



**The training materials listed below are specific to IQNavigator. Each section highlights specific aspects of the IQN Procure-to-Pay process. Coverage includes:**

* **Step-by-step instructions for standard workflow process steps (Requisition to Active Assignment)**
* **Supplier actions to manage their respective Resource Pools (Resource Management)**
* **Manager (Program Office, Hiring Manager, Approver, and Supplier) actions throughout the duration of the active assignment (Assignment Management)**
* **Background Information documents that include a Glossary of Terms, System Status Definitions, and User Roles list.**

**To ensure that you are always using the MOST CURRENT VERSION of each document,
just use the link provided.**

**Headings displayed below a document title indicate topics covered within that document.**

Going forward, all updates to these materials will retain the same URL used here. Content will be updated on an "as needed" basis.

|  |
| --- |
| **NOTE: ALL CONTENT IN THESE GUIDES IS CLIENT-NEUTRAL AND FOLLOWS STANDARD IQN CONFIGURATION.** **CLIENTS AND/OR PROGRAM OFFICE USERS MAY MODIFY THESE GUIDES TO REFLECT THEIR SPECIFIC WORKFLOWS AND CONFIGURATION SETTINGS.** |

# ~ Requisition to Active Assignment

#  01 - [Buyer: Create a Requisition](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/01-Buyer--Create_a_Requisition.docx)

## To create a new requisition:

#  02 - [PMO: Create a Requisition](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/02-PMO--Create_a_Requisition.docx)


## To create a new requisition:

## To view the active requisition:

#  03 - [Approver: Approve or Reject a Requisition](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/03-Approver--Approve_or_Reject_a_Requisition.docx)


## To approve a submitted requisition:

## To reject a submitted requisition:

## Overview of Action Items/Requisitions Features

#  04a - [Supplier: Submit a Candidate](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/04a-Supplier--Submit_Candidate.docx)

## To submit a resource as a candidate to a job opportunity:

#### Select from the Available Resources List

#### Create New Resource (Quick Resource)

#### Create a Resource Profile

#### Clone an Existing Resource

## Resource Status List

#  04b - [Supplier: Decline a Job Opportunity](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/04b-Supplier--Decline_a_Job_Opportunity.docx)

## To decline a job opportunity:

#  05 - [PMO: Initial Candidate Screen](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/05-PMO--Initial_Candidate_Screen.docx)

## To screen submitted candidates:

#### To decline a submitted candidate

#### To compare candidates side-by-side

#### To qualify a candidate for Buyer Org/Hiring Manager review

#  06 - [Buyer: Manage Requisitions](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/06-Buyer--Manage_Requisitions.docx)

## To manage requisitions:

#### To decline a candidate

#### To compare candidates side-by-side

#### To manage interviews

#### To make an Offer to Extend request

#  07 - [Supplier: Manage Interviews](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/%2007-Supplier--Manage_Interviews.docx)

## To manage interviews:

#### To view and respond

#### To change a scheduled interview time

#### To cancel an interview

#  08 - [PMO: Submit Offer](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/08-PMO--Submit_Offer.docx)

## To review an offer:

#### To submit an offer to the supplier

#  09 - [Supplier: Approve or Reject Offer](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/09-Supplier--Approve_or_Reject_Offer.docx)

## To View Offers Submitted for Approval:

#### To view/adjust the assignment record (non-contractual)

#### To view the Work Order (contractual offer record)

#### To approve or reject the offer (including review)

## Express Approval:

# ~ Resource Management:

#  Supplier: [Create a Full Resource Profile Record](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/Supplier--Create_a_Full_Resource_Profile_Record.docx)

## To create a resource profile:

#### General

#### Desired Job

#### Skills/Roles

#### Education

#### Attachments

#### Bill Rate / Salary

#### Other

#### Summary

#  Supplier: [Manage Resource Login Access](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/Supplier--Manage_Resource_Login_Access.docx)

## To create initial login credentials for a resource/contractor:

#### Option 1: Automatically generate login credentials.

#### Option 2: Manually create login access.

## To reset a user password:

#### Option 1: Send contractor a password reset link.

#### Option 2: Manually reset contractor’s password.

## To disable a resource/contractor’s login access:

## To deactivate a resource/contractor user:

#  Supplier: [Search Resource Pool](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/Supplier--Search_Resource_Pool.docx)

## To retrieve Resource records from your Resource Pool:

## Working with filters and search:

## Adjusting display features:

## Resource/Candidate Status

# ~ Assignment Management:

#  Manager: [Assignment Management](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/Manager--Assignment_Management.docx)

## To edit an assignment:

## To amend an assignment (Contract Terms):

## To adjust/review the onboarding checklist:

## To close an assignment (including evaluation):

## Off Boarding (optional):

#  Approver: [Approve or Reject an Assignment Amendment](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/Approver--Approve_or_Reject_an_Assignment_Amendment.docx)

## To approve an assignment amendment (Contract Terms):

## To reject an assignment amendment:

#  Supplier: [Work Order - Assignment Management](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/Supplier--Work_Order-Assignment_Management.docx)

## To approve an amendment (contractual):

## To reject an amendment (contractual):

## To amend a work order:

## To edit an assignment:

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

# ~ Background Information:

## [IQN Glossary of Terms](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/IQN-Glossary_of_Terms.docx)

## [IQN System Status Definitions](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/IQN-System_Status_Definitions.docx)

## [IQN User Roles](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/IQN-User_Roles.docx)

# ~ Zip file

 [IQN How to Documents: zip file](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/IQN_HowToDocuments.zip)

This zip file includes copies of all the documents listed above. It is provided as a convenient download for those clients/program offices that plan to create their own client-specific documentation.

# ~ IQN Videos

# System Walk Through Videos:

 [Create Requisition](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/beeline-iqn-system-training_create-requisition_2017.mp4)

Provides highlights on how to create three types of requisitions.

* **Request for Talent**: This is a client-defined, template-driven method. The user answers a series of questions to determine what type of requisition is needed.
* **Copy Requisition:** This is for the user familiar with IQN Navigator. The user can easily copy a previously submitted Requisition to create a new request.
* **Create Requisition:** This method is also for the user familiar with IQNavigator. In this method the user selects a job title and then adjusts fields on the requisition template to create a requisition.

**Total playing time: 3:08 mins**.

[ Manage Requisition](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/beeline-iqn-system-training_manage-requisition_2017-2.mp4)

Provides overview of managing a requisition as well as the candidate review process. Recording shows a variety of the review/candidate comparison options that can be incorporated into the Requisition process.

**Total playing time: 4:02 mins.**

[ Manage Assignments](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/beeline-iqn-system-training_manage-assignment_2017.mp4)

Provides overview of assignment-related activity including contractual amendments, non-contractual edits, expenditures, history, worker evaluations, and onboarding activity. It also includes how to approve a timecard directly from the assignment record.

**Total playing time: 5:32 mins.**

 [Invoice Processing](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/beeline-iqn-system-training_system-walk-thru-expenditure-processing_2017.mp4)

Provides overview of the invoicing process from a Hiring Manager’s perspective.

**Total playing time: 2:48 min.**

 [Create SOW (Statement of Work)](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/beeline-iqn-system-training_create-sow_2017.mp4)

Provides overview on how to create a Statement of Work (SOW) also known as Services Procurement or Project Agreement.

**Total playing time: 2:33 min.**

 [Manage SOW (Statement of Work)](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/beeline-iqn-system-training_manage-sow_2017.mp4)

Provides overview of managing a Project Agreement and a review of the Projects list screen features. Coverage includes milestone payment requests and SOW details.

**Total playing time: 6:42 min.**

# Operational Reporting Videos:

 [Operational Reports](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/operational-reports_2017.mp4)

Provides overview of custom reports including what data fields are available and how to adjust layouts and scheduling options.

**Total playing time: 11:12 min**.

# System Structure Videos:

 [Operational Hierarchy Add & Configure](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/beeline-iqn-system-training_operational-hierarchy-add-configure_2017.mp4)

Reviews how to set up a system organizational hierarchy. These hierarchies control workflow and settings ensure that system practices conform to local regulatory requirements. Coverage includes how to adjust parent/child hierarchy settings.

**Total playing time: 6:59 min.**

 [Operational Hierarchy Approval Delegations](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/beelin-iqn-system-training_operational-hierarchy-approval-delegation_2017.mp4)

Reviews how to set up and maintain an approval delegation.

**Total playing time: 3:02 min.**

 [Operational Hierarchy Buyer - Supplier](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/beeline-iqn-system-training_operational-hierarchy-buyer-supplier_2017.mp4)

**Total playing time: 14:12 min.**

 [User Accounts - Maintain & Update](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/beeline-iqn-system-training_system-structure-user-accounts-maintain-update_2017.mp4)

**Total playing time: 4:35 min.**

 [User Accounts - Opt In/Out Notifications](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/beeline-iqn-system-training_system-user-accounts-opt-in-opt-out-notifications_2017.mp4)

**Total playing time: 1:54 min.**

# Customization Videos:

 [Custom Defined Fields](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/custom-defined-fields_2017.mp4)

**Total playing time: 10:52 min.**

 [Custom Locations](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/custom-locations_2017.mp4)

**Total playing time: 6:45 min.**

 [Custom Labels](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/custom-labels_2017.mp4)

**Total playing time: 4:33 min.**

 [Procurement Workflow - Assignment Layout](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/procurement-workflow-assignment-layout_2017.mp4)

**Total playing time: 4:22 min.**

 [Procurement Workflow - Requisition Layout](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/procurement-workflow-requisition-layout_2017.mp4)

**Total playing time: 3:51 min.**

 [Supplier Tiering](https://webapps.beeline.com/beelinetms/%21_IQN_Support_Documentation/supplier-tiering_2017.mp4)

**Total playing time: 4:48 min.**

# ~ IQN: URLs for documents

### IQN REQUISITION TO ACTIVE ASSIGNMENT:

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/01-Buyer--Create\_a\_Requisition.docx

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/02-PMO--Create\_a\_Requisition.docx

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/03-Approver--Approve\_or\_Reject\_a\_Requisition.docx

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/04a-Supplier--Submit\_Candidate.docx

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/04b-Supplier--Decline\_a\_Job\_Opportunity.docx

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/05-PMO--Initial\_Candidate\_Screen.docx

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/06-Buyer--Manage\_Requisitions.docx

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/07-Supplier--Manage\_Interviews.docx

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/08-PMO--Submit\_Offer.docx

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/09-Supplier--Approve\_or\_Reject\_Offer.docx

### RESOURCE MANAGEMENT:

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/Supplier--Create\_a\_Full\_Resource\_Profile\_Record.docx

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/Supplier--Manage\_Resource\_Login\_Access.docx

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/Supplier--Search\_Resource\_Pool.docx

### ASSIGNMENT MANAGEMENT:

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/Manager--Assignment\_Management.docx

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/Approver--Approve\_or\_Reject\_an\_Assignment\_Amendment.docx

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/Supplier--Work\_Order-Assignment\_Management.docx

### BACKGROUND INFORMATION:

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/IQN-Glossary\_of\_Terms.docx

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/IQN-System\_Status\_Definitions.docx

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/IQN-User\_Roles.docx

### INDEX for all documents:

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/~IQN\_How\_to\_Documents\_INDEX\_with\_URLs.docx

### ZIP file (all documents):

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/IQN\_HowToDocuments.zip

### IQN Videos:

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/beeline-iqn-system-training\_create-requisition\_2017.mp4

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/beeline-iqn-system-training\_manage-requisition\_2017-2.mp4

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/beeline-iqn-system-training\_manage-assignment\_2017.mp4

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/beeline-iqn-system-training\_system-walk-thru-expenditure-processing\_2017.mp4

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/beeline-iqn-system-training\_create-sow\_2017.mp4

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/beeline-iqn-system-training\_manage-sow\_2017.mp4

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/operational-reports\_2017.mp4

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/beeline-iqn-system-training\_operational-hierarchy-add-configure\_2017.mp4

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/beelin-iqn-system-training\_operational-hierarchy-approval-delegation\_2017.mp4

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/beeline-iqn-system-training\_operational-hierarchy-buyer-supplier\_2017.mp4

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/beeline-iqn-system-training\_system-structure-user-accounts-maintain-update\_2017.mp4

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/beeline-iqn-system-training\_system-user-accounts-opt-in-opt-out-notifications\_2017.mp4

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/custom-defined-fields\_2017.mp4

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/custom-locations\_2017.mp4

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/custom-labels\_2017.mp4

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/procurement-workflow-assignment-layout\_2017.mp4

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/procurement-workflow-requisition-layout\_2017.mp4

https://webapps.beeline.com/beelinetms/!\_IQN\_Support\_Documentation/supplier-tiering\_2017.mp4