection by buyer users on the contractor's assignments or project billing events; or whether you'd like to 'disable' the Segment (if no longer a valid segment). Note: you may also rename the segment if it changes later and don't have to disable it.

- Entry/Selection Rules - Define the entry/selection rules for this segment

  □ Drop-down means a list of values will be presented to the buyer user in a drop-down field.
  □ Search means the buyer user is given a search feature to find the segment value they desire (note: this is useful when a large number of segment values are available).
  □ Read Only/System Generated will default based on CAC values defined on the user profile.

- User Entry Allowed - Define whether the buyer user is allowed to create & select their own values for this segment. If the buyer user creates his/her own value, it will not only be saved on the assignment, but also in this admin view for future use by other users.

- Display Description - Choose whether you want the segment definition to be displayed to the buyer users (along with the segment value name).

- Allow Segment to be Associated to a User - When the configuration is set to yes then a CAC value must be associated to the user on the user account. If no CAC value for the segment is associated, then the user will not be able to select a value for this segment when selecting a CAC on an object.

- Save the segment definition by selecting save, or cancel to discard.

To create a new Cost Allocation Code (CAC) segment value or edit an existing one, select the edit button in the CAC Values row. The Cost Allocation Code Segment value screen will display
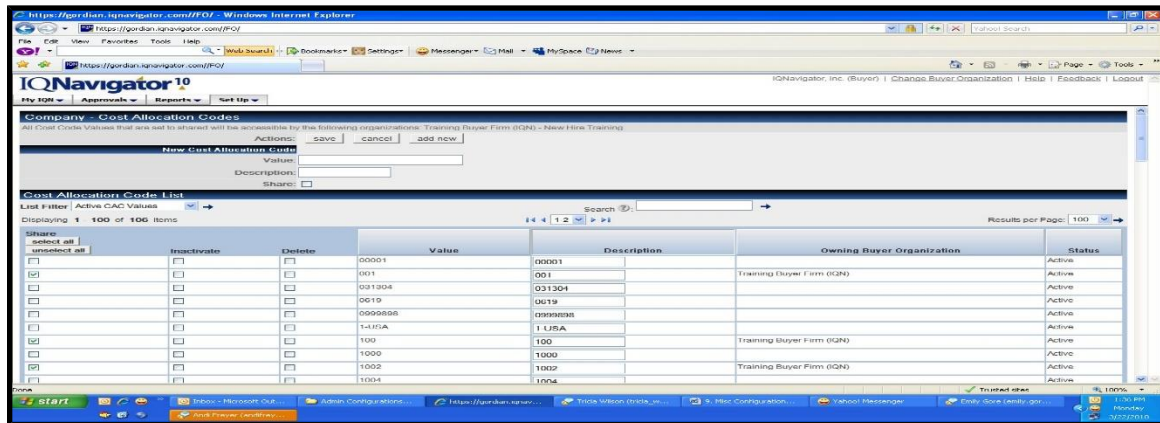
- Input the CAC **Value** and **Description**. If this is a share-able value across organizations in the enterprise, check the **Share** box, then select **add new** button.

- You can share CAC values, by clicking in the **Share** checkbox, those CAC's selected will be shared with Buyer Orgs selected from the Cost Invoice Detail Screen.

- Once a CAC Value has been created and saved, you may **inactivate** it if you no longer want it available for selection.

- You may **delete** old CAC segments that will no longer be used, if the functionality is turned on. By deleting the CAC it will not be available on future transactions, although it will not affect past transactions that used that CAC segment.

- You may edit the **Description** at any time.

- The system will validate duplicate entries, so if you try to add a CAC Value that has the same name as another, the system will not save the duplicate entry.

- Because the list of CAC Values can be extremely long, you may filter the list that's display for easy maintenance using the **List Filter** feature. Additionally, you may search for a specific CAC Value using the **Search** feature.

- Save the CAC Segment Values by selecting **save** or **cancel** to discard.

Cost Allocation Code Business Rules

Under the Cost Allocation Code Business Rules section, general validation rules can be created for CAC selection on Assignments, Project Billing Events and Timecards/Expense Reports, ensuring that time card and expense sheets contain valid codes. This also leads to fewer exceptions in the invoicing process.

- **Cost Allocation Code #1** – These settings apply to the general transaction in IQNavigator, such as requisitions and agreements/assignments. When selecting the CAC rules, make sure the CAC segment rules don't conflict with the CAC string rules.

- **Cost Allocation Code #2** – Same as above.

- **Time and Expense Cost Allocation Code #1 -** These settings apply specifically to time and expense transactions in IQNavigator. When selecting the CAC rules, make sure the CAC segment rules don't conflict with the CAC string rules.

- **Time and Expense Cost Allocation Code #2 –** Same as above.

- **Payment Request Cost Allocation Code #1 –** These settings apply specifically to payment request transactions in IQNavigator. When selecting the CAC rules, make sure the CAC segment rules don't conflict with the CAC string rules.

- **Payment Request Cost Allocation Code #2 –** Same as above.

- **Associate Cost Allocation Codes to users** - You may designate whether Cost Allocations Codes can be associated to users. This will trigger a new action item to be available on the **User List**, allowing you to associated specific CACs to end users so they only get these subsets of values. (Refer to the **Assign Cost Allocation Codes to Users** section in this document).

- **Allow users to associate all CACs to a transaction (e.g. an Assignment) -** This feature is useful for organizations that have hundreds of projects that an individual contractor may be allowed to charge his/her time against. This way a buyer user doesn't have to select each CAC value available to his/her contractor, but can rather choose to 'select all', saving time and screen performance.

- **Display CACs on Summary Tab** – used for performance enhancement if there are hundreds of CAC values selected on the assignment.

- **Allow overlapping date ranges on CAC #1** – allows effective dates of CAC values to overlap on assignments.

- **Allow overlapping date ranges on CAC #2** – Same as above.

- **Allow Interdependency between CAC Segments -** When Yes is selected you can create a relationship between the CAC segments within the CAC segments across CAC 1 and CAC 2. This will require the user to select the CAC segment values in the order of the relationship. When this is enabled, the organization will not permit the "Allow user entry" setting to be set to Yes.

- **Allow Mutual Exclusivity Between CAC 1 and CAC 2? -** When Yes is selected, you can configure the exclusion of one CAC segment when another CAC segment is selected. For example, if you configure CAC 1.1 and CAC 1.2 to be mutually exclusive, selecting a CAC 1.1 value will prevent the selection of a CAC 1.2 value.

- **Allow Interdependency between CAC 1 and CAC 2 -** When you allow interdependencies across CAC 1 and CAC 2, the system will enforce only one active CAC segment at a time for each string.

- **Enforce Assignment Transaction Date Validation –** This will require that the system validates the CAC start date against the assignment start date which will ensure that at least one CAC value is valid for all effective dates on the associated assignment.

- **Restrict Cost Allocation Code selection to valid CACs on Expenditure Entry–** This setting allows you to restrict the CAC options available on transactions.

Cost Allocation Code Upload Settings:

- **Time/Expense Upload CAC Settings** – Determines how CAC information provided in the load sheet should be validated against the assignment.

- **Payment Request Upload CAC Validation Settings –** Determines how CACs on a load sheet are validated against an existing Project Agreement.

Cost Allocation Code Value Sharing:

- Any CAC values that were selected as 'shareable' may be shared with other business rule organizations that may utilize the same Cost Allocation Codes. Highlight the organization name and click **select** to move it from the **Available Buyer Organization** box to the **Selected Buyer Organization** box.

User Roles That Are Allowed to Add Cost Allocation Codes:

- Specify the roles, if any, that can manually add new CAC values to this organization. Based on type of business object (requisition, assignment, project).

Note: Once the CAC structure is determined and implemented, it is very difficult to update the structure (not values). IQNavigator will need to get involved if any changes to the structure need to be made.

Examples

- GL Code
- Project Number
- Cost Code
- Accounting Code
- Purchase Order Number
- Department
- Division

A Closer Look at: Cost Allocation Code Interdependencies

Interdependencies allow the customer to define inter-dependent relationships between CAC segments to better manage the CAC selection on a requisition, work order or project agreement. Interdependencies are enabled on the business rules section within the Cost Invoice Details business rule. Interdependencies can be defined once all CAC segments and values have been added to the application.

Predecessor CAC segments are defined in the CAC segment properties. Once this relationship is defined between two CAC segments predecessor values can be defined within the CAC segment values screen. For each value defined, select the appropriate predecessor values. A user will then have a limited list of available values based on the associated predecessor selected when adding CAC values to a job requisition, work order or project agreement. CAC interdependencies can be easily edited at the admin level, but cannot be overridden at the end user level.

Loading CAC Data

IQNavigator offers a standard CAC load template that allows the Managing Firm Admin to automatically upload all segment values of a CAC, therefore eliminating the need for manual entry. Once the CAC structure (segments and definition) are in place, the load process can occur. See IQNavigator for the latest load template before beginning this process.

(Refer to the Tools section of this document for details on how to complete this activity).

Default CAC on User Profile

It's possible to assign certain Cost Allocation Code values for each user in the IQNavigator application, which will limit the CAC values to only those assigned to that user when they are creating transactions in the application.

Why Configure

For customers that have an overwhelming amount of Cost Allocation Code values, and for end users that only ever use a sub-set of those values, this functionality can be quite valuable to the end user's experience when inputting values onto transactions.

How to Configure: CACs to Users

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Select the **work with users** action button in the Buyer Firm Profile screen, the system will present you the **Staff List** screen.

- Select **assign cost details** in the **Config User Acct** action column, then select the blue go arrow. The system will present the **Assign Cost Details** screen.

- Select **edit** for the appropriate CAC string in which you'd like to assign values. The system will present the full editor screen (see screenshot below).

- Search for a CAC value by input the value or description in the search field and selecting **view all** button.
- Highlight and **select** the CAC values for each category that apply to this user in the **Selected CAC Values** box. The CAC values appear from what has already been configured in the Cost Allocation Code Configuration section referenced previously in this document.
- Save the CAC segment values selected by selecting **save,** or **cancel** to discard.

Evaluation Templates

There are two types of contractor performance evaluations that can be utilized in the application, Standard Contractor Evaluations and Complex Contractor Evaluations.

Standard Evaluations – present a limited number of Yes/No questions to the hiring manager when evaluating an assignment. The standard evaluations may be configured to mandatory or optional for end users. By choosing this option, there is no further configuration needed.

Complex Evaluations – May be configured to meet the needs of the organization. Free form text questions and weighted answers are available. By choosing this option, user will need to set up the evaluation templates.

Evaluation Templates are used for configuring complex contractor evaluations. The questions are defined by the buyer firm and can be completed for an assignment throughout various points of the assignment.

Why Configure

Evaluations can be customized to meet the client's requirements. This is a common request.

How to Configure: Evaluation Templates (Simple)

The first step in configuring the evaluations to be available for end users is to enable either type (Standard or Complex) on the Buyer Firm Profile.

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Select the **edit** action button in the Buyer Firm Profile screen, and navigate to the **Work Order & Assignment** section.

- **Resource Evaluations** – Check the type of evaluation that will be available to end users.

How to Configure: Evaluation Templates (Complex)

Evaluation Templates are used for configuring complex contractor evaluations. The questions are defined by the buyer firm and can be completed for any individual assignment during various points of the assignment.

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Select the **evaluation template** action button in the Buyer Firm Profile screen, the system will present the **Evaluation Template List** screen.

- Select **create evaluation template** button. The system will present the evaluation template creation screen **Create New Evaluation**

General:

- **Template Name** – Title this template.

- **Template Type** – What type of template will it be for; assignments or project agreements (out of scope).

- **Scoring** – Scale for when a question is answered by a number value

- **Add weight criteria** – The user can make some questions more important than others.

- **Instructions** – provide instructions to the evaluators on how to complete evaluations.

- **General comment field** – allow evaluator to provide a comment on the evaluation form, if applicable.

- **Allow document attachments** – attach any specific documents that may be needed

- Include Overall Rating?
- **Create Question Categories** – Enter category titles for the questions in the text field above the box and choose **add to list**. Use the **move up** and **move down** buttons to order the categories.

Once all required fields are completed select the next tab **Evaluation Criteria.**

Evaluation Criteria:

- Based on the Evaluation Categories the user created on the previous page, the user will now add questions for each category. Once all questions are added their order can be rearranged.

Once completed, select the next tab **Question Type and Weighting.**

Question Type and Weighting:

The questions from the previous page will pre-populate on the Question Type and Weighting tab.

For each question:

- Choose whether or not the question is required

- Choose the question type, Free-Form, Yes/No, Date, Single-Select, Multi-Select, or Scoreable

Once completed, select the next tab **Review and Schedule.**

Review and Schedule:

- **Evaluators** - Select the evaluators as well as schedule when the evaluation will be need to be completed. It can be scheduled for when the agreement reaches completion or termination, or a specific number of days after the assignments starts or ends.

- Click **view evaluation form** to view a preview of what the evaluation will look like to the end user.

- After viewing the preview select **close.** The user can then go back and edit the template.

- Save the template by selecting **save changes,** or **cancel** to discard.

- Your new evaluation template will populate in the evaluation template list.

- Actions to take: **activate, clone** or **edit,** the template.

Examples:

Most commonly, clients have incorporated their existing evaluation questions into IQNavigator.

On-Board Check List

The On Boarding Checklist is a set of requirements or steps that a company has deemed important in preparation for the on-boarding of a contractor on his/her assignment. The checklist items configured in this screen will appear to the buyer user on the contractor's assignment screen in the system.

Why Configure:

Depending upon the customer needs, often specific on-boarding procedures must take place prior to the contractor beginning their assignment. This feature allows the tracking of these on-boarding procedures, and can be configured so that either the supplier and/or the buyer side can update the data.

How to Configure: On-Boarding Checklist

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Select the **on boarding checklist** action button in the Buyer Firm Profile screen, the system will present the **On Board Checklist** screen.

- **Allow Suppliers to Edit On-Boarding Checklist** - The buyer can allow or disallow the supplier to edit the On Boarding checklist. If this setting is checked 'No' the On Boarding Checklist on the assignment will appear as read only to supplier.
- A set of default checklist items will appear on the screen. You may edit these checklist items (item name/description, question item type, whether to default the answer to yes or no). Select **edit** in the action column for the checklist item you'd like to change.
  Select **create** button to create a new on-boarding checklist item. The system will present the **On Board Question** input screen.

- **On Board Checklist** - Specify enabled or disabled
- **On Board Checklist Question** - Give the checklist item a name/description (this is the question on the assignment)
- **On Board Checklist Question Type** - What type of question is it (yes/no radio button, or text field)
- **Default Question Answer** - Set a default value for the question's answer
- Save the selections by selecting **save,** or **cancel** to discard.

Examples

Common on-boarding criteria:

- Drug Test Passed & Details
- Background Check Passed & Details
- Non-Disclosure Agreement Signed
- Job-specific training provided by supplier

Rate Identifiers

Rate Identifier is what IQNavigator terms the label of a rate in the application.

Helpful definitions of different rate field terms used in the IQNavigator application:

- Rate Identifier – describes the rate that shall apply under a given circumstance. The 'Rate Identifier' is the adjective in front of the 'Rate Category'. Examples: regular time, overtime, doubletime, public holiday, bank holiday, on-call rate, pager pay rate
- Rate Category - refers to the designators of Pay Rate, Mark-up, Bill Rate, Adjusted Bill Rate, Reimbursement Rate and OT Discount Rate
- Rate Type – signifies the frequency by which the system will calculate the contractor's time. Examples: Daily, Hourly
- Transaction Rates – Numeric values specified on business transactions (jobs, express requisitions, work orders, express assignments, project agreements, etc.) Transaction rates are the 'actual rates' on a system transaction.
- Rate Card Identifier – Configurable list of categories by which a rate card is organized. The rate card identifiers serve as the columns on the rate card. Within these columns, the system captures rates for each rate identifier. Examples: Weekday Day, Weekday Evening, Weekend Night
- Rate Card Rates – Numeric values specified on the rate card within each rate card identifier purposes of reporting and rate card variance calculations. They do not represent the 'transaction rate'. Rate card rates represent anticipated rates for a specific job title, rate card identifier and rate identifier.

Why Configure

If a customer has a unique need in terms of identifying rates, for example holiday pay, then a fourth rate identifier can be created in the system. This way, all hours billed can be tracked accurately.

How to Configure: Rate Identifiers

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Select the **Rate Identifiers** action button in the Buyer Firm Profile screen, the system will present the **Rate Identifiers** creation screen.

- Specify the **Expenditure Type** name and **Description** (Description is what will display to the end users on the system transaction) for billable or non-billable identifiers.
- Select the **save and add new** button. The system will provide a warning message that you may only ever have one additional rate identifier created at a time and that this will have immediate impacts on any newly created transactions and edits to some existing transactions (e.g. the new rate identifier will display upon create & edit of these transactions). ***Please consider the impact to your system transactions before creating a new rate identifier – as you cannot undo this action.***
- Save the selections by selecting **save changes,** or **cancel changes** to discard.

Examples

Some organizations may have specific rate identifiers that are critical to be able to capture rates by in the system so that contractor's may charge their time against it. Also, many international corporations capture rates differently than typical US rates.

Examples: Public Holiday, Bank Holiday, On-Call Rate, etc.

Shift Configuration

If the application needs to support shift work for this organization, you may set up shift requirements & details on this screen. These shift schedules will be applied to Job, Express Requisition, Work Order & Assignment transactions.

Why Configure

If shift work is established for an organization, then most likely tracking data to that shift will be a requirement. For reporting purposes, if spend needs to be tracked against shift work/values, then shift configurations will need to be established.

How to Configure: Shift Configurations

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Select the **shift configuration** action button in the Buyer Firm Profile screen, the system will present the **Shift Configuration** screen.

Shift Capability

- **Shift Schedules** - First specify the schedule requirement: Optional, Required, Disabled (this is how the shift field will appear on the system transaction)
    - □ If Shift Schedule is set to required, buyer users will be required to indicate the shift days when they create a requisition.
    - □ If a shift is required on the requisition, this will be criteria for auto-matching, and if a resource does not have a shift specified on their profile, they will be filtered out and not match to that job. (Note: they can still be directly submitted to the opportunity).

Shift Configuration

- **Shift Label** - Give the shift Name (required field)
- **Shift Hours** – Specify the hours for this particular shift
- **Length of Shift Cycle** - In weeks
    - o Length of shift cycles will determine how many Shift Days of Week sections appear on screen.
- **Shift Start Date** – Input the beginning date for this shift type
- **Shifts** - Designate the Day(s) of Week that apply for this shift
- **Shift Start Time -** Give a Start Time for the shift (required field)
- **Shift End Time -** Give an End Time for the shift (required field)
- Select **save and add new** button to save the shift details and add another one. The details of all shifts entered will populate in the lower portion of the screen.
- Save the screen details by selecting **save,** or **cancel** to discard.

Examples

Shift examples will mimic a customer's existing shift schedules.

Application Look and Feel

The following section describes miscellaneous configuration steps that apply to the overall look and feel of the application for end users.

Why Configure

There are many features in the IQNavigator application that can be configured to address common customer scenarios and requirements. The following section will address:

- Customer Defined Fields
- Configure Screen
- Custom Labels
- Dashboard Configurations
- List Configurations
- Notifications
- Reason Codes
- Custom Branding
- Decision Manager

Customer Defined Fields

Customer Defined Fields allow users to create customer-specific fields to be made available on various system transactions; including Assignments, Change Requests, Express Assignments, Express Requisitions, Job Requisitions, Job Templates, Payment Requests, Payment Request Lines, Users (Configure Account Page), Workers, Work Order/Targeted Orders, Work Order Payment Requests.

- These fields are labeled and created for the specified transaction, and then the formats of their values are defined. These new fields can be shared with organizations under the parent Org.
- Customer Defined Fields can either be a public or internal field and they can be set to required or not required.
- Once created Customer Defined Fields can be activated or inactivated and edited, however taking these actions affect every transaction specified that has a required field.

This section describes how to create customer defined fields for an organization.

Why Configure

This functionality allows a customer to further customize their use of the IQNavigator application by using terminology & data input fields that are specific to them and their organization. It is very useful for reporting purposes. For example, when creating a requisition a specific field an organization wants to report on may not be on the standard requisition but can be easily added by creating a customer defined field.

How to Configure: Customer Defined Fields

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Select the **customer defined fields** action button in the Buyer Firm Profile screen, the system will present the **Customer Defined Fields** configuration screen.

- Customer Defined fields can be edited or inactivated/activated from the actions column.
- Select **define new field** button to create a new customer-defined field, or select an existing customer defined field name hyperlink to edit it.

Define Field:

- **Field Label** – This is the title of the question or the field that will be on the transaction.

- **Is this Field Required** – Specify if required for buyer end users or not.

- **Apply to Objects/Page(s)** – Select the applicable system transactions that this new field should be applied to. Highlight the selection and select over to the Selected object(s)/page(s) select box.
- **Field Type** – select from a list of choices:
  - Document Attachment
  - Drop-down select field (note: selection of this value will change the screen to allow you to input the select values, see the snapshot below)
  - Free-Form Field - Date
  - Free-Form Field - Number field
  - Free-Form Field – Read only test
  - Free-Form Field - Text
  - Multi-select box (note: selection of this value will change the screen to allow you to input the select values, see the snapshot below)
  - Single line text
- **Sharing** - Select which organizations you want this customer field shared with. Highlight the selection and select over to the Selected Organizations select box.
- **Visibility** - Set the visibility of this field: public (buyer & supplier visibility); internal (buyer visibility).
- **Internal Visibility by Role** – All User Roles or Selected User Roles
- **Internal Editability by Role** – All User Roles or Selected User Roles
- Save the customer defined field by selecting save, or cancel to discard. Return to the previous screen by selecting return to list.

Define Value:

- When using dropdown select field or multi-select box, values must be defined per customer. Once
  added these values can be edited and removed.

Examples

The customer will drive the requirements on this, usually based upon current procedures they have in place today that need to be addressed. Example:

- Job Requisition Customer Defined Field
    - Was a reasonable internal search effort conducted prior to creating the job requisition; Yes or No

Configure Screen

Once you've set up customer-defined fields for various system transactions, you can then manage what order these fields appear on these system transactions. All of the customer defined fields can be re-organized to appear in the most logical order. This configuration item can only happen if there are two or more customer defined fields on a transaction item.

Why Configure

The purpose of configuring the screen is to arrange the customer defined fields in the most meaningful order on the system transaction for the buyer organization.

How to Configure

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Select the **configure screen** action button in the Buyer Firm Profile screen, the system will present the Configure Screen List.

Select the **screen name hyperlink** or **edit** action associated to a specific system transaction-type screen that customer defined fields have been made available to.

Please note: at least two customer defined fields must have been made available to a specific transaction type for field ordering to apply.

- Designate the field order of the customer-defined fields by moving the specific field names **up** or **down** in the list.
- Save the field order by selecting **save,** or **cancel** to discard. Return to the previous screen by selecting **return to list**.

Examples

The customer will drive the order in which their specific fields should be displayed on a transaction. Example:

- Job Requisition Configure Screen
    - □ The first customer defined field could be a yes or no question; Was an internal search made? Then second question could be a free form text field; Please explain why we could not hire internally?

Custom Labels

This functionality allows you to change the display name of an existing system field from the IQNavigator given name to a customer defined name. By changing the name of an existing field, the new given name will appear wherever this field appears within the application. This is true for all areas of the application including General areas, the menu, jobs, and work orders.

Why Configure

The purpose of creating custom labels is to further customize the application to fit the buyer's needs. It will allow for IQNavigator to match up with the customer's internal use of vocabulary.

How to Configure: Custom Labels

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Select the **custom labels** action button in the Buyer Firm Profile screen, the system will present the Custom Labels configuration screen.

- Enter the customer-specific name to the right of the existing field name
- If the customer is operating with more than one local select 'open translations' to manually translate custom labels to match each available locale.
- Save the customer label selections by selecting **save changes,** or **cancel changes** to discard.

Examples

The customer will drive the requirements on this based upon current vernacular used at the company to cause less confusion to their system end users. Example:

- If a customer uses the word 'engagement manager' instead of IQNavigator's term, 'hiring manager' then the application can be configured so that anywhere 'hiring manager' was in the application, will be replaced with the customer's term 'engagement manager.'

Dashboard Configuration

The look, feel, and content of an end user's IQNavigator homepage (a.k.a. Dashboard) may be configured on a user by user basis. Configuring a dashboard is setting up what areas of the dashboard the end user will be able to view and access.

There are different portlets, such as my approvals, my metrics, my status items, and my quick links. Within each of these portlets there are different graphs and links that can be viewed can be edited. So they can be viewed on the dashboard or not there at all.

Why Configure

The purpose of customizing dashboards is to make the dashboard more meaningful to users within the organization. It is a way to make it easier for the end user to access areas of the system that they will most commonly use.

How to Configure: User Dashboards

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Select the **dashboard configurations** action button in the Buyer Firm Profile screen, the system will present the Dashboard Configurations List screen.

- Select **create dashboard configuration** button to create a new dashboard, or select a dashboard name link to **edit** an existing one. The system will present the create/edit screen.
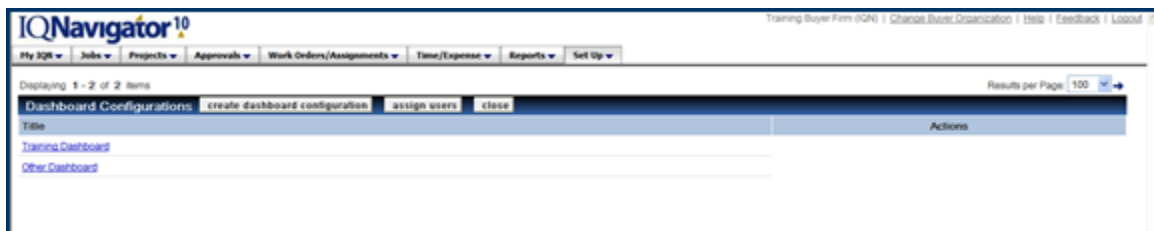
Dashboard Configuration:

- **Title** – Give the dashboard Title.

- **Description** – Optional.
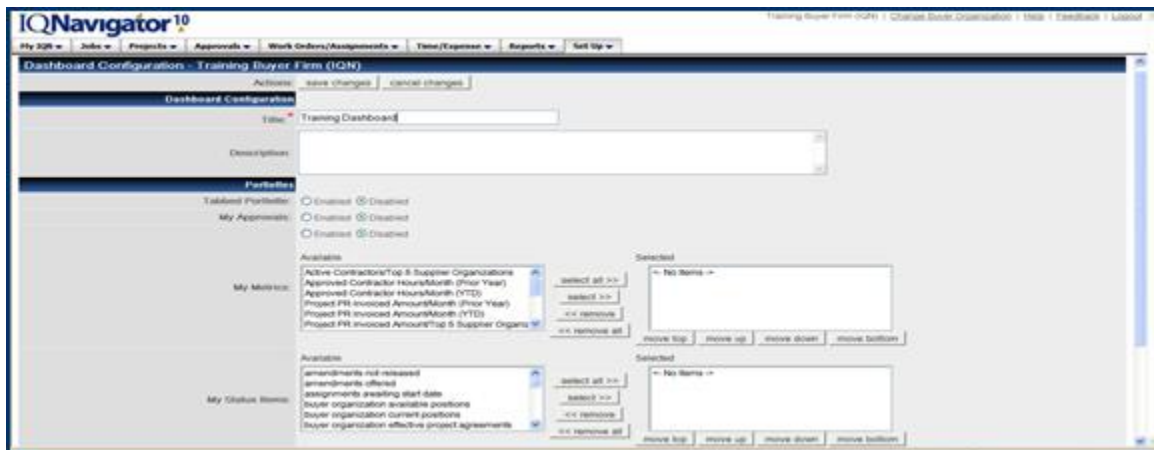
Portlets

- **My Approvals** – Enable/Disable whether approvals should display.

- **My Metrics** - Enable/Disable whether metrics (common graphs) should display. Also select which metrics to display by selecting them from the Available box and moving to the Selected box. Then designate what order the metrics values should be displayed by moving the metric name **up** or **down** in the Selected box.

- **My Status Items** - select which statuses to display by selecting them from the Available box and moving to the Selected box. Then designate what order the status values should be displayed by moving the metric name **up** or **down** in the Selected box.

- **My Quicklinks** - select which Quicklinks to display by selecting them from the Available box and moving to the Selected box. Then designate what order the Quicklink values should be displayed by moving the metric name **up** or **down** in the Selected box.

- Save the dashboard configuration selections by selecting **save changes,** or **cancel changes** to discard.

How to Assign Dashboard to Users

To assign a dashboard type to specific users, select the **assign users** button from within the **Dashboard Configuration** screen.

- You can easily switch all users from one dashboard type to another by selecting the applicable dashboard in the **Currently Assigned Dashboard Configuration** drop-down field (example: from System Default dashboard to another new dashboard) and then selecting the **search** button. The system will present you with a list of users that currently have the dashboard configuration you've selected. OR

- You can select a from a list of users with specific role(s) to give a new dashboard type to by selecting the role(s) from the **Available Roles** box to the **Selected Roles** box, and then selecting the **search** button. The system will present you with a list of users that currently have the dashboard configuration you've selected. The system will search for users having *all* the role(s) that you select.

Note: if you select a value in the Currently Assigned Dashboard Configuration field AND Role(s) before searching, the system will look for only those users that have both criteria and your search results may be limited.

- In the Search Results section, select the **Dashboard Configuration To Assign** value that you'd like to switch the user(s) to.
- Select the user(s) from within the search results that you'd like to apply the new dashboard to. (You may use the **select all** button).

Examples

Approvers can be assigned a dashboard that is specific to approvals, they may not need quick links or metrics, so those fields can be disabled, and the enabled field might be 'my approvals,' so it is easy for them to approve items.

List Configuration

List Screens throughout the system are presented to users as a grouping of transactions that they have created or have access to view. You may configure what columns display on the list screens for this organization, based on which user interface is being use (old vs. new).


Why Configure

Configuring list screens allows for important customer specific columns to be added to the required columns that appear on list screens. It is useful if users are quickly glancing at list screens for information as opposed to drilling down onto a specific item to find that information.

How to Configure: List Screens

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Select the **list configuration** action button in the Buyer Firm Profile screen, the system will present the Configure Lists screen.
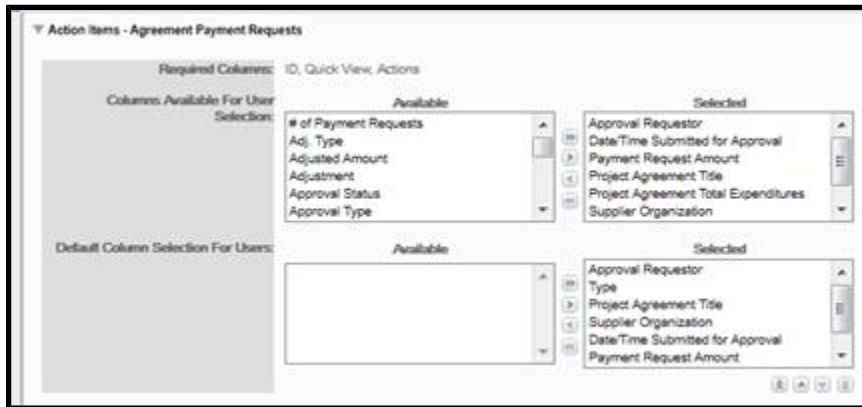
- Column choices include almost all field values from the particular system object (example: all fields from the job/express assignment will be available for column selection on the Jobs List view).

- Choose which columns to display by selecting them from the **Columns Available for User Selection** box and moving to the **Selected** box. Then designate what order they should be displayed by moving the column name **up** or **down** in the Selected Columns box.

- Required columns are those columns that are required to be displayed on the list view, they are not configurable.

- Save the list configuration selections by selecting **save changes,** or **cancel changes** to discard.

Examples

If configuring the approvals list screen, the only required columns are approval item and actions. Therefore more columns may need to be added so that there is more information from the list screen, for example adding an approval status column or the approval type.

Notifications

Notifications are broken down by role on the notifications configuration screen. These notifications are emails that are sent to users with that specific role when particular events take place in the application. These notifications can be enabled or disabled depending on whether or not users within an organization want to receive them or not. This is role based and not individual user based.

Why Configure

Enabling or disabling notifications allows the organization to determine which notifications are important to receive or not receive.

How to Configure: Notifications

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Select the **notifications** action button in the Buyer Firm Profile screen, the system will present the Notifications Configuration screen.

- Notifications may be enabled or disabled by role type. **Check** the appropriate notifications to enable them, or **un-check** to disable them. The system will default all notifications as 'enabled' for all role types (e.g. checked).

- Save the notification selections by selecting **save changes,** or **cancel changes** to discard.
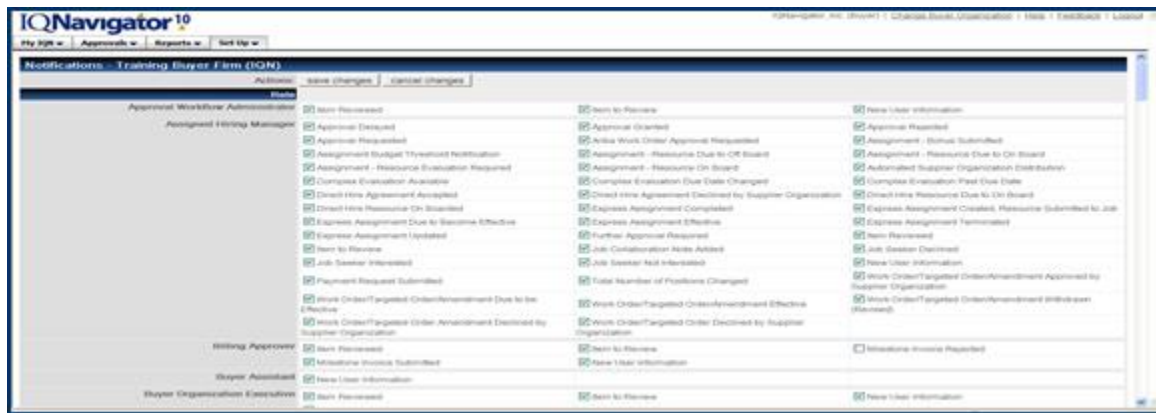
Other System User Notifications that may not be disabled

User Notifications are generated out of the system when new users are created. New users can be a buyer user, a supplier user or a contractor. Listed below are the instances when notifications are sent to users:

Notification	Explanation
New Buyer/Supplier User Manually Created	Creator has the ability to delay notification or send immediately
New Buyer/Supplier User Created through a load process	User notifications are delayed and an admin user will need to trigger the notification
Contractor User when Work Order Created through system	The user notification will go to the contractor upon the work order/assignment becoming effective. The work order/assignment becomes effective when the start date has been reached.

Notification	Explanation
Contractor User when Work Order Created through Load	The user notification will go to the contractor after the work order/assignment becomes effective – this will be at least midnight of the day after the work order is loaded. If the start date is in the future, the contractor will receive the user notifications once the start date of the assignment has been reached. If the start date is in the past, the user notification will be sent the day after the work order has been loaded.

Communication

As items are set up, IQNavigator will need to be informed of data in relation to the implementation schedule. Please notify your IQNavigator POC for the following items:

- Estimated Go-live date
- Project time lines – specifically Dates to load production, dates integrations/development needed, etc.
- Dates for use of the Implementation environment (testing, training)

Examples

A hiring manager could potentially receive over 40 different types of notifications. If the Hiring Manager does not want to be bombarded with so many emails then the organization can turn off some of the notifications that hold minimal importance in their organization.

Reason Codes

Reason Codes are systematic prompts to end users when they select a cancel or reject action in relation to a system transaction, asking them to specify 'why' they are canceling/rejecting. There are pre-defined reason codes that can be enabled or disabled. Or new reason codes can be configured for the organization.

Why Configure

Reason codes are useful for communications. When an item is rejected or canceled the person on the other end can see the reason why it was rejected or canceled. It can speed up the transaction process of certain items. If an approver were to reject a work order then they would have to give a reason why and then the user who requested the approval item would know immediately why it was rejected.

How to Configure

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Select the **reason codes** action button in the Buyer Firm Profile screen, the system will present the Reason Codes configuration screen.

You may configure which reason codes are displayed to your organization's users by selecting (checking) existing reason codes or selecting the **add new** button to create your account-specific reason codes. You may configure reasons codes based on system transaction types (e.g. timecard rejection).

Translations may also be added to your account-specific reason codes by selecting the **add translation** button to the right of the reason code name.
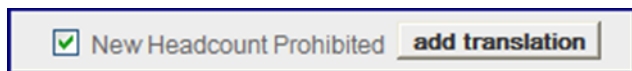
- Save the reason code selections by selecting **save changes** or **cancel changes** to discard.

Examples

For timecard approval several reason codes for why the timecard approver is rejecting can be added. For example, incorrect hours, incorrect CAC code, Time entered on a holiday, etc.

Organization Sub-Classification

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Select the **organization sub-classification** action button in the Buyer Firm Profile screen, the system will present the Organization Sub-Classification configuration screen.

- Define an Organization Sub-Classification title in the **Name** field - this will be displayed in the org sub-class field in the system transaction (Job/Work Order); list views will display the default of 'Dept/Division'. Be sure to select the '+' key to expand these sections for any applicable translations needed.

  Specify whether or not you would like to make this field required, by selecting the appropriate radio button.
- Define your org sub-classification values by inputting the **Value**, then select **add new** button.
- Values may be inactivated later by selecting the **Inactivate** checkbox associated to the right of the value.
- Save the org sub-classification values by selecting **save,** or **cancel** to discard.

Examples

- Department
- Division
- Group
- Region
- Cost Center, etc.

Decision Manager

The Decision Manager has replaced the Decision Tree functionality as a means for guiding managers who are through the procurement process in the system.

Why Configure

When the Decision Manager option is selected from the hiring manager's "Create" tab, it will present them with a series of questions to guide them to the appropriate action for procurement and management of the procurement process. Administrative users will be able to create a series of questions and answers designed to guide hiring managers through this process. Administrators will have the ability to tailor both questions and responses to direct their users to the best choices to meet their needs.

For example, if a hiring manager wants to supplement a team with a temporary employee, the standard process involves completed and submitting a requisition for approval. For hiring managers new to their

organization or otherwise unsure of the process, the Decision Manager can help the user understand the steps involved and point them in the right direction to complete the process in the system.

For more information about configuring the Decision Manager, please refer to the Best Practices Configuration Workbook.

Tools

The tools mentioned in this section can help set up customer organization accounts more efficiently.

- Online Help
- Load External Data
- Contract Templates
- Custom Locations
- Custom Branding

Online Help

Documents or Intranet links can be added to **Help** Tab in the IQNavigator application. This area of the application is most commonly used for on-line access to training materials.

Why Configure

Customers can store training recordings and/or materials within the application to assist users through questions.

How to Configure: Online Help

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Select **online help** action button in the Buyer Firm Profile screen, the system will present the configure online help screen.

- Select the **add document** button.
- **Title** the document
- **Browse** Files and attach the desired file *(Cannot exceed 5MB)*
- Save the document by selecting **add**.

- Once the documents have been added their order can be rearranged by clicking the button **ReOrder Documents.**

Load External Data

This functionality replaces many hours of manual data entry during an implementation process by giving the ability to automatically load the data for various key areas of the application.

Why Configure

You may load various types of data by browsing for the file to be uploaded and selecting the type of data load to apply it to.

How to Configure: External Loads

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Select **load external data** action button in the Buyer Firm Profile screen, the system will present the Data Load screen.
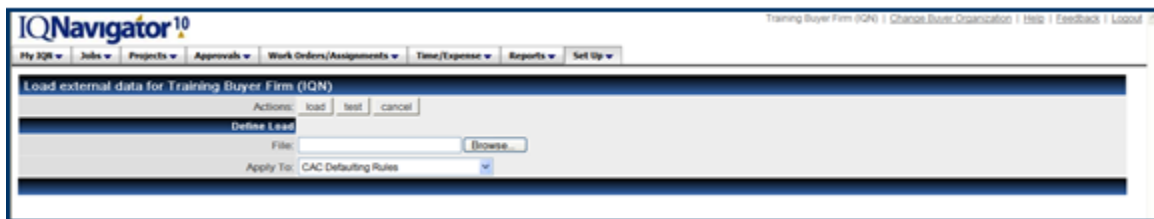
- Browse for the file to be uploaded
- Apply To – select the type of load process
- Select the load button to apply the upload process, select test to see if the file format is complete without errors, or cancel to cancel the upload process.
- The file must be in a .csv format in order to load into the application. The most current load formats can be obtained from your IQNavigator point of contact.

Items that can be loaded via the application:

- Cost Allocation Codes
- CAC Defaulting Rules
- Express Assignments
- Invoice Detail
- Job Templates
- Project Agreement Express Assignment
- Project Outline

- Rate Card

- Rate Treatment Rate Card

- Service Identifier

- Service Rate Table

- Supplier Organization

- Targeted Assignment

- Work Order

- Work Order with Rate Card

- Work Order with Rate Ranges

Items that can NOT be loaded – These items will need to be manually input into the

application

- Job Requisitions

- RFxs

- Project Agreements

- Dept/Div

- Supplier Tiering

Contract Templates

Why Configure

Contract Templates gives you the ability to create a template for Supplier Statements of Work (SSOW) creation, which will save you time and manual data entry. Since there is an SSOW created for every supplier organizations supporting the buyer organization, this feature will allow you to apply contract defaults when creating each new SSOW.

How to Configure: Contract Templates

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Select **contract templates** action button in the Buyer Firm Profile screen, the system will present the Contract Templates creation/list screen.

- Select the **create supplier organization SOW template** action button or **clone** an existing template to create a new one.

- Input all the data applicable to the SOW Template, that you would like to default on the SOW when creating new SOW agreements for supplier organizations.

- Save the contract template by selecting **save changes,** or **cancel changes** to discard.

Customer Defined Locations

Why Configure

Custom Locations give each customer the option to customize their locations based upon their internally used location codes, addresses, etc. When an organization selects Custom Locations Only, they must define all the location values. These can either be maintained on the Buyer Firm Profile by a managing firm or buyer firm admin user. The locations can also be maintained through an integration, developed for the customer. Custom locations can be defined in any combination of these fields: address line 1, 2, 3, town/city, state, postal code, county and country. In addition to the address lines, generic attribute fields are available to store organization specific data elements. These could be used to store a location code or a site name, etc.

How to Configure: Customer Defined Locations

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Select **Locations** action button in the Buyer Firm Profile screen, the system will present the Locations screen.

- Select the Custom Locations Only button or Inherit locations from Parent Organization if custom locations are defined there.

- Select over the custom location properties that are relevant to the customer. If a generic attribute is selected this can be renamed in the attributes field below. All attributes can be hidden from the end user (e.g. when the customer utilizes a location code that would be beneficial for reporting purposes but would not necessarily be necessary for the hiring manager to view).

- Once the properties and attributes are defined, select **save and view custom locations**. The system will present the custom locations screen. Select **create new** to enter a new location. You will define the location in the required fields and list the location as 'active'.

Custom Branding

Why Configure

In the new UI, the custom branding functionality allows admin to add a customer logo to the user interface. For further information, refer to the IQN System Configuration Best Practices Workbook.

Activities Requiring Development

The configuration items in this section require additional assistance from IQNavigator if they are going to be implemented for a customer.

Tools Requiring Development

- Authentication Policies
- Resource Schedule Integration

Policy • User Integration Policy

- Service Categories
- Service Category Hierarchies
- Category Hierarchies

Authentication Policies

Authentication policies are used for customers using single sign-on to access the application. These policies are configured in conjunction with the development effort for setting up a single-sign on customer. All customers that don't use single sign-on will not require any updates to this setting and will have a Domain that is set to "Global" by default.
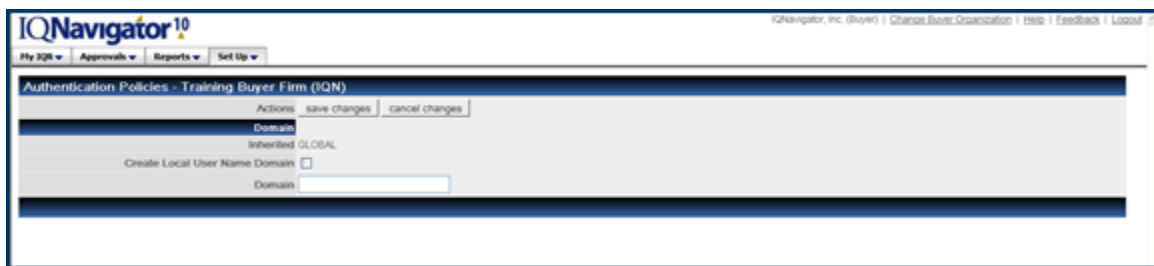
Resource Schedule Integration Policy

Resource schedule integration policy is used when setting specific outbound integrations from IQNavigator to an external system. These policies are configured in conjunction with development work for specific integrations. This page has been used most often when interfacing to resource scheduling systems, often used in a light industrial or high volume environment.

User Integration Policy

User integration policy is used when setting specific outbound integrations from IQNavigator to an external system. These policies are configured in conjunction with development work for specific integrations.

Service Categories

Service Categories are a way to set up specific service categories in the application. This functionality is most often used with Project Procurement Functionality. Additionally, using service category functionality is typically utilized in conjunction with interface programs that build the services categories and service category hierarchies.

Service Category Hierarchies

Service Category Hierarchies allow for Service Categories to be grouped in hierarchical fashion. This functionality is most often used with Project Procurement Functionality. Additionally, using service

category functionality is typically utilized in conjunction with interface programs that build the services categories and service category hierarchies.

Category Hierarchies

Category Hierarchies are used to group data associated with cost allocation codes into a hierarchical fashion. This is often used to help with reporting as well as approval processes. In addition to values stored in the hierarchy, the system can store 'approvers' associated to specific values as well as 'managers'. Approvers have approval authority for a specific value and managers have the ability to view data associated to a specific value. Category hierarchies are most often set up via an integration program that defines the hierarchy of values and associated approvers and managers.

For example, if a cost allocation code is set up to be a project number, and a project is associated to a specific department and the department is associated to a specific business unit, the system can store the project and its related department and line of business information in a hierarchical fashion. In addition, the system may store a department level approver and a line of business approver. When a project is then selected, the system knows which department and business unit approver to send the request to approver for using a rules based approval workflow. Additionally, a department or line of business value may have a set of associated managers that can view all the data that is associated to project values in their department or line of business (although these managers are not responsible for approval).

Organization Structure

Organization was covered briefly here. This section covers the topic in greater detail.

Enterprise Hierarchy

An enterprise hierarchy is a high level representation of the customer within IQNavigator.

A hierarchy is the IQNavigator term for a collection of one or more buyer organizations. Organizations are defined in the hierarchy as 'parent', 'child' and 'sibling' organizations.

Enterprise is the IQNavigator term for a customer. Each customer is represented in the IQN system by an Enterprise which consists of a buyer organization or a hierarchy of multiple buyer organizations.

Sample Organization Hierarchy
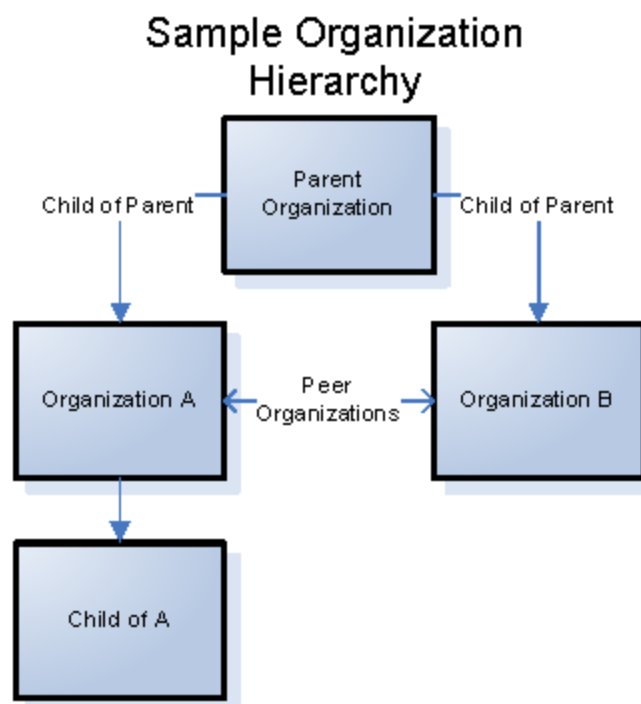
Business Rule Organization/Non-Business Rule Organization

Business rules are configured at the individual buyer organization level to allow for complex process flows utilizing a single hierarchy of organizations.

Business rules are defined at the organization level but there are various configurations that can be shared across an entire enterprise.

There are two types of organizations in the IQNavigator system: Business Rules Organizations (BROs) and Non-Business Rules Organizations (NBROs)

A BRO is an organization in which business rules were executed. An NBRO is an organization in which business rules have never been executed.
The sample hierarchy below will be used to describe the functions of a BRO versus an NBRO
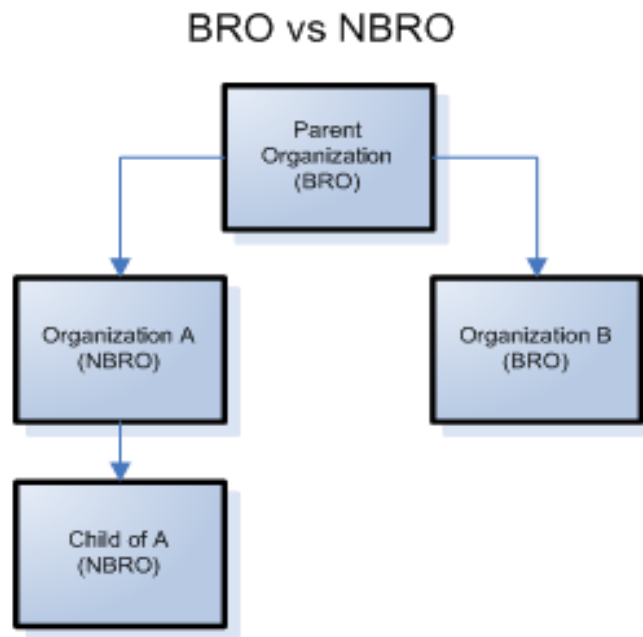
Sample BRO/NBRO Hierarchy

- The diagram above shows a simple hierarchy consisting of a parent organization and 3 children organizations.

- The parent has two immediate children, Organizations A & B, and one grandchild, Child of A.

- The parent organization is a Business Rules Organization (BRO). This means that business rules have been executed at this level. This org has no parent of its own and therefore cannot inherit any business rules.

- Organization A is a Non-Business Rules Organization (NBRO) child of the Parent organization. This is a NBRO because no business rules have been defined any transactions or system use that takes place in Organization A will follow the business rules defined in the parent.

- The NBRO child always inherits all business rules from the parent organization. For example: if job requisition approval is enabled in the Parent organization it will also be enabled in Organization A.

- Child of A is a NBRO child of Organization A. This organization is also an NBRO. Child of A does not have a parent BRO. This means that the system will walk up the hierarchy until it finds a parent BRO and that BRO will determine the business rules that apply to Child of A. In this case Child of A will follow the business rules defined in the Parent organization.

- Organization B is a BRO child of the Parent organization. Business rules have been defined for Organization B and therefore no business rules will be inherited from the parent.

- For example: job requisition approval can be enabled in the parent organization and disabled in Organization B.

- While business rules cannot be shared down to a child organization it is possible to share the following data elements:
    - **Customer Defined Fields** – These can be shared across an entire enterprise regardless of an organization's position within the hierarchy.
    - **Cost Allocation Codes** – These can be shared across an entire enterprise regardless of an organization's position within the hierarchy.
    - **Approval Workflows** – A BRO can inherit approval workflows from its parent BROS. The child organization configuration to inherit approval workflows will apply to all approval workflows created in the collection of parent organizations.

Designing an Organization Structure

This section will cover a few common scenarios that will help to define an organization structure.

Case Study A – Stewart's Plumbing

Requirements:
- Stewart's Plumbing is a new customer. Their organization consists of two main business units – Residential and Commercial.

- All users will need the ability to procure work for both the Residential and Commercial business units.

- All Residential requisitions are small in size and do not require internal approval. All Commercial requisitions are large in size and require executive approval before they can be sourced.

Solution:
- All users will need access to both business units so this would be a driver for placing all users in the parent organization.

- One business unit requires requisition approval while another does not. This would be a driver for two separate buyer organizations within IQNavigator.

- We have defined a minimum of two organizations, one for each business unit, as well as a parent placeholder for all users. The proposed organization structure is shown below:
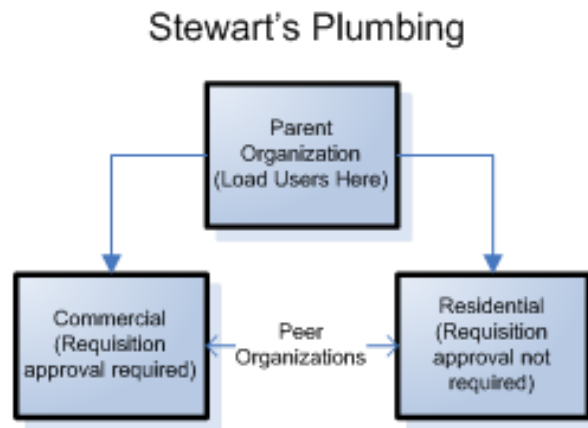
- The two child organizations can have different business rules defined and can support separate processes.

Case Study B: Joe's Shoe Store

Requirements:
- Joe's Shoe Store is a new customer. The implementation will consist of implementing all 5 Joe's stores around the area.

- Each user will need access to the requisitions for their store only. Only corporate finance will need visibility into all data.

- The business process will be the same for all stores.

- A separate invoice will be required for each store.

Solution:
- Each store will be created as a separate organization in the hierarchy.

- Because no store requires visibility into the actions of another store they will all be created as peer organizations.

- Finance requires visibility into all organizations so a Parent placeholder organization will be created under which all peer organizations will be created.

- All users will be loaded into their respective stores/locations/organizations.

- All organizations will follow the same business process so there is no need to define business rules at the individual organization level.

- The proposed organization structure is shown below:

Joe's Shoes

Parent BRO (Load Finance Users Here)

**Store 1 NBRO**

Store 2 NBRO

Peer Organizations Each employee Is Created only in their respective location

Store 3 NBRO

Store 4 NBRO

Store 5 NBRO
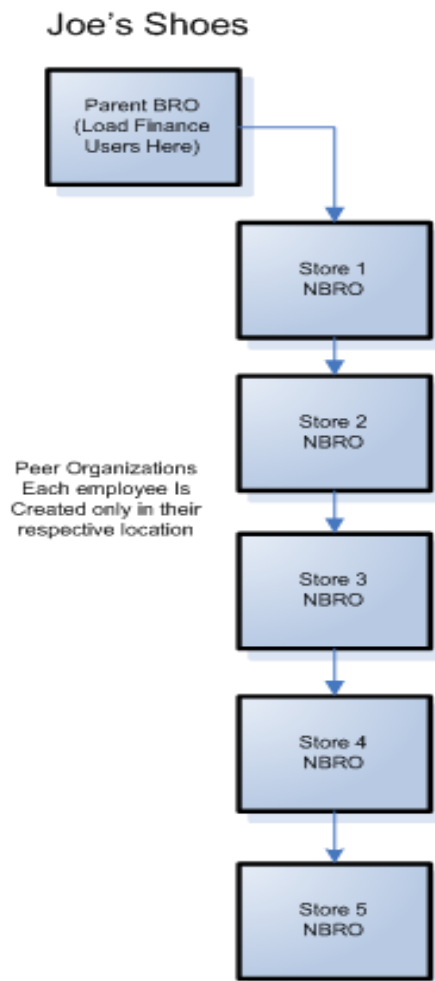
Supplier Configuration

This section covers the administration of a Supplier Organization (or Supplier Firm). *Required* configurations for Supplier Organization are covered in the Supplier Organization Setup section. Configurations in this section, while not systematically required, may be important aspects of a particular engagement. This section covers the various configurability options in setting up suppliers, what they are used for, and when they are typically used. All of these setup steps address various points within the end-to-end continuum of contract labor procurement for the suppliers. Wherever applicable, the workflow diagram (below) will be highlighted with respect to what step in the end to end process is being addressed.

General Organization Profile Settings

The Supplier Firm Profile contains various system settings that drive processing for the supplier within many areas of the contract labor process. Therefore there is not just one particular step that is highlighted or addressed by these settings in the workflow below.
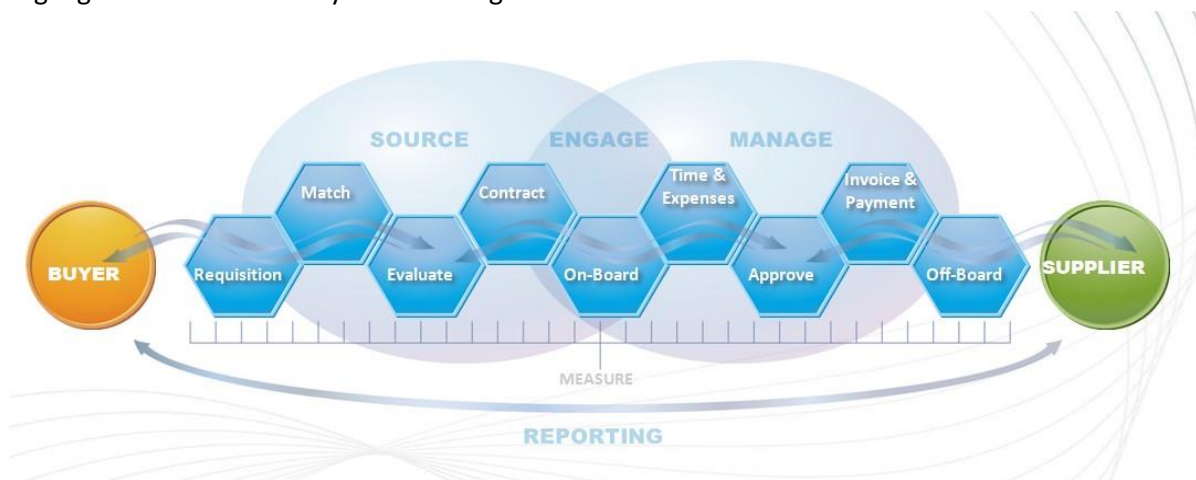
Business Information

Only the additional configuration settings, outside of the required fields addressed in the Supplier Organization Setup section, will be covered here.

Why Configure

General information and settings for the supplier organization can be established in this section of the Supplier Firm Profile, if needed.

How to Configure: Supplier Firm Business Rules

Only settings not already addressed in the Requisitions section of this document will be addressed here.

Selecting the **supplier organization name** hyperlink from within the **Accounts** list will take you to the **Supplier Firm Profile** for this account. Choose the **edit** button in order to update/modify this profile for the Supplier Organization.

- **Use Password Expiration** – Enables or disables password security through expiration rules.
- **Passwords Expire Every XX Days** – Designates how often users will have to change their passwords.
- **Enforce Highly Secure Passwords** – If enabled, passwords cannot have a string of three (3) consecutive identical characters, be the same as the user name, be the reverse of the user name, and/or contain the user's first or last name.
- **Disable User's Password After Failed Login Attempt** – Designates # of failed attempts allowed.

  Prevent the Reuse of User's Previous XX Passwords – Designate re-use of password settings.

- The following settings drive the type of supplier this is and their industry/sourcing expertise for searching capabilities in the application (not shown in screenshot):
  - ○ **Geographic Coverage** – Specify the geographic coverage of the supplier
  - ○ **Industry Specialization** – Specify supplier's industry specialization
  - ○ **Skill/Role Categories** – Specify supplier skill type specialization
  - ○ **Supplier Organization Type** – Specify type of supplier (MWDVE, etc.)

Functionality Settings

In the **Supplier Firm Profile**, the section titled **Functionality** addresses various system configuration items that drive processing for the supplier within many areas of the contract labor process. Therefore there is not just one particular step that is highlighted or addressed by these settings in the workflow below. The Functionality section of the Supplier Firm Profile has three required fields which were covered in the Supplier Firm setup section. The remaining fields are not required and will default to the IQNavigator standard values.

Why Configure

The fields in this section may be changed to address important aspects of 'how' the supplier organization will transact in the buyer organization's marketplace, as well as address items that may be specific to the supplier's requirements for transacting in the IQNavigator application.

How to Configure: Supplier Functionality

Selecting the **supplier organization name** hyperlink from within the **Accounts** list will take you to the **Supplier Firm Profile** for this account. Click **Edit** to update/modify this profile for the Supplier

Organization. Navigate to the **Functionality** section of this screen.

- The first four required fields have been addressed [here: Supplier Setup](#)

- **Show job opportunities in active list even if the job start date has passed –**
  - □ Yes = All open jobs will show in active list regardless of start date. *(Default Setting)*
  - □ No = If today's date is after the target start date of the job, it will not appear as active.

- **Display inactive resource profile(s) when submitting to Job Requisitions**
  - □ No = Any candidate profile set to "inactive" status will not appear in the "active profiles" list when submitting to a job. *(Default Setting)*
  - □ Yes = All candidate profiles (inactive and active) will display in the list when submitting to a job requisition.

- **Display inactive resource profile(s) when submitting to Project Agreements –** See above.

- **Allow resource to maintain their own profile**

  - □ No = Resource cannot edit their e-mail address, phone number, etc. *(Default Setting)*

□ Yes = Allows a candidate/resource to edit their resource profile.

- **Automatically populate Supplier Organization Resource ID with the unique resource ID**

    □ No = The Supplier Representative must specify a unique resource ID. *(Default Setting)*

    □ Yes = The system automatically populates the unique resource ID into the Supplier Organization Resource ID field.

    Note: If the Supplier Organization is using an internal tracking system, the Supplier Organization Resource ID is usually manually entered by the SAR in order to maintain a common link between the two systems.

- **After an Express Assignment is created or a Work Order is approved, the resource profile will -**

    o Remain active = This relates to the second rule listed above. If the profile remains active, the candidate will still be available to be submitted to other job requisitions, even while he/she is on Assignment. *(Default Setting)*

    o Become inactive = The resource profile will be set to "inactive" status. If the above rule #2 is set to "No" then these resources will not be available to be matched to a job requisition.

    o Ask user at time of Work Order Approval/Submittal = This allows the user to decide whether the resource profile should be set to inactive or not.

- **Is this supplier organization an ancestor supplier organization that should receive payment for the markup/commission for descendant supplier organizations?**

    □ No = This default should never be changed. It is a configuration for a special, historical arrangement. *(Default Setting)*

- **Auto-Create User ID & Password for resource upon effective assignment?**

    □ No = The user must create the user ID & password for a resource when an assignment is made effective. *(Default Setting)*

    □ Yes = The system auto-generates a username and password for a resource when an assignment is made effective.

- **Allow contractors to create/submit timecard adjustments?**
    □ No = Only assigned SAR's can create adjustments. *(Default Setting)*

    □ Yes = Resources are allowed to create adjustments for their own timecard errors.

- **Display Bill Rates on SAR time entry screens**
    □ No = The bill rate for the contractor is not displayed on the SAR's time entry screen. *(Default Setting)*

          ☐ Yes = The SAR can see the bill rate for the contractor when submitting hours on his/her behalf.

- **Enable Time Upload functionality for system users**
    - o No = Time entry must be made through the IQN timesheets. *(Default Setting)*
    - o Yes = Timesheets are derived from a time feed or time upload. This configuration should not be turned on without coordination with IQNavigator.

- **Enable Payment Request Upload functionality for system users**

    ☐ Same as above

- **Display column titles when scrolling default setting for new users**

    ☐ No = Column titles do not freeze at the top of a screen. *(Default Setting)*

    ☐ Yes = Column Titles freeze at the top of a navigation screen when scrolling.

- **Users allowed to log into this organization** –

    ☐ **All** = This will allow all users set up within this organization to log into the

    organization.

    ☐ **Managing Firm Users Only –** This will prevent anyone other than managing firm users from logging into the application. This would be used during the implementation period.

- **Headcount Tracking Assignment –** enabled or disabled. This will allow contractor/resource tracking for individuals who do not have rates stored in the system. This setting is used if the customer has the need to track individuals for security purposes but not necessarily budget purposes.

Requisitioning

The following section pertains to requisitioning functionality that the supplier organization maintains.
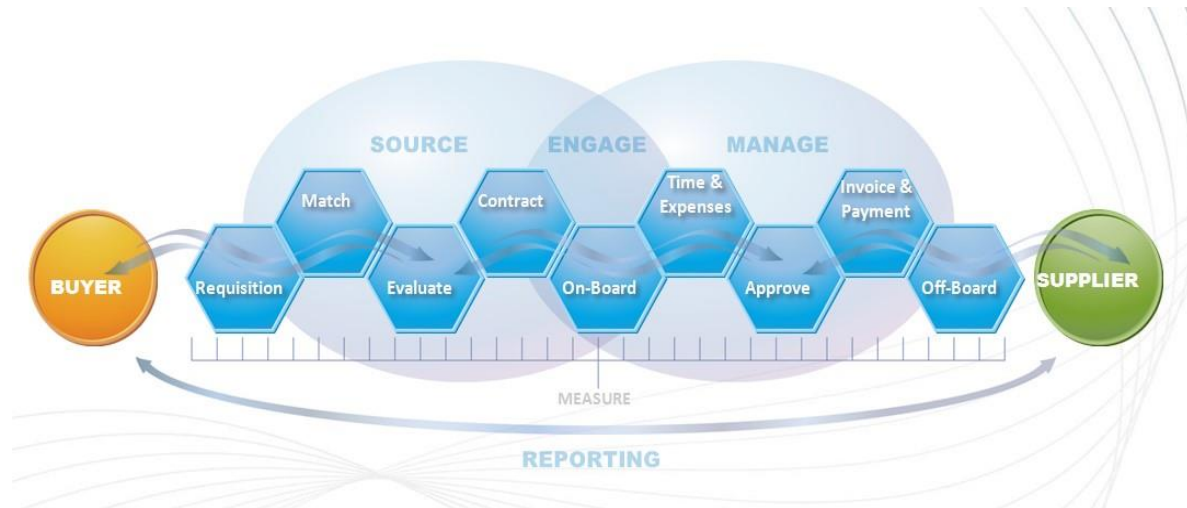
Why Configure

Suppliers will have different requirements with respect to what is important to them with daily fill requisitioning, for example different suppliers may want to see different time to fill metrics, different job states, etc.

How to Configure: Position Calendar

Selecting the **supplier organization name** hyperlink from within the **Accounts** list will take you to the **Supplier Firm Profile** for this account. Choose the **edit** button in order to update/modify this profile for the Supplier Organization. Navigate to the **Position Calendar Configuration** section of this screen.

- **Configure Display** – Designate what items are important for this supplier to see each day of the calendar (job statuses and job metrics).

- **Week Ending Day** – Designate the week ending day for display of the calendar.

Supplier Distribution Lists

Supplier distribution lists are similar to Buyer distribution lists (covered here). The key difference is that these distribution lists are maintained on the Supplier organization level rather than the buyer organization level. The latter allow managers or CAMs to release to particular vendor lists, while the former allows a supplier to share a requisition with a particular vendor list.

Why Configure

Supplier managed distribution lists are applicable in an MSP scenario, where the manager creates a requisition and it routes to the MSP supplier who then determines any additional vendors to whom the requisition should be released. This functionality can also support sub-vendoring scenarios, where the supplier has other suppliers that are helping to source the opportunity on their behalf.

How to Create Supplier Distribution Lists

Organization Distribution Lists are made available to all users within an organization and any non-business rule organizations units that inherit this org unit's functionality and settings. The Managing Firm Administrator does not have the ability to set up supplier organization distributions lists.

A supplier-side role, such as Supplier Firm Administrator, must create the lists.

Log into the end user account for a user with a Supplier Firm Administrator role and select the **Distribution Lists** sub-menu link from within the **My IQN** tab.
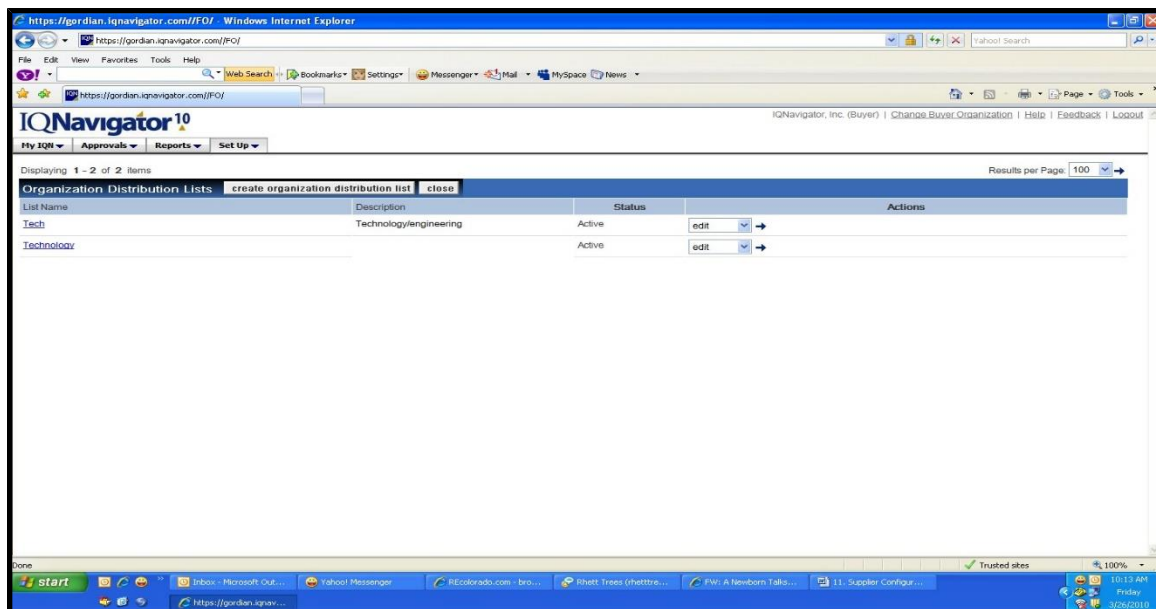
- Select create organization distribution list action.

- You may edit or delete existing supplier distribution lists by selecting the applicable action associated to the list.
- **Distribution List Name** - Specify a unique distribution list name.
- **Description** – Provide a description if valuable.
- **Supplier Organizations** - Select the applicable supplier(s) for this list by highlighting the supplier(s) name in the **Available Supplier Organizations** select box and selecting over to the **Selected for Distribution** select box.
- Use the **search supplier organizations** feature to help you search for suppliers by specific criteria.
- Save the supplier distribution lists by selecting **save,** or **cancel changes** to discard.

Share Requisition

Share requisition is the terminology used for a supplier releasing or sharing a requisition with other supplier organizations. In order to utilize this feature, supplier organizations must be set-up as child organizations of the "parent" supplier firm. Usually, Distribution Lists are created (as mentioned above) to facilitate an MSP model for the "parent" supplier firm.

## *Why Configure*

Distribution of requisitions from one supplier to other supplier(s) is most typically applicable in an MSP scenario, where the manager creates a requisition and it routes to the MSP supplier who then determines any additional vendors to whom the requisition should be released. This functionality can

also support sub-vendoring scenarios, where the supplier has other suppliers that are helping to source the opportunity on their behalf.

How to Configure Share Requisition Feature

A Supplier Firm Administrator and Managing Firm Administrator have the ability to create/edit Sharing Rules.

Selecting the **supplier organization name** hyperlink from within the **Accounts** list will take you to the **Supplier Firm Profile** for this account. Choose the **share requisition** button in order to configure sharing rules. The system will present you the Sharing Rules screen.

- Click on the second **Allow Sharing** radio button which will enable sharing.
- **Shared Requisition Display Policy** – set the display rules of the requisition to the original supplier that is distributing the requisition to others.
- Select the appropriate child supplier organization with which requisition may be shared.

- Click **Save** and then **Cancel.**

Application Look and Feel

The following section describes miscellaneous configuration steps that apply to the overall look and feel of the application for end users.

Why Configure

There are many features in the IQNavigator application that can be configured to address common customer scenarios and requirements. The following section will address:

- Customer Defined Field
- Configure Screen
- Custom Labels
- Dashboard Configurations
- List Configurations
- Notifications
- Reason Codes

Customer Defined Fields

Customer Defined Fields on the Supplier Organization side are very similar to those on the Buyer Organization side; however, there are only 2 pages on which a supplier may apply CDFs: User and Resource.

- These fields are labeled and created for the specified transaction, and then the formats of their values are defined. These new fields can be shared with organizations under the parent Org.
- Customer Defined Fields can either be a public or internal field and they can be set to required or not required.
- Once created Customer Defined Fields can be activated or inactivated and edited, however taking these actions affects every transaction specified that has a required field.

Why Configure

This functionality allows customers to further customize their use of the IQNavigator application by using terminology & data input fields that are specific to their organization. It is very useful for reporting purposes. For example when creating a resource profile, a specific field an organization wants to report on may not be on the standard profile but can be easily added by creating a customer defined field. Additionally if a mandatory on boarding checklist wanted to be created on the work order, CDFs can be used for that purpose as well.

Configure Screen

Once you've set up customer-defined fields for various system transactions, you can then manage what order these fields appear on these system transactions. All of the customer defined fields can be re-organized to appear in the most logical order. This configuration item can only happen if there are two or more customer defined fields on a transaction item. Since the functionality is identical to Buyer Organization screen configuration, please see this section for more detail.

Custom Labels

Refer to the Tools section of this document for a detailed explanation of Custom Labels. The functionality is the same er for Supplier Organizations and Buyer Organizations.

Dashboard Configuration

The Dashboard Configuration for a Supplier Organization is similar to a Buyer Organization; however, the fields and data elements available are slightly different. Refer to this section for a detailed explanation of Dashboard Configurations. The functionality is the same for Supplier Organizations and Buyer Organizations.

List Configuration

List Configuration for Supplier Organizations is very similar to Buyer Organizations; however, the particular lists available to the different organization types will vary. Refer to this section for a more
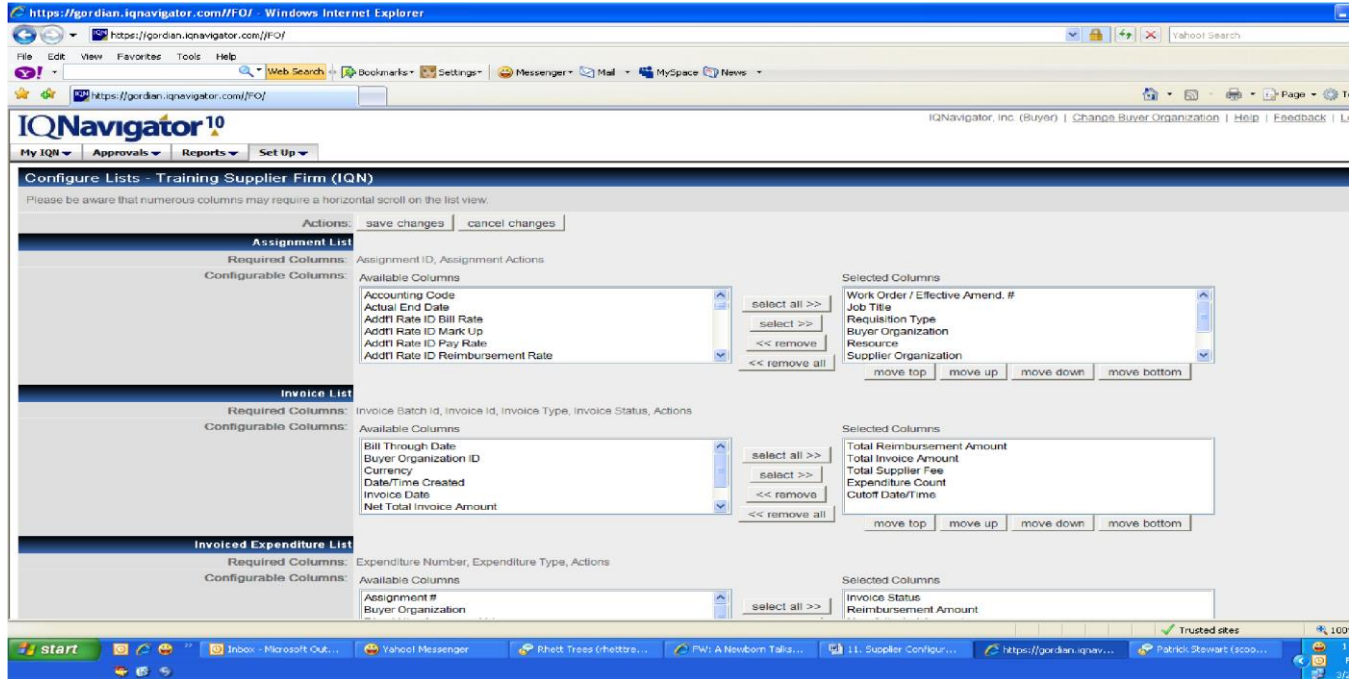
detailed explanation of List Configuration.
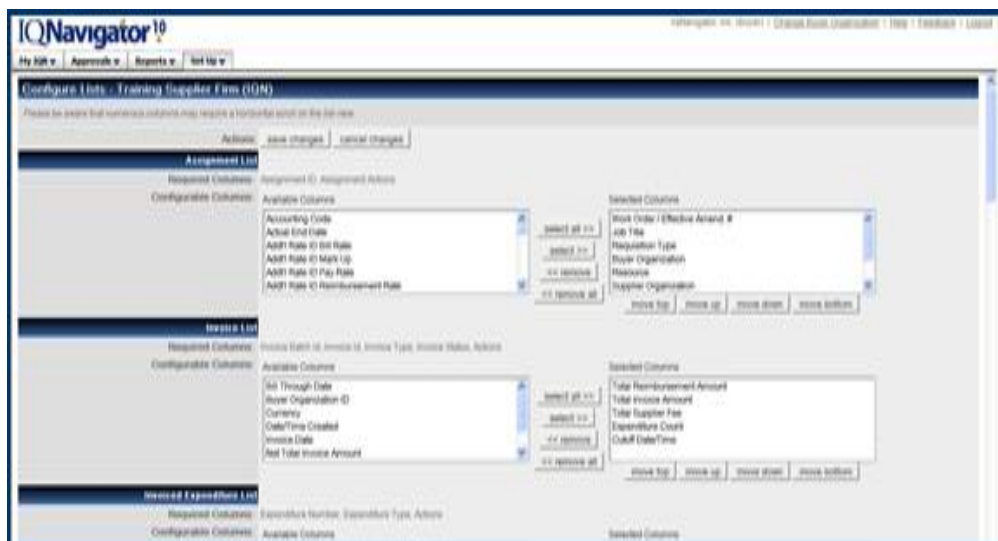
Notifications

Notifications for Supplier Organizations are very similar to Buyer Organizations; however, the particular notifications available to the different organization types will vary. See the Buyer Organization Look and Feel section for a more detailed explanation of Notifications.

Reason Codes

Reason Codes for Supplier Organizations are very similar to Buyer Organizations; however, the particular reason codes available to the different organization types will vary. See the Buyer Organization section on Reason Codes for a more detailed explanation.
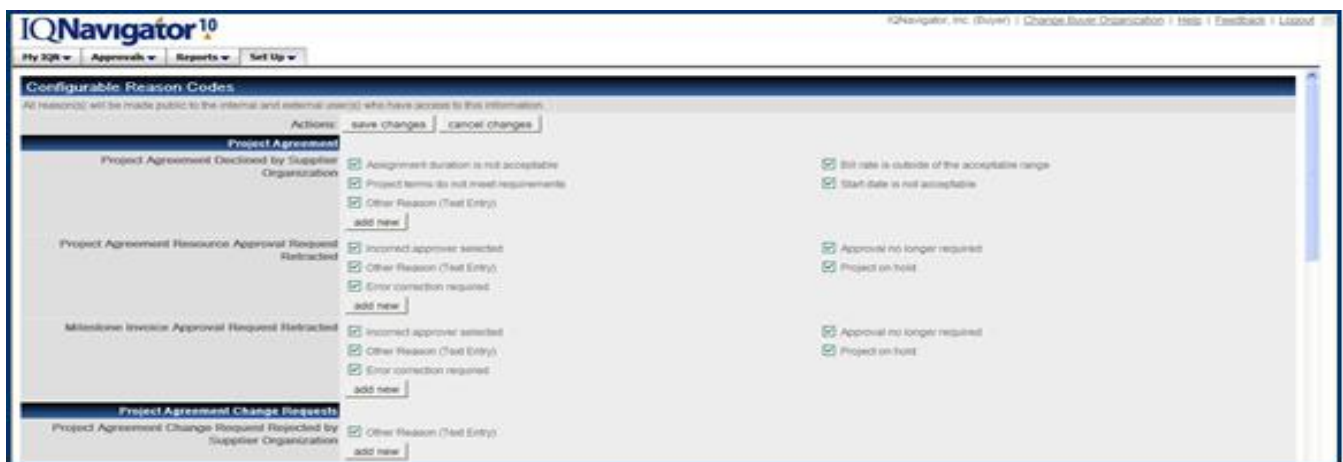
Custom Branding

Custom Branding for Supplier Organizations is identical to Custom Branding for Buyer Organizations.

Supplier Reporting

Custom Reports Configuration for Supplier Organizations is very similar to Buyer Organizations; however, the particular custom report data sources and column values within those data source will vary. See the section on Custom Reports configuration for a more a detailed explanation.

Tools

Refer to the Tools section of the Buyer Organization configuration for a detailed explanation of Tools. The functionality for Supplier Organizations is identical to the functionality for Buyer Organizations, only suppliers will have only a sub-set of tool features available.

- Online Help

- Load External Data

Activities Requiring Development

Refer to the Buyer Organization section on Activities Requiring Development. The functionality for Supplier Organizations is the same as for Buyer Organizations. Only the following features apply:

- Authentication Policies

- Resource Schedule

Integration • User Integration

Policy

Projects Procurement

Projects Procurement is the IQN module utilized to manage procurement categories outside of contract labor. These categories vary from consulting projects to more complex service categories. Project or services procurement can currently support Professional Services and Consulting Engagements, Legal Services, Field Services, and Offshore Resources. This section will discuss the initial administrative configurations necessary to create project agreements.

Project configuration contains setup steps in the following area of the application. This presents the most useful order for setup of Project configurations:

1. Selections on the Buyer Firm Profile
2. Project Agreement Types
3. Rate Identifiers
4. Services Identifiers
5. Services Rate Tables
6. Units of Measure
7. Currency Conversions

Why Configure?

Customers have different requirements based on the industry, type of project based work they will source for, and payment types they accept from suppliers.
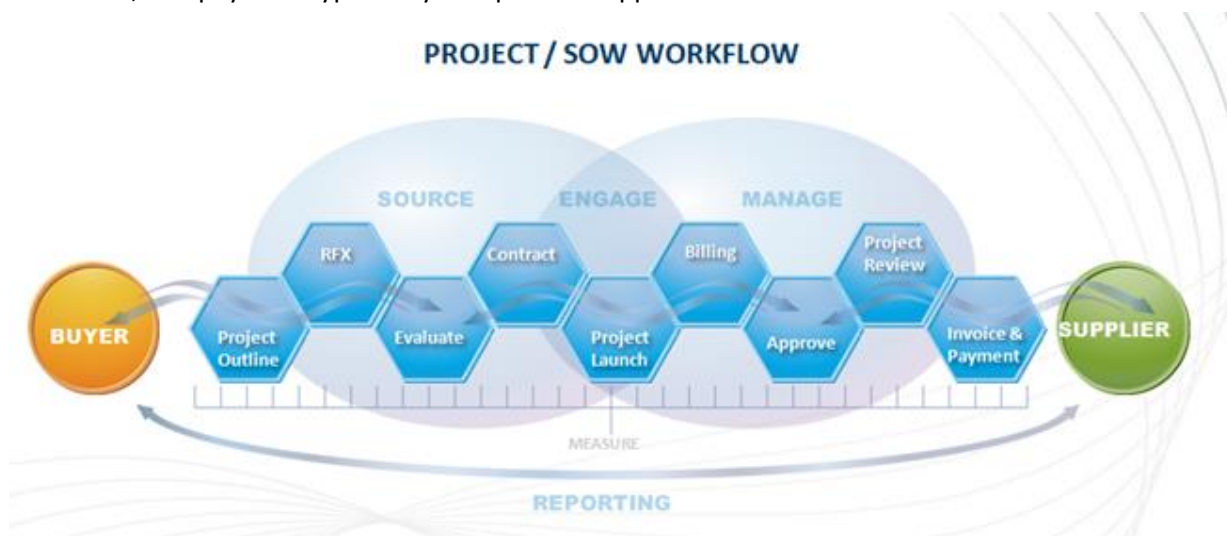
Create Project Agreement

Once the decision has been made to procure project based work or consulting labor, an agreement is created in the application. Project Agreements are the electronic agreements between the Buyer and Supplier firm(s) holding the terms of the project work. The Project Agreement includes milestones to be

completed, expected expenses and resources or consultants that will track hours against the project. Once created, the project agreement is routed through an approval process and released to the supplier organization that has been awarded the project work. The project manager can choose to send the project agreement for supplier review prior to receiving internal approval.

Buyer Firm Profile Settings for Projects

Project details must be defined on the Buyer Firm Profile. These questions are all pertaining to the projects procurement process. This is the first step in configuring Project Agreements.

How to Configure

Selecting the buyer organization name hyperlink from within the **Accounts** list will take you to the Buyer Firm Profile for a specific account. The Managing Firm Administrator has access to manage and configure more features and options on the Buyer Firm Profile for a buyer organization than does the Buyer Firm Administrator for the same organization.

Selecting the edit action button for the Buyer Firm Profile takes you to the editable account information screen. This screen contains all general business information and general system functionality settings that apply to all users within this organization.

Project options give the ability to add or disable configurations based on the customer's needs. *Note: certain options must be used in conjunction with one another.*

- Display Supplier Organization field on Project Outline i**f the supplier organization field is enabled on the Project Outline and a user specifies a value, the system will select that supplier organization by default when a Project Agreement is created. This field will be editable on the Project Agreement.**

- **Enable Request to Buy** – Choose yes or no.

- **Require Request to Buy Approvals** – Choose yes or no.

- **Enable Project Agreement Types** this allows the client to customize each project agreement type to support different project requirements. Note that when multiple Project Agreement Types or Categories are set up, the creation of a Project Agreement is a two-step process. First, users are requested to select a Project Agreement Type. This allows the system to default information such as the required fields for the Project Agreement and the workflow rules associated to the Project Agreement. The system will display a description of the Project Agreement Type to help users ensure they are selecting the correct Project Agreement Type/Category.

- **Associate Project Agreement to Invoice Details** this can be set to allow a project agreement to be associated to an external purchase order number for tracking and reporting purposes.

- **Enable Project Adjustment Field** enabling this will allow a project manager to adjust the total project budget without allocating the changes to a specific milestone deliverable or resource. The adjustment acts as a budget contingency for a project agreement.

- **Resource Rate Table Budget Calculation** this determines if the resource budget is determined by calendar or business days for the date range entered on the resource rate table line.

- **Allow users to create Resource Rate Table Project Agreements** with rates that exceed the Rate Table rate? This feature will not allow the supplier or project manager to create a Project Agreement that exceeds the maximum established rate.

- **Allow Consultant Timecard Entry** this will enable time entry for any consultant with an express assignment associated to a project agreement. These timecards can then be associated to a payment request submitted by the billing submitter.

- **Include Customer Timecard Approval** in Consultant Time Writing this will allow individual timecards to be submitted for approval without being associated to a payment request. The timecard approval process will follow the same process we see in the CWM module.

- **How many days after completing/terminating a Project Agreement can a Payment Request be submitted?** This setting determines the number of days after a project agreement is complete or terminated that a payment request can be submitted against it.

- **Separate Project Express Assignment Approvals from the Project Approval Workflow** - Enabling this setting will keep the assignment approval process separate from the projects approval process.

- **Resource Rate Table Payment Request** will reference when creating a payment request this determines if the resource lines will reference those defined on the project agreement or the resource rate table.

Project Agreement Types

Project agreement types allow an organization to define multiple project agreement forms for a particular organization. This allows the client to customize each project agreement type to support different project requirements. When multiple project agreement types are enabled a project manager

will have the ability to create project agreements that are specific to a certain business area or process. Each project agreement type can be configured to support different process flows for approvals, supplier acceptance, etc.

Example: An organization may utilize the projects functionality to support both Legal and Marketing spend. Assuming these two areas have different requirements the customer would enable to project agreement types: Legal and marketing. Legal may have required Customer Defined Fields that do not apply to a marketing project.

Why Configure

A client may use Projects Procurement to support different service categories; these categories may have different information required to source and procure the project work. By enabling multiple project agreement types a client can easily support multiple business areas within one business rules organization.

How to Configure: Project Agreement Types

Click the buyer organization name hyperlink from within the **View Accounts** list to open Buyer Firm Profile for this account. Before customer defined fields can be added to a project agreement type, custom defined fields must be defined and made available for use on project agreements (see Application Look and Feel: Customer Defined Fields).

- Select project agreement types action button in the Buyer Firm Profile screen. The system will present to you the project types screen.

Project Agreement Type:

Define the Project Agreement Type Label (e.g. Legal Services Project Agreement).

Existing Templates:

Any current Project Agreement Types that have been defined will be listed here. Default Project Agreement Type will automatically be enabled and cannot be deleted, but may be edited as necessary.

Payment Request Options:

Select all applicable Payment Requests necessary for this Project Agreement Type.

Configurations:

- **Allow user to remove optional field** this gives the project manager the ability to remove optional fields from the project agreement template.
- **Require Project Agreement End Date** will ensure that all project managers specify an end date when creating a new project agreement. This will also define the dates for which payment requests can be submitted.
- **Require Deliverable Start and End Dates for Milestone deliverables defined on the Project Agreement** this will require both a start and end date to be entered for each milestone defined on the project agreement.
- **Require Project Description** will make the project description field mandatory on project outlines, project RFxs and project agreements.
- **Require Project Location** selecting yes will make the project location field required on project outlines, project RFxs and project agreements. Custom or standard locations will be available based on the organization set up, (see the Customer Defined locations section).
- **Enable Project Agreement Supplier Review** this will allow a project manager to send a project agreement to a supplier prior to receiving internal approval. This allows the manager to ensure that the supplier will accept the project as it stands prior to submitting it for budgetary approval. This is beneficial when an organization is not using the RFx process.
- **Project Agreement Creation Type** determines the process flow of the project agreement can be defined to require supplier acceptance upon creation, or can be set to become effective upon creation where supplier side acceptance is not required.
- **Change Request Creation Type** determines the process flow of the project agreement this can be defined to require supplier acceptance upon creation, or can be set to become effective upon creation with no supplier side acceptance required.
- Number of days after project is completed that it may be amended through a change request allows you to prevent change requests to projects which have been closed.

- Allow Project Agreement Name and Project Identifier to be changed on Effective Project Agreements allows any user to make changes to the name and identifier at any point during the project agreement. This can be locked down for standardization and reporting purposes.
- Enable Project Agreement Evaluations allows complex evaluations to be associated to all project agreements. Evaluations can be associated to time specific parameters or be required upon completion or termination of the project agreement. Evaluations are configured within the Evaluation Templates section of the Buyer Firm Profile.

- Enable Multi-Currency Project Agreements this will allow milestones to be billed in a currency other than what is defined within the project agreement budget. This would be used if a project agreement was created and scheduled to be completed in one country and the work was being provided by a supplier operating in a different country using a different currency (e.g. A project agreement created in Great Britain may have a budget defined in GBPs; this could be sourced to a supplier in France who would bill in EUR. Each payment request would be submitted by the French supplier in EUR but would be converted to show the estimated amount in GBPs to easily manage the total project budget).
  Effective Date for Project Agreement budget currency exchange rate user defined will allow the user to choose the effective date, while system derived will default from the project agreement start date.

- Enable Project Agreement payment request budget management this can be associated to milestone payment requests and/or rate table payment requests. This will enable a warning on any payment request submitted that exceeds the total approved budgeted amount listed on a project agreement.

- Enable Adjustable Project Agreement Budget this will allow a project manager to make adjustments to a project agreement budget by allocating the budget changes to a specific milestone deliverable or resource.
- Allow Supplier Project Manager to Edit Draft Project Agreement this will allow project to be edited by the supplier during the supplier review phase. The supplier changes will be visible to the project manager which would then be submitted for any required approval.
- Allow Automatic Update on Project Agreement - Under review
- Service Level Agreements can be enabled or disabled across the organization. This allows SLAs to be created on each project to support penalties and bonuses when project work is completed behind or ahead of schedule. When a payment request is submitted the bonus or penalty would automatically be calculated and the invoice would be adjusted.

- Use Rate Tables allows for the setup of rate tables which can be associated to specific expense types for fee based and/or unit based milestones and expenses. This setting drives the ability to enable standard and resource rate tables.

- Enforce Requisition and Assignment Dates are within Project Agreement Date Range selecting yes will require all job requisitions and assignments created from the project agreement to start and end within the duration of the project agreement.

- Require Rate Details on Resource Submittal if contractors will be assigned to a project agreement, the supplier organization will have to define rates for the contractor submitted. If this is not required the rates will default to what was defined within the project agreement. Regular, Overtime, Double Time and Custom Rates can be required independently.

- Display payment request expenditure date field on payment request approvals setting this to yes will require that the billing approver define the request date prior to approving any payment request transaction. This will almost always be set to yes.

- Allow Billing Approvers to edit CAC segments if enabled the billing approver will have the ability to edit and allocate payment requests against one or multiple CACs.

- Cost Codes Available for Selection on Milestone Invoices and Payment Requests this can be set to allow the supplier to select any CAC available within a given organization, or be limited to select from CACs that have been associated to the project agreement.

- Enable Line Item Rejections on Rate Table Payment Requests this allows the billing approver to reject one or more line items on any payment request.

- Enable Supplier Organization Editable Payment Request Customer Defined Field this setting allows a client to view customer defined fields that have been applied to the Payment Request screen. If this setting is not enabled any CDF that is applied to the payment request screen will not be visible to the end user.

- Display Supplier Reference Number Field on Project Payment Request Editor this can be set to no, optional or required. This will allow a supplier side billing submitter to add a supplier reference number to any payment request which can be tied back to their internal records. This field will be available for reporting purposes.

- Display Supplier Reference Date Field on Project Payment Request Editor this can be set to no, optional or required. This will allow a supplier side billing submitter to add a supplier reference date to any payment request which can be tied back to their internal records. This field will be available for reporting purposes.

- Display Supplier Reference Flag Field on Project Payment Request Editor this can be set to no, optional or required. This will enable a yes/no radio button on the project payment request. This can be relabeled and is used as a hard coded customer defined field that is able to integrate into IQNavigator's back office. This is a legacy feature that is used by customers that utilize back office invoicing and have a specific yes/no question that will affect the invoicing process (i.e. Do taxes apply to this payment request: Yes/No).

- Display Supplier Reference Amount 1 Field on Project Payment Request Editor this can be set to no, optional or required. This will allow a supplier side billing submitter to add a supplier reference amount to any payment request which can be tied back to their internal records. This

would be in addition to the payment request amount. This field will be available for reporting purposes.

Display Supplier Reference Amount 2 Field on Project Payment Request Editor this will allow the supplier to include a second amount field to a project payment request.
Allow Payment Request Expenditure Date Entry on Supplier Project Payment Request Editor Enabling this settling will allow suppliers to add an expenditure day on payment requests.
Allow Cost Allocation Code entry on Supplier Project Payment Request Editor selecting yes will allow the supplier project manager to edit the cost allocation code when submitting a project payment request.

- Number of Days the Payment Request Expenditure Date may exceed the deliverable or milestone

  end date Enabling this setting prevents transactions from being created which have dates that exceed the applicable end date
- Enable Detailed Resource Table on Project Agreement this will allow a project manager to associate rate tables to specific job titles, thus maintaining a level of consistency around project rates for consultants across an organization. These rates will be defined in the admin layer and will be associated to a specific job title, currency, rate, and supplier organization.

- Enable Detailed Expense Table on Project Agreements this will allow specific expense types to be enabled for project agreements. The project manager can define a specific dollar amount to be allocated to any available expense category. This can then be associated to the total project budget.

- Create Assignment on Project Agreement Resource Acceptance if set to yes, an assignment will automatically be created when the resource is accepted. If set to no after accepting a resource the project manager will then have to take action to create an assignment.

  Assignment Creation Approval Status can be defined to create an assignment and immediately list it as approved, or the creation can follow the express assignment approval configurations which may require buyer or supplier side approval prior to becoming effective in the application.
  Create Assignment Labor Estimated Cost from Project Agreement this will allow the assignment budget to be calculated based on the details listed on the project agreement versus creating the budget based on the specific assignment rates.
  Project Agreement Resource Rate Source can be set to default based on the project agreement resource rate, or to the rate defined at the time of resource submittal from the supplier manager.
- Attach Printed Template This will allow an organization to incorporate information not included in the IQNavigator application in a printed version of the project agreement. For example, an organization could configure the template to include contractual data associated to the SOW in

the printed template, essentially allowing an end user to generate a client specific SOW for any particular project agreement directly from IQNavigator.
Require Timecard on Resource Rate Table Payment Request this will require a consultant timecard to be entered on a resource rate table payment request.

- For time writing timecard upload, for time a single date allow timecard adjustments to previously created timecards or do not process timecard adjustments and warn the user they are duplicates – allow timecard adjustments will process any changes to an existing timecard without warning.
- Allow Editable Resource Line on Timewriting Payment Request selecting yes will allow the supplier project manager to edit the resource line when submitting a timecard on a resource rate table payment request.

- Enable CDFs: Select any CDFs you want to appear on the project agreement.

Create Project Agreement Type: Edit Layout

- From the project agreement types page, locate the project agreement type name and click on the drop down menu under the "Actions" column.
- Select "Edit Layout"
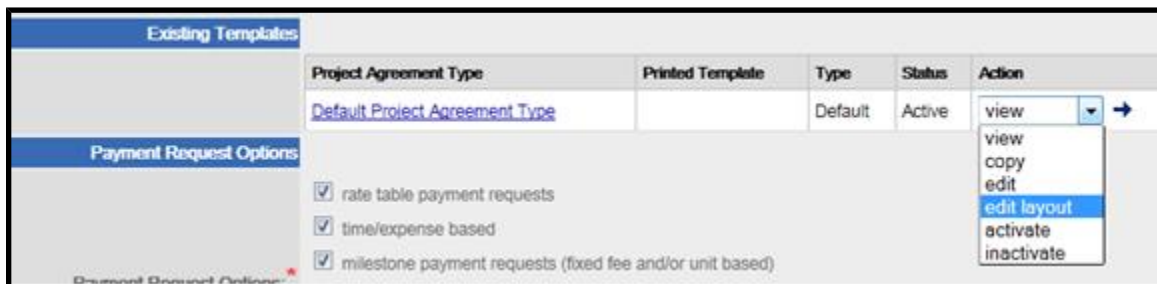
- Drag and drop the fields that you would like to add to this project agreement type.

Service Identifiers

Service Identifiers are a way to categorize services rate tables based on a meaningful identification to an organization (e.g. expense categories, part numbers or other billable item identifiers). These are used in conjunction with services rate tables which allows an organization to tie identification codes to specific services which are then associated to rates.

- For example, some IQN customers utilize project agreements to manage legal services; each service identifier is associated to an attorney's name and each attorney has a specific rate that is defined within the services rate table. When a supplier bills for the attorney fees they will select an available attorney name within the payment request, define the unit amount and when

submitted the rate defined within the services rate table will be pulled onto the payment request for invoicing.

- Some IQN customers utilize projects for field services such as vegetation management. Suppliers bill for services such as post storm clean-up and proactive clearing of vegetation from power lines. An example of a service identifier is the circumference of a tree branch being cut down – the service identifier has an associated rate to branch removal for each defined circumference. A supplier will then bill for the number of branches removed, each unit is associated to a specific rate within the services rate table which will be included in the payment request for invoicing.

Why Configure?

Defining service identifiers is required for the use of services rate tables. This allows for pre-defined rates or charges to be billed into the organization.

How to Configure: Service Identifiers

Selecting **the buyer organization name** hyperlink from within the view accounts list will take you to the Buyer Firm Profile for this account.

- Select the **services identifiers** action button in the **Buyer Firm Profile screen**, the system will present the services identifier screen (see screen shot below).

- New identifiers can be added by defining an identifier number or phrase and entering a description if necessary.
- Select the **add to list** action button to enable the identifier.
- When adding multiple values, utilize the add # of rows option to open multiple identifier fields.
- Service Identifiers must be set up before Services Rate Tables can be created.

- Service Identifiers and Services Rate Tables can be edited at any time. When Service Identifiers are edited there is an immediate effect on the associated Services Rate Tables.

Services Rate Tables

Once services identifiers have been defined, services rate tables can be associated to these identifiers. This will allow a client to define specific rates that a service will be paid out at. The rates can be defined based on supplier organization, region, etc., depending upon the rate variations across the organization.

Why Configure

Services Rate Tables allow an organization to standardize rates for any service across the organization. This ensures consistency across business areas and regions for payment and reporting purposes. Utilizing rate tables will allow a customer to drive costs down by standardizing rates across supplier organizations.

How to Configure Services Rate Tables

Selecting the **buyer organization name** hyperlink from within the view accounts list will take you to the **Buyer Firm Profile** for this account.

- Select the **services rate tables** action button in the **Buyer Firm Profile** screen, the system will present the services identifier list screen.
- Select the **create new** action button at the top of the screen or choose to edit an existing rate table by selecting the 'edit' option from the actions drop down menu.
- Define the name and description of the Services Rate Table. ● Select the supplier organization(s) that this Services Rate Table will apply to.
- Define the number of rows and the default effective dates that you would like to add – then select the **add rows** button.
- The system will add the rows below.
- Define the services identifier and description, the rate type whether it is a flat rate, a cost plus a percentage, or a rate range.
- Enter the rate for each row and associate the effective dates.
- These rates can be listed as negotiable between the client and the supplier, they can also be opened up for adjustments by the project manager by selecting the 'allow adjustments' box.

- There is a contract reference field available for reporting purposes. This would allow the user to tie the services rate table to an outside contract.
- Select the save button to save any new or updated services rate tables. Going forward these changes will be effective on any projects that this rate table is associated to. Updates made to services rate tables will not affect any effective project agreements that are associated to an earlier version of the services rate table.

Units of Measure

Units of measure define the available unit selections listed on any unit based milestone project agreements. These can be customized to reflect the project work that an organization may be sourcing for. Units of measure must be defined when unit based milestones will be used. When creating a unit based milestone on a project, the user will define the number of units, the unit type and the cost per unit. The system will use these values to calculate the total milestone budget. Unit based milestones are typically used when services rate tables have not been defined, but can be available in conjunction with services rate tables.

For Example, common units of measure include Each, Per Mile, Per Meter, Per Hour, etc.

Why Configure

Units of measure are defined based on the type of project work an organization is sourcing for. This functionality is beneficial to an organization that can break deliverables into smaller units based on number of batches, document deliverables, training sessions, etc.

How to Configure: Units of Measure

Selecting the **buyer organization name** hyperlink from within the view accounts list will take you to the **Buyer Firm Profile** for this account.

- Select **the units of measure** action button from the **Buyer Firm Profile.**

- Select whether units of measure will be enabled or not. By disabling units of measure, a project manager could not create a unit based milestone on a project agreement. When enabled you will have the ability to select standard units of measure defined within the application, or add customer specific units of measure within the 'add new unit' section.
- Select the **add new** action button to add a custom field to the list of selected units.
- Once all unit types have been defined, save the list by selecting the **save changes** action button.

Reporting

The following section describes miscellaneous configuration steps that can be taken with respect to the reporting functions in the application.
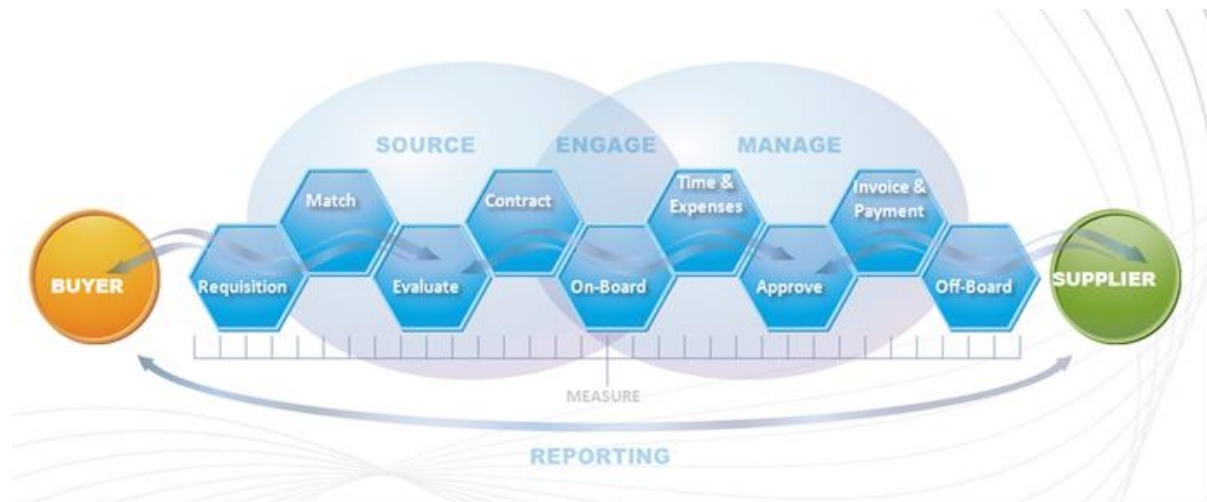
Custom Reports

Custom Reporting provides users of the IQNavigator application the ability to create ad-hoc reports and data extracts from a multitude of areas within the application. When creating a custom report, the system will first ask an end user from what area of the application they would like to query data (this is called a **data source** in the Custom Reporting tool). A data source contains information about an area in the application in which a custom report points to, essentially the 'source' of where data in the system is being queried.

This section addresses how custom report data sources and column values within those data sources can be configured to the specific needs of a customer/supplier. These settings can be inherited from a parent organization unit (whether a business rules org unit or non-business rules org unit); but there is no org-specific sharing of these settings to other organization units. The following features can be configured within a buyer or supplier business rules organization unit:

- whether a data source appears or does not appear to end users

- the name of a data source that appears to an end user

- whether a column value appears or does not appear to an end user

- the name of a column value within a data source

- help text associated to a data source

- help text associated to column values within a data source

One note of caution: when altering the data source and column value names; be sure to keep in mind the managing firm super users that will need to run reports on behalf of its customers/suppliers. When a reporting value is changed to a customer-specific naming convention, this naming convention needs to be tracked/maintained by the managing firm as it will be different for each customer/supplier. The managing firm user that is reporting for a multitude of customers/suppliers will need to know the different naming conventions for the specific data sources and column values in order to assist in running reports on behalf of the customer/supplier, as well as trouble-shooting. For consistency purposes, it's best to stick to IQNavigator standard terminology whenever possible. This will help avoid a large maintenance project and confusion over managing multiple customers/suppliers who all use different reporting terminology.

Why Configure

In some cases, a customer or supplier may not want their users to have access to specific IQNavigator data sources. These data sources may not make sense to how the customer/supplier is utilizing the IQN application. For example, if a customer is not utilizing IQN's Projects (consulting services) module, then any data sources related to this module can be disabled.

Additionally, the IQNavigator standard terminology for data sources and column values (data elements) may not be straight forward to end users and may in some cases cause confusion around business processes. For example: 'expenditure type' may be termed 'transaction type' or 'contractor' may be termed 'temporary worker' for a specific customer. In some cases, this variance on terminology can become a critical issue if it causes confusion around normal business processes for a customer/supplier's end users.

How to Configure: Custom Reports

Selecting the **buyer organization name** hyperlink from within the **Accounts** list will take you to the **Buyer Firm Profile** for this account. Select the **custom reports** action button in the Buyer Firm Profile screen, the system will present the Custom Reports configuration screen.

- Select the rule setting either to:

  o Inherit data sources from the Parent Organization (default), or

  o Specify Data Sources

- To enable or disable specific data sources for this org unit highlight the **available data source** then click **select** to enable it or remove specific data sources by highlighting the **enabled data source** then clicking **select** to disable it.

- To edit the name of an enabled data source, highlight the **enabled data source** then select the **edit** button.

- To edit the columns (enable/disable or change column name) within a data source, highlight the **enabled data source** then select the **edit columns** button.
- Save the data source selections by selecting **save changes,** or **cancel changes** to discard.

Edit Data Source Name:

After highlighting the **enabled data source** name then selecting the **edit** button, the system will present the **Data Source Customizations section** (below screenshot).

- Designate a new **Label** and **Description** for the data source, be sure to select the '+' key to expand these sections for any applicable translations needed.

- Save the data source selections by selecting **save changes,** or **cancel changes** to discard.
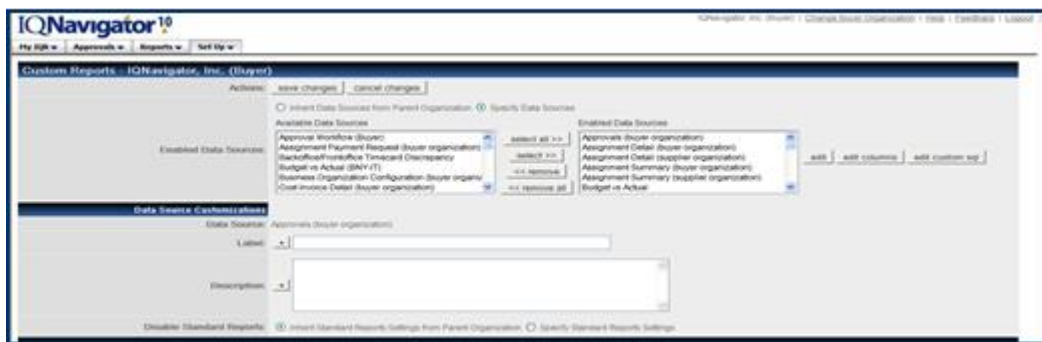
Edit Data Source Columns:

After highlighting the **enabled data source** name then selecting the **edit columns** button, the system will present the **Data Source Customizations** screen for column configuration (below screenshot).

- Designate whether to display the column or not by checking the **Display** checkbox next to each column attribute.

- Designate a new name for the column in the **Label** field.

- Edit the help text displayed to end users by selecting the **edit help** button in the **Description** column and then selecting **save** button on the pop-up.

- Save the data source column edits by selecting **save changes,** or **cancel changes** to discard.

Examples

- **Enable/Disable Data Sources**: Remove the Project (Buyer Organization) and Projects (Supplier Organization) data sources for those customers/suppliers that are not utilizing IQN's Projects module, which is the consulting services module

- **Edit Data Source Columns**: Rename any column that references 'Hiring Manager' to 'Requisition Manager' or 'Engagement Manager' because that's what the customer calls it.