

Continuous Learning: Web Import Tool



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Web Import Tool – Introduction

The **Web Import Tool** feature reduces the amount of time it takes for **client** data to be imported into the Beeline Platform by granting authorized users access rights to manage client production site data. These **Web Import Tool** usage rights are assigned based on the following criteria:

- **Validate Only** – grants users the ability to download an import template file, populate data into it, and then validate the completed file prior to import.
- **Validate with Import Rights** – grants users the same rights as Validate Only plus the right to import validated files into the client’s production or project sites.

Please note: The **Web Import Tool** only validates and imports data that is populated into one of Beeline’s standard import template files.

◆ Primary benefits:

- Gives authorized users the ability to self-manage data imports.
- Reduces turnaround time for importing data into a client production site.

◆ Secondary benefits:

- Enhances skills and knowledge level regarding Beeline Platform data formats and data system requirements.
- Enhances overall knowledge of Beeline Platform functionality and differences based on system user roles.

If you are given Web Import Tool access rights:

Use caution when importing data into any Beeline Platform site; **with great power comes great responsibility!** You will be responsible for **ALL** data you import into **ANY** client Beeline Platform site. This means that **YOU** are responsible for correcting any issues resulting from, or caused by, “bad data” you import into a Beeline Platform production site.

Import / Export Rights

Data in the Beeline Platform is stored in a series of data tables arranged in a hierarchy structure to support system functionality and workflows. To ensure that data is populated into the relevant data table, data can only be imported using a Beeline import template. The process starts by downloading the relevant import template. Templates are revised as needed to ensure that Beeline supports current market practices therefore users should ALWAYS download a new template prior to EVERY import to ensure that the template in use is the most current version.

Once the new/revised data is populated into the template file, the next step is to validate the data by running the file through the validation process. In a perfect world, all files always validate with no errors with the first validation “run”. In the real world, there are several factors that can cause the validation to require multiple “runs”, requiring multiple error adjustments, before a file successfully validates.

Templates that include data fields that are replicated throughout Beeline data hierarchies or templates that include multiple “conditional” fields will be the biggest challenge. Every data field has a single “home” location. However, a data field may be replicated in multiple data tables. Each instance of that field must remain in sync with the value of the “home” location. Some data fields are required due to Beeline data rather than client data, but this data needs to be entered as indicated. The validation process is not only to check data in the import file, but also to verify that it is consistent with the data already populated in the system. Patience is a key factor! The Import Tool is ALWAYS right. Items in the error list must ALWAYS be resolved—and resolved to the Import Tool’s satisfaction. The Errors List is not the enemy. It is the guardian at the gate to ensure that all is well before the import portal will be opened.

A “View Details” option allows users to review the validation results and make adjustments to data entries as indicated. If adjustments are made, the file must be re-validated. **This process is repeated until all data entries pass the validation process.** ALL line items included in any import template data file must successfully validate before the file is ready to import into the Beeline Platform.

The validation process identifies data that meets format or system specifications required within the Beeline Platform. Validation does NOT verify that the content information is accurate—it can only verify that the content matches all system requirements as to data entry format requirements and data table hierarchy specifications. **Verification that the data is accurate is a task reserved to client-side users because the data is, and always remains, the property of the client.**

An Export file can go a long way to simplify the overall validation process since it can “reveal” how data is currently stored in your Beeline instance and therefore serve as a model to follow when creating a new import file. Export files are also frequently referred to as “reverse imports”.

Step-by-step instructions for creating an import file, exporting a reverse import, validating the new import file, and importing the validated file are provided below. A list of the Import Templates is included in the **Appendix** and the list indicates which templates allow for reverse imports. For those templates that do not include export rights, follow the instructions provided in the Header row Comment tags for guidance.

Who is authorized to Import, Export, or Validate?

Reach out to your Program Office for any questions as to import, export, and/or validation rights. These actions are permissions assigned to your user role. Please note: THESE PERMISSIONS ARE INDEPENDENT FROM CERTIFICATION LEVEL TRAINING. Completing Certification level training is not a prerequisite or requirement for the granting of import, export, and/or validations rights. The degree to which you are able to complete the activities included below depends on which permissions are assigned to you. If your permissions only grant you validation rights, then you will need the assistance of someone in the Program Office who has import rights to complete the import process once you have validated the import file. Permissions must be assigned to your profile to enable you to import, export, or validate files. You cannot impersonate a user to import, export, or validate in the **Web Import Tool**. Which Program Office staff are granted which rights is determined by your Program Office managers. Assigning the permissions to a user role profile record requires assistance from your Beeline Representative.

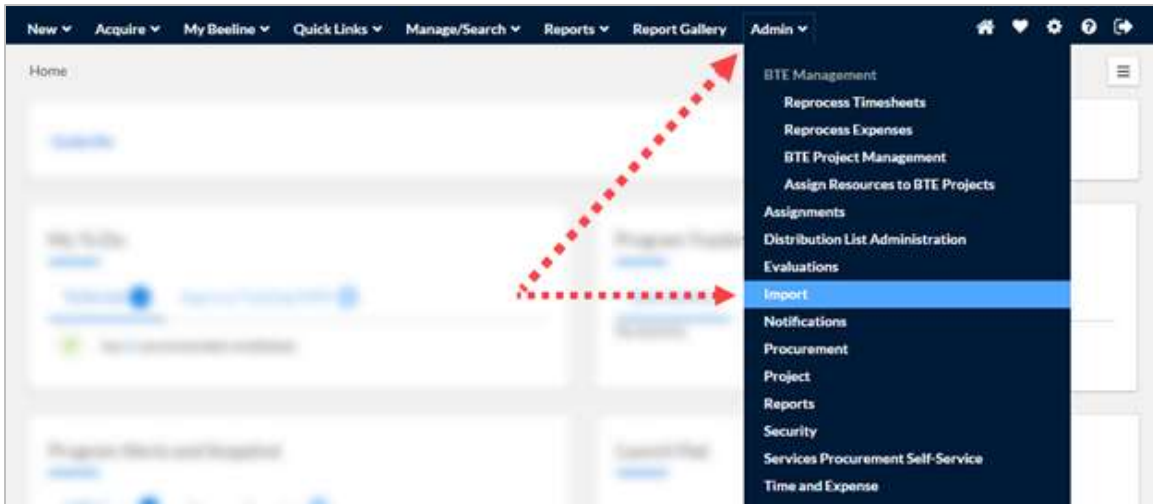
Download the template and populate the data fields.

Access to download an import template file is located under the Admin Header Menu or via the Self-Service Data Management selection list located under the Preferences Menu. Both methods are detailed

below. System configurations and your user role settings determine which access method is available to you.

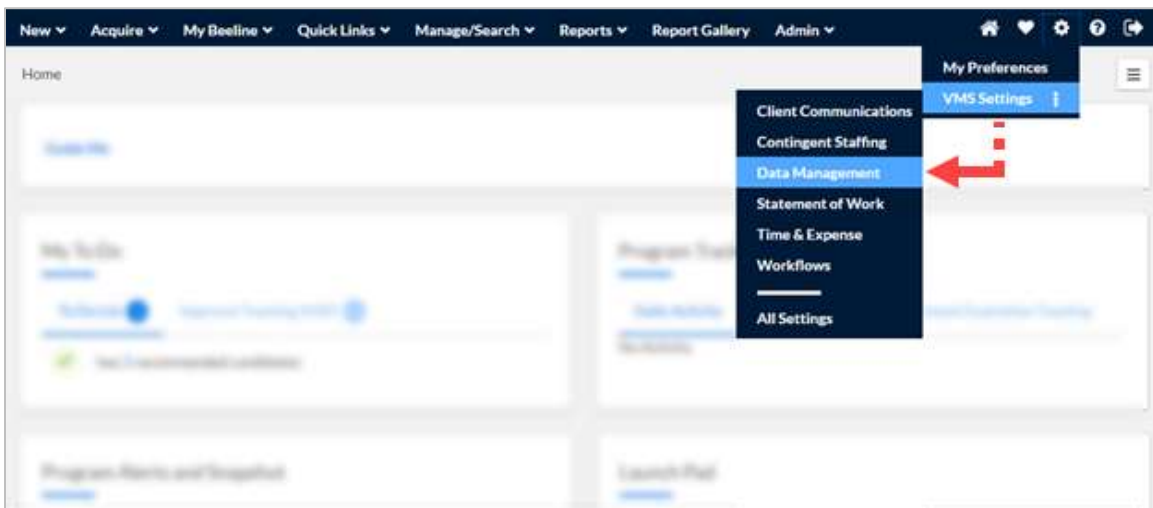
Option 1 – Admin Header Menu:

- From your home dashboard, click **Admin** in the Header Menu bar, then click **Import**. The **Import** screen displays.

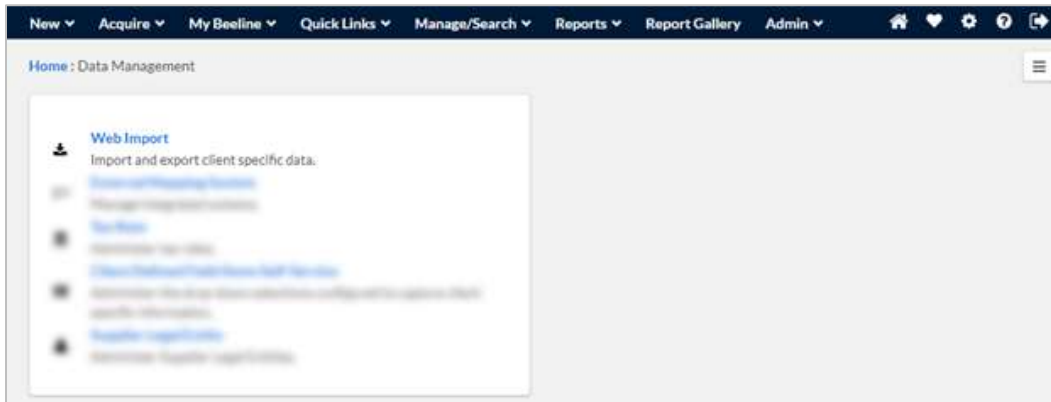


Option 2 – Preferences Menu:

- From your home dashboard, click the gear icon (⚙️) to display the **Preferences** menu.
- Hover over **VMS Settings**, then click **Data Management** in the fly-out panel. The **Data Management** screen displays.

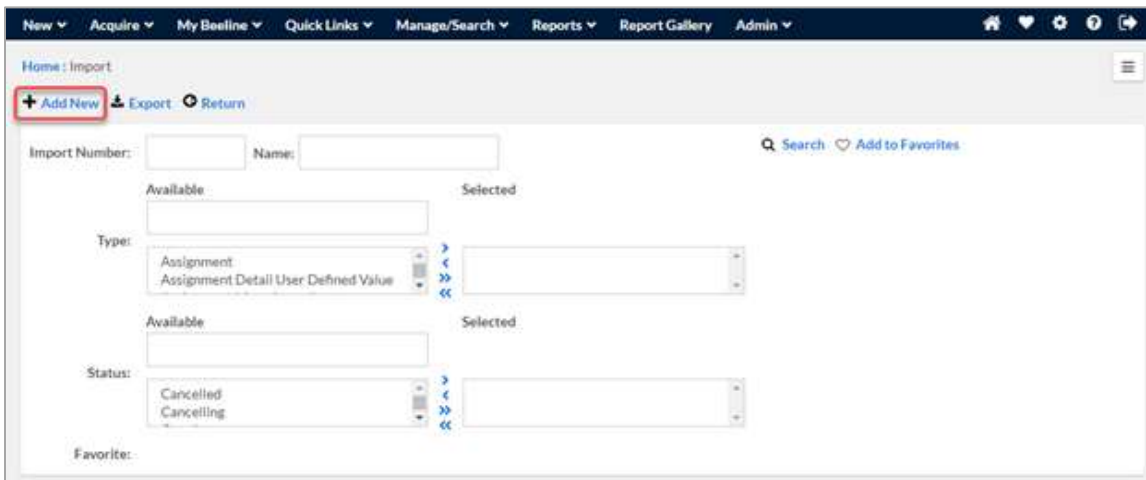



- Click **Web Import** in the list of options. The **Data Management : Import** screen displays.

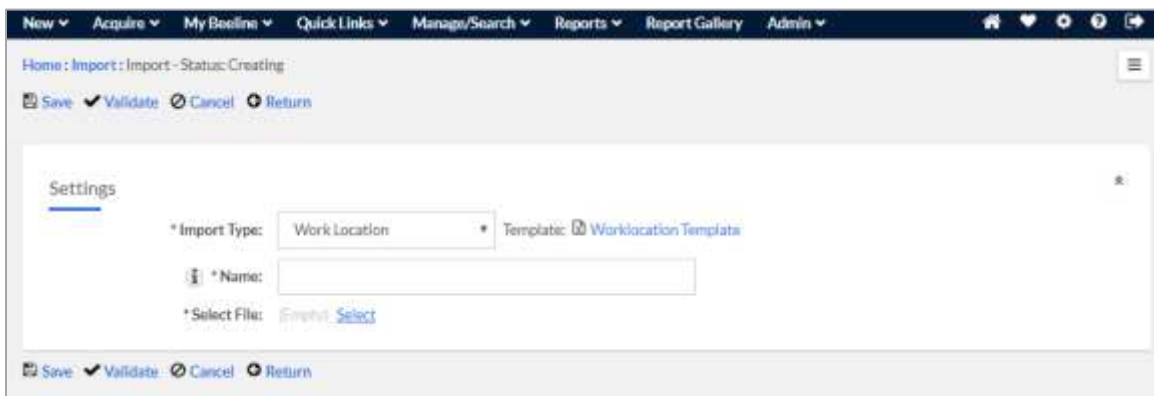
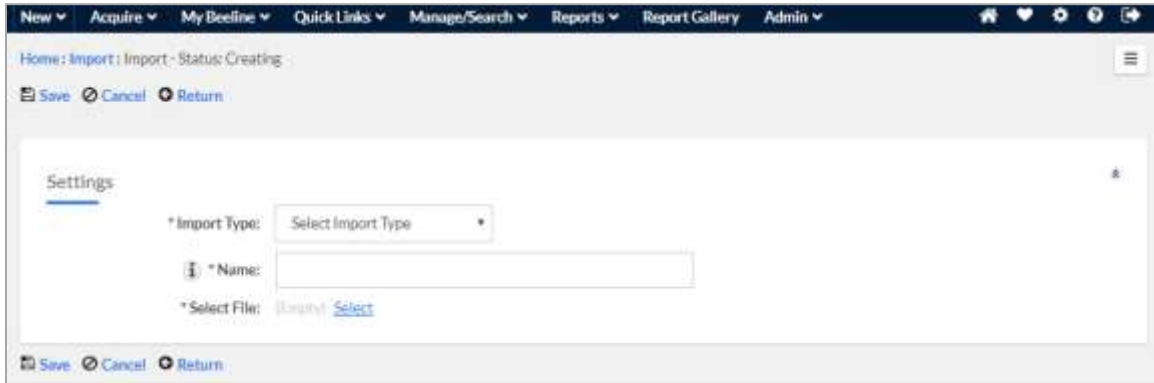


From the Import List screen:

- On the **Import** list screen, click **Add New**. (Note: The **Add New** link is only visible to users granted **Web Import Tool** access rights.) The **Import – Status: Creating** screen displays.



- On the **Import – Status: Creating** screen, expand the **Import Type** drop-down list and select the import template you need. Once your selection is made, a download link for that import template automatically displays to the right of the **Import Type** field as shown in the **second** screenshot below. Notice that the **Validate** button ( **Validate**) is now visible as an Action button as well as the template download link next to the Import Type field.

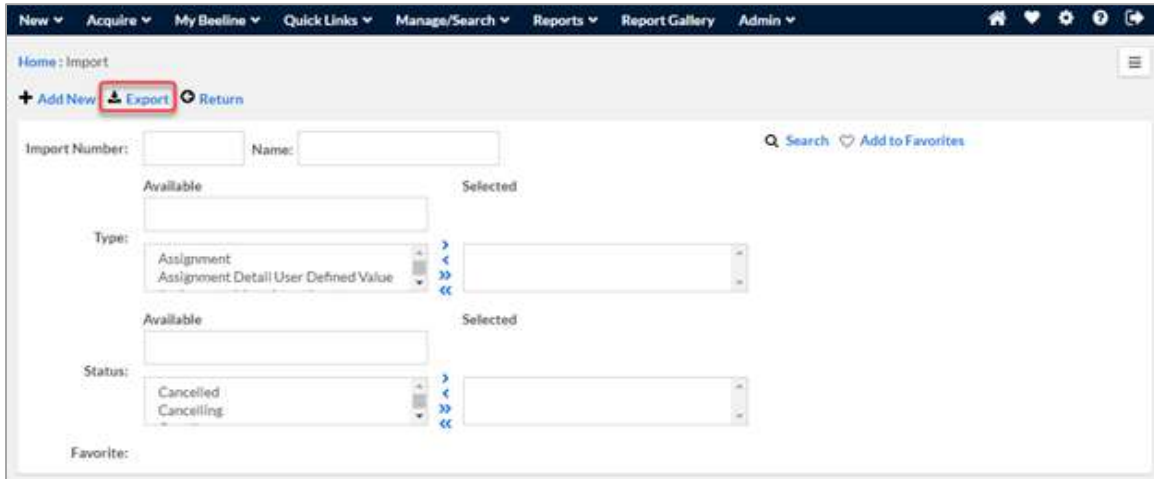


3. Click the template name hyperlink to download the import template.
4. Click **Cancel or Return** to exit the **Import – Status: Creating** screen.
5. Use the “Save As” option to rename and save the template as your import file. Please follow any file-naming conventions required by your program. Use a filename that **CLEARLY** defines the contents of this template file, especially if someone else will be the importer and needs to select the file from the list screen.
6. Follow the format requirements as indicated in the import template’s header row. Simply hover over the header cell in each template column and the requirements display as Comments. Once your data entry into the template is complete, the next step is to validate your data file.
 - *Optional:* Extract a sample file (i.e., reverse import) of your system data to use as a reference aide by following the instructions in the **Export** section below.

Please note: Not all import templates include export rights. Check the **Import/Export Template List** in the **Appendix** to verify if this option is available for your import template.

Export a “reverse import” to use as a reference aide.

1. Use either the **Admin/Import** or the **Preferences/VMS Settings** option explained in the **Download** section above to navigate to the Import list screen.

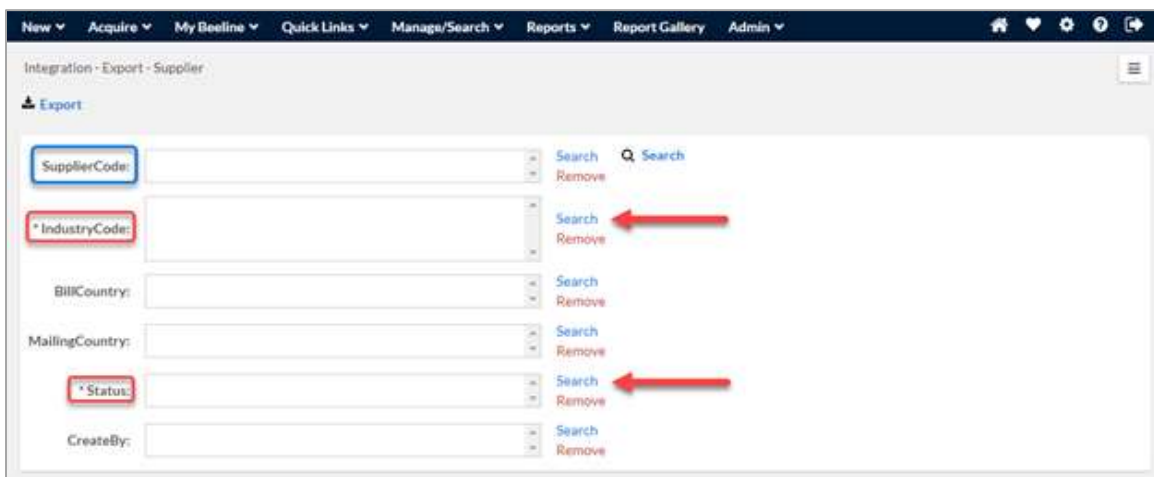


2. Click **Export** (↓ Export). The **Export Screen** displays.

NOTE: If you do not see the **Export** option, reach out to your Program Office for assistance. (Export is a separately assigned user role permission.)

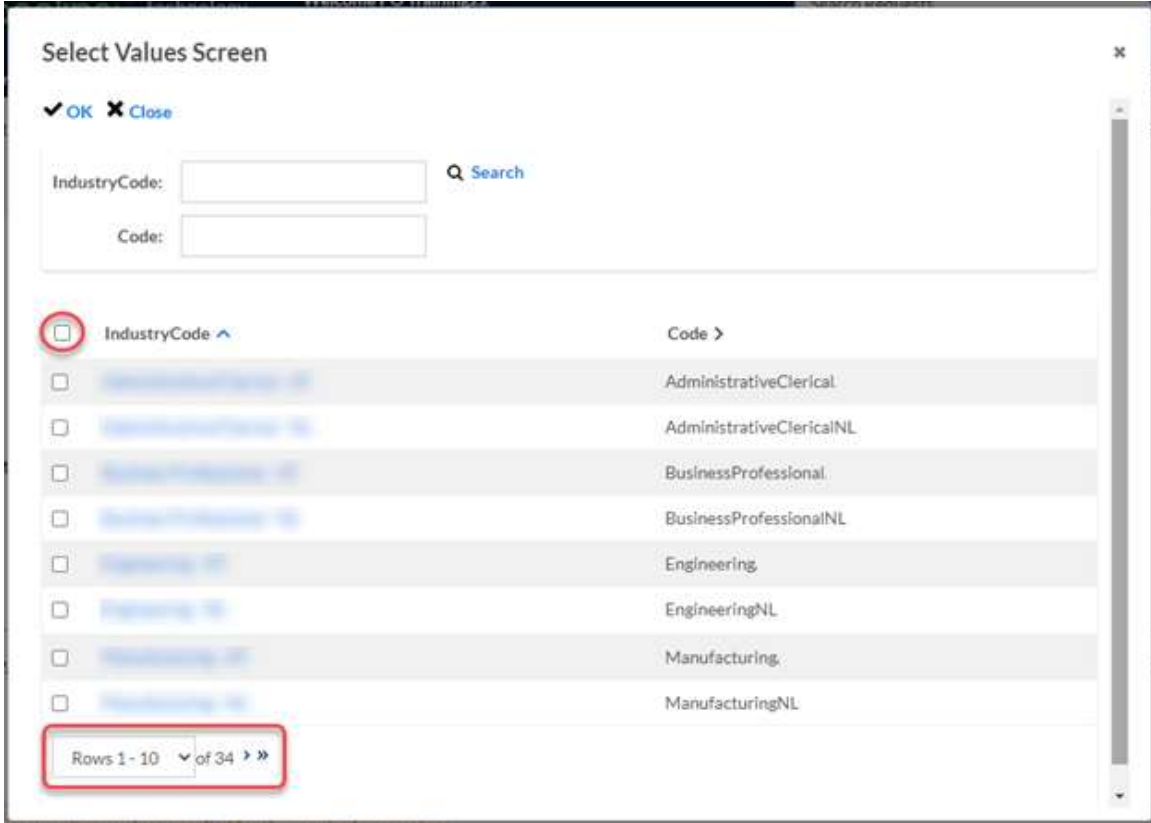



3. Expand the **Export Type** drop-down list and select the export Type to match your intended import. The screen refreshes to display data fields specific to that data template. Notice that **Beeline** required fields are indicated by an asterisk (*). (The example shown below is based on the **Supplier** template.)



4. Click **Search** to the right of each Required field and then make your selections from the pop-up **Select Values Screen** as to which categories should be included in your export file. Use the checkboxes to select individual items or the checkbox in the header row to select all items.

TIP: Check the results total at the bottom of the list to make sure you have reviewed all possible items for your selection list.



5. Click **OK** to save your selections and return to the Export screen.
6. Repeat Steps 4 and 5 until you have made your selections for all Required fields. If you want your export file to include examples of non-Required fields, follow the same process to make your selections. Notice that SupplierCode is not designated as a Required Field. It is required to IMPORT a Supplier record, but not for an export file, although the information would be helpful to use as an example.
7. Now click **Search** ( **Search**) for the entire Export file. The screen refreshes to display a results list to match the selections you made.

Integration - Export - Supplier

Export

+ Search Options

Rows 1 - 20 of 150

Validated >	ValidationComments >	SupplierCode >	SupplierName >	IndustryCode >	Description >
Yes	Existing Data	10041279	Integral Design Resources, Inc	FreescaleProcurementIndustryBusinessProfessional	Staff Augmentation Supplier - US
Yes	Existing Data	10040503	Austin IC Design, Inc	FreescaleProcurementIndustryBusinessProfessional	Staff Augmentation Supplier - US
Yes	Existing Data	842369001	Austin IC Design, Inc, FSL	FreescaleProcurementIndustryBusinessProfessional	Austin IC Design, Inc
Yes	Existing Data	10042219	On-Board Services, Inc	FreescaleProcurementIndustryBusinessProfessional	Staff Augmentation Supplier - US
Yes	Existing Data	2012081000	Accel North America, FSL	FreescaleProcurementIndustryBusinessProfessional	Staff Augmentation Supplier - US

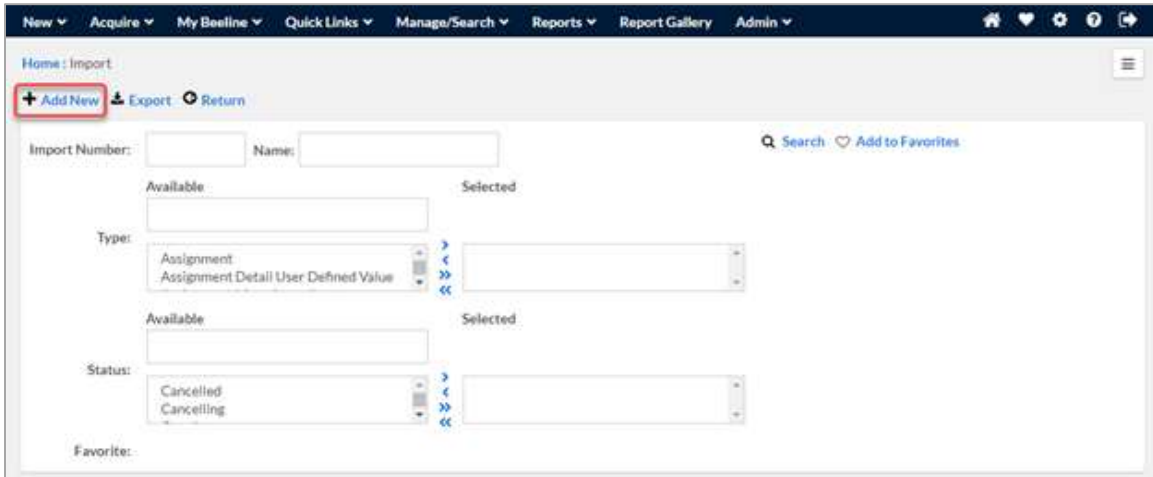
- Review the list and click **Search Options** (+ Search Options) if you need to make adjustments. Notice that the data has been previously validated—which makes it an excellent resource to consult when filling out your import file.
- Click **Export** (Export) to download your file in xlsx format.
- Use standard Excel® practices to open and review your exported file. Not only does the export file show you how data has been entered previously into Beeline data tables; it also provides an example so that your data entries can be consistent and indicates which fields can be left blank without triggering a validation error.

TIP: Export files use a generic filename label. **Save** or **Rename** the file using a filename that is more descriptive for your purposes.

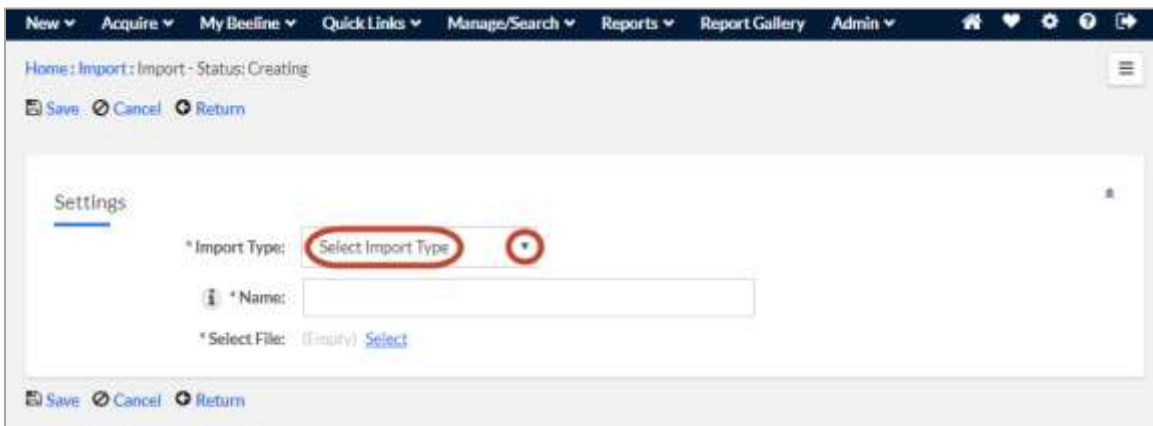
Upload and validate your import file.

- Use either the **Admin/Import** or the **Preferences/VMS Settings** option explained in the **Download** section above to navigate to the Import list screen.
- On the **Import** screen, click **Add New**.

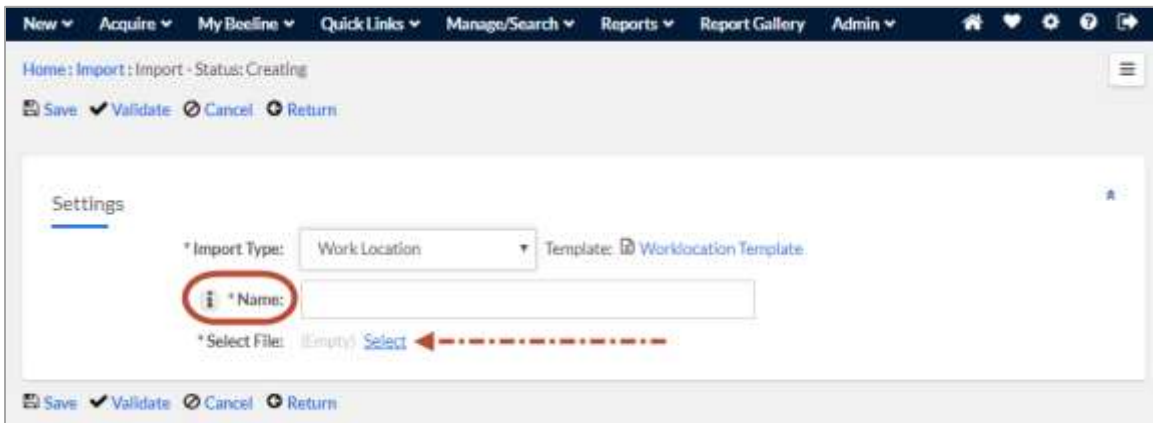
NOTE: The **Add New** link is only visible to users granted **Web Import Tool** access rights. You cannot impersonate a user who has these rights, the permissions must be assigned to YOUR profile record.



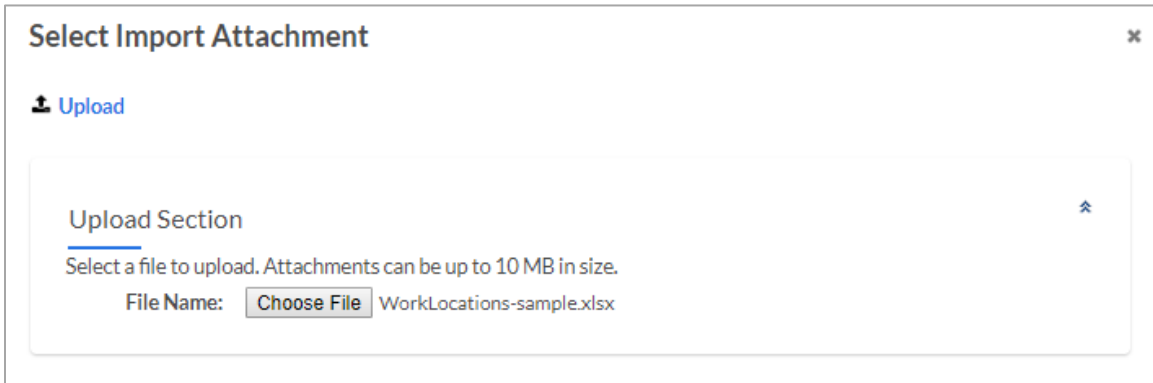
- Expand the **Import Type** drop-down list to select the import “type” that matches your import file.
⚠ Do not leave this field at the default “Select Import Type” setting or your import will not validate properly.



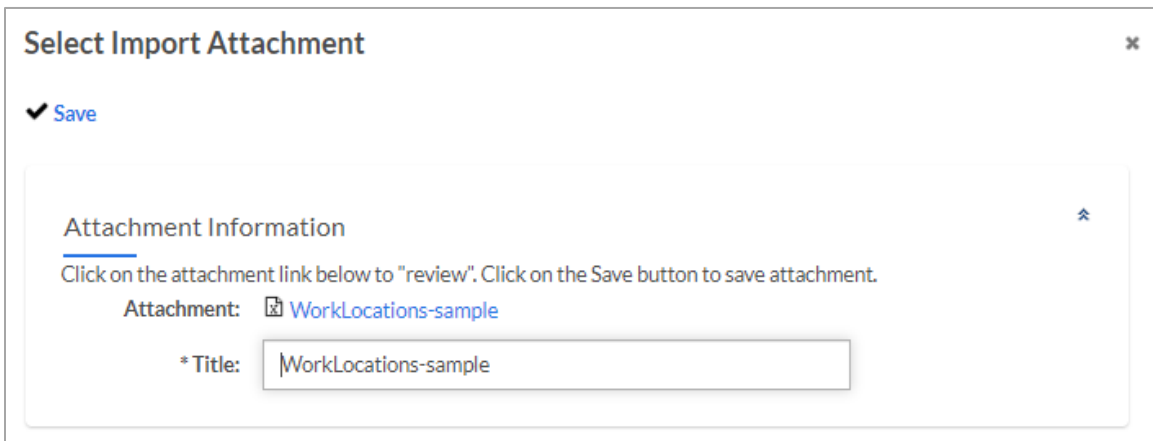
- Enter the name of your import file in the **Name** field. This is now your data-loaded import file you previously downloaded as a template. Follow any file-naming conventions required by your program.
- Click **Select** next to the **Select File** label and use your browse options to locate your import file.



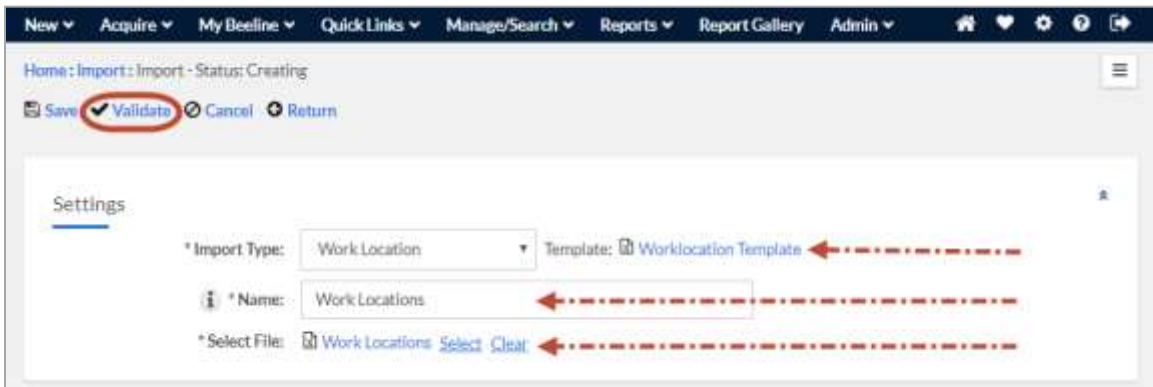
- Click **Upload** in the **Select Import Attachment** pop-up window to import your file.



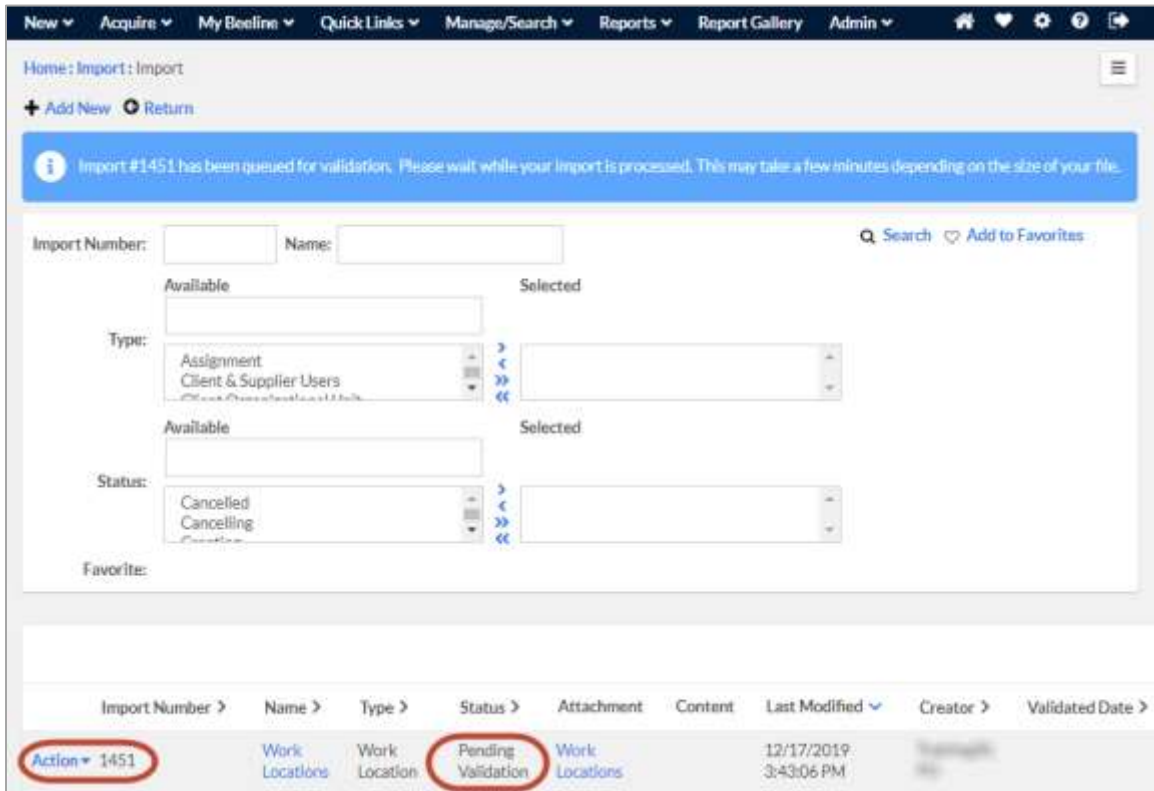
- Click **Save** in the next **Select Import Attachment** pop-up window to complete the import process.
 ⚠️ Notice that this window includes an **Attachment** hyperlink and a **Title** field. You can review your file by clicking the hyperlink or you may adjust the text you entered in the previous **Name** field by entering revised content in this **Title** field.



- The screen refreshes to display the **Import – Status: Creating** screen. Verify that the **Import Type** selection matches your import file “type”. As noted above, do not leave this field at the “Select Import Type” default setting or your import will not validate properly.
- Confirm that the **Name** entry is the filename you want to use for this file. Regardless of the filename you selected during the **Select** process, it saves your file using the content in the **Name or Title** field.



- Click **Validate** to begin the validation process now. Your file is automatically assigned an **Import Number** for tracking purposes and added to the display list on the **Import** screen.
Optional: Click **Save** to store your file to validate at a later time. Use this option when importing large files that need to be processed after standard business hours.
- When you click the **Validate** button, it triggers the validation process. Your file goes into the validation utility queue and the status of your file updates to "Pending Validation". A banner message indicates the status of your file and updates when the validation process is complete. You may leave this screen open to monitor the process of your validation or you may click **Return** to exit and return later. The validation process continues to run in the background.



- During the validation process, the status changes to one of the following options based on the import results:
 - Pending Validation:** File is in queue for validation utility process.
 - Validation Failed:** File has errors that need to be corrected.
 - Validated:** File has passed validation with zero errors.
 - Importing:** File import is in process.
 - Imported:** File has been validated and imported.
- After the validation process is complete, click **View Details** in the **Content** column to open your file and review the validation results. Results display as separate line items.

Import Number >	Name >	Type >	Status >	Attachment	Content	Links	Status Message >	Total Rows >
Action= 1451	Work Locations	Work Location	Validation Failed	Work Locations	View Details	1 3-4	Record import failed. 5 total records: 1 records rejected, 4 records passed.	5

Notice that the **View Details** screen includes two new columns, **Validated** and **Comments**. The **Validated** column indicates a **Yes** or **No**.

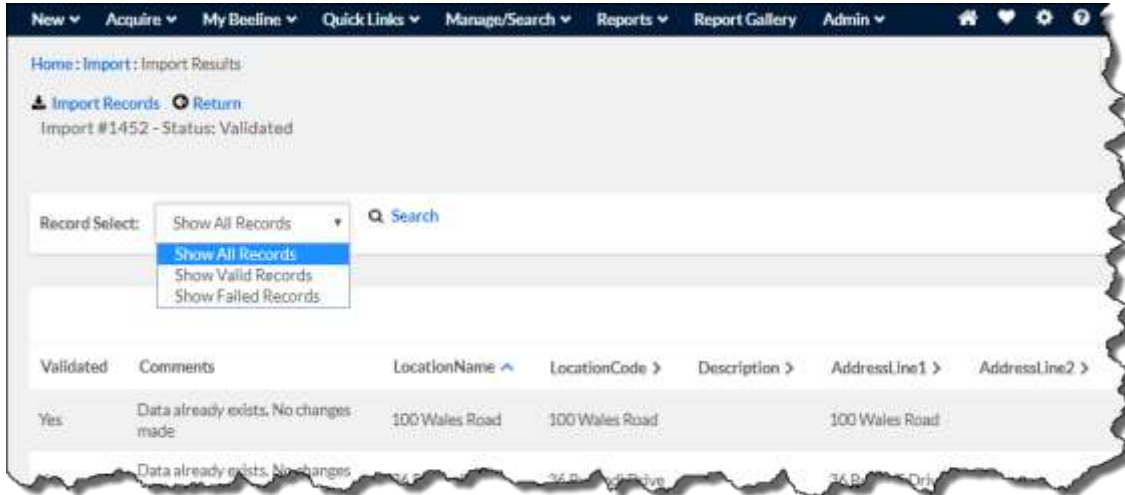
Record import failed. 5 total records: 1 records rejected, 4 records passed.

Import #1451 - Status: Validation Failed										
Record Select: Show All Records Search										
Validated	Comments	LocationName	LocationCode	Description	AddressLine1	AddressLine2	City	State	Zip	Country
Yes	Successfully Inserted WorkLocation	100 Wales Road	100 Wales Road		100 Wales Road		Omaha	NE	68105	US
Yes	Successfully Inserted WorkLocation	36 Burundl Drive	36 Burundl Drive		36 Burundl Drive		Jacksonville	FL	32081	US
Yes	Successfully Inserted WorkLocation	764 Waterloo Way	764 Waterloo Way		764 Waterloo Way		Columbus	OH	65748	US
Yes	Successfully Inserted WorkLocation	94 Cattlemen Trace	94 Cattlemen Trace		94 Cattlemen Trace		Helena	MT	59620	US
No	Value in [Zip] is too long: 10	96 Walden Way	96 Walden Way		96 Walden Way		Burlington	MA	0183322222	US

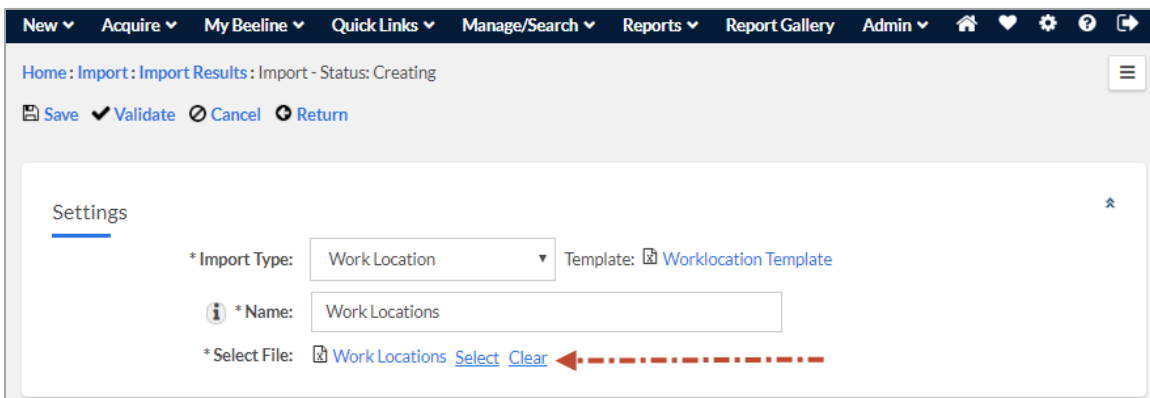
- For all **No** results, review the information in the **Comments** column to determine what adjustments you need to make before you re-validate the import file.
- For all **Yes** results, review the **Comments** information to ensure that the validation result is the **EXPECTED** result.

For example, if your intent was to “add” a new record but the validation comment indicates that the record was “updated” or “replaced”, then you need to check the data in the Beeline Platform to resolve the inconsistency. **REMEMBER**, data can originate from multiple sources and/or users (i.e., manual entry, import file, feed file, utility program, etc..) within the Beeline Platform but all client data is stored within a single production environment. You need to ensure that the data you import is compatible with the data already in place or generated from other sources. Validation results for Timesheet imports are explained in the **Appendix**, “Event-Driven Import Templates” section, since they include “conditions” that are unique to timesheet entry.

14. Use the **Record Select** pull-down menu to filter which records you want to view. Options include Show All Records, Show Valid Records, or Show Failed Records.



15. **If your validation includes failed records**, review the content in the **Comments** column to determine what adjustments need to be made to your original import file. Check the “Beeline CWS Import Error Guide” workbook for additional information related to validation comments and how to resolve them. Each tab in this Excel® workbook is specific to a template. Please be sure to consult the tab that matches your import template. [Click to download this guide.](#)
16. **If your file passes the validation, it is highly recommended that you review all line items in your import file to ensure that the information you plan to import is accurate. The validation process is data processing that checks for FORMATS and Beeline Platform SPECIFICATIONS; it cannot verify that the content entered in the template is accurate information.**
17. When you have finished making adjustments to your template file, click **Reset Status** to exit the validation screen and return to the **Import – Status: Creating** screen.
18. Click **Clear** to remove your prior import file, then use the same **select.** upload, and validate steps to process your revised (i.e., corrected) import file.



19. **Repeat this process until ALL line items in your import file pass validation. Note:** Depending on the complexity of the template, it is normal to go through multiple validation attempts to achieve ultimate success!

Import the successfully validated file.

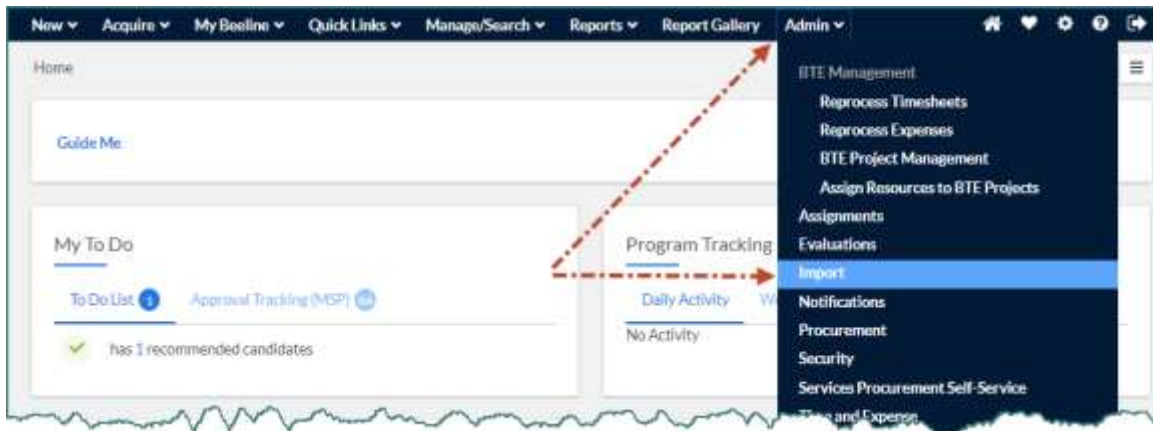
Once all line items in an import file have successfully validated, it is ready for import into a Beeline Platform environment. We strongly recommend that all validated import files be imported into a client-specific test environment (UAT) for review prior to their import into your production environment. Please reach out to your Beeline COM (Client Operations Manager) for assistance with project test environments. Process steps for importing validated files vary based on the assigned **Web Import Tool** usage rights granted to client-side users.

- **Validate Only*** – users with this level of access may validate files but need to reach out to their Program Office to identify who has import rights and can import your validated file.
- **Validate with Import Right*** – users with this level of access have the ability to import validated files.

*If you are not sure whether you have been assigned validation/import permissions, check with your Program Office. If you are tasked with importing a file created by someone else, work with your Program Office as to visibility rights to the file.

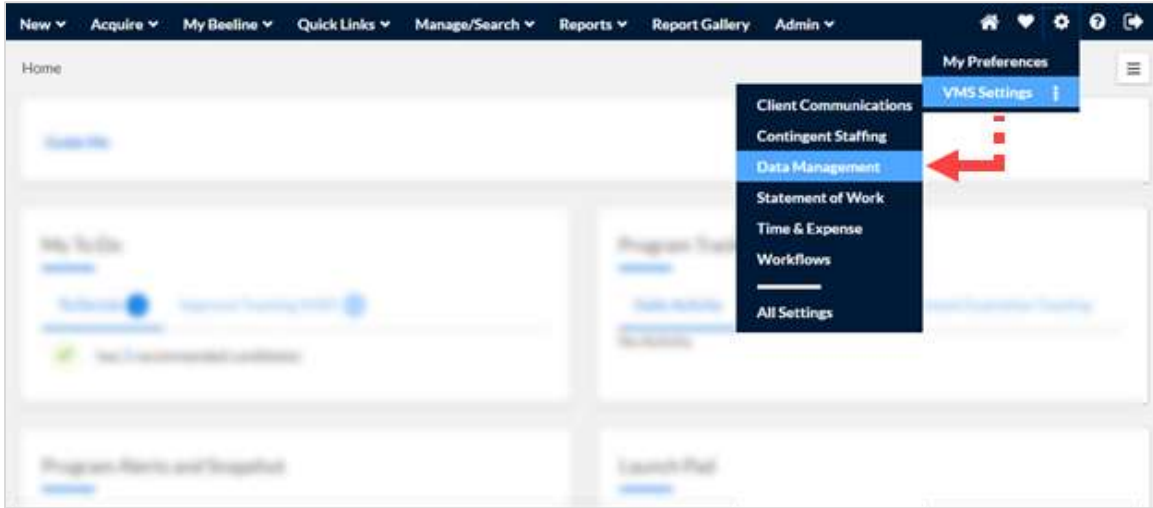
Validate Only - Steps to Import:

1. Use either the **Admin/Import** or the **Preferences/VMS Settings** option explained in the **Download** section of this document to navigate to the Import list screen.

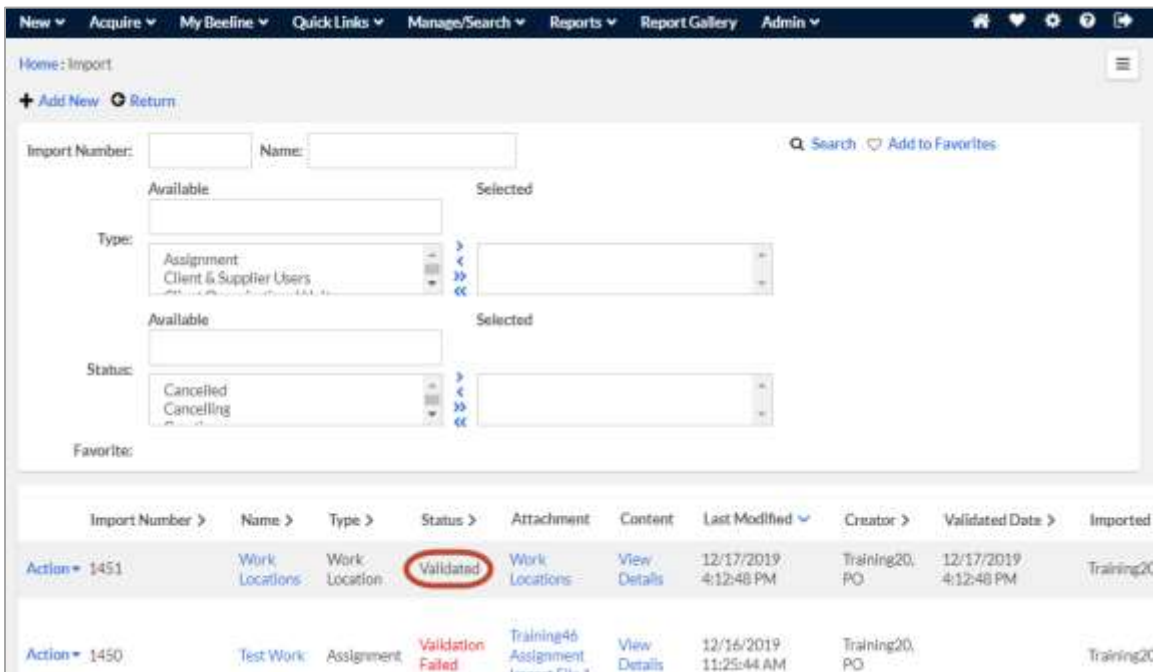


OR

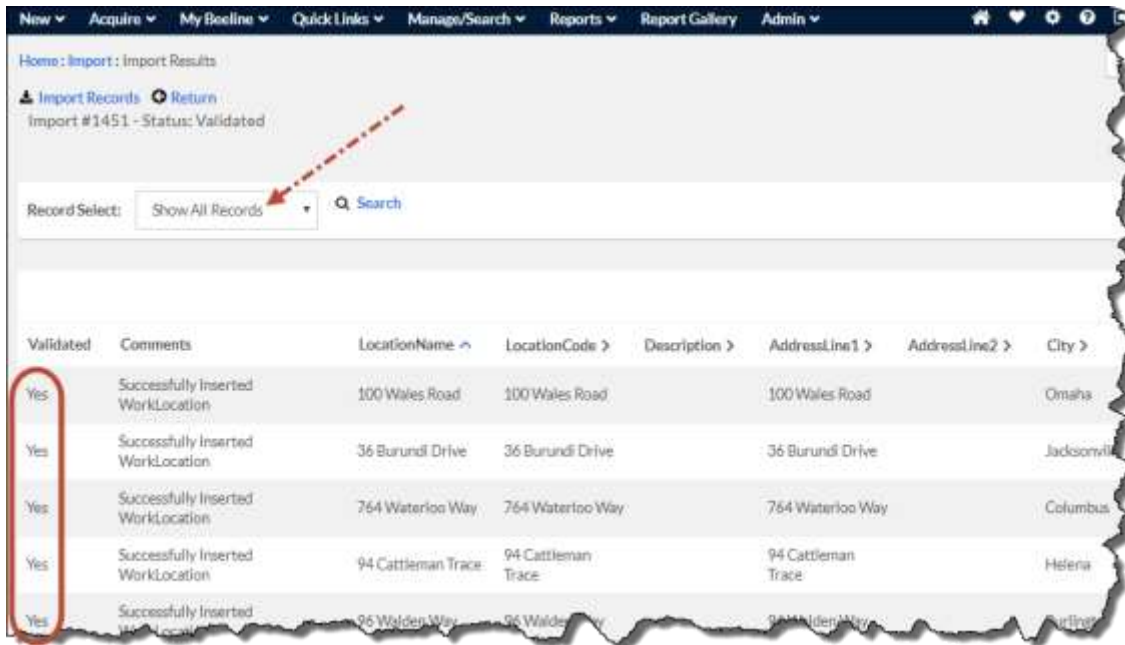




2. On the **Import** screen, locate the file to be imported in the displayed list or use the Search Options to locate the file.
3. Verify that the file status indicates “validated”.



- Click **View Details** in the **Content** column. The screen refreshes to the **Import Results** screen.



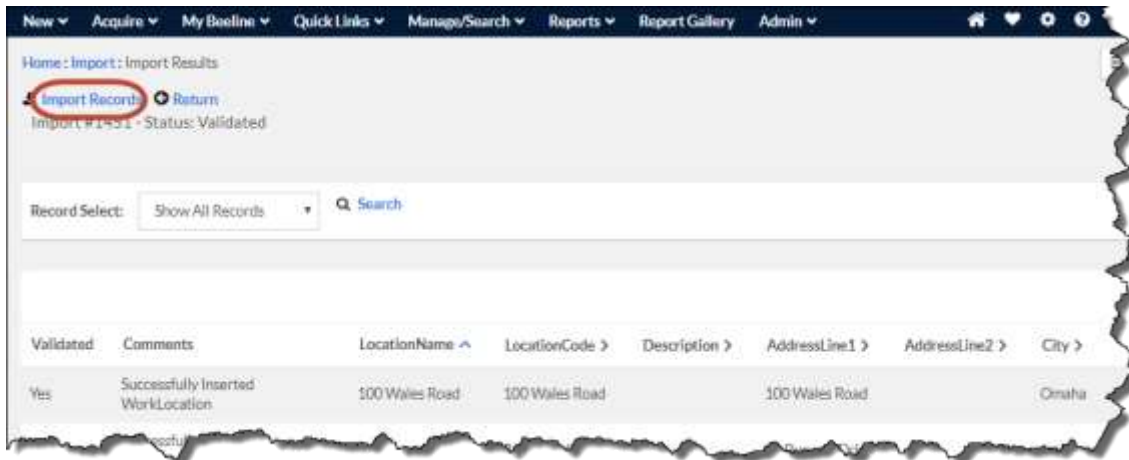
- Confirm that the **Record Select** field is set to “Show All Records” and that all displayed line items indicate “Yes” in the **Validated** column.
- Review all line items in your import file to ensure that the information you plan to import is accurate. The validation process verifies the data meets FORMAT and Beeline Platform REQUIREMENTS; it cannot verify that the data is accurate information.**
- Notify the designated Importer that the file is validated and ready for import; include the file number.
NOTE: Each Program Office should have at least one user who has import rights.

Validate with Import Rights - Steps to Import:

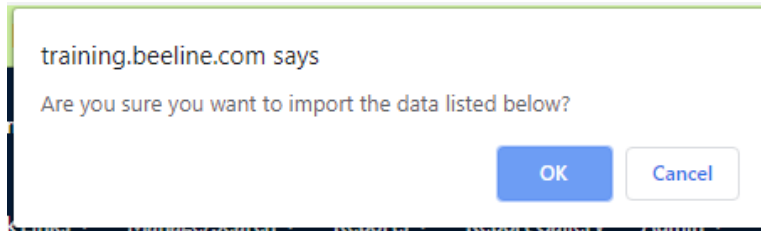
- Use either the **Admin/Import** or the **Preferences/VMS Settings** option explained in the **Download** section of this document to navigate to the Import list screen.
- Complete Steps 2 through 6 as described in the “Validate Only” section above.
- Review all line items in the import file to ensure that the information you plan to import is accurate. The validation process is data processing that checks for FORMATS and Beeline Platform SPECIFICATIONS; it cannot verify that the content entered in the template is accurate information.** You will be prompted during the import process to accept responsibility for the data you import—including any fees assessed to “correct” imported data errors.



4. Click **Import Records** to begin the import process.

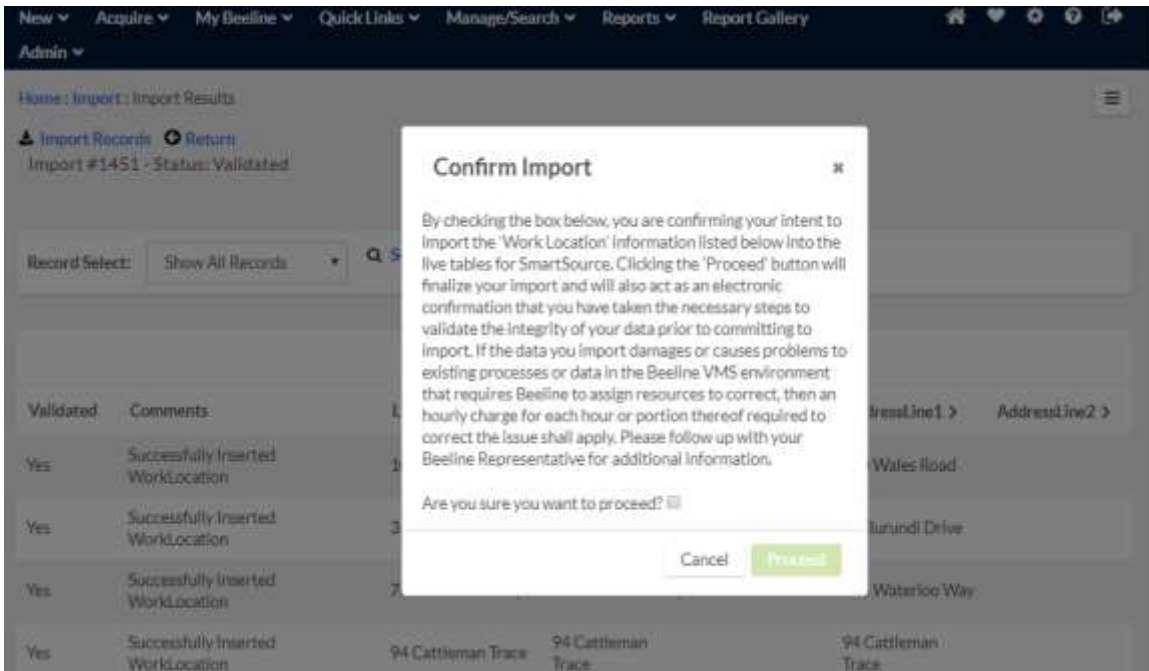


5. A pop-up window displays requesting confirmation. Click **OK** to proceed.

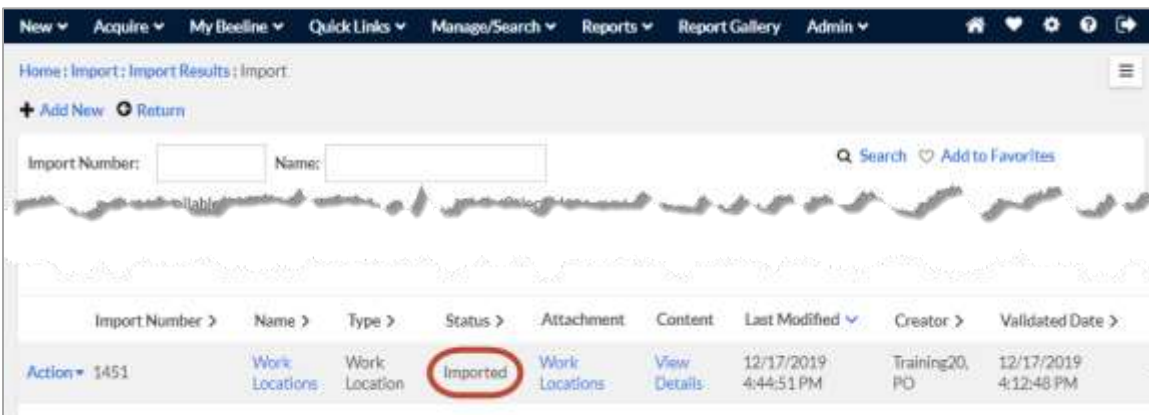


6. A **second** confirmation pop-up window appears. This window includes a checkbox to indicate that you wish to proceed and that you accept responsibility for the data you are about to import. Click the

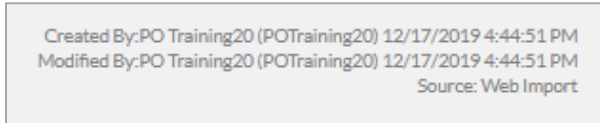
checkbox and then click **Proceed** (**Proceed**) to continue. **Note:** each import process requires acceptance on BOTH confirmation windows.




- The screen refreshes back to the **Import** screen. A status banner indicates that your file is queued for import. The status message updates when the import process is complete. The status of the file updates to: Imported. You may leave this screen open to monitor the process of your import or you may click **Return** to exit and return later. The import process continues to run in the background.



- Once completed, import results can be verified by locating any of the imported records using any of the Header Menu bar options (e.g., Manage Search or Admin/Security). Locate a record you imported and then scroll down to the lower right corner of the record and you will see information that indicates the user, the date, and the time the record was "Created By" and "Modified By". It will also indicate that the "Source" was a "Web Import".



ADVISORY CONTENT:

- **REQUIRED FIELDS:** When you open the downloaded template file, hover over each column header field to view instructions on how to enter data into the template.
Note: required fields for data **updates** are indicated by an asterisk (*) in the column header. Required fields for **new** records are noted when you hover over the header row comment tags.
- **CLIENT REQUIRED FIELDS:** As noted, required fields are identified by an asterisk or in the Comment tags but your program may have additional fields that are “required” for your specific program but are not designated as such on the templates. For example, the Cost Center Owner is not a required field but for some clients the Cost Center Owner is the Timesheet Approver, which makes this field “required” for that program’s purposes. Be aware of any instances where your program might have un-designated “required” fields and make sure you enter template data accordingly.
- **STORED TEMPLATES:**  Templates are subject to change without notice so ALWAYS download a new template file for each import process to make sure you are using the most current version!
As a “best practice”, however, you should download and store copies of all import files in a location that is accessible to all Program Office staff who have **Web import Tool** access rights. These files can be used to track your system updates and as a sample file to create new import files in the future—take care to use a new download of the template and not just a copy/paste of this previous file to ensure that the new file reflects CURRENT data settings. Do not rely on the files stored within the Beeline Platform because they are purged on a regular basis.
- **“CREATOR” vs. “IMPORTER”:** If the person who creates/validates the import file does not have import rights, then the Program Office manager with visibility to all import files (i.e., Admin – Import View All) needs to facilitate access to the validated file so that the designated Importer can access the file from the Import List screen and complete the import process.
- **COMMENT TAGS:** Follow the instructions in the Comment tags attached to the Header fields as to data entry requirements. Failure to do so will cause your import file validation to fail. Remember—you are responsible for **ALL** data you import into **ANY** client production site. This means that **YOU** will be responsible for correcting any issues resulting from, or caused by, “bad data” you import into a Beeline Platform production site. Take the time to ensure that the data you populate into an import template is the CORRECT data. The time and effort it takes to “correct” data after it is imported is never time well-spent and should any of this data get associated to a finance-related record, it can never be deleted since all finance-related records are retained in the financial datawarehouse for audit purposes.
- **WHICH IMPORT PRECEEDS ANOTHER:** Be aware that some templates are more complex than others and some templates need to be imported in a specific order. There are too many details to list them all here. Check the **Data Imports: How to Guide** section in the **Appendix** for guidance.
- **ADJUSTMENTS TO THE TEMPLATE LAYOUT:** NEVER change the arrangement of the columns, add or delete columns, or hide columns in a template. If it is not designated as a required field and it is not a field that is relevant to your program, then leave it blank. The validation tool requires that ALL template fields are included on every import file and that the fields are arranged in the same order as the default template.
- **RATE CARD IMPORTS:** All Rate Card imports must include a default rate card and the line items for the default rate card must be listed BEFORE supplier-specific rate cards. The only exception is when

ALL requisitions will be released to the SAME supplier, which is a rare event. The default rate card is assigned to the initial request; the supplier-specific rate cards are assigned to the respective candidate submit.

- DATA FIELDS WITH “NAMES”:** The importance of consistent data entry when populating “Name” fields cannot be overstated. Examples include First Name, Last Name, or Middle Name, but it could apply to any data field used as a “name” label. Develop standard protocols and enforce them! Avoid duplicate entries since they can negatively impact downstream system functionality such as Resource Matching, Tenure Tracking, Candidate History, budget-related reporting, report results in general, and Beeline Analytics reports. Remember, the Import Tool is a processor that validates data based on format and Beeline requirements. This data populates throughout the Beeline Platform including dashboards, <search> results lists, system reports, and Beeline Analytics so the importance of proper data entry cannot be overstated!

For example: JOSE VALDEZ, Jose Valdez, jose valdez, and José Valdez could be the very same person, but the system processes these names based on format and therefore would create a separate record for each format (e.g., ALL CAPS, Mixed Case, lowercase, names with diacritic letters). If you copy/paste name entries from a third-party source, take care that the original does not include letters with diacritics or characters that are not standard to an English language keyboard. In the digital world, every letter has a unique code and EVERY variation of that letter has a unique code as well. Therefore, E, e, é represent three different unique codes. The system accepts the text as entered and although the subsequent record can be selected/submitted, any <search> will never generate a “match” since a standard English keyboard does not include diacritic letters or non-standard special characters. Search results will be an **EXACT** match to your **typed** entry.

- HYPHENS AND DASHES:** A variation on the avoidance of diacritics described above, is the careful use of hyphens to separate words. Use a single hyphen and ONLY a single hyphen, never two adjacent hyphens. Why? Because Word® and Excel® frequently convert hyphens used as spacers to either an “en” dash or an “em” dash and the validation process typically accepts one format but not the other. A hyphen is the width of a single space, an “en” dash is a space and a half, while an “em” dash is two spaces in width. Stick with a single hyphen and your entries should not end up in the Error List.

Hyphen	En Dash	Em Dash
-	–	—
Used for combined words and to separate numbers that are not inclusive (e.g., phone numbers, 803-773-1212).	Used for date ranges or in mathematical formulas. January 1 – June 30	Used to emphasize a strong break in the content of a sentence.

- COMMAS WITHIN A DATA FIELD:** Traditionally, the most common format for a data export file was .csv (comma separated value) since it was the standard export format for Excel. The format has changed to xlsx but care still needs to be taken with how you use a Beeline export file as an import into a third-party system. If the third-party system is based on .csv functionality, the import will
 at every comma by shifting to the next column. If you include a comma WITHIN a data field, the column alignment in your third-party file will be out of alignment because the import process will
 at the comma entered, rather than the end of the data field. This is frequently encountered with Last Name data fields. John Smith, Jr. should have a Last Name data entry of Smith Jr., not Smith, Jr in order to avoid the potential for this error. In general, it is best to avoid using any

punctuation internally in any data field that could be used as the delimiter in an extract/import process to ensure the transfer of data runs as smoothly as possible.

- **SORT ORDERS:** The visible display for any <search> results list is alphabetical for text and descending numeric for numbers. Depending on several factors (program language, code, server settings) an alphabetical list could be separated into sections based on the format used for the letters. In a strict ASCII (American Standard Code for Information Interchange) sort (i.e., ACSIIbetical), all UPPERCASE letters precede all lowercase letters precede all Mixed Case letters—and numbers precede all letters. If you consider the case of Jose Valdez (See: **DATA FIELDS WITH “NAMES”** entry above.), this could result in three separate sections in a single alphabetical list—the all caps items would sort first, followed by the all lower case items, and the mixed case items at the end. Just be mindful when working with data from other systems that the data you import into Beeline should generate a SINGLE sort in the results list.
- **LEADING INDICATORS:** Supplier company names that begin with “A”, “An”, or “The” can be problematic in alphabetical lists. A, An, and The are known as leading indicators. Since digital processing has no comprehension of the meaning of words, it treats these letters like any other, even though to the human reader, their usage in this instance is strictly grammatical. A and An are the least problematic since they alpha sort near the top of your Supplier list—“The” is the problem of the trio. **The Eastridge Group** is the legal name of a staffing agency. The template instructs you to enter the Supplier’s legal name. If your Supplier list requires significant scrolling, how many of your users are going to scroll down to the “T” section when looking for this Supplier—especially when they scrolled through the “E” section first and saw no entry for “Eastridge”? And how long before someone creates a separate Supplier profile for “Eastridge Group”—which risks negatively impacting system report results, not to mention budget and invoice tracking since you now have TWO profiles for the same Supplier. Spare yourselves the misery! Develop a Program Office policy for leading indicators and broadcast it to all users so they know where in a list to look for these “exceptions”.
- **FEED / INTEGRATION FILES:** Does your program use feeds or integration files to update your client data? If so, factor that into your manual import process. Client Users, OUs, and Cost Centers are the most common feed files, however there can be a variety of others. Depending on the settings/actions assigned to the integration process, the data you processed in an import file could easily be changed by a subsequent scheduled feed or integration. Check with your Program Office as to scheduled feeds or integrations to avoid overlays.

Appendix

Import/Export Template List

Template	Includes Export Option
Assignment	Y
Assignment Cost Allocation	
Assignment Cost Allocation C#	
Assignment Detail User Defined Value	Y
Assignment Mass Amendment	
Assignment Misc Fee	
Assignment Pay Package	
Assignment SLIP	
Assignment Time System Cost Center	
Background Check Provider	
Client & Supplier Users	Y
Client Organization Unit	Y
Cost Allocation Segment Combination	
Cost Allocation Unit Segment	
Cost Center	Y
Country State	Y
Currency Exchange	Y
Delegates	Y
Expense	Y
Functional Partition	Y
Functional Partition Business Area	Y
General Ledger	Y
Job Class	Y
MSP Organization Unit	Y
MSP User	Y
Natural Account	Y
OU Approver	Y
PO Upload	Y
Procurement Client	
Procurement Market Rate	
Project	Y
Project Approvers	Y
Project BTE	Y
Project Milestone Payment	Y

Template	Includes Export Option
Project Resource Assignment BTE	Y
Project Task BTE	Y
Project Type BTE	Y
Projects and Services	Y
Projects and Services Cost Allocation	
Rate Card	Y
Rate Card Category	Y
Report Field	Y
Request	Y
Request Cost Allocation	
Request Skills	Y
Request Template	Y
Resource	Y
Resource Email	Y
Resource Phone	Y
Resource Profile Update	Y
Resource User Contact Information	Y
Resource Skills	Y
Securable Data	
Settlement Supplier Number	Y
Signing Limit	Y
Skills Template	Y
Source Location	Y
SOW Draft Import	Y
Supplier	Y
Supplier Sub Category	Y
Supplier Tax Registration	Y
Supplier Users	Y
Terminology Keys and Values	Y
Timesheet	Y
User Defined Items	Y
User External ID Change	Y
User Name Change	Y
Work Location	Y
Work Location Region Mapping	Y
Work Order	Y
Worker ID Upload	Y
User Defined Value	Y

Data Imports: How to Guide

This guide lists the data import templates in the order in which they should be imported in the Beeline Platform. The table layout for each template includes a separate column for Field Name, Comments, Character Limit, and Column.

Field Names are color-coded as follows:

- **Yellow** - required Client data
- **Green** - required Beeline data
- **Gray** - optional data



Field Name	Comments:	Character Limit	Column
OU Code	Code of the Organizational Unit being created.	50	A
OU Name	Name of the Organizational Unit Being Created. Required for new Organization Units or Organizations. OU name must be unique.	255	B
OU Description	Description of the Organizational Unit.	255	C
OU Type Name	Name of the Type of Organizational Unit (Examples: Department, Organization, Business Unit) This value must	255	D

[Click to download guide.](#)

Text headers highlight advisory content as follows:

- **Purpose** - indicates what type of information is to be imported and how that data reacts in the system
- **be in sync** - provides special hints to use when entering data into a template
- **be advised** - provides additional information or helpful tips

Data Template Samples

Sample files for some of the data templates are provided below. [Click any data template name to download the file.](#)

NOTE: These sample files are listed in alphabetical order by data template name. **They are provided for instructional purposes only. ALWAYS** download and use the standard **Beeline Import Template** from the **Web Import Tool** to ensure you are using the latest version of each template.

Data Templates - Samples		
Assignment Cost Allocation	Job Class Title and RC Class	Skills

Data Templates - Samples		
Assignment Detail UDV	MSP User	Suppliers
Assignments	Project BTE	Suppliers Users
Client Organizational Units	Project Task BTE	Tax Definition
Client Users	Rate Card	Timesheets
Cost Centers	Rate Card Categories	User Defined Items
Country State	Request Template	User Defined Value
Functional Partition Business Area	Resources	Work Location Region Mapping
Functional Partition	Resource User Contact Info	Work Locations
General Ledger	Signing Limit	

Standard State and Country Codes

Standard Code Lists for State and Country Codes, US County Codes, and Country/ISO Codes are provided below. Use of codes should be consistent throughout your data tables.

Standard Codes		
State and Country Codes	US County Codes	Country/ISO Codes

Validation Errors

The import tool validation process checks the data that was entered in the template and then saved as the import file to determine if it meets the data requirements of the Beeline Platform. Any line item in the file with data that does not match the expected format rules and inclusion requirements will generate an “error”. All errors need to be resolved before the file is ready to import. An error may be based on a single data field in that line item (i.e., record) or it may be related to data entered in a preceding field when there

are several data fields that are inter-related. In these instances, resolving a single data field error may eliminate the “error” status of the related data fields. **You may need to repeat the validation process several times before you have a file that “passes” without any errors.** Our **Beeline CWS Import Error Guide** (see hyperlink below) lists the most common errors and how to resolve them.

[Click to download](#) the **Beeline CWS Import Error Guide workbook**.

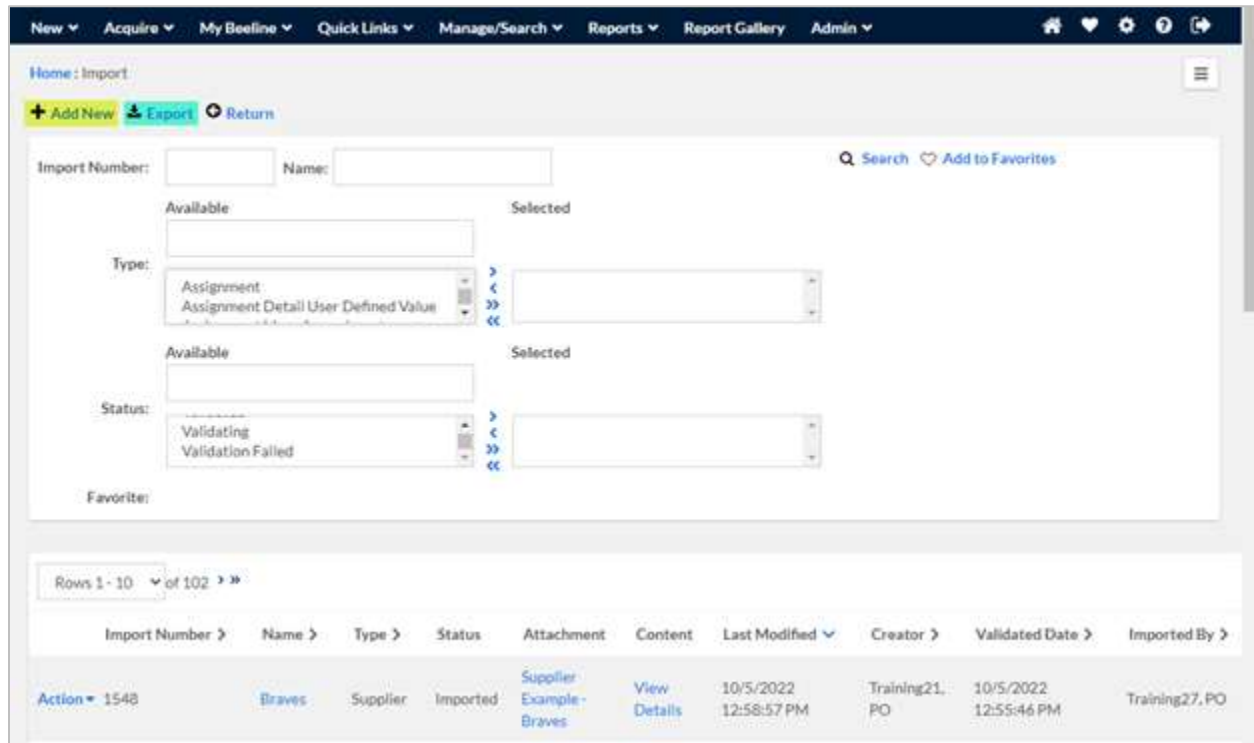
	A	B	C
	ERROR MESSAGE	DESCRIPTION	HOW TO RESOLVE
1	Industry is required	Feed's industry code value not provided	Provide value to feed's IndustryCode
2	Invalid Industry	Can't find matching industry	Feed's IndustryCode should have matching industry in the system.
3	[Job Class Code] is required	Feed's job class code value not provided	Provide value to feed's job class code
4	Value in [Job Class Code] is too long. <MaxCharLength> maximum allowed	# of characters of feed's job class code exceed the max length allowed in db	Job class code char length should be 255
5	DisplayOrder not numeric	DisplayOrder value not numeric	Should be numeric in value
6	[Job Class Name] is required	For new record, job class name is required	If new record job class name is required in the feed
7	Value in [Job Class Name] is too long. <MaxCharLength> maximum allowed	# of characters of feed's job class name exceed the max length allowed in db	Job class name char length should be 255
8			

The **Overview** tab (first tab) is an index to all the imports that are included in the guide. Click the hyperlink or the tab to go to a specific import template error list.

Each list includes:

- **ERROR MESSAGE** (Column A) – The displayed error message should match the message in the “No” items on the View Details screen.
- **DESCRIPTION** (Column B) – This is an explanation of the error or what caused the error. In some instances, it may be a repeat of the content in Column A. These descriptions are created by Beeline staff who specialize in database management so the terminology is frequently technical in nature.
- **HOW TO RESOLVE** (Column C) – This content explains how to resolve/correct the validation error.

Import (screen details)



The **Import** screen is the portal to all **Web Import Tool** activity. The row below the screen title includes the action buttons (e.g., Add New, Export, and Return). The top section of the screen displays search options/filters for locating previously imported data files. The list in the bottom section displays your “working” data files. Note that you can search by **Import Number** and **Name** but otherwise the functionality is standard Beeline Platform. Once you click the **Add New** button, you will advance to screens where the functionality is specific to validation and import processes. Take care to review and verify all data entered and all setting adjustments as they have the potential to impact data in your production environment, which in turn can impact Beeline Platform reports and analytics visualizations.

BE AWARE – The retention timeframe for these files is managed by the attachment clean-up process. This is based on a 30-day cycle where older files are automatically deleted from the Beeline Platform server. However, **processed file data** is only retained for 14 days.

As a “best practice”, we recommend that you download and stored copies of all your import files in a location that is accessible to all your Program Office staff who have **Web import Tool** access rights. These files can be used to track your system updates and as a sample file to create new import files—however, care should be taken that all new files reflect CURRENT data and not just a copy/paste of a previous file.

Import – Status: Creating (screen details)

1 Functions:

- Save Use “save” when you need to import and validate your file at a later time.
- Validate Use “validate” to start the validation process for a recently uploaded or saved file.
- Cancel Use “cancel” to back out of a validation process.
- Return Use “return” to exit the **Import – Status: Creating** screen and return to the **Import** screen.

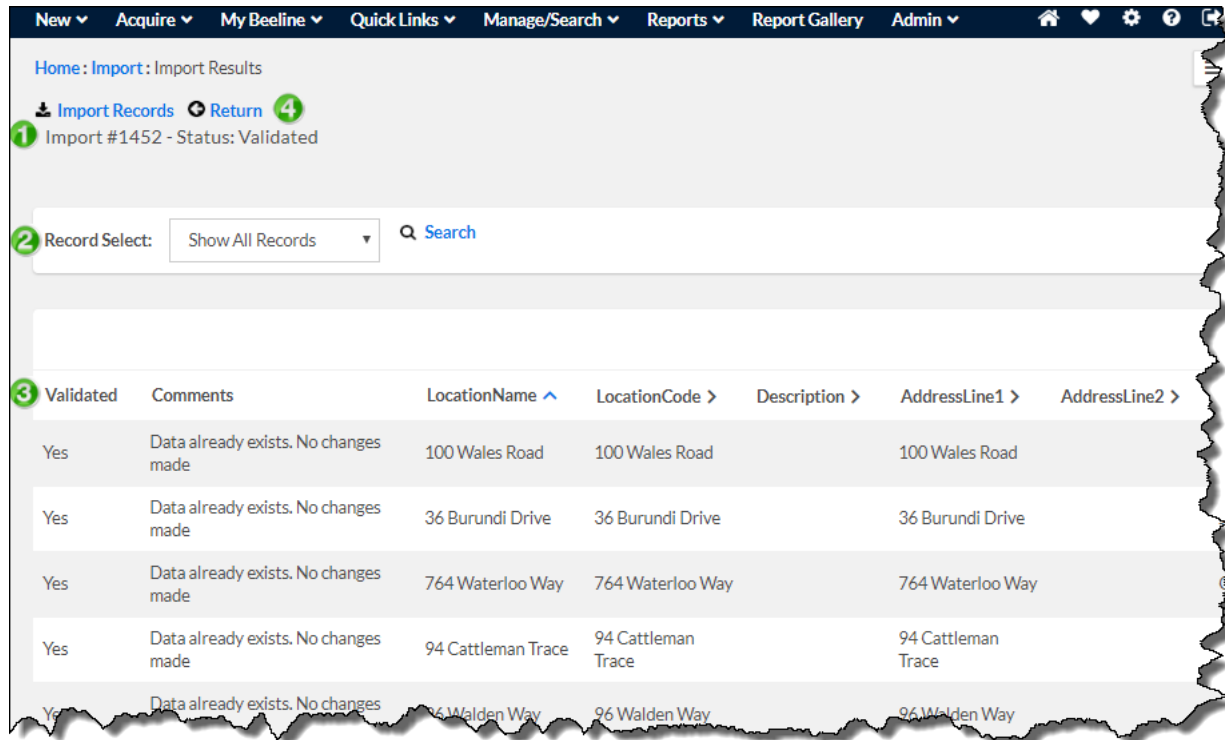
2 Fields:

- Import Type:** This is a required field. Use the pull-down selection list to indicate the Import Type. Do not leave this set at the default value when you validate; it will cause errors.
- Name:** This is a required field. The “name” entered here will replace the uploaded filename.
- Select File:** Technically this is not a field. It displays the name of your upload file and includes links to import (Select) or delete (Clear) files you plan to validate.

3 Links:

- Template:** When you select an Import Type, the template link automatically displays to the right of this field. Use the hyperlink to ensure that you are always working with the most current version of the import template. ALWAYS select the Import Type that matches your file in the Select File field, even if you will not be downloading the template. This ensures that the validation utility validates your file based on the rules/requirements for that specific import template.
- Select:** Use this link to upload your import file into the Beeline Platform for validation. If the import filename differs from the text you enter in the **Name** field, the import results will be saved using the text entered in the **Name** field.
- Clear:** When you need to re-validate a file, use “clear” to remove your previous import.

Import Results (screen details)



<p>1</p>	<p>The import number and current file status displays at the top of the Import Results screen. Import numbers are auto-assigned during the validation process and are unique identifiers of import files. The file status updates as your import file works its way through the validation process steps.</p>
<p>2</p>	<p>The Record Select feature allows you to filter your validation results by: Show All Records, Show Valid Records, or Show Failed Records. When working with large import files, this can simplify resolving validation-related issues.</p>
<p>3</p>	<p>Each row from your import file displays as a separate line item in your results list. The list includes two new columns for Validated and Comments. The Validated column is a Yes or No value to indicate if the item validated or not. The Comments column indicates a successful validation or items that need to be corrected when the validation fails. All other displayed columns will be an exact match to the Import Type selected on the Import – Status: Creating screen during the upload process—which is why the Import Type should never be left at the default setting! Successfully validated line items should be reviewed before import to ensure the information is accurate. Validation does not confirm the accuracy of the data; only that it conforms to Beeline Platform data format/logic requirements.</p>
<p>4</p>	<p>Click the Return button to exit the Import Results screen and return to the Import screen. Using this link is preferred over using the <back> arrow on your Web browser. An Import Records button will display at the top of the screen for users with the Validate with Import Rights permission when the validated file is ready for import.</p>

Event-Driven Import Templates

The **If Exists Action** field in the **Timesheet** import template allows the user to set what action the import process will follow when there is an existing timesheet header record. The user must select one of the following options:

"Ignore" - If an existing timesheet header is found, this data will not be loaded (i.e., imported). This option should be selected when the user is going to import a timesheet but then manually adjust or approve the timesheet within the Beeline Platform. This reduces the risk of the import overwriting work manually entered within the application. If no header exists, the time is loaded via the import.

"Replace" - If an existing timesheet header is found, the entire header (and all day-level records associated to it) is replaced by the data in the import. The status is rolled back to match the import record status. If the existing timesheet has already been billed, the timesheet is marked for reprocessing. This is the best option to select for clients who use the timesheet import process exclusively rather than manual timesheet entry within the Beeline Platform. Be careful when selecting this option as the import record wipes out any existing Beeline Platform data and replaces it with the data entered in the import template. If your intention is to adjust part of a timesheet and you use this option, then the complete timesheet (not just the adjusted part) needs to be entered in the import file or you will lose the timesheet data that was not adjusted. If no header exists, the time is loaded via the import.

"Update" - Update allows day-level adjustments to existing Beeline Platform timesheet records. A full week's worth of time is not required as with the "replace" option. If an existing timesheet header is found, only the day-level adjustment in the file is updated. If the existing timesheet header has already been billed, the timesheet is marked for reprocessing.

"Add" - This option adds one day-level timesheet to an existing header. If no header exists, the time is loaded as via the import. The status of the header rolls back to match the status of the imported detail record. If the existing header has already been billed, the timesheet is marked for reprocessing. This is an optional method that is best selected when you do not plan on sending over an entire week's timesheet.

"Delete" - This option can ONLY be used when there is an existing timesheet header that INCLUDES a detail record. This option lets the user delete an existing detail record via an import. If the existing header has already been billed, the timesheet is marked for reprocessing. This option should be selected with care as it can result in data loss and incorrect billing.

Glossary of Terms

A...	
Assignment:	<p>This is the result of a candidate placed on a job. The assignment will track all activity of the contract worker.</p> <p>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.</p>
Admin Cost Center:	<p>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.</p>
Approver:	<p>The user that has been determined as the owner of the action or workflow step. There can be one or many approvers.</p>
B...	
Beeline ID	<p>An identification number (or letter/number combination) a supplier uses to keep track of their resources. The format is defined by the client.</p>
Billing Cost Center:	<p>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.</p>
Bill Rate:	<p>The rate billed to the client by which the supplier will be paid.</p>
Billing Schedule:	<p>The defined period at which all timesheets are gathered to create an invoice.</p>
Billing Shift:	<p>The time period in a given day to which time is applied.</p>
Billing Term	<p>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.</p>

C...	
Candidate	A Candidate is a Supplier Resource that is submitted for an open Requisition. If they are the successful Candidate, they become the Worker (also known as Consultant or Contingent Worker.)
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 Beeline Platform and their location on a screen display can only be customized in Services Procurement.
Consultant:	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, off-boarding 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 the Beeline Platform, 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.

<p>Disqualify:</p>	<p>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.</p>
<p>E...</p>	
<p>Earning Code:</p>	<p>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.</p>
<p>External ID:</p>	<p>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.</p>
<p>F / G...</p>	
<p>Geography:</p>	<p>Different countries listed in the Beeline Platform that the client has configured for their program. Configurations can be made specific to a geography.</p>
<p>H...</p>	
<p>Hiring Manager:</p>	<p>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.</p>
<p>I...</p>	
<p>Independent Contractor/1099:</p>	<p>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.</p>
<p>J / K...</p>	

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 Beeline Platform. 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 Beeline Platform. Labor categories are grouped industries of labor that the client procures in the Beeline Platform. 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 Platform with information updates or action required. Notifications can be automated, scheduled, or workflow driven.
O...	
Offboarding:	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).
<h2 style="margin: 0;">P...</h2>	
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 fulfillment.
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 Beeline Platform 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 Beeline Platform to provide the best suited candidates to the positions posted by a client. Supplier can use the Beeline Platform 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 Beeline Platform 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 the Beeline Platform. 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.

History

Original release: Dec. 23, 2016

Revised release: May 30, 2017

Revised Import Screen access graphic: Aug 2017

Revised screenshots to UI Upgrade version, text changes, and added Advisory Content section: Dec 2019

Updated template formatting – Mar 2020

Revisions to title page, glossary, VMS to Platform – May 2021

Moved to new template, extensive updates to content, added export section – Oct 2022