# Supplier: Manage Work Orders and Assignments

This document provides suppliers with the steps necessary to manage Work Orders and Assignments. In the Legacy UI, Work Orders track contractual terms and Assignment records include all non-contractual information. In general, adjustments to contractual terms (Work Order) are **amendments** while changes to non-contractual information fields (Assignment) are **edits**. Amendments require supplier acceptance and include approval workflows; edits do not. This guide uses standard IQN VMS configuration. Your specific setup may vary slightly based on your client's configuration.

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

## To approve an amendment (contractual):

1. Log in to IQNavigator using your *user name* and *password*. Your Home dashboard displays.
2. Click the **amendments to approve** link located in the Work Orders/Assignments section of the Status column on the right-hand side of your dashboard screen. The Work Orders – Amendments to Approve list screen appears.

**NOTE**: This list is specific to YOUR user role and reflects Work Orders/Assignments for which you are the designated contact person.

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|  | *• Use the Results per Page pull-down selection option on the right-hand side of the screen to adjust how many records display per screen.* *• Click the GO arrow  to open the Work Order or Assignment record based on the selection made in the Work Order Actions column.* *• Click any column header to change the sort order of the list based on that column. Click the column header a second time to sort in reverse order.* *• Click the  Search & Filter (amendments to approve) link at the top of your screen for additional search/filter options.*  |

1. Click the hyperlink number in the Amend. In Process # column to open the Work Order in review mode. All the contractual changes (i.e., amendments) made to the previously effective version of the assignment display in the Fields Changed box located in the upper right-hand side of the screen. Notice that all fields are <read only>.

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|  | *You can click the respective tab to review the other sections of the Work Order (Position and Resource Detail, Buyer Organization Detail, and Supplier Organization Detail) that are also <read only>. If you want to propose adjustments to the Work Order, use the Collaboration button or contact the CAM (Customer Account Manager).*  |

1. Click **approve** () to accept the changes. The screen returns to the Work Orders – Amendments to Approve list screen. The Work Order / Effective Amend. # column now displays a combined Work Order / Effective Amendment number and the Amend. In Process # column is now blank.

## To reject an amendment (contractual):

1. Complete Steps 1 through 3 as described above.
2. Click **reject** (). The Specify Decline Amendment Reason screen appears.
3. Use the checkboxes to indicate your reason(s) for declining. This is a required field as noted by the red asterisk (\*). (Multiple selections are permitted.) Use the Other Reason text field if there is no reason match. NOTE: As indicated, all reason(s) will be made public to the internal and external user(s) who have access to this information.
4. Click **OK** to confirm and exit. A notice is sent to all impacted business stakeholders and the status updates to Working — Amendment Declined.

## To amend a work order:

Contact the CAM (Client Account Manager) or Hiring Manager if adjustments are needed to a Work Order. Once the Work Order status updates to “Effective”, the record becomes <read-only>.

To edit an assignment:

1. Log in to IQNavigator using your *user name* and *password*. Your Home dashboard displays.
2. Click the **effective assignments** link located in the Work Orders/Assignments section of the Status column on the right-hand side of your dashboard screen. The Assignments list screen appears.

**NOTE**: This list is specific to YOUR user role and reflects Assignments for which you are the designated contact person.

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|  | *• Use the Results per Page pull-down selection option on the right-hand side of the screen to adjust how many records display per screen.* *• Click the GO arrow  to open the Assignment record based on the selection made in the Assignment Actions column.* *• Click any column header to change the sort order of the list based on that column. Click the column header a second time to sort in reverse order.* *• Click the  Search & Filter (amendments to approve) link at the top of your screen for additional search/filter options.*  |

1. Click the hyperlink number in the Assignment ID column to open the assignment record in assignment management mode. Notice that the assignment record is divided into multiple tabs and the majority of data fields are <read only>.
2. Click any section tab to go directly to a specific tab or use the next/previous buttons at the bottom of the screen.
3. Update the General Supplier Organization tab if adjustments are needed for:
	* Managing Supplier Agent
	* Supplier Accounting Representative
4. Update the Onboarding Checklist tab to include the Contractor’s email address and any status updates to the checklist activities.
5. Update the Assets tab if adjustments are needed (*optional*).
6. Click the **save** button () on the Assignment Management Summary tab if you made ANY changes/adjustments on ANY tab. This is the only “save” option for the assignment record. A Validation Message displays to indicate you have saved successfully.
7. Click the **return to list** button () to exit the assignment record and go back to the effective assignments list.

## To adjust the onboarding checklist and/or contractor email address:

1. Log in to IQNavigator using your *user name* and *password*. Your Home dashboard appears.
2. Hover over the Work Orders/Assignments menu drop-down arrow located in the Header Menu bar.
3. Click **Assignments**. The Assignments list screen appears.

NOTE: This list of active assignments is specific to YOUR user role.

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|  | *• Use the Results per Page pull-down selection option on the right-hand side of the screen to adjust how many records display per screen.**• Use the View by Date Range filter option in the upper right-hand section of the screen to filter active assignments by date.**• Click any column header to change the sort order of the list based on that column. Click the column header a second time to sort in reverse order.* *• Click the  Search & Filter (amendments to approve) link at the top of your screen for additional search/filter options.*  |

1. Locate the Resource/Assignment ID that needs adjustment.
2. Select **update contractor email** using the down arrow in the Assignment Actions column for the respective record.
3. Click the GO arrow  to open the Assignment record with the Onboarding Checklist tab active.
4. Enter/Adjust the contractor’s email address and make adjustments to the Onboarding Checklist as needed.
5. Use the <next> button or click the tab to go directly to the Assignment Management Summary tab.
6. Click the **save** button () on the Assignment Management Summary tab to save your changes. This is the only “save” option for the assignment record. A Validation Message displays to indicate you have saved successfully.
7. Click the **return to list** button () to exit the assignment record and go back to your assignments list.