# Supplier: Create a Resource Profile

This document provides suppliers with the steps necessary to create a full resource profile record In IQN VMS. BEFORE YOU CREATE A NEW PROFILE RECORD, you should search your Resource Pool to ensure that a record does not already exist. Remember to set the search filter to include both active and inactive resource records. If you discover your resource has an existing record, but it is only a “Quick Resource” record, use the instructions below to upgrade the partial record to a full profile.

**NOTE**: Numeric and bullet lists describe process steps. The information icon () provides supplemental and/or advisory content.

This guide uses standard configuration. Your specific setup may vary slightly based on your client's configuration.

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|  | *The importance of consistent data entry when creating resource records cannot be overstated. Develop standard protocols and enforce them. Avoid duplicate entries since they can negatively affect downstream system functionality such as tenure tracking and budget-related reporting. For example: JOE SMITH, Joe Smith, and joe smith may be the same individual, but the system will accept these names as entered and could create a separate record for each version. If you copy/paste name entries from a third party source, take care that the original does not include letters with diacritics. The system will accept the “copy” as entered and although the subsequent resource record can be selected/submitted, any name search will never generate a match since a standard English keyboard does not include diacritic letters and search results must be an EXACT match.* |

## To create a resource profile:

1. Log in to IQNavigator using your *user name* and *password*. Your Home dashboard appears*.*
2. Hover over the **Resources** menu drop-down arrow located in the Header Menu bar.
3. Click **Create Resource**. The Create Resource screen appears with the General tab active.

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|  | A single resource profile record has multiple tabs. Data entry requirements and functionality vary from tab to tab. Data entered on one tab can impact data requirements on other tabs so watch for prompts and advisory content as you work through the tabs. Use the tab headers or the embedded <next> / <back> buttons to move from one tab to another. DO NOT USE THE BACK ARROW ON YOUR BROWSER WINDOW! |

1. Follow the instructions provided below to complete each respective tab.

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|  | Be aware that once you click Create Resource, the system’s active session timer starts its countdown. You need to click ‘save changes’ on the Summary tab BEFORE your active session times out or you will lose ALL the data you have entered on ALL the tabs of the resource profile record. The maximum duration of an active session is 15 minutes. Until you become familiar with the data entry requirements and functionality associated to the various tabs throughout the full profile record, you may want to complete all the required fields as indicated by the **red asterisk (\*)** on the General tab then skip directly to the Summary tab and click ‘save changes’. Your record will be saved and the active session clock will reset. You can then go back to complete each tab you skipped in <edit> mode. The 15-minute session limit applies even in <edit> mode so it is advisable to use the ‘save changes’ option frequently rather than risk losing your entries. Leave time during your active session for the system to run its internal data validation check once you click ‘save changes’. Any data entry corrections display in an alert message. You must make the adjustments and re-click ‘save changes’ before your session time limit expires.  |

### General:

* Complete all required fields on this tab as indicated by the **red asterisk (\*)**. Typically, the standard required fields include the resource’s First Name, Last Name, Email, Unique Resource ID, and the Managing Supplier Agent(s). Other fields may be designated as required depending on client requirements.
* Click the **generate unique id** button () after you enter/select data in the component data fields. The format of the unique ID is set by the client but the content remains confidential to the supplier and is not shared with the buyer organization.

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|  | If “match alerts” is enabled, the supplier has visibility to the resource’s previous assignments. Buyers can view duplicate submittals, contractor time limits, prior evaluations, etc., during the candidate review process. |

* Review the list of names shown in the “Available Supplier Agents” selection box, then use the selection arrows to designate which supplier agents you want to manage this resource’s profile. Your selection(s) will then transfer to the “Managing Supplier Agents” selection box.
* Complete other data fields as desired.
* Clicking on “Duplicate Search” will help to ensure that you are not creating a resource that is already in the system.
* Click the **Desired Job** header tab or the **next** button () located in the lower-right corner of the screen to move to the next tab.

### Desired Job:

* Review the advisory content located at the top of the tab section under the header bar. Note that although there are no required fields indicated by a red asterisk (\*), both Job Type and Location Preference(s) are required to upgrade a resource profile to active status.
* Review/Adjust defaulted fields as needed.
* Complete other data fields as desired.
* Click the **Skills/Role** header tab or the **next** button () located in the lower-right corner of the screen to move to the next tab.

### Skills/Roles:

* Note the column on the right-hand side of the screen. Use this section to create the pick list you will need to use to populate data fields on the left-hand side of the screen.
	+ Click the down arrow in the **View** field to set the filter criteria for the pick list. If the list does not auto-refresh, click the GO arrow  to update the list based on your filter.
	+ *Optional*. Use the Search field to refine your filter criteria further. Click the GO arrow  to update your list.
	+ *Optional*. Click Request a New Skill if you cannot locate your choice in the pick list. An email request is generated and sent to: skillsmaster@iqnavigator.com.
	+ Click add for EACH item in the pick list column that you want to add to the Job Skills and Roles section on the left-hand side.
* Click any line item in the Selected Skills/Roles data field. Notice that data fields auto-populate in the Selected Skill/Role section to match your selection.
	+ Use the pull-down selection list to specify experience level.
	+ Enter a number to indicate the years of experience.
	+ Select a Resource Preference value from the selection list. NOTE: “Required” will leverage the IQN match engine to create auto-matches with active candidates from your Resource Pool.
	+ Adjust the Visibility setting as desired. The default setting is Public.
	+ Repeat for each item you added to the Selected Skills/Roles data field.
	+ *Optional*. Click the remove button () if you decide to delete any selected item from the Job Skills and Roles list.
* Use the pull-down selection menu in the Certification Credentials section to select a certification credential.
	+ Enter a date or use the calendar picker to include the ‘date granted’ and the ‘expiration date’ for the certification. Complete the additional fields as needed (Granting Authority is a required field.) Click **save** in the Action column to complete each certification entry.
	+ Repeat as needed for each additional certification credential.
* Click the **Education** header tab or the **next** button () located in the lower-right corner of the screen to move to the next tab.

### Education:

* Review the advisory content located at the top of the tab section under the header bar.
* Note the Disciplines column on the right-hand side of the screen. This is your pick list for the Resource Educational Disciplines/Selected Disciplines data field. Unlike the pick list feature on the Skills/Roles tab, there are no filter and/or search options for this list.
* Click **add** for each discipline you want to include in the Resource Educational Disciplines/Selected Disciplines data field.
* Click any line item in the Resource Educational Disciplines/Selected Disciplines data field. Notice that the Discipline data field auto-populates in the Selected Education Discipline section to match your selection.
	+ Use the pull-down selection list to specify education level.
	+ Enter the name of the associated education institution.
	+ Repeat for each discipline you added to the Resource Educational Disciplines/Selected Disciplines data field.
* If no educational disciplines apply, then select Not Applicable from the top of the pick list.
* Click the **Attachments** header tab or the **next** button () located in the lower-right corner of the screen to move to the next tab.

### Attachments:

* Review the advisory content located at the top of the tab section under the header bar to verify if there are restrictions as to attachment content, the number of attachments, and/or attachment file size.
* Click **Choose File** to browse and locate the file you plan to attach.
* Click **attach** () to import the file. The filename displays in the Document list for each successful import.
* Optional. Use the Misc. Text box to add any supplemental text.
* Click the **Bill Rate / Salary** header tab or the **next** button () located in the lower-right corner of the screen to move to the next tab.

### Bill Rate / Salary:

* Notice that this tab has a separate section for Bill Rate and Salary criteria. Use the section that is applicable to your resource and the job opportunity.

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|  | If you indicate ‘Contract’ (see Job Type on the Desired Job tab) as your only selection, then the Bill Rate Criteria is required. If you indicate ‘Contract to Hire,’ then both the Bill Rate **and** the Salary Criteria are required. NOTE: Bill Rate is the contractor’s pay rate x markup. |

* Select a ‘Calculate rates based on’ value and then enter both the Minimum and Maximum amount for just the line item that matches the value you selected. Click **calculate rates** (  ) and the system will auto-calculate all the additional rate fields.
* Select the appropriate Currency from the selection list.
* Adjust the Visibility selection if you do not want to use the default value.
* Complete the other data fields (e.g., Rates Negotiable, Pay Rate, Hourly Overtime Rate, Hourly Overtime Rate Negotiable, and Bill Rates Comment) if desired. These are not required fields and the rate fields do not auto-calculate.
* Click the **Other** header tab or the **next** button () located in the lower-right corner of the screen to move to the next tab.

### Other:

* Use the radio buttons to adjust your preferences for the listed items. Note that some items have data fields to indicate percentage, date, or allow for comments.
* Click the **Summary** header tab or the **next** button () located in the lower-right corner of the screen to move to the next tab.

### Summary:

* Review the summary information from each tab. To make adjustments you need to go back to the respective tab.
* Click **save changes** () when your review is complete. Error alerts display at the top of the section if any data fields fail to validate.
* Make any adjustments as indicated by the error alerts, return to the Summary tab, and click **save changes** again. Repeat until the system indicates your save is successful.
* Click **activate** () to upgrade your resource to active status.

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|  | A resource can be auto-matched to available job opportunities in the system only when they have a status of ‘active’. |

Instructions for creating a Quick Resource record or cloning an existing resource record can be found in the “Supplier—Submit Candidate” guide.