Continuous Learning:
Personal Dashboards

CONTENTS

Personal Dashboards

Personal Dashboards allow users to publish reports and have them collectively displayed. A Personal Dashboard can be configured in several ways and can be published so other program users can view it. The following document will explain how to create, configure, and publish reports.

Adding a Report to the Widget Library

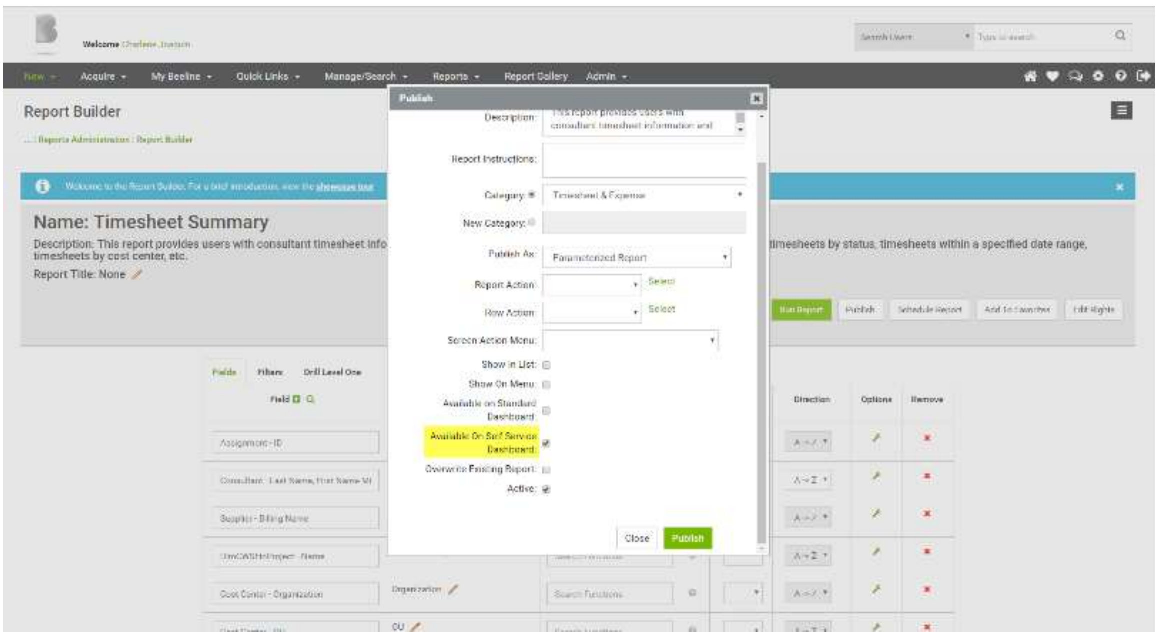
A report can be added to the widget library via the "Available on Self Service Dashboard" flag. This flag will be editable on any report that meets the technical criteria necessary for rendering on the new dashboards.

The "Available on Self Service Dashboard" flag is how these reports can be available on the Personal Dashboard. Below are the steps to ensure these reports populate in that pick list.

Step 1 - Create the report to be used on the personal dashboards.

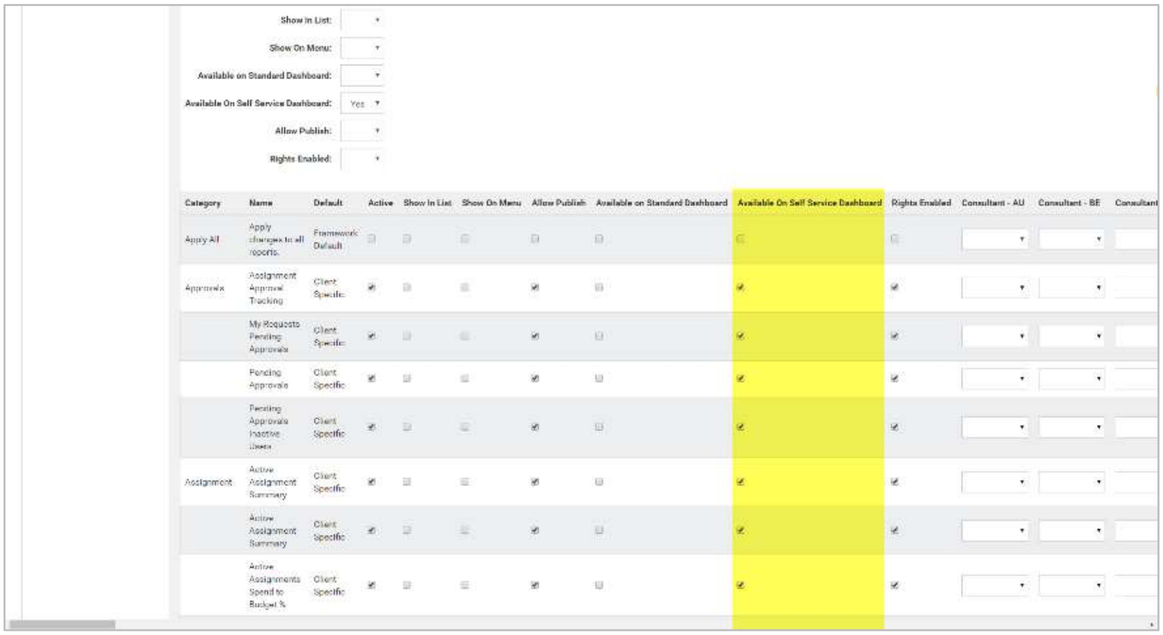
Step 2 - Set the "Available on Self Service Dashboard" flag on the report.

From the **Report Builder**, the option is in the Publish modal.



The second way to set the flag is by accessing the **Manage Reports Screen**. This can be accessed in the following paths:

- *Mega Menu > Reports > Manage Reports*.
- Inside a report click **Edit Rights**.
- **Program Office Dashboard** or the **Program Office Reporting Dashboard** (if Level II Certified)
    - Click on Manage Report Rights



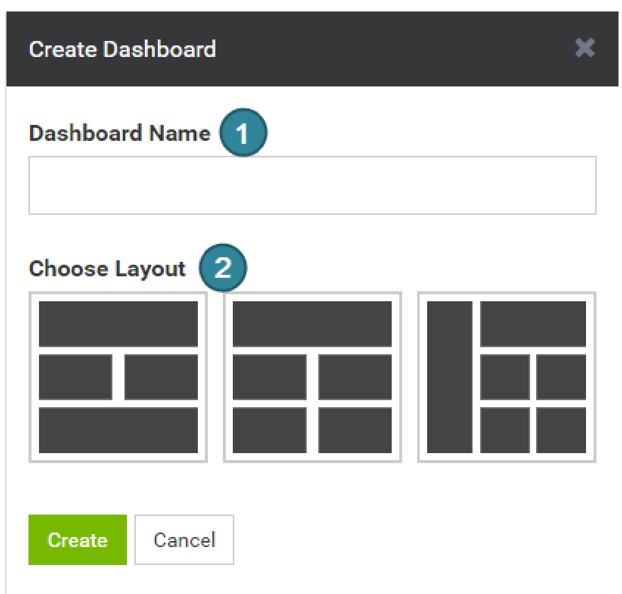
How to Create a Personal Dashboard

Step 1 - Under the "My Beeline" menu's "My Personal Dashboards" section, click on "**Create Dashboard**" to open the personal dashboard's creation modal.

Step 2 - Fill out the form presented in the modal accordingly.

1. Dashboard Name is required. The name cannot be the same as an existing personal dashboard for that user.

2. Layout is required. Once set, the layout cannot be changed.



Step 3 - Click **Create**.

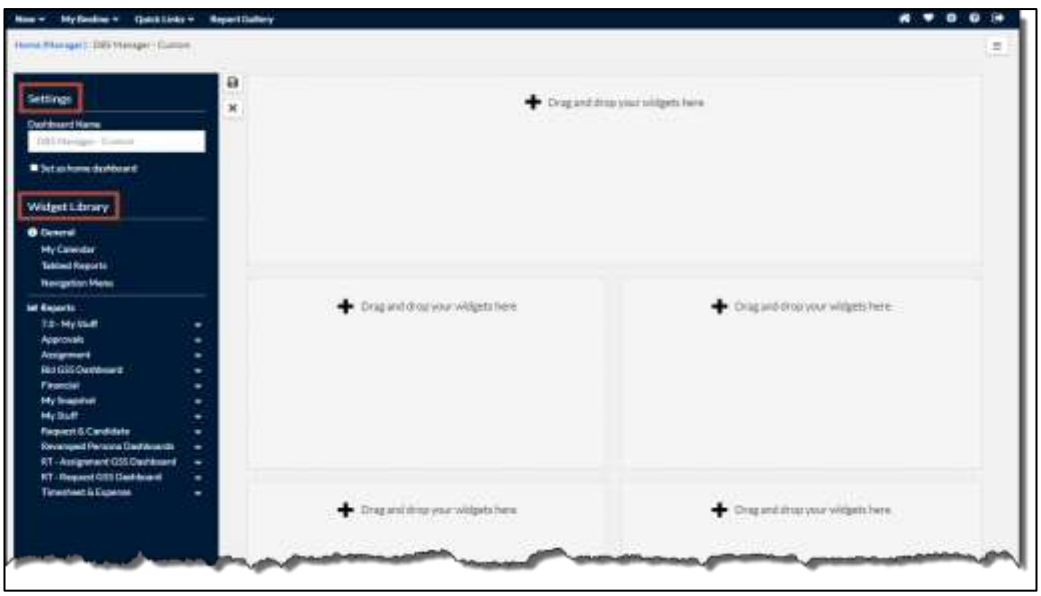
How to Manage Content on a Personal Dashboard

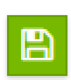
Step 1 - Navigate to the personal dashboard. (My Beeline > My Personal Dashboards > Select a dashboard)

Step 2 - Enter edit mode by clicking on the edit button  (NOTE: If there is currently no content on the dashboard, the dashboard will automatically be in edit mode when first navigating to it)

Step 3 - Manage widgets on your dashboard accordingly.

- **Add widgets** by dragging them out of the widget library into a template zone (indicated by "Drag and drop your widgets here"). Each zone can hold up to a maximum of 4 widgets.
- **Remove widgets** from the dashboard by clicking on the "x" in the top right corner of the widget.
- **Arrange widgets** by clicking and holding the right mouse click on top of the widget and dragging it to the desired location. Widgets can be moved from one zone to another or within its current zone.



Step 4 - Click on the save button  to save your changes.

How to Delete a Personal Dashboard

Step 1 - Navigate to the personal dashboard. (My Beeline > My Personal Dashboards > Select a dashboard)

Step 2 - In view mode (with the widget library closed), click on the delete button

Step 3 - Click **Confirm Delete** in the confirmation dialog.

be advised:

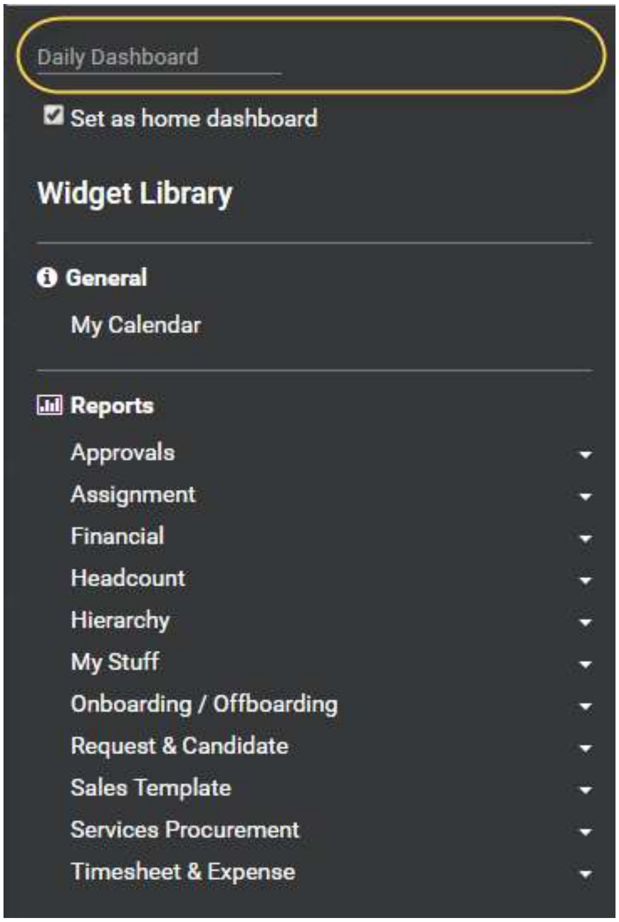
- Once deletion is confirmed, there is no way to recover your personal dashboard

How to Rename a Personal Dashboard

Step 1 - Navigate to the personal dashboard. (My Beeline > My Personal Dashboards > Select a dashboard)

Step 2 - Enter edit mode by clicking on the edit button  (NOTE: If there is currently no content on the dashboard, the dashboard will automatically be in edit mode when first navigating to it)

Step 3 - In the widget library, enter the desired name in the name text box. The name cannot be the same as an existing personal dashboard for that user.



Step 4 - Click the **Save** button to save your changes.

How to Set a Personal Dashboard as the Default Dashboard

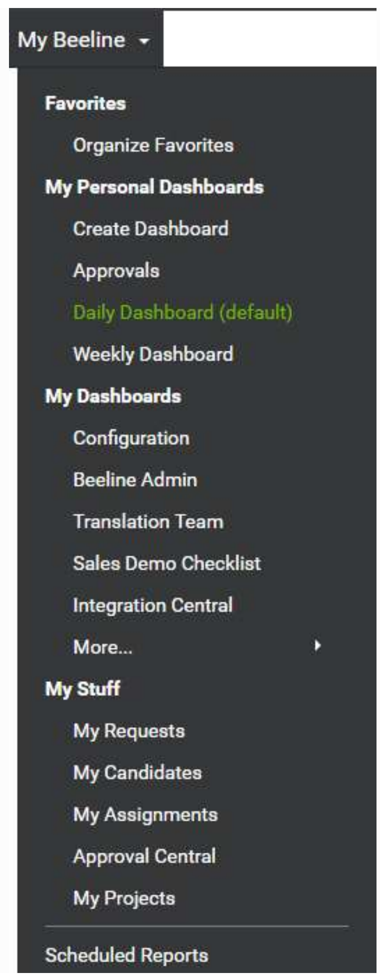
Step 1 - Navigate to the personal dashboard. (My Beeline > My Personal Dashboards > Select a dashboard)

Step 2 - Enter edit mode by clicking on the edit button (NOTE: If there is currently no content on the dashboard, the dashboard will automatically be in edit mode when first navigating to it)

Step 3 - Check the "**Set as home dashboard**" checkbox in the widget library. (NOTE: Checking this option overrides the current existing home dashboard)

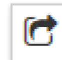
Step 4 - Click the **Save** button to save your changes.

TIP: Your default dashboard is indicated with "**(default)**" next to its name under My Beeline > My Personal Dashboards. To set the default dashboard back to the original standard dashboard default, uncheck the "Set as home dashboard" option.



How to Push a Personal Dashboard to Users

Step 1 - Navigate to the personal dashboard. (My Beeline > My Personal Dashboards > Select a dashboard)

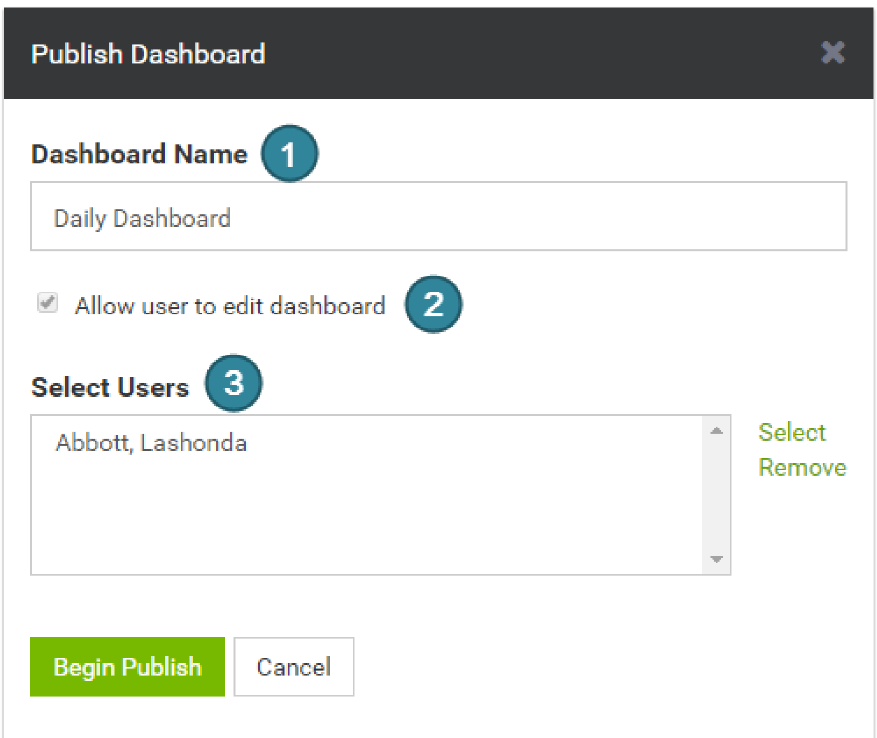
Step 2 - In view mode (with the widget library closed), click on the publish button  (NOTE: The publish button will only be available if the current user has the correct permissions

Step 3 - Fill out the form presented in the modal accordingly.

1. Dashboard Name is required. If a dashboard is pushed out to a user who already has a dashboard of the same name, the dashboard will be pushed out with a number (example: Daily Dashboard (1)) accordingly.

2. Checking "Allow user to edit dashboard" will allow the user to edit the dashboard. If the option is not selected, the user will only receive the "view" mode of the personal dashboard.

3. Select the users to push the dashboard to.

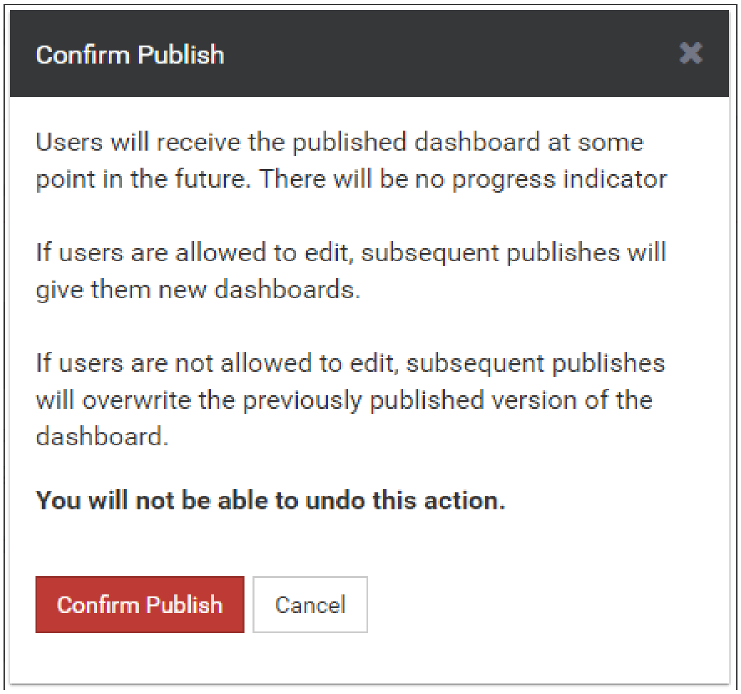


Step 4 - Click "**Confirm Publish**" on the confirmation modal. The dashboard will be pushed to the indicated users when the "Dashboard Publish" utility process is run.

be advised:

- There is no way to track the status or see the progress of a published dashboard.

- Publishing the dashboard again will give the new dashboard to all users specified including user that ALREADY have that dashboard. User that already have the dashboard will have their dashboards overridden with the new dashboard.
- There is no way to take back the published dashboard from users.



Glossary of Terms

A…	
Assignment:	This is the result of a candidate placed on a job. The assignment will track all activity of the contract worker. Contract workers can be on multiple assignments in different status (i.e.: Active, Expired, Canceled), including rate changes and financial management. Assignments have a definitive start and end date.
Admin Cost Center:	Usually relates to the cost center of the hiring manager and can be different from the bill to cost center. This information will default based on the data we receive from the client.
Approver:	The user that has been determined as the owner of the action or workflow step. There can be one or many approvers.
B…	
Beeline ID	An identification number (or letter/number combination) a supplier uses to keep track of their resources. The format is defined by the client.
Billing Cost Center:	This cost center to which monies shall be paid. There is only one primary on the assignment but the contract worker can enter more at time entry.
Bill Rate:	The rate billed to the client by which the supplier will be paid.
Billing Schedule:	The defined period at which all timesheets are gathered to create an invoice.
Billing Shift:	The time period in a given day to which time is applied.
Billing Term	The category used to bill fees against an assignment. The billing term drives the Beeline fee, so it could be a reduced fee (for a grandfathered assignment) or a different fee (for payroll purposes). Predefined fees that can be categorized depending on the type of labor or how they were sourced.

C…	
Client Defined Field (CDF):	A feature that can be added to any of Beeline's products which enables the capture of client specific information pertinent to the decision making or approval process throughout the procurement life cycle. These fields are added to the bottom section of certain pages in the VMS and their location on a screen display can only be customized in Services Procurement.
Consultants:	A contract worker on a consulting services engagement or SOW project. This should not be interchanged with a contractor worker.
Contingent Worker:	Individuals that accept work on a contractual basis. Contingent contract workers may also be defined as temporary contract workers, contractors, or consultants.
Contingent Workforce Management (CWM):	This is an 'umbrella' term typically used to refer to the combination of software and services that help streamline temporary staffing processes. Management of the "req-to-check" process containing the requisition, approval, release, sourcing, evaluation, onboarding, management, and payment process, offboarding and performance evaluation of the contingent workforce. Duties may also include quality and performance management of workforce suppliers.
Contingent Workforce Solution (CWS):	The innovative way to streamline the process for engaging resources on a contingent or contractual basis by a client. Contingent contract workers may also be defined as temporary contract workers, contractors, or consultants. Beeline Solutions include VMS, MSP, Analytics & Business Intelligence, Services Procurement, and Professional Services.
D…	
Delegates:	One or many users who can approve tasks, timesheets, expenses, or run reports on behalf of the user.
Disqualify:	This is the action of disqualifying a candidate who was submitted to a request. This action is done by the MSP/VMO. During the screening process of the procurement cycle, a user can disqualify a candidate due to their skill set, rate, or other attribute determined by the client. There are instances where Hiring Managers can disqualify.

E…	
Earning Code:	Also referred to as the pay code. This is an attribute of the rate to differentiate the different bill rates associated to a contract worker. Examples include regular time rate, overtime rate, and double time rate.
External ID:	ID used to identify resources in the Beeline application, for example: first initial + last name + last 4 of SSN (jknows1234). This usually is a client's unique identification for a contract worker that helps with alignment of two systems and is used to identify a contract worker.
F / G…	
Geography:	Different countries in the VMS that the client has configured in the VMS. Configurations can be made specific to a geography.
H…	
Hiring Manager:	The person that is responsible for the work that is being contracted. They are usually the approver of time and expense for the applicable contractor workers.
I…	
Independent Contractor/1099:	An independent contractor provides services to a company but is not an employee of that company. The company pays the independent contractor without withholding payroll taxes or paying the employers share of payroll taxes. Independent contractors do no work directly for the client.
J / K…	
Job Class:	A category classification (i.e., Developers or Customer Service Representatives) and then there are job titles mapped to each category job class.

Job Title:	A job title is the name of the position procured in the VMS. It can be defined by the client or by using Beeline standard titles and it has a related job description.
L…	
Labor Category:	Grouped categories of labor that the client will be procuring in the VMS. Labor categories are grouped industries of labor that the client procures in the VMS. Some of the most frequently used labor categories include IT, Admin/ Clerical, and Professional.
LOB:	Line of Business. Used as a categorization of transactions as defined by the client.
M / N…	
Notification:	A method to alert a user either by an email or dashboard notice within Beeline VMS with information updates or action required. Notifications can be automated, scheduled, or workflow driven.
O…	
Off-boarding:	Actions performed when a contractor worker has completed the assignment. This step can include tasks or checklists.
Offer:	Once a candidate is considered qualified, the MSP/VMO can present an offer to him/her to fill the request.
Onboarding:	This is the last step of the approval process once the candidate has accepted an offer. The act of onboarding is the final action before the request becomes an assignment.
Open Tasks Summary (Action Required):	This is a section in the application that informs a user of any tasks that are awaiting their action.
Organization:	This is a group within the client who has specific cost centers, procedures, hierarchies, managers, and other units that help build their specific processes.

Organization Unit (OU):	This identifies the different groups within a client site where they use different cost centers, processes, hierarchies, and specific managers tied to anyone within just that group.
Outsourced Services:	Services engaged under a service level contract that support how a business operates (i.e., security, cafeteria contract workers).
P…	
Pay Code:	This indicates the type of hours the contract worker and the client was billed, for example, whether it Regular Time, Over Time, or Holiday Hours. See also: Earning Code.
Pay Rate:	The rate at which the contract worker is paid.
Payment Register (PR):	Beeline's consolidated billing system.
Physical Work Location:	This is the actual address where the contract worker is to report to in order to complete the job.
Position:	The position is the name of the job/request title being used in the system.
Pre-Identified:	This pertains to a candidate that has already been pre-selected by the client to fill a candidate position.
Project:	Project sometimes refers to a large collaborative enterprise, frequently involving research or design, which is carefully planned and managed over a designated duration to achieve a particular aim. Others reference a project as an ad hoc Statement of Work. Beeline's Project Tracking functionality assumes the broader definition of a project as a large, budgeted endeavor—possibly with multiple Statements of Work attached to it.
Purchase Order (PO):	Purchase Order (PO) number – an alphanumeric code that is assigned to each order that a business places with a vendor. Internally, the number makes it possible to apply the costs of those orders to the budgets of the Cost Centers that placed the orders. The PO number also provides the Accounts Payable team with verification that the expense is legitimate and payment may be rendered to the vendor.

Q…	
Qualify:	During candidate screening, an MSP/VMO can determine whether the Hiring Manager should consider the candidate for the request. The HM can then move forward with viewing their profile and decide whether to continue with the procurement process.
R…	
Rate Card:	A component of the application that stores the rates as it relates to a job title request, candidate submitted, offer of a candidate, and assignment. The default rate cards are developed by the Managed Services team or VMO to provide a baseline of industry rates for the job titles and skills required.
Reason for Position/Request:	This is a description of why the position needs to be filled.
Reclassification:	This action is used when an assignment needs to be modified from one job title to another within the same job class. This is often used when a contract worker has been promoted but still doing the same type of work.
Releasing a Request:	This action takes place once a request has completed its initial approval process. This action allows the request to be shared with the supplier community for fulfilment.
Request:	The area in the application that stores the detailed for the work being requested. This is something called a job order or work order.
Requestor:	The user who is requesting the work to be procured, usually this is the hiring manager.
Resource:	The contingent worker who is on an assignment.
Resource ID:	Unique ID that can be used to keep track of the resource. The format is defined by the client.
Resource Pool:	Suppliers can use the VMS as a portal to manage their resources by storing the resource's profile information. An individual in the resource

	section of the application can be submitted to a current or future request released to the supplier. These users are also referred to as a Resource.
S…	
Scope of Work:	The predefined requirements and/or tasks that should be completed as a result of task, project, work order, or request.
Services Procurement:	Beeline's Services Procurement solution provides support for the entire procurement lifecycle, from sourcing, through negotiation, into engagement management, and invoicing with the flexibility to use only the needed components. Services projects include contingent contract workers providing services on an arrangement other than just time and expense (usually a Statement of Work) and not managed day-to-day by a client employee.
Service Level Agreement (SLA):	Part of a service contract that records the common understanding about services, priorities, responsibilities, guarantee, etc., – collectively it defines the mutually agreed to level of service between Beeline and the client.
Sourcing:	A segment of the procurement process wherein you send a job request to a community of suppliers to fulfill the request.
Statement of Work (SOW):	A Statement of Work (SOW) is a document, routinely employed in the field of project management, which defines project-specific activities, deliverables, and their respective timelines, all of which form a contractual obligation upon the vendor, in providing services to the client.
Submit Candidates:	This is action performed by the Supplier once a request is released to them. They will assign applicable candidates to a request for review by the client.
Supplier:	Staffing companies who use our VMS to provide the best suited candidates to the positions posted by a client. Supplier can use the VMS to maintain their candidates, receive new positions, receive remittance, and timesheet information. Suppliers are the employers of the contractor workers working our clients. Most clients have a preferred supplier list that is specific to their labor category and/or geography. Suppliers should not be referred to as vendors.
Supplier Timesheet Extract:	A report that is available to suppliers where they can export all timesheet data for a given period.

T…	
Tax Job Category:	Allows the VMS to apply the appropriate taxes based on country, state, county, and/or city taxes that job falls under.
Timesheet Approver:	This person is responsible for approving timesheets that are submitted by a contract worker. The timesheet must be approved before it can be processed in an invoice. The Hiring Manager is typically also the Timesheet Approver.
U…	
User Defined Field (UDF):	See: Client Defined Field
User ID	Is the login ID for a person to access Beeline VMS. For a client user it will typically be the same as their employee number or employee ID. The typical Supplier user id is their email address and for a contractor it is typically their Beeline ID.
V…	
Vendor:	This is a company that provides services and/or resource(s) to another company. For example, Beeline is a vendor to our clients who utilize our technology, as well as our clients who implement our technology and use a Managed Services Provider (MSP) to manage their program. Supplier is the designation used to identify companies that provide contingent workers.
Vendor Management Office (VMO):	An onsite client team that is responsible for managing their non-employee workforce.
W…	
Worker:	Identifies an individual provided by a Supplier for a Client's assignment or project.

X / Y / Z	
X-Consultant ID	A unique identifier for a contract worker. The format can vary by client.