Hiring Manager Experience ~ the basics

Welcome to the Hiring Manager Experience!

From your initial **Log in** to your final **Log out** signoff, the **Hiring Manager Experience** is designed to simplify your Beeline Enterprise usage by providing easy access to your online tasks, summary lists, and reports. Everything is accessible within a few clicks along with the ability to drill down for detailed records when more insights are needed.

This overview provides instructions on how to navigate throughout the **Hiring Manager Experience** along with descriptions of the key features and highlighted screenshots for easy identification.

◈ For a more interactive learning experience, try our eLearning module. It walks you through the **Hiring Manager Experience** using a series of instructional modules, followed by a frequently asked questions section, and finally, a knowledge assessment quiz to test what you've learned. Click the link provided below to begin:

[Hiring Manager Experience Training Module]

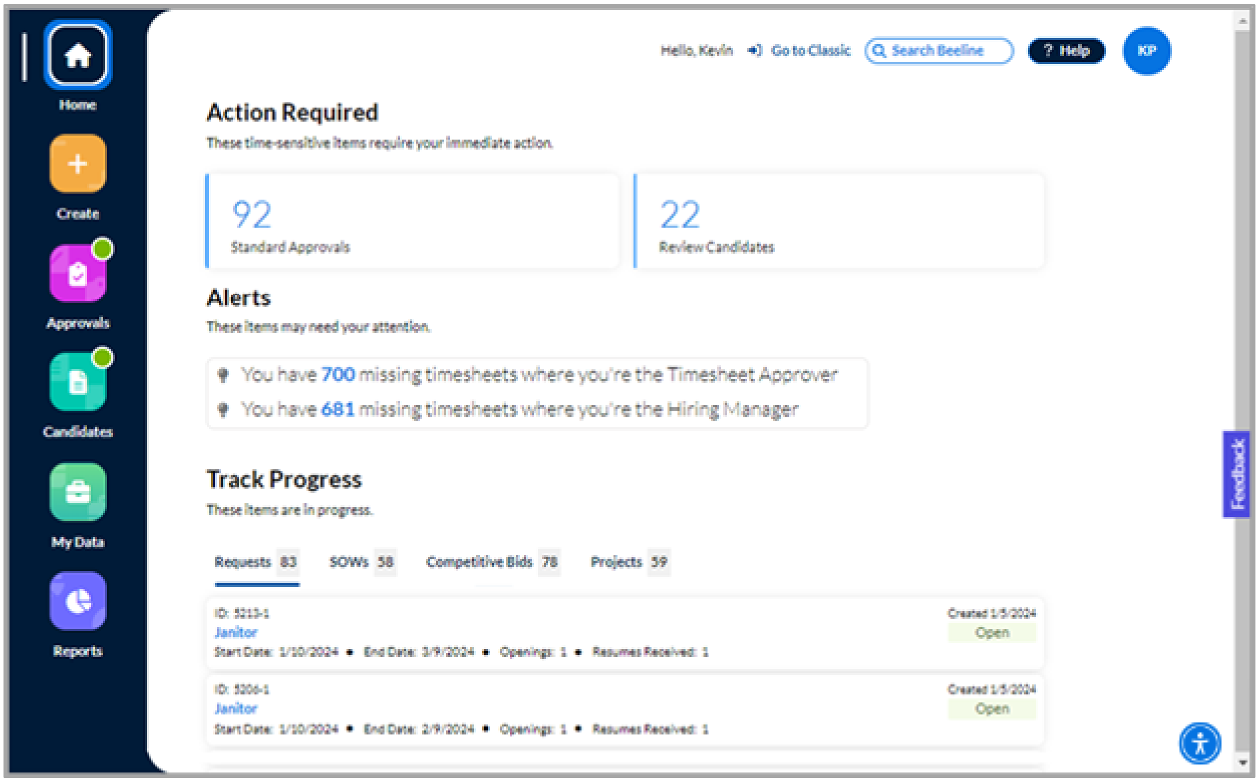
Use the **Directory** links in the chart below to skip to the topic of your choice. (Hold down the <Ctrl> key and click the linked text.) Or use the **Table of Contents** feature available in your web browser to navigate throughout this document. Not sure how to access a web browser's Table of Contents feature? We've included instructions beneath the **Directory** table.
Please note: The **Table of Contents** functionality varies by web browser.

Directory		
Home	Create	Approvals
Candidates	My Data	Reports
	Appendix	

- **Microsoft Edge**: Click the Table of Contents icon ( ) in the pdf header bar and a slide-out panel displays all headings as a Table of Contents. Click any heading to navigate directly to that section.
- **Chrome**: A page thumbnail index automatically displays to the left of the document. To switch to a Table of Contents view, click the TOC icon ( ) in the panel. Click each arrow ( ) to expand the headings sections; then click any heading to go directly to that section.
- **Mozilla Firefox**: Click the Toggle Sidebar icon ( ) in the pdf header bar and the thumbnail index displays to the left of the document. Click the Show Document Outline icon ( ) to view the Table of Contents. Double-click to expand all sections in the TOC. Click any header to go directly to that section.

The first screen you'll see once you log in is **Home**. Notice that it is divided into two areas, the navigation panel on the left and the work area on the right.

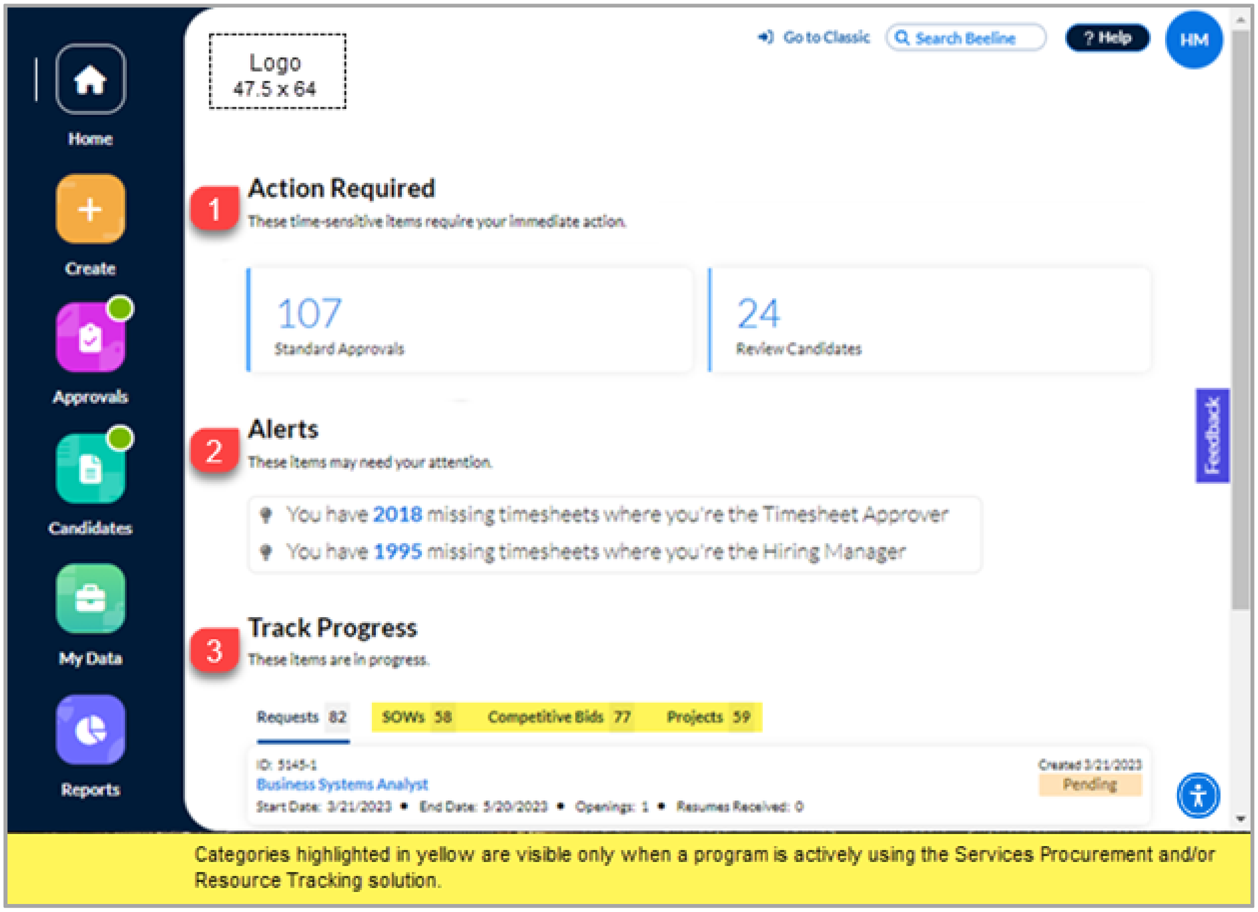
Home

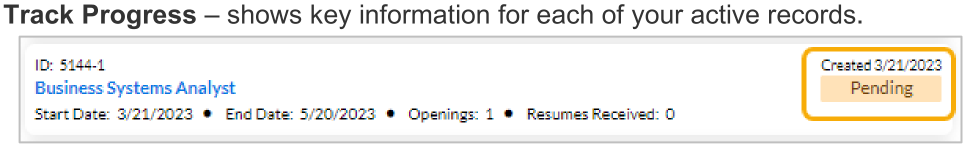


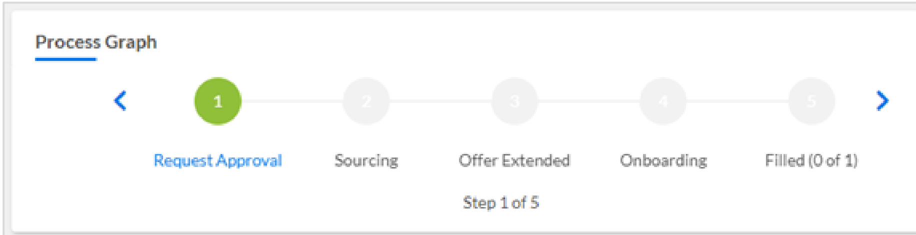
Each button in the navigation area is a separate, direct link to one of the **My Apps**. The panel includes a direct link to **Home**, **Create**, **Approvals**, **Candidates**, **My Data**, and **Reports** apps. A green circle displays in the upper right corner of any app button as an alert to let you know that there are items in that app that need your attention.

The **Home** button navigates you directly back to **Home** from any location throughout the **Hiring Manager Experience** application.

Action Required, Alerts, and Track Progress

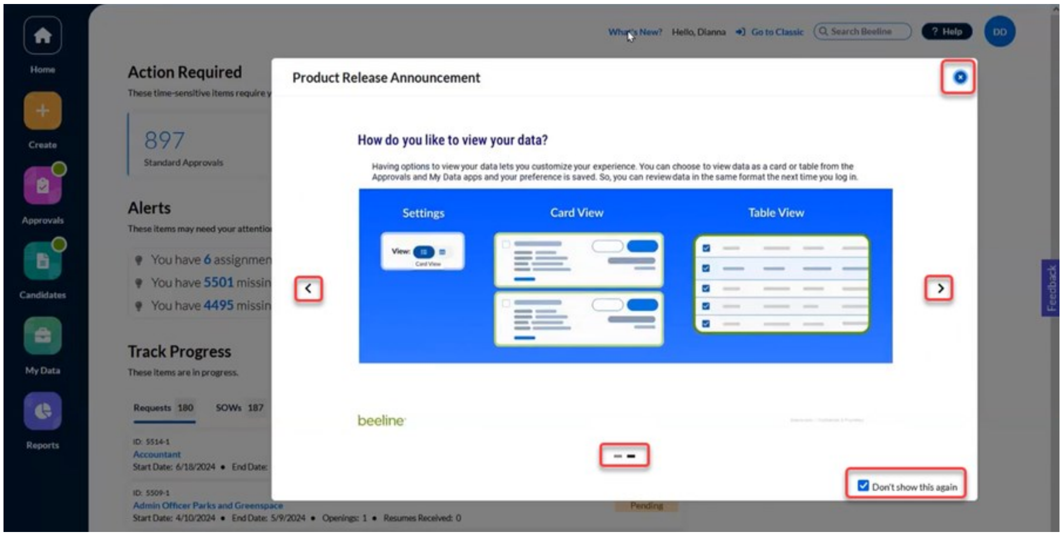


1	**Action Required** – shows the total number of standard approvals and submitted candidates waiting for your review and action. Click the number to navigate directly to your list.
2	**Alerts** – shows activity you need to be aware of, even if you are not the designated system approver. Click the number to drill down for details.
3	**Track Progress** – shows key information for each of your active records. 

	Click the **Status** (Pending, etc.,) to drill down and view the Process Graph where you can check to see which workflow steps still remain to be completed. 
	Alert Button – highlights which apps have actions waiting on your attention.
? Help	Click for access to standard **Beeline Help** or for access to a **Guided Tour**, client-specific guides, forms, or this guide and the eLearning module that goes with it. Can't find what you need? Use the **Feedback** link to submit your questions or reach out to your Program Office.
HM	Click your initials to access/edit the **Manage Preferences** options on your Beeline account record—or to use the **Reset Password** link. Need to delegate your tasks/approvals while you're away? Click **Delegates** under **Manage Preferences**, then click **+ Add New**. Follow the prompts to fill in the Delegate, Date, and Approvals sections. Additional settings can be added for Reports, Delegate Subordinate, and Impersonation. Click **OK** to save your changes. When you are ready to exit Beeline Enterprise, use the **Log Out** option.
Feedback	Help us, help you! Use the **Feedback** option to share your insights, make suggestions, or just let us know how we can make the **Hiring Manager Experience** better suit your needs.
Home	Click the **Home** button to navigate directly back to Home at any time.
Create	Click any app button to navigate directly to that app. Remember, the green alert circle identifies which apps have items that need your attention.
Home b	Customers or a PMO can now brand the **Hiring Manager Experience** with their company logo to replace the b logo displayed in the upper left corner of the work area. Instructions to add logo are posted in **Beeline Community**. Please note: The dimensions for this logo slot are 47.5 x 64 pixels.
	Click the **UserWay® Widget** button located at the bottom right corner of the screen to open the slide-out panel. The widget lets you adjust accessibility features and functionality for a variety of disability profiles and adjust settings to your personal preferences. Details are provided in the Appendix.

Product Release Announcements

Keep informed of new Hiring Manager Experience features and functionality as they are released by viewing the posted items shown in the **Product Release Announcement**'s dialog window display. Use the right or left arrow button to navigate through the items. The carousel tabs beneath the displayed item indicate the total number of updates. Use the X button in the upper right corner to close the window and return to your Home screen. Use the checkbox to activate the "Don't show this again" feature.

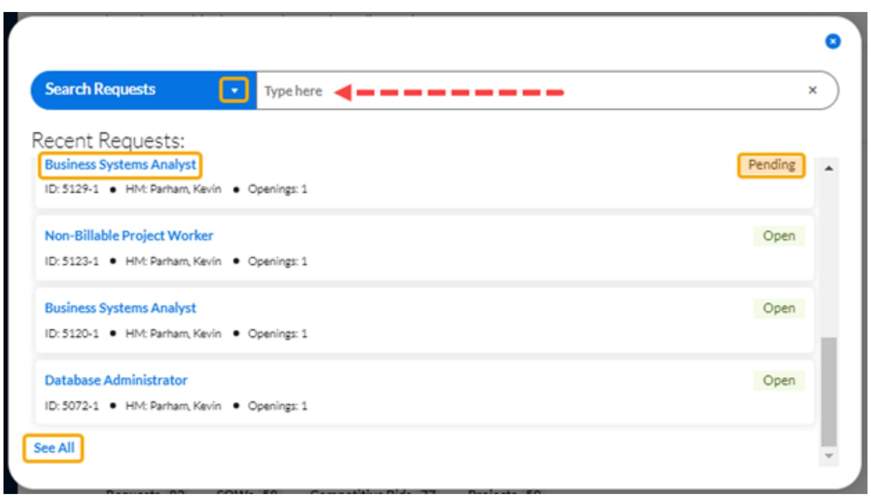


When you want to restore the display, just click the "What's New?" label at the top of your screen.

Search Beeline

Located in the upper right section of the screen is the **Search Beeline** feature. This global search feature is accessible on all major screens throughout the **Hiring Manager Experience**.

- Click in the **Search** field and a pop-up displays with your search results.



- Use the down arrow in the **Search** field to select a different search option or enter text in the **Type here** field to refine your current search. Use the scroll bar to navigate to the bottom of the results and click the **See All** link to be redirected to the My Data App to view your full list of results. To drill down to the **Details** screen, click either the hyperlink on the left or the status displayed on the right for any item posted in the results list. Request and Assignment records are visible to both the Hiring Manager as well as the Hiring Manager's manager, making these records visible and actionable by either manager.
- Search options include:

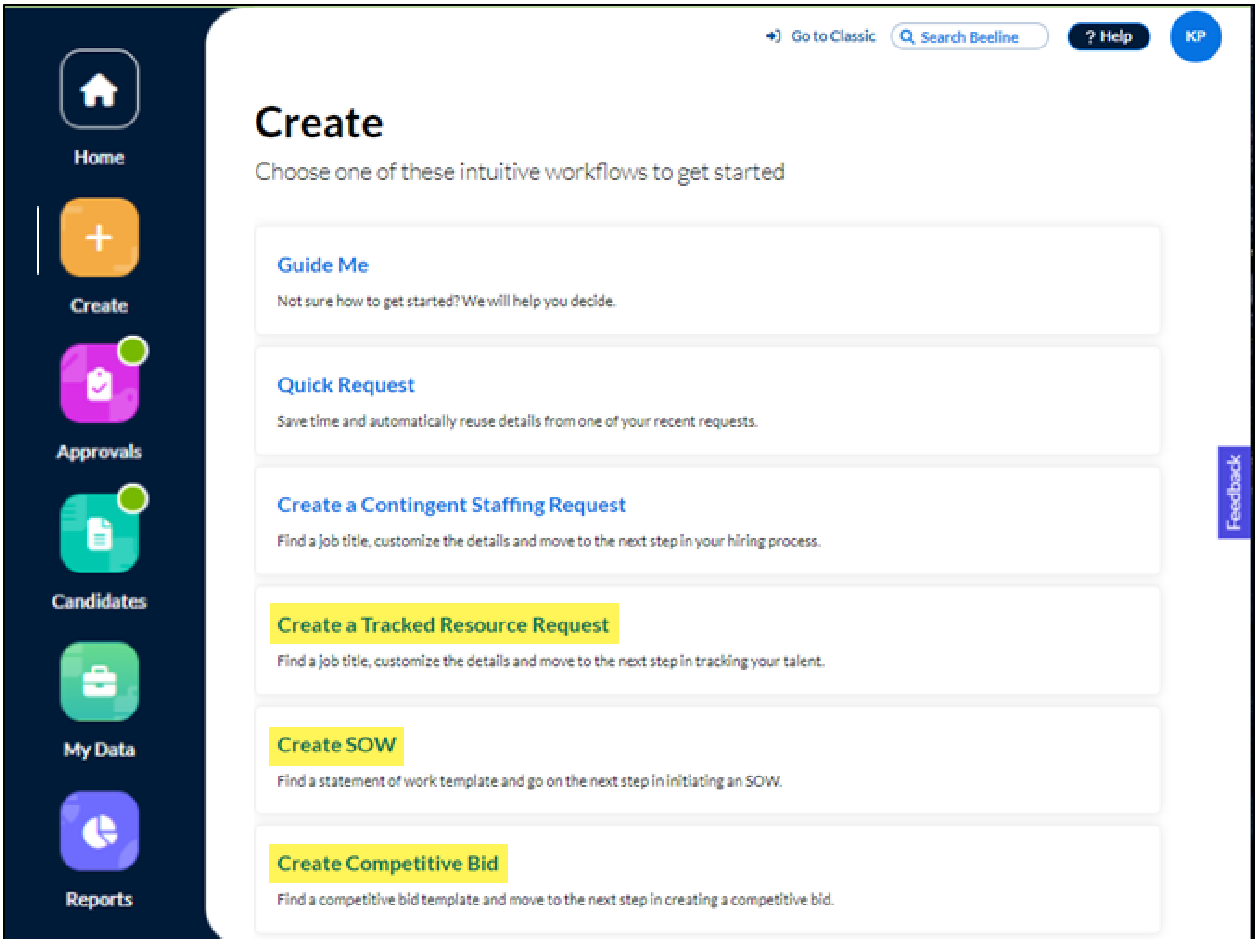
Option:	Sample search result record:
Assignments	Abrams, Helen — Active ID: 21293
Candidates	Tsunami, Johnny — Business Systems Analyst ID: 3003-1
Expenses	Aadland, Sharen — SAadland2293 ID: 15960
Milestones*	Independent Contractor - Website Design-3396 - Website Design - 2022/03 — Supplier Approved ID: 319 - 3 ● Type: Deliverable ● Supplier: [redacted]
Projects*	ERP Upgrade 2022 - #317 Supplier: [redacted] ● SOW: ERP Upgrade 2022 ● SOW #: 3389
Reports	% Spend vs Budget — Financial Type: Published Adhoc
Requests	Database Administrator — Pending ID: 4998-1 ● HM: Manager, Hiring Manager ● Openings: 1
SOWs*	Independent Contractor - Graphic Designer ID: 3411 ● Owner: Manager, Hiring Manager ● Supplier: [redacted]
Timesheets	Aaron, Jacob — JAaron2218 ID: 18296

*Only visible to a client with an active Services Procurement account.

Create

- ➢ Need to submit a request for a new contingent worker?
- ➢ Need to onboard a new tracked resource?
- ➢ Need a new project-related statement of work (SOW) or competitive bid?

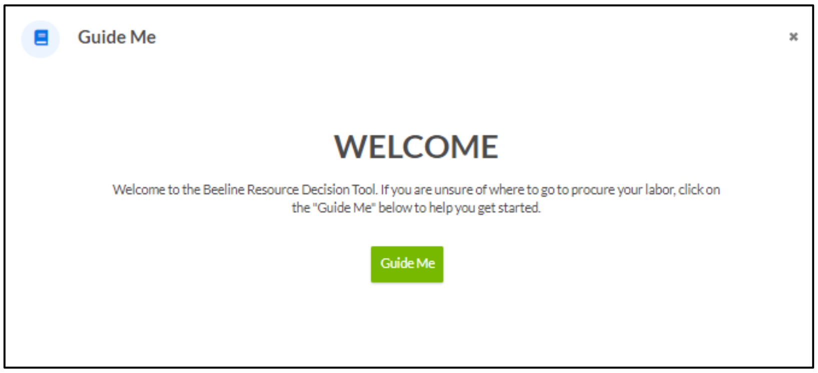
The **Create** app is where you begin.



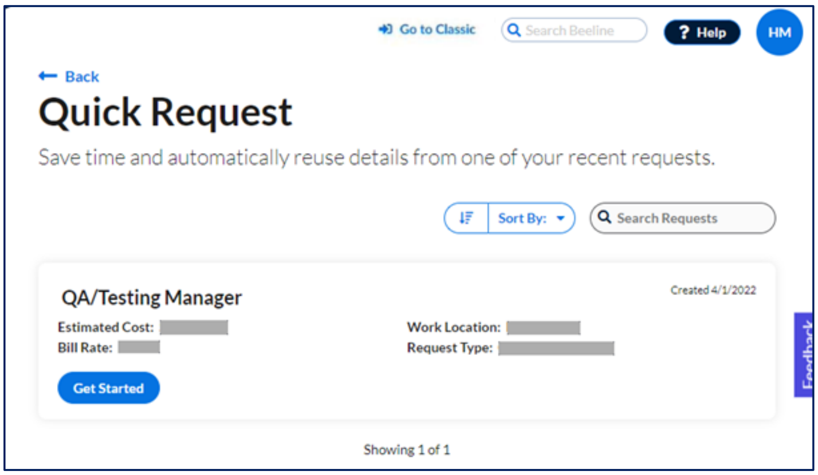
Categories highlighted in yellow are visible only when a program is actively using the Services Procurement and/or Resource Tracking solution.

Requests (Contingent Worker)

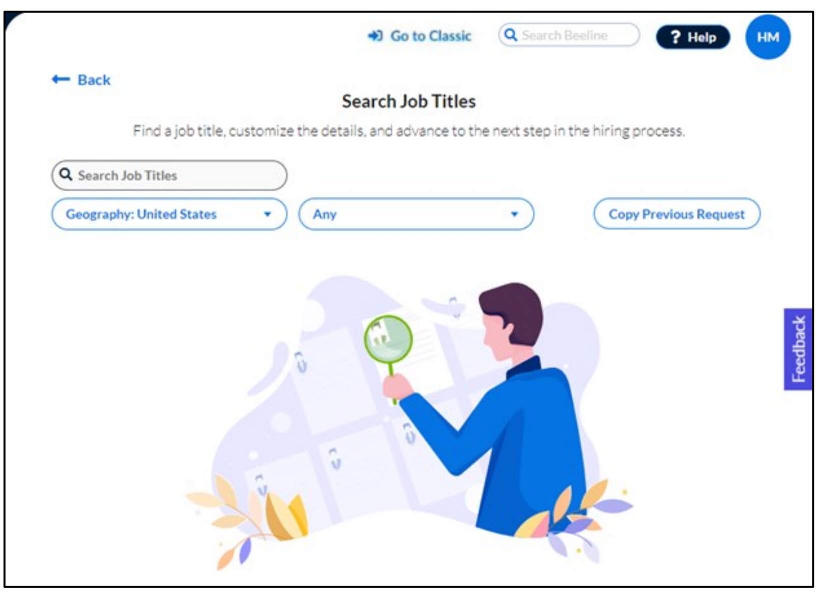
- **Guide Me** (Client configuration option) – answer a series of questions and the system walks you through the decision process to complete the Request.
  NOTE: Some programs use **Guide Me** as their default method for all new Requests, which makes it the only visible option.



- **Quick Request** (Client configuration option) – when it's not the first request for a specific job title, we shorten the completion time by filling in fields based on your previous Requests. Be sure to check the auto-populated fields to make sure the entries are still valid!



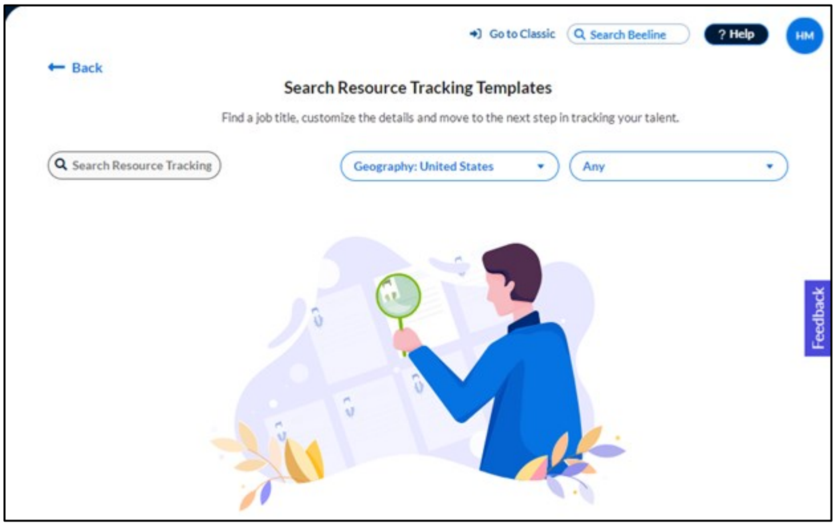
- **Create Contingent Staffing Request** – when there's no prior Request with sufficient match points to auto-populate fields, you'll need to fill out the complete form by first selecting the job title.



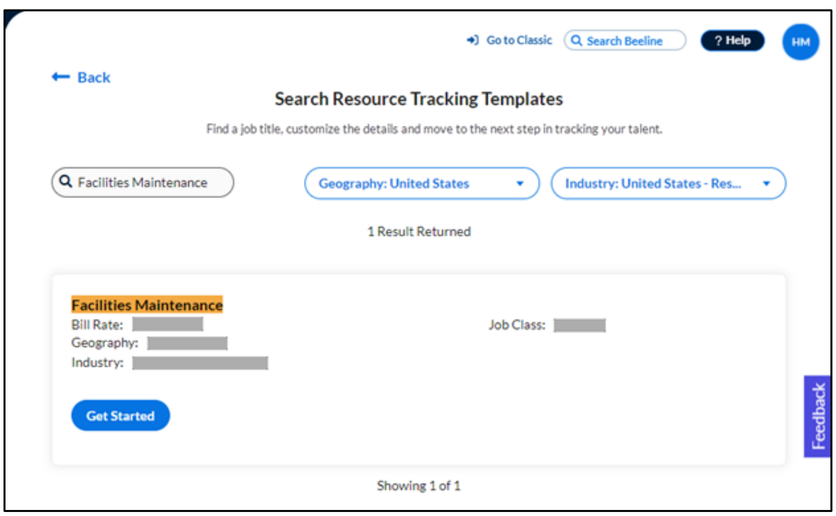
Requests (Resource Tracking)

Beeline's Resource Tracking solution tracks third-party workers who work onsite at client work locations but whose time and expense tracking is managed by their third-party employer. This solution provides oversight and visibility at work locations for both onboarding and offboarding protocols to ensure that only authorized workers are onsite at a work location at any given time.

- **Create a Tracked Resource Request**



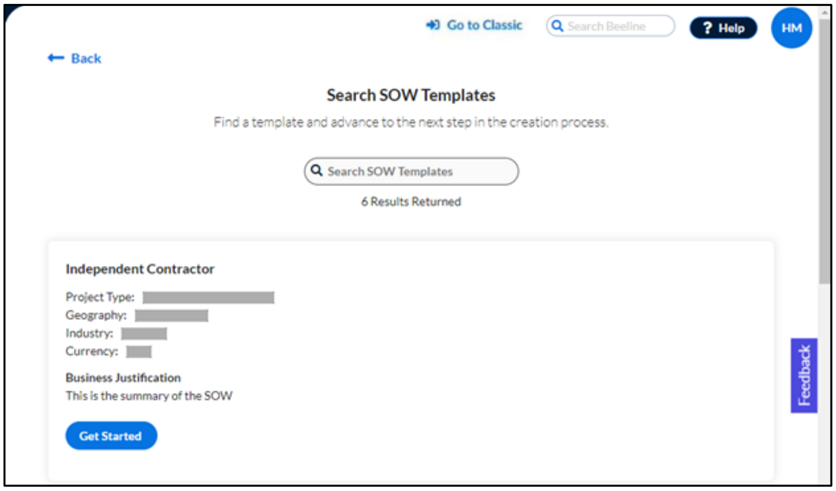
- Make your selections for **Geography** and **Industry**, then use the **Search** box to search by Job Title.



- Click the **Get Started** button and the screen refreshes to show the full Request form. Fill in the fields as indicated; then click **Save** to complete your Request and forward it to the Approver.

SOW – Statement of Work (Services Procurement)

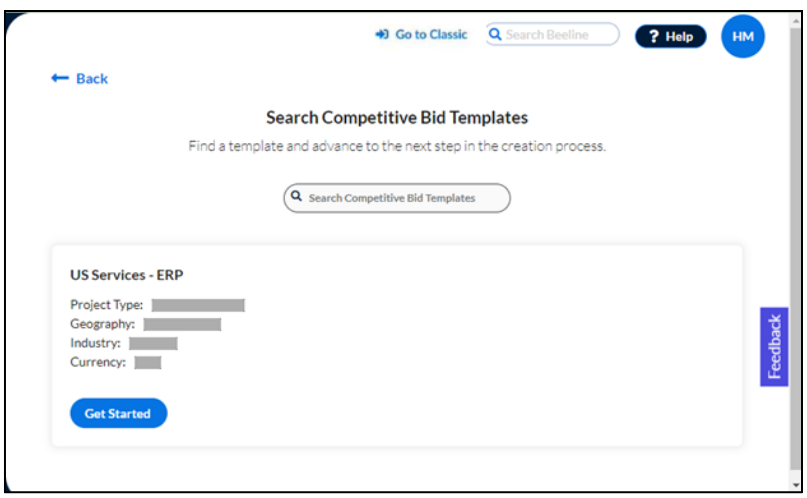
Beeline's Services Procurement solution supports the entire Services Procurement lifecycle from *sourcing,* through *negotiation,* into *engagement management,* and *invoicing*. Programs can use the full range of components or just the basics. Services Procurement is a project-based solution with payments based on milestones and/or units of measure (UOM). Some programs may also incorporate time and expense payments for their projects-based contingent workers.



- Click the **Get Started** button and the screen refreshes to display the initial step in the SOW creation ribbon. Follow the prompts to complete the steps; then click **Submit** to forward the SOW to the approval process. Depending on program requirements, terms and financials may be negotiated after this initial approval and prior to releasing to the vendor.

Competitive Bid (Services Procurement)

For some projects, the client may already know who the service provider will be and the bidding process can be skipped. However, in those instances where a formal process is needed to identify and request products and/or services from multiple potential service providers, a **Competitive Bid** is used to award the SOW to the successful applicant.



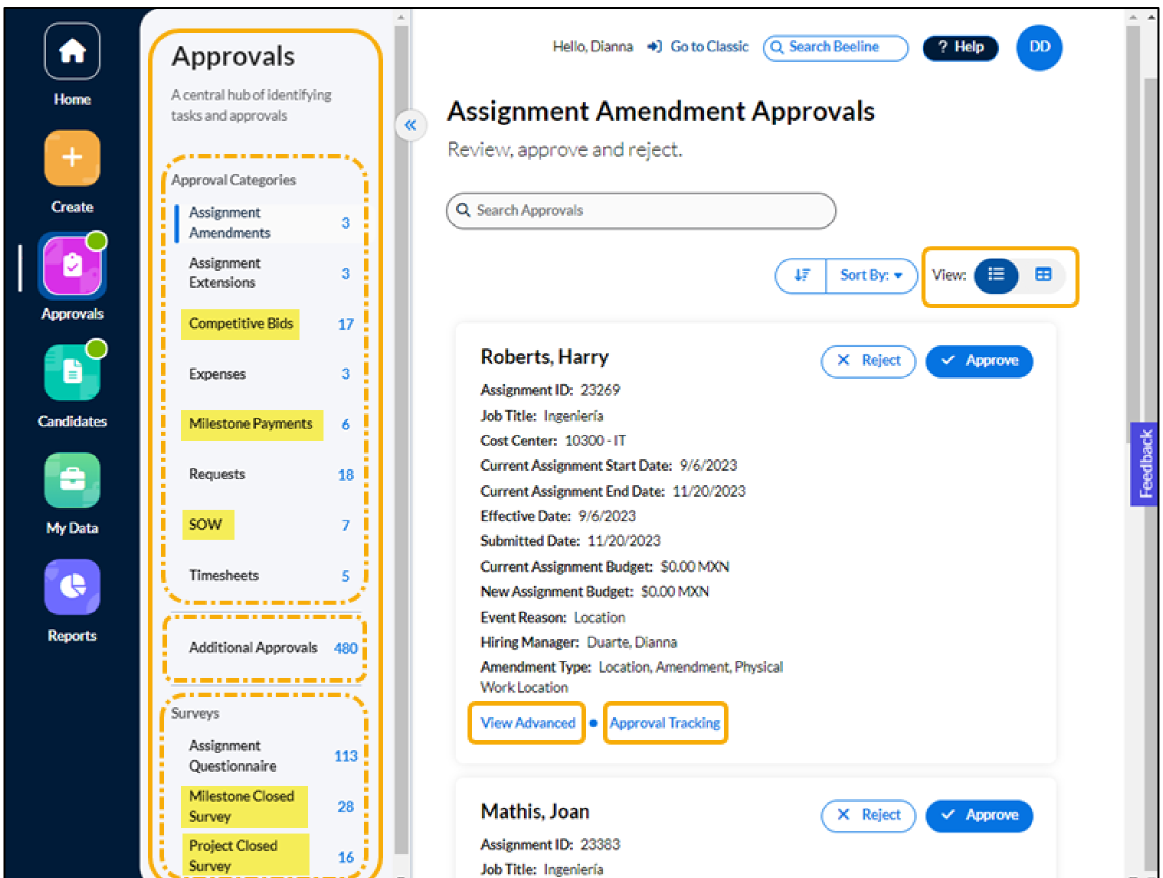
- Click the **Get Started** button and the screen refreshes to display the initial step in the Competitive Bid creation ribbon. Follow the prompts to complete the steps; then click **Submit** to complete the Competitive Bid and forward it for approval before it can be released to the designated vendors.

Approvals

Ready to take action? Let's start with Approvals.

Click either the **Approvals** number in the **Action Required** section of the **Home** page or the **Approvals** app button in the navigation panel. Your screen refreshes to display all approvals waiting for you to take action. The slide-out panel located between the navigation panel and your work area separates the approvals into sections by **Approval Categories**, **Additional Approvals**, and **Surveys**. What you see listed depends on which tasks are assigned to YOU, as a Hiring Manager within Beeline Enterprise. Request and Assignment related approvals are visible to both the Hiring Manager as well as the Hiring Manager's manager, making these records visible and actionable by either manager.

In the sample below, the client program has active Beeline Time and Beeline Expenses modules as well as Contingent Staffing and Services Procurement solutions. The Approvals slide-out panel displays tally numbers to give you a quick overview of your current activity. It also helps you determine which areas need your attention first. Click any tally number to refresh the screen to display the associated list of tasks.



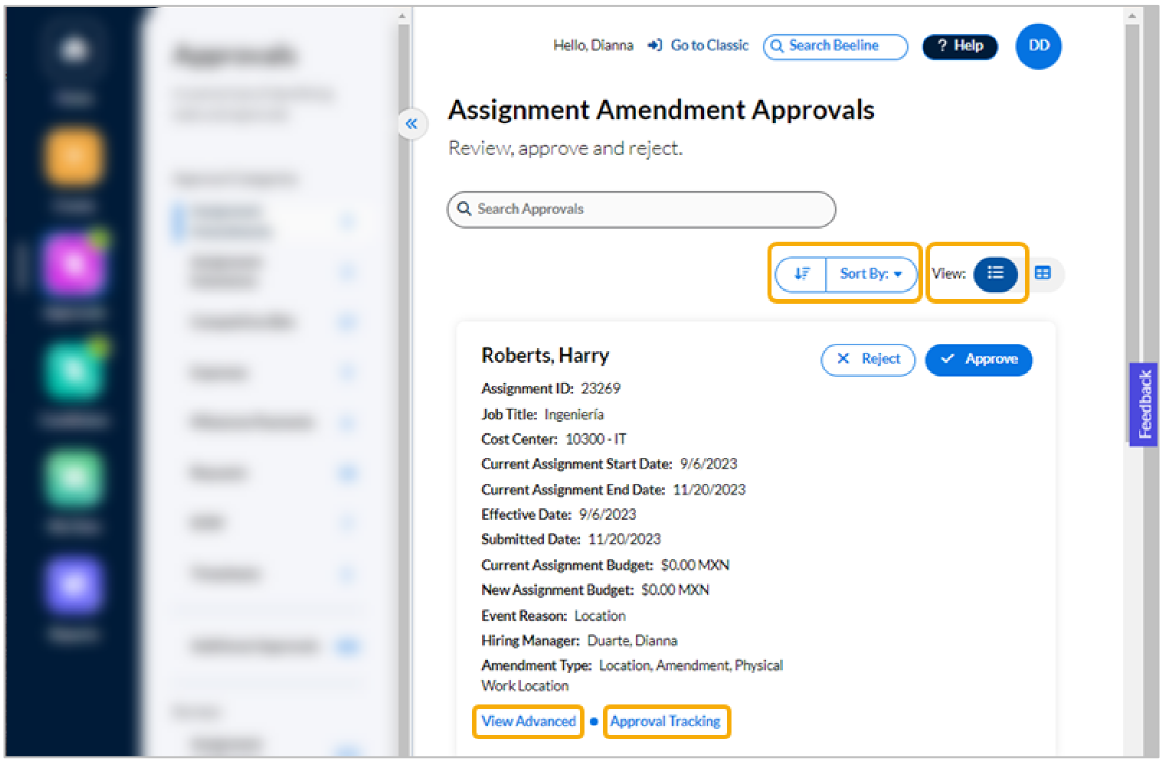
Categories highlighted in yellow are visible only when a program is actively using the Services Procurement and/or Resource Tracking solution.

Notice the white line next to **Approvals** in the navigation panel. This indicator is a quick way to always know which app is currently active.

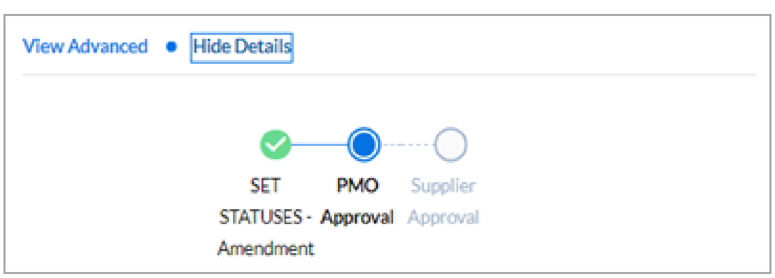
Approval Categories

The screen layouts are similar for all **Approval Categories** to provide consistent ease of use. You have the option to display records in Card View or Table View. There are a total of eight **Approval Categories**, however only those that are valid for your program will be visible. Any approval that does not fall under one of the eight Approval Categories will post in the **Additional Approvals** section.

• Card View



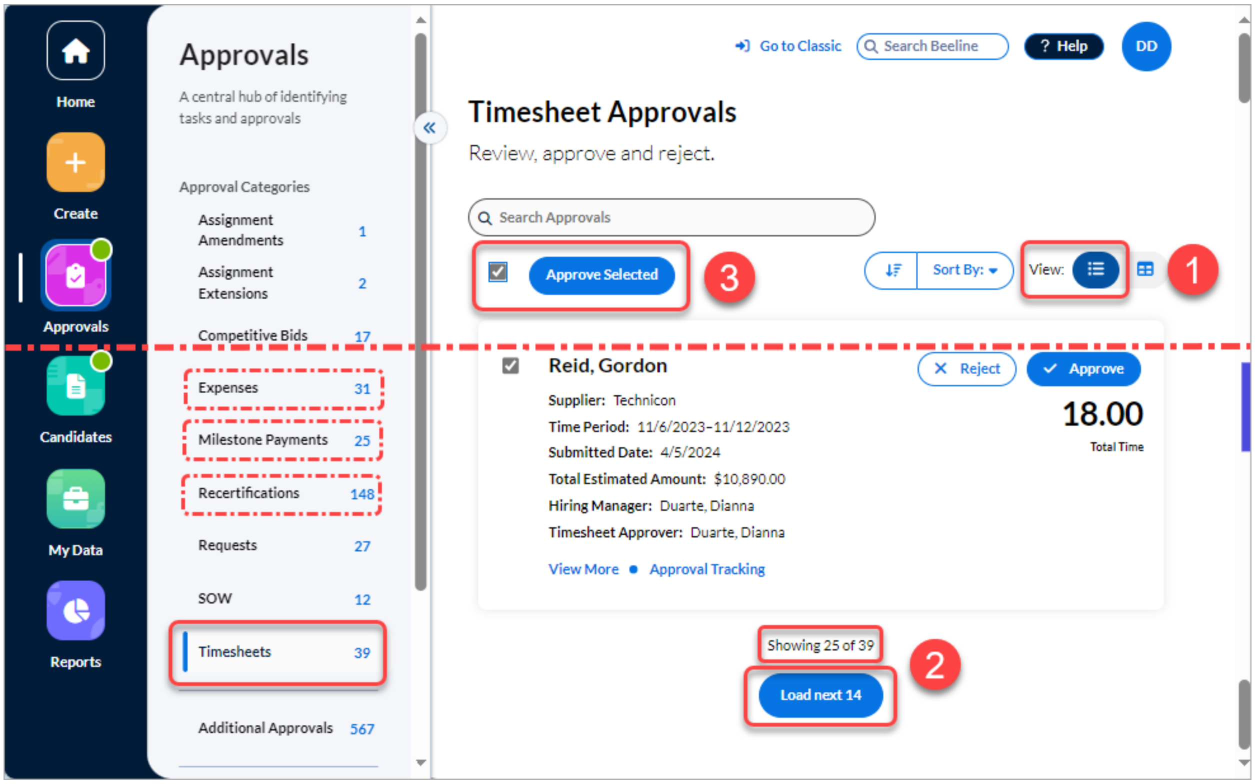
In **Card View**, records display in order of the **Sort By** setting. Fields display in a single column aligned along the left hand side. Buttons and features are located in the same area of the screen throughout the categories although the functionality may vary slightly. Take care to notice the differences in summary data fields and the differences in **Sort By** options. All card views include either a **View Advanced** or **View More** link to access additional details related to the approval record. They also include an **Approval Tracking** link that displays an approval process graph to let you know which approval steps have been completed, as well as which steps still need to be completed. The Card View is best suited for taking action on a one-by-one basis. There is an option to approve multiple records in bulk, however this is only valid for Timesheets, Expenses, Recertifications, and Milestone Payments.



Keeping layouts similar from one Approval category to the next helps you work through your lists quickly.

⇨ Bulk Approval process

As mentioned previously, Approvals can be processed in bulk for Timesheets, Expenses, Recertifications, and Milestone Payments by batching these records together and then approving them as a distinct group. Each Card View screen can display up to 25 records. You can combine ALL records together into a combined group by clicking through the screens until you reach the end of the list. Then scroll to the top of your combined list and click the checkbox next to Approve Selected. This activates the Approve Selected button. (It will turn blue.) Click **Approve Selected** and ALL the records will be approved as a distinct group.



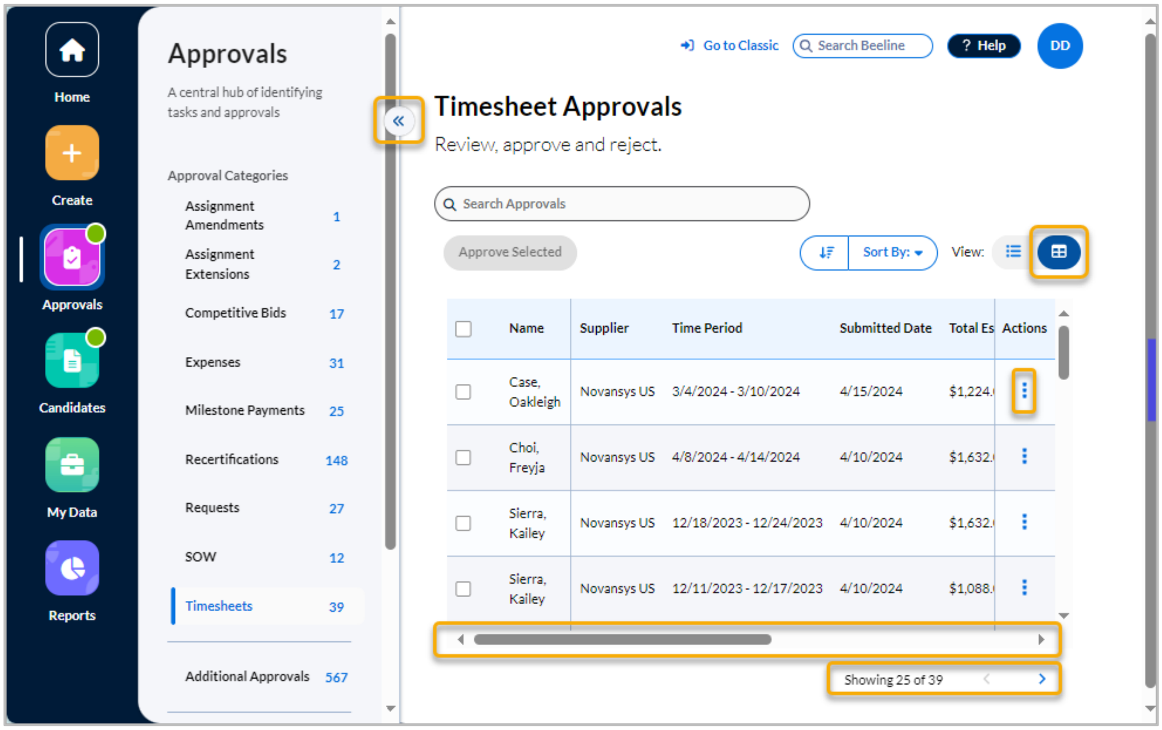
Steps for bulk approval:

1. Select the Card View (see example above).
2. Verify the total number of records to be approved, then click **Load next…** until you reach the end of the list.
3. Scroll back up to the top of the list and select the **Approve Selected** checkbox—the button activates. Click **Approve Selected**. All the selected records will be processed in a single batch.

TIP: If there are any 'exception' records in the approvals list, process those FIRST so that when you create your combined list, it only includes records that qualify for the same 'action'.

• Table View

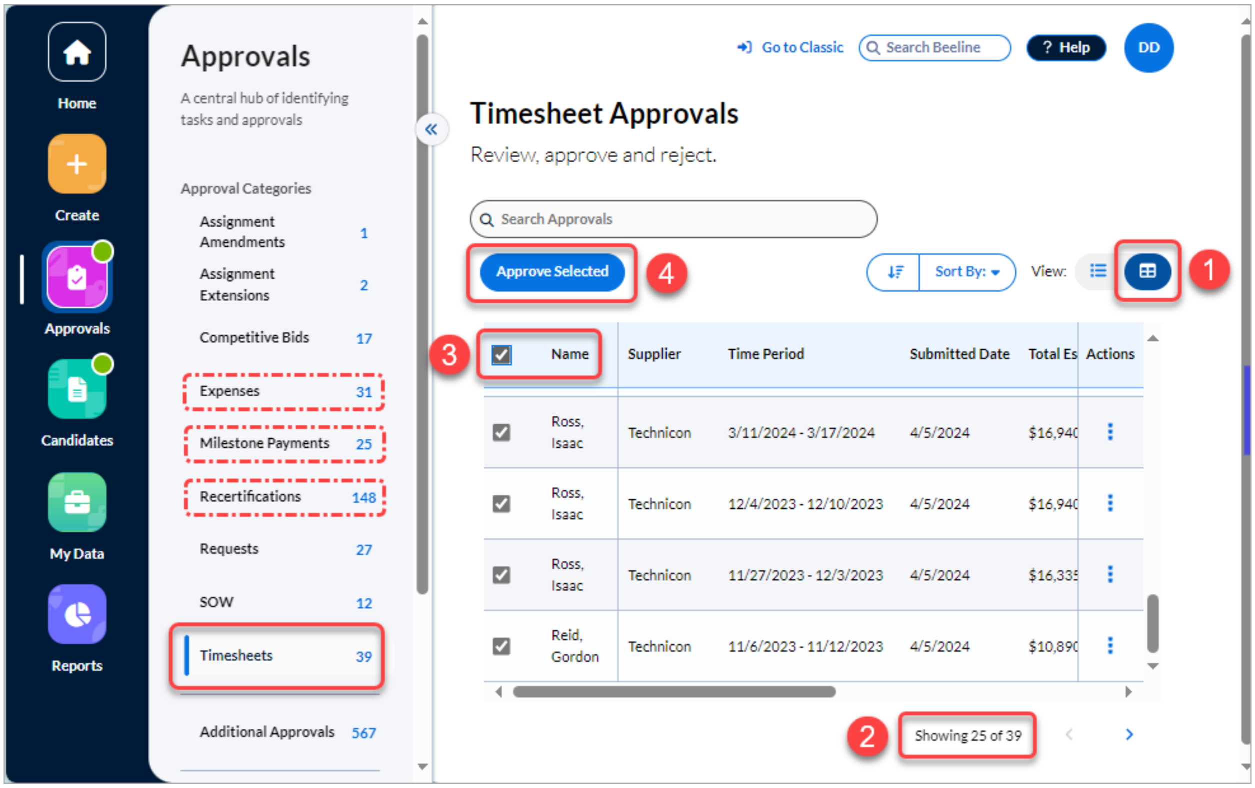
In **Table View**, records display in rows and columns. The default sort order is the same as the Card View. The column headers are the same fields as displayed in the card view with the addition of a **Delegated By** column. The final **Actions** column is locked in place, and for some approval types, other key identifier columns (for example, **Name** or **Assignment ID)** might be locked as well, while all other columns are visible by using the horizontal scrollbar. Take care to notice the differences in data fields (columns) across categories. Each table can display up to 25 records (rows). The counter located in the bottom right corner lets you know how many records there are in total. Click the kebab icon (⁝) in the **Actions** column to view your options for taking action on the displayed records.



TIP: You can maximize your visible work area space by hiding the **Approvals** slide-out panel. Just click the slider button («) to hide it, then click it again to restore it.

⇨ Bulk Approval process

Approvals can be processed in bulk (i.e., batches) for Timesheets, Expenses, Recertifications, and Milestone Payments by selecting all records from a single table and then approving them as a group. Click the checkbox in the table header row to select all records (rows). This activates the Approve Selected button. (It will turn blue.) Click **Approve Selected** and ALL the records in the table will be approved as a distinct group. Repeat the process on each screen until all records have been processed.



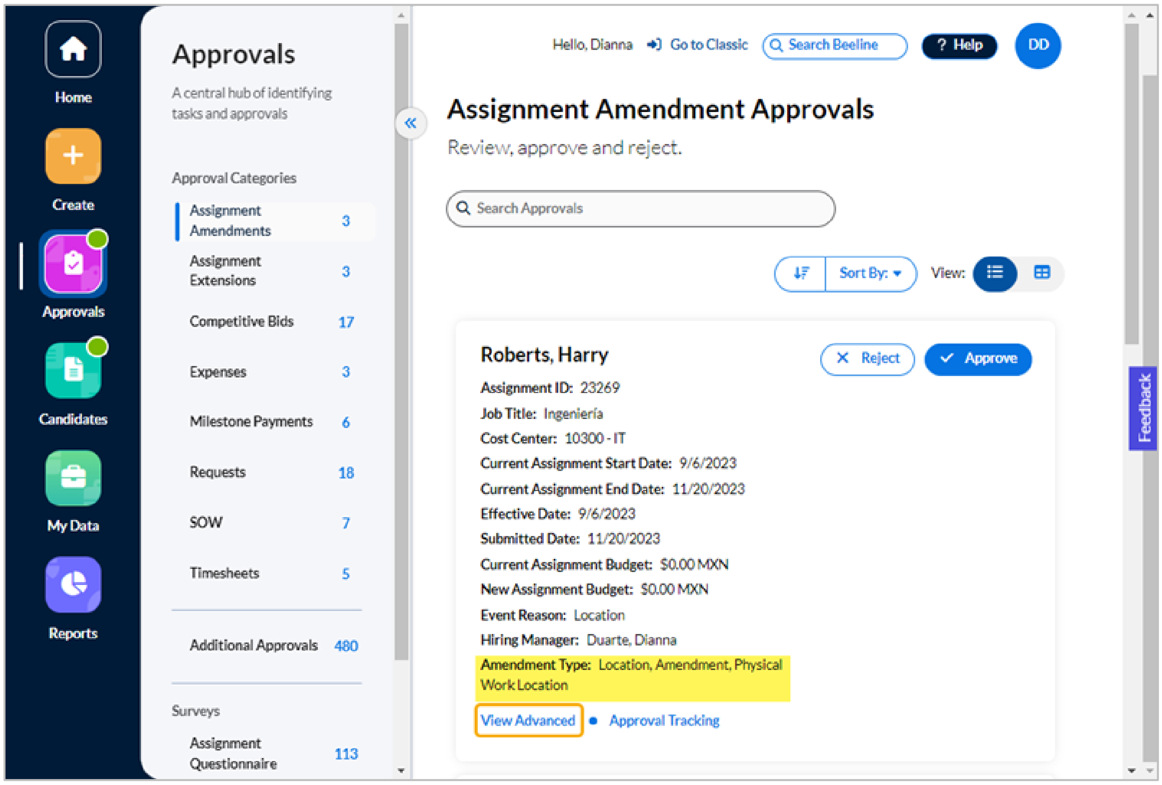
Steps for bulk approval:

1. Select the Table View (see example above).
2. Verify the total number of records to be approved. You can approve up to 25 records as a single batch.
3. Click the **checkbox** in the header row of the table to select ALL the records—the **Approve Selected** button activates.
4. Click **Approve Selected**. All the selected records will be processed in a single batch.

TIP: If there are any ‘exception’ records in the approvals tables, process those FIRST so that when you process the tables as groups, they only include records that qualify for the same ‘action’.

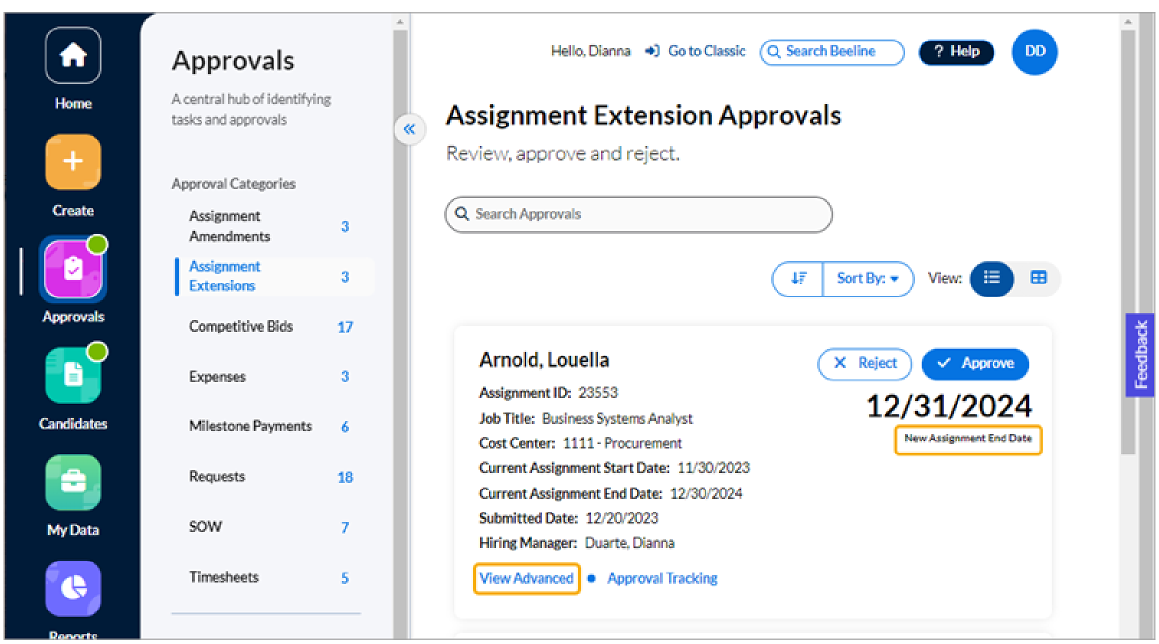
Assignment Amendments

Not all assignment amendments require approvals. Approvals are needed for updates that impact on the budget (e.g., extensions, cancellations) or assignment management (e.g., work location or equipment issued during onboarding). Be sure to check the **Amendment Type** field so you'll know which information to check on the assignment record. To view the full assignment record, click the **View Advanced** link. The **Reject** action button opens a text box for you to explain why the amendment was rejected and what adjustments need to be made in order to resubmit.



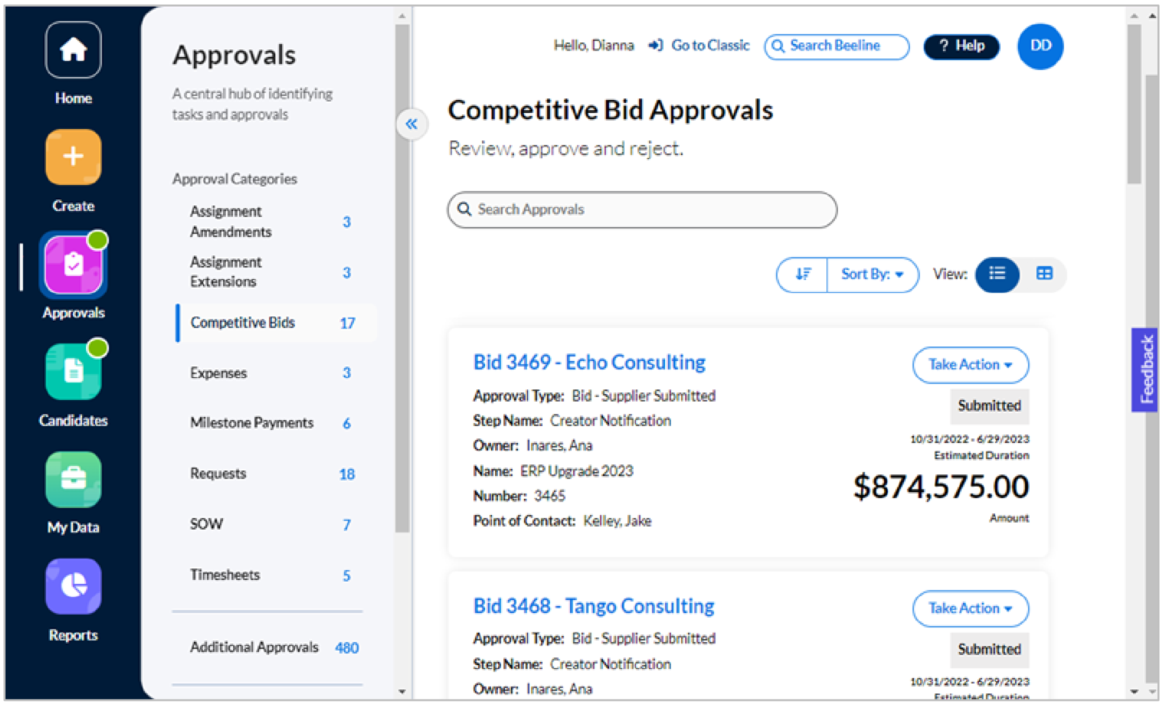
Assignment Extensions

Assignment extensions have their own workflow approval path. The extension amendment can combine an extension with a budget adjustment (e.g., increased rate) or just be an extension without any budget adjustment. When actioning an approval, check the **Amendment Type** field in the **Event Reason Information section** (go to **View Advanced** screen) so you're aware if the changes are only to duration timeline or also include budget related fields.



Competitive Bids

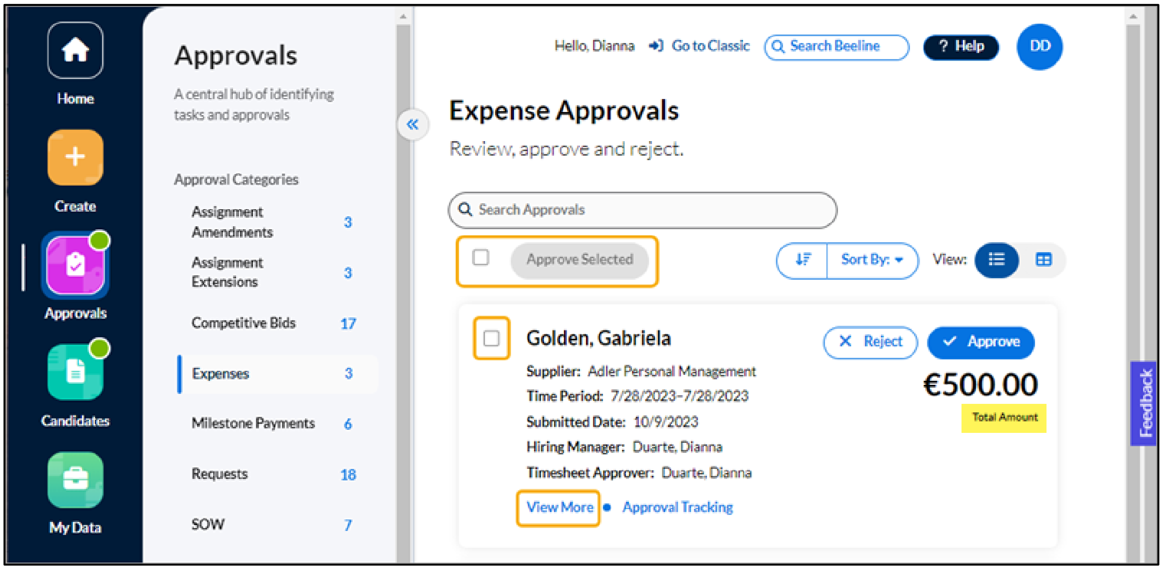
Competitive Bids are an optional feature in the Services Procurement solution. Clients use competitive bids to solicit multiple vendors to respond to a single sourcing event for a defined scope of work. The successful vendor then advances to the SOW (Statement of Work) stage to scope out how the terms and conditions. Once the terms and conditions are agreed upon, the SOW is promoted to an active Project which is used to manage the agreed scope of work.



Expenses

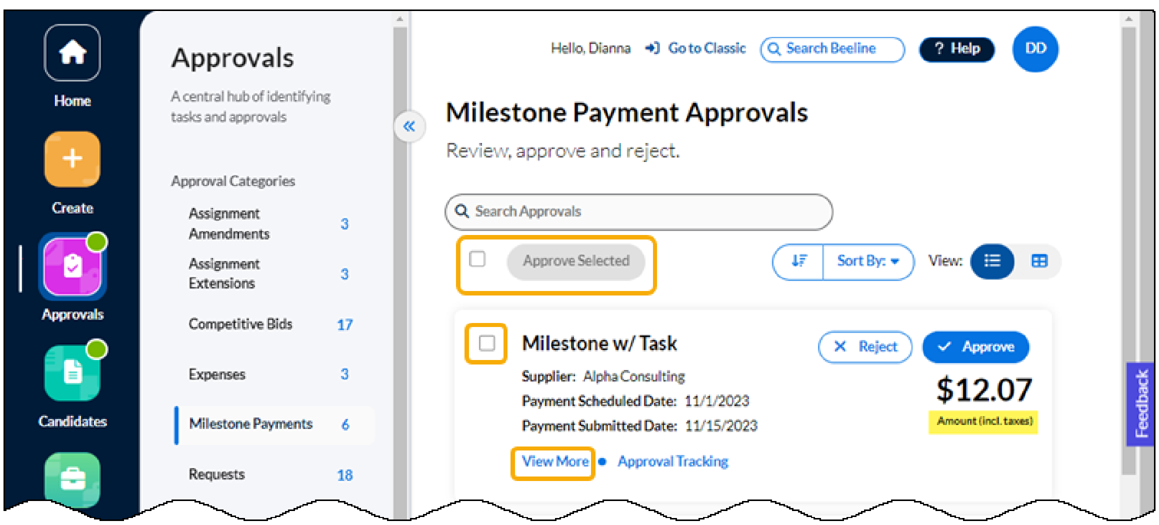
You can take action on a single Expense approval or you can use the checkbox option to bundle similar expense types together and take action on them as a batch (**Approve Selected**). Scroll through the list and determine which items need separate handling. Take action on those as needed. Then go back and combine all the remaining expense items into "like" batches for quicker and more efficient processing. Notice that the amount displayed on the right-hand side is the **total** amount of the submitted Expense. When you reject an expense, a text box displays so you can enter Comments as to why it was rejected and what needs to be adjusted before it can be resubmitted.

Use the **View More** option to reveal a slide out section that displays expense entry details. Click the **Download Attachments** link to view submitted expense documentation. Click **View Less** to collapse this section. Notice that the **Download Attachments** link is only visible in the **View More** expansion section.

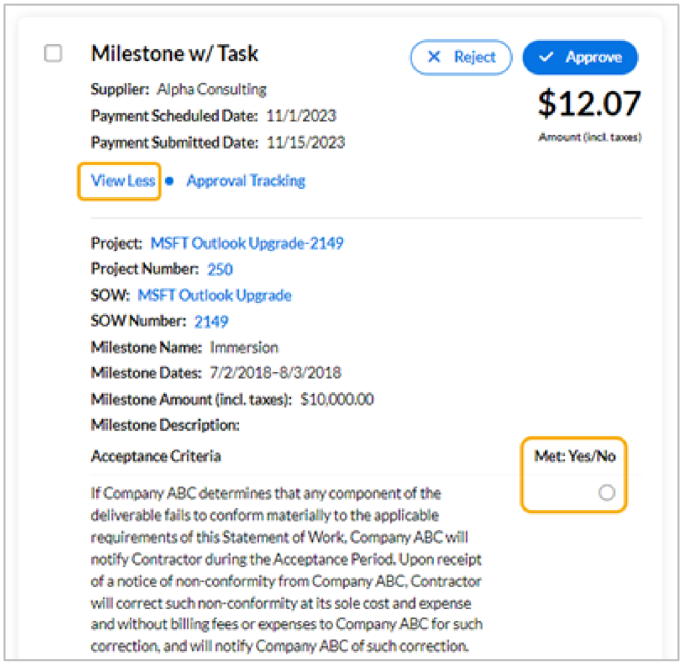


Milestone Payments

Milestone Payment Approvals is a standard feature used in the Services Procurement solution. It uses a different method to display details. When you click **View More**, the Milestone section simply expands to reveal its details section.

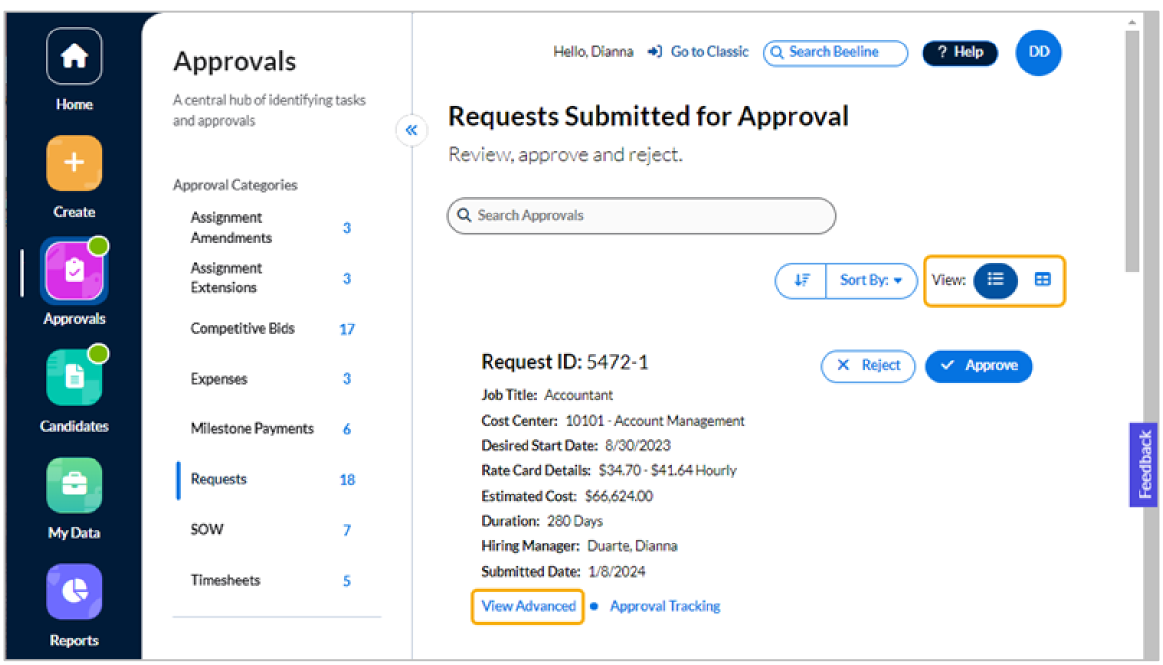


Milestone – View More:



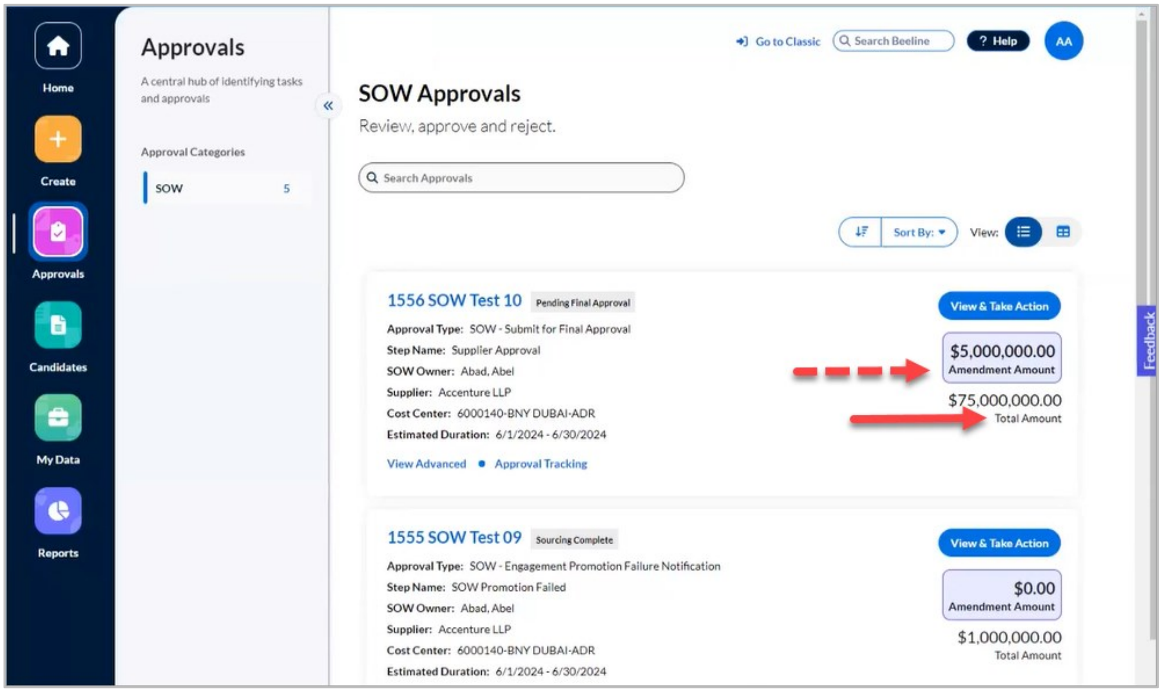
Requests

Follow the same principles used for the assignment approvals to work through your Request approval list. The screen layouts are similar and the buttons and features are located in the same area of the screen. Take care to notice the differences in summary fields and the differences in **Sort By** options. Use the **View Advanced** link to access more details if you can't determine how to action the approval based on the summary fields information. Remember the Card View is best for actioning short lists on a one-by-one basis while the Table View is better for actioning multiple records in batch mode.



SOW (Statement of Work)

As mentioned previously, the SOW is a phase of the Services Procurement solution used to scope out the terms and conditions of the proposed work Project. Once the terms and conditions are agreed upon between the client and the vendor, the SOW is promoted to an active Project to manage the agreed upon scope of work. The Card and Table views display key summary information. Financial tracking is simplified by showing both the Total Amount of the Project as well as the Amendment Amount specific to the open approval.

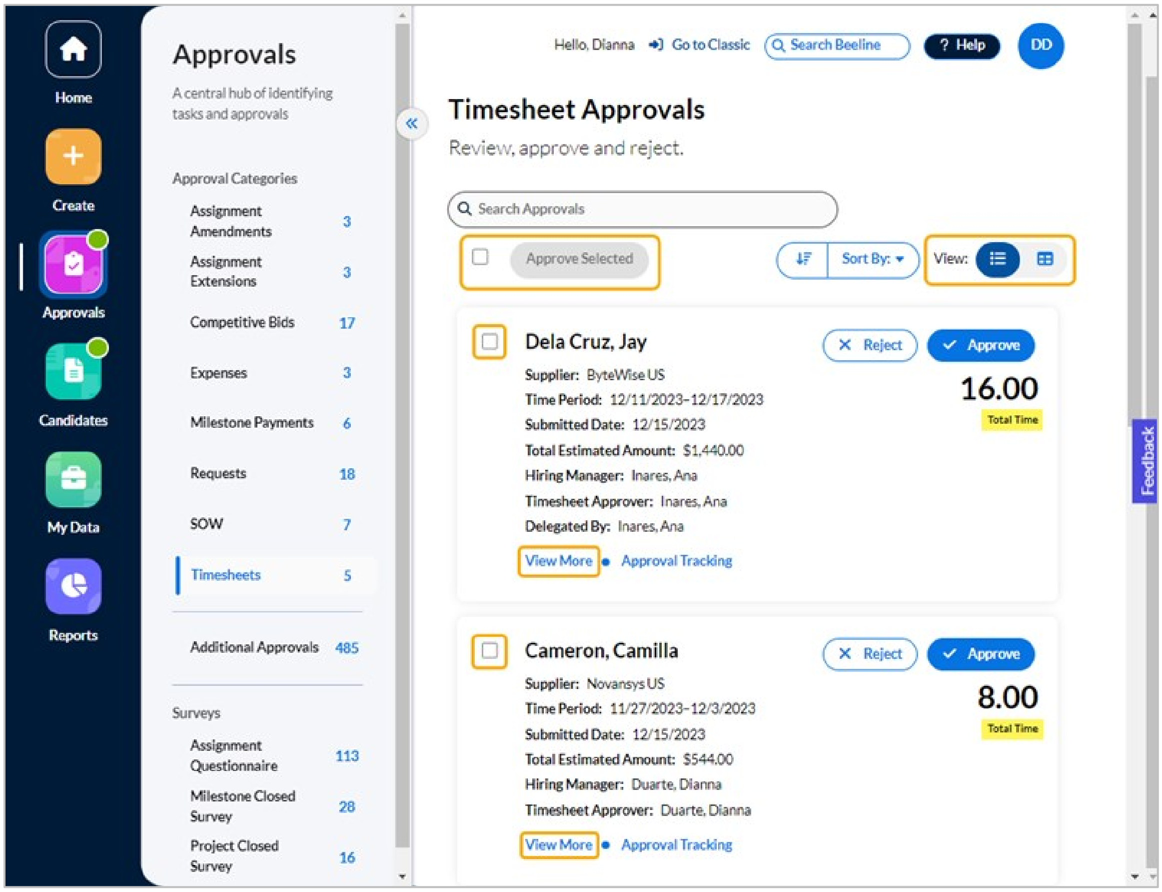


Timesheets

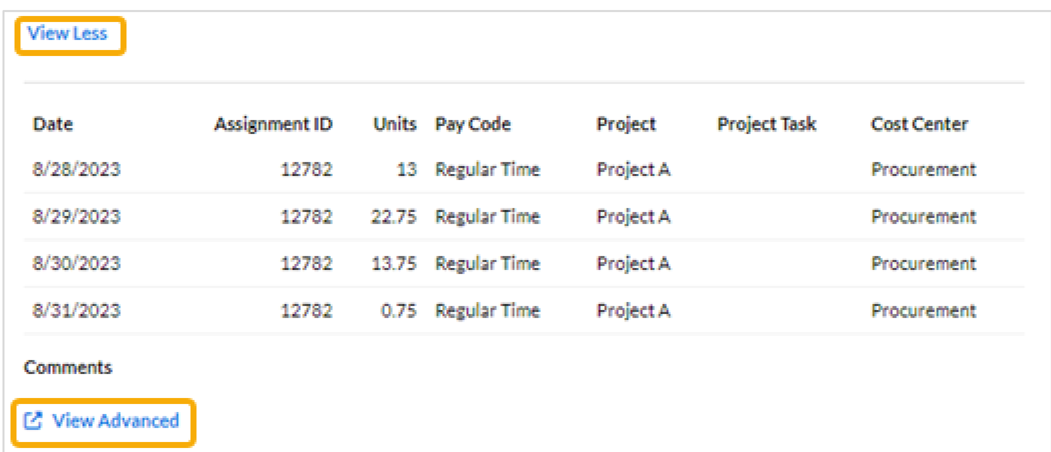
Timesheets are typically approved by the Hiring Manager or the designated Timesheet Approver. For some programs this is the same individual while for other programs these roles are separate. Either method can be managed within the Hiring Manager Experience.

In the Card View, you can take action on a single timesheet record or you can use the checkbox option to bundle similar timesheets together and take action on them as a batch (**Approve Selected**). To simplify the process, scroll through the list and determine which timesheets need to be actioned on an individual basis. Take action on those as needed. Then go back and combine all the remaining timesheets into “like” batches for quicker and more efficient processing. Notice that the **total** displayed on the right-hand side is the **Total Time** submitted. When you reject a timesheet, a text box displays so you can enter Comments as to why it was rejected and what needs to be adjusted before it can be resubmitted.

In the Table View, it is easier to organize timesheets into groups for batch processing.



In the Card View, click **View More to** reveal a slide-out section with timesheet details. Click **View Less** to collapse this section.


View Less

Date	Assignment ID	Units	Pay Code	Project	Project Task	Cost Center
8/28/2023	12782	13	Regular Time	Project A		Procurement
8/29/2023	12782	22.75	Regular Time	Project A		Procurement
8/30/2023	12782	13.75	Regular Time	Project A		Procurement
8/31/2023	12782	0.75	Regular Time	Project A		Procurement

Comments

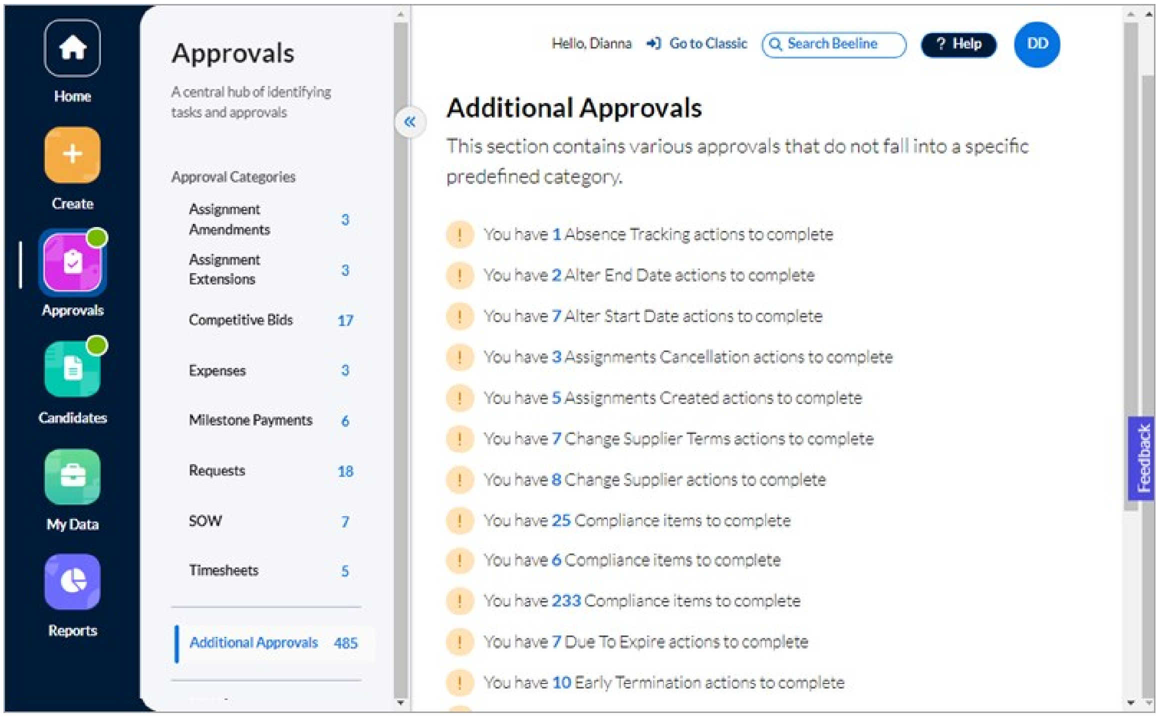
View Advanced

The **View Advanced** option navigates you to the complete timesheet record to view all details. Click the **Back to My Apps** link to return to the Timesheet Approvals list.

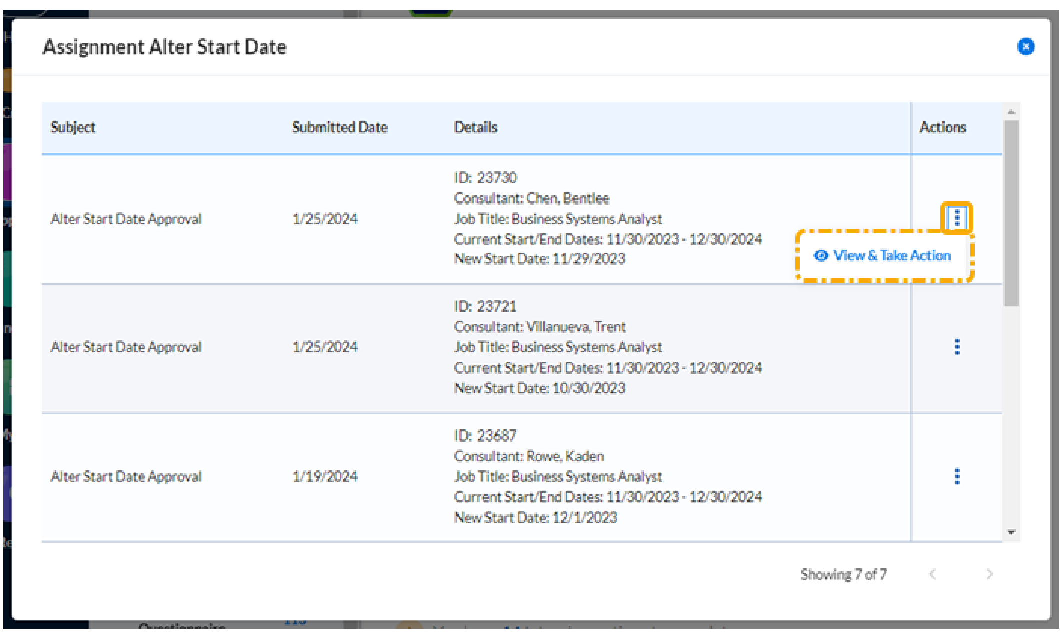
> **NOTE:** The **View Advanced** link is only visible in the **View More** expansion section.

Additional Approvals

All other approval types are combined into a single list in the **Additional Approvals** section.



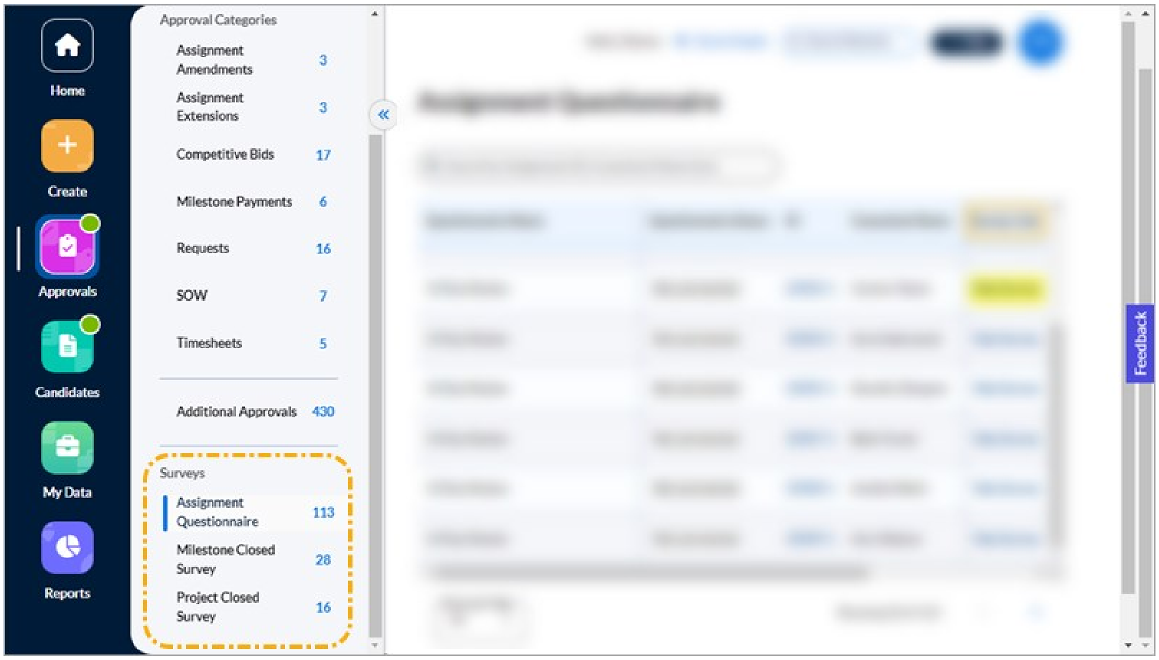
Click any blue tally number in the list to open the dialog window with further details (Table View).



Click **View & Take Action** in the **Actions** column to navigate to the record **Details** screen. Review the record and use the displayed action buttons to approve or reject. Click **← Back to My Apps** to navigate back to the list.

Surveys

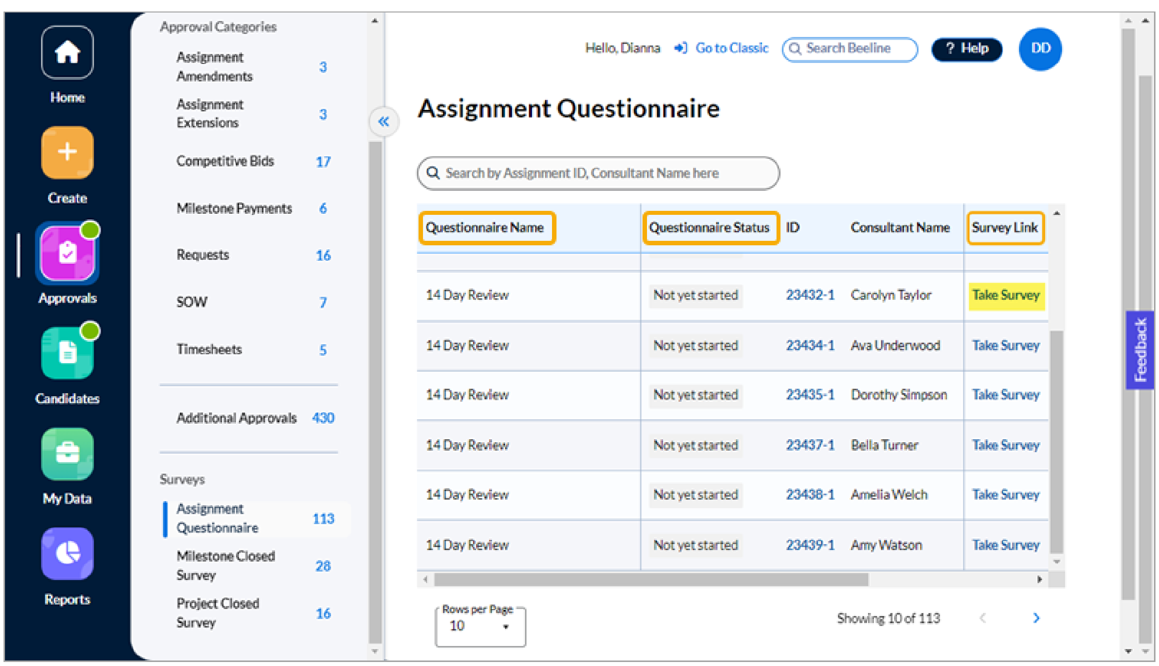
Programs decide which, if any, questionnaires and surveys to assign to Hiring Managers. In Classic Beeline, notifications informed Hiring Managers of these tasks. The **Surveys** section in the **Approvals** app now lists all outstanding questionnaires or surveys and includes a direct link for easy access. No more overlooked notifications causing you to miss providing this valuable feedback!



NOTE: Only those questionnaire/survey categories that are valid for your program display in your Hiring Manager Experience instance. All **Surveys** screens display in Table View format.

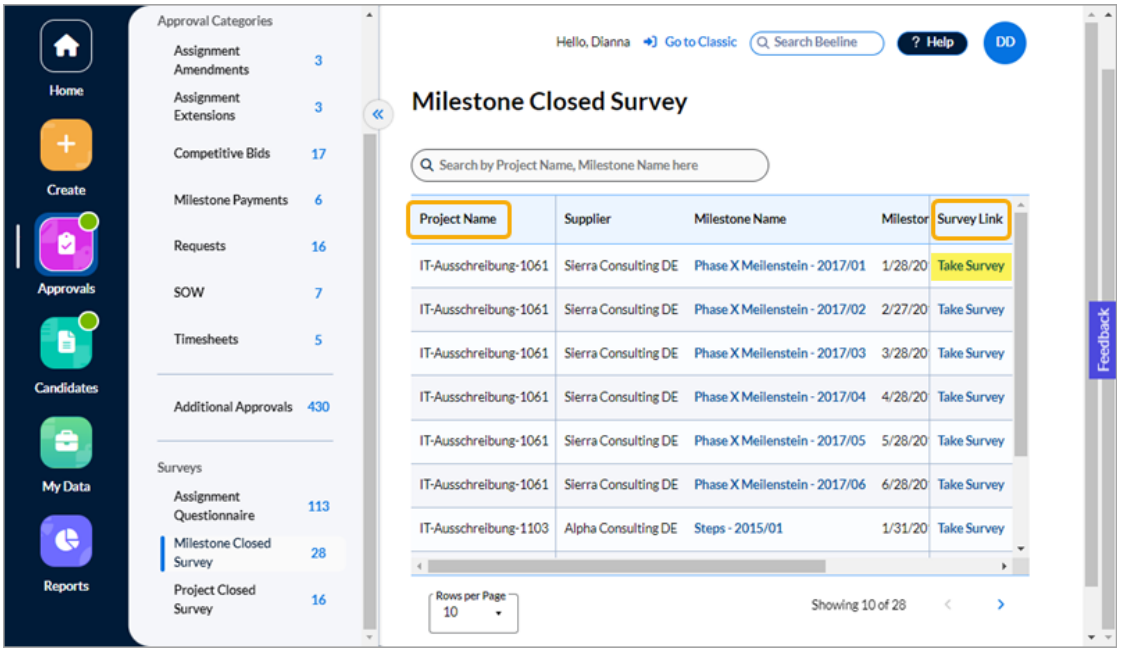
Assignment Questionnaire

Assignment questionnaires can be created for a variety of purposes throughout the assignment lifecycle. They provide important feedback to the Program Office not only as to worker performance but also VMS processes and functionality. Therefore, timely completion can go a long way to provide better oversight and program efficiencies.



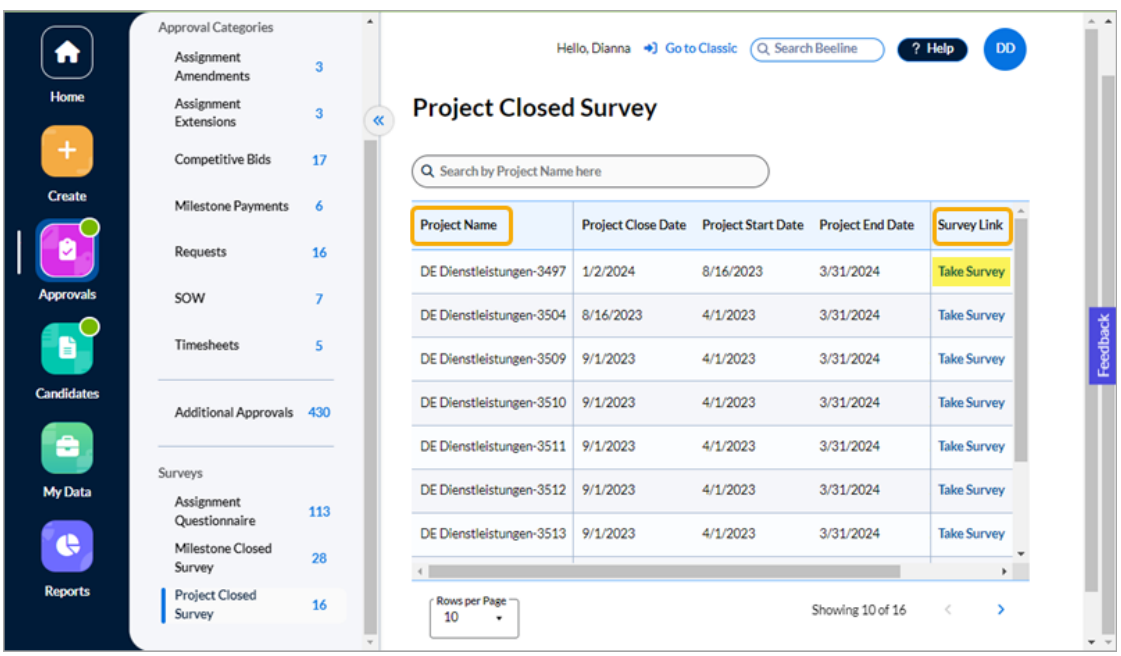
Milestone Closed Survey

Milestones are specific to the Services Procurement solution. They are used to ensure that the overall Project is meeting its SOW (Statement of Work) related terms and conditions. Each Project has its own specific requirements; however, these surveys ensure that not only are the specific Project requirements being met, but also that the project-based model is working effectively as well.



Project Closed Survey

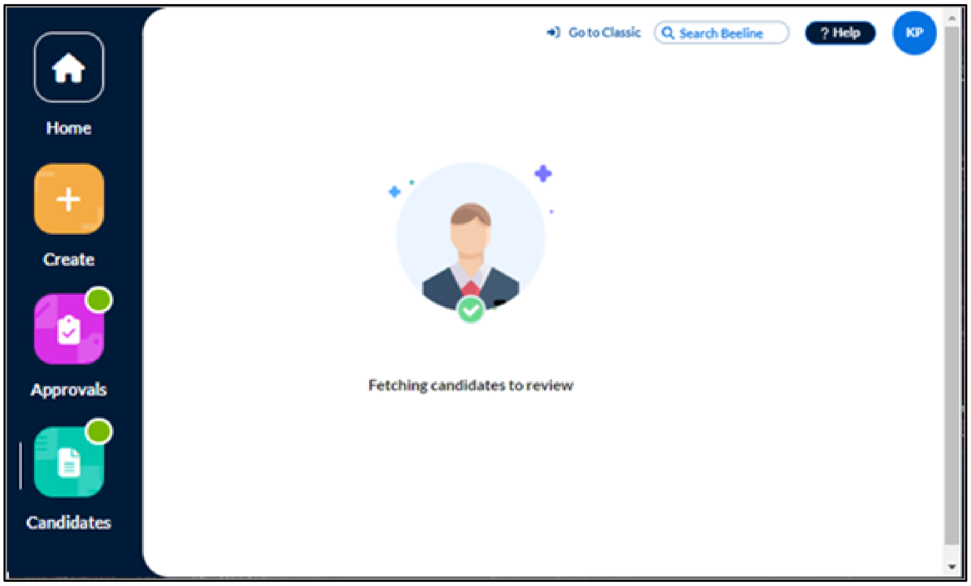
Project Closed surveys assess the overall Project rather than the separate stages managed as Milestones. The objective is feedback that covers the broad range of actions and workflow tracking throughout the lifecycle of the active project.



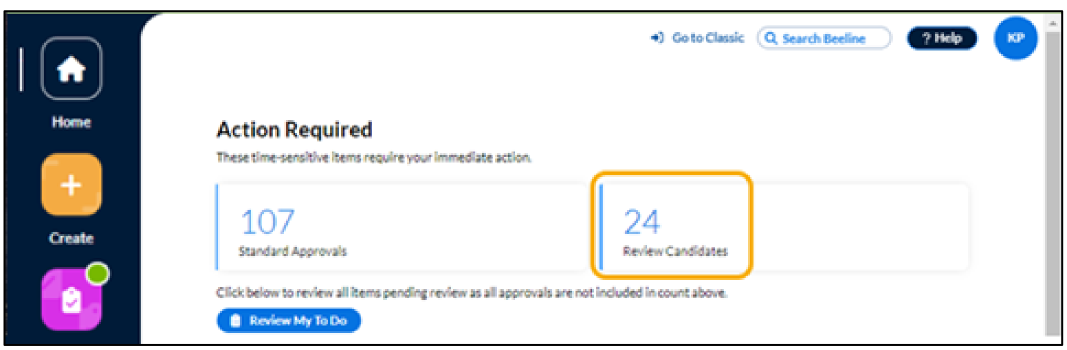
Candidates

The **Candidates** app simplifies the workflow needed to review, assess, and qualify candidates. Best of all—it does this with streamlined display screens and easy access to Action links so that you can navigate from one evaluation task to another with minimal clicks.

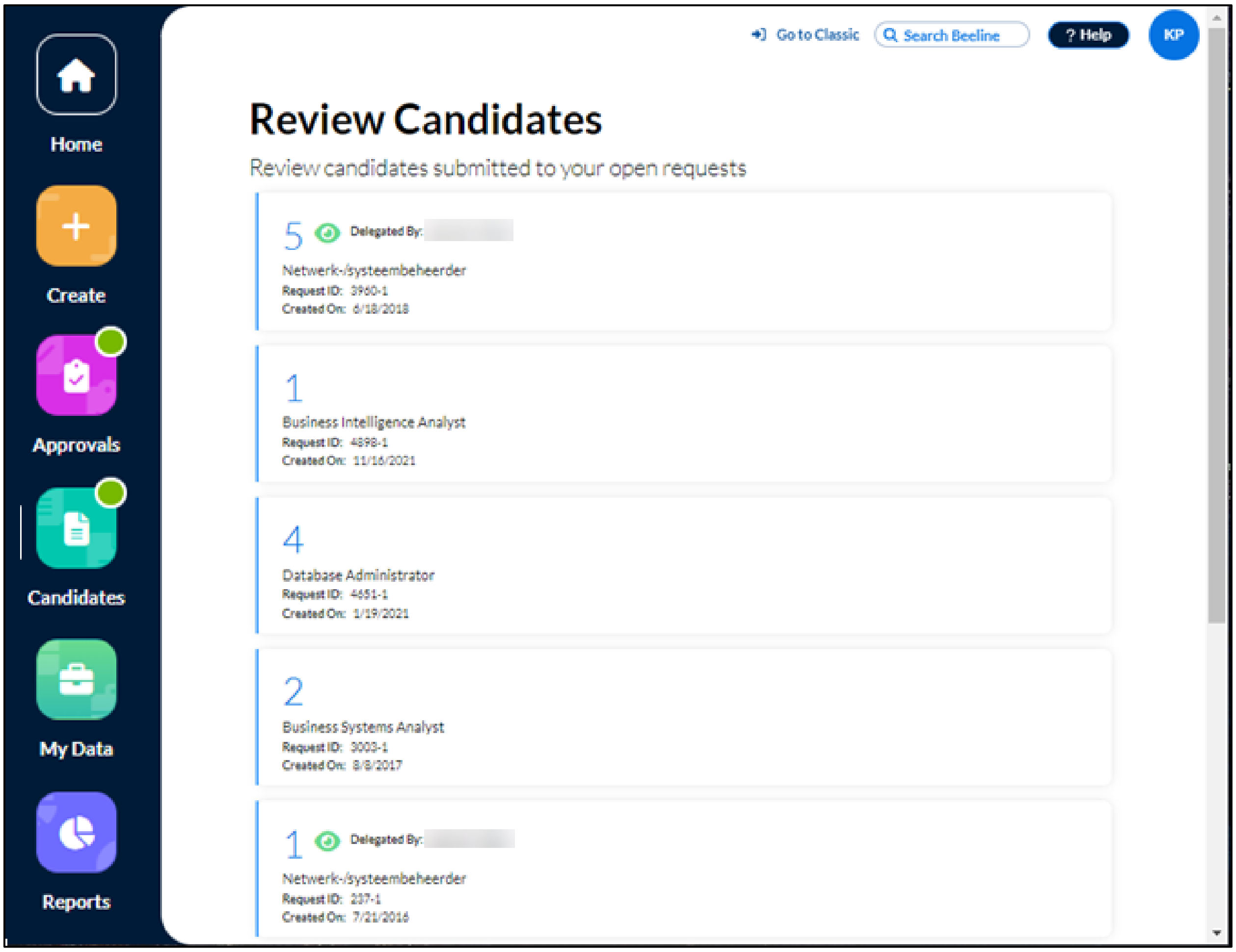
The process begins when you click the **Candidates** app button in the navigation panel and the platform "fetches" all candidates submitted for your review based on your open Requests. Then, just sit back and let the "digital assistants" do their job!



TIP: If you click the **Review Candidates** tally number in the **Action Required** section on the Home page, you'll also navigate directly to Review Candidates.

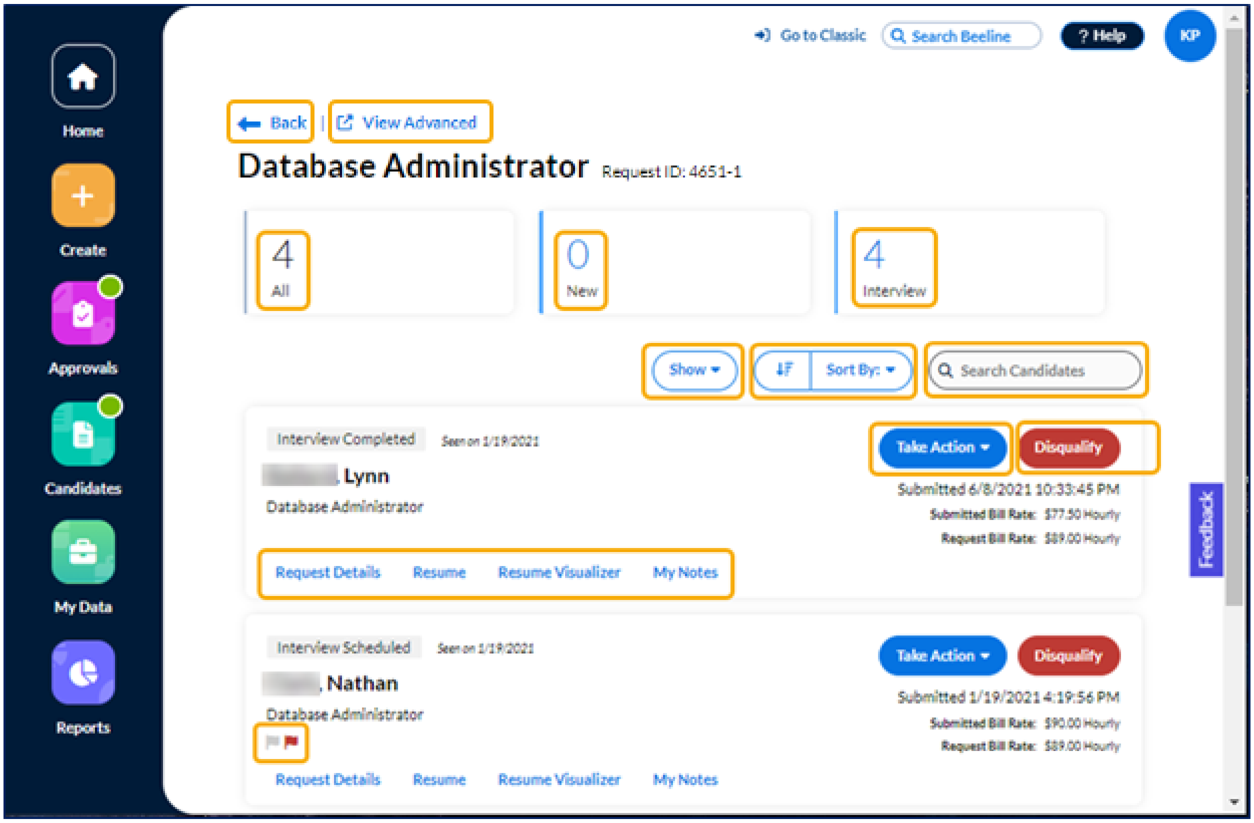


When the "fetching" is complete, the screen refreshes to display results organized by Job Title.



Each card is a separate request. The number at the top indicates the number of submitted candidates and the details inside the card include Job title, Request ID, and the Created On date. If the Request is one that was delegated to you, the Delegator will be identified to the right of the number of submitted candidates.

Scroll through the list and click the tally number to advance to the review process. Let’s start with the 4 Database Administrators in the third card from the top.



Take a moment to review the screen layout and get familiar with all the features.

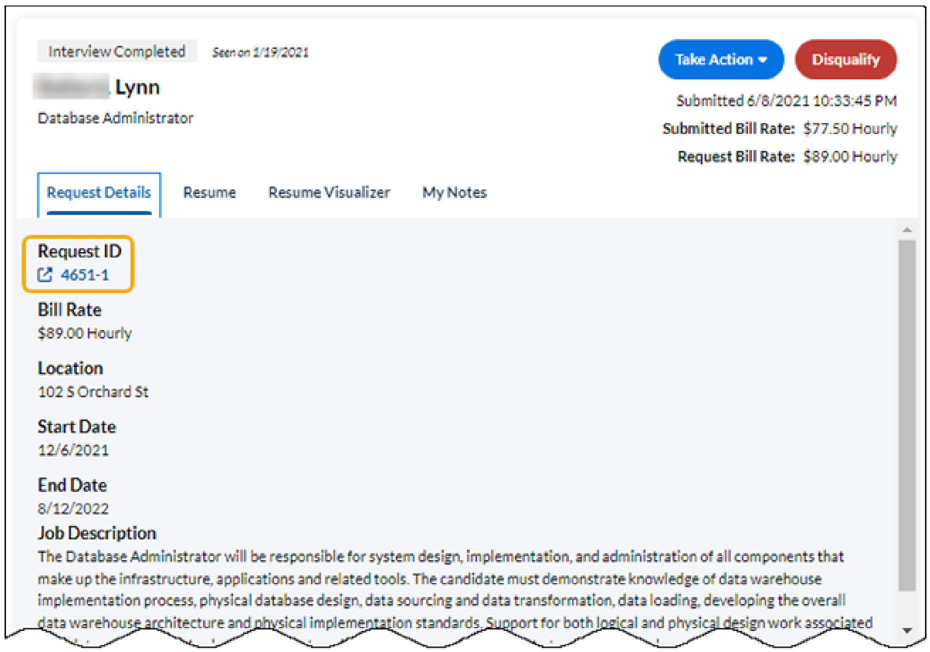
- ✓ At the top of the workspace are your navigation options.
  - Click ← **Back** to return to your results list.
  - Click View Advanced to navigate to the **Candidate Evaluation** list screen.
- ✓ Below the item count totals are the search, filter, and display options.
  - **Show** – to filter by key evaluation actions.
  - **Sort By** – to change the sort order of the candidate records.
  - **Search Candidates** – use to locate specific candidate records.
- ✓ The **Take Action** button gives you access to **Select Candidate**, **Manage Interview**, **Rate Interview**, or **Send Profile**.
- ✓ The **Disqualify** button displays a pop-up window where you can select the **Reason** and enter **Comments** as to why a candidate is disqualified.
- ✓ Tally numbers for each item type (All, New, and Interview) display across the top of the screen just below the Job Title and Request ID.
- ✓ Hover over any displayed Candidate Flags ( ) for additional details. **NOTE**: For a complete list of Candidate Flags and other identifying icons that you may encounter throughout these evaluation screens, review the **Candidate Flags and Icons** section at the end of this section.

Candidate Details

Each candidate tile includes links to view more candidate details including Request Details, Resume, Resume Visualizer, and My Notes. Click any tab and the Candidate tile expands to display the relevant information.

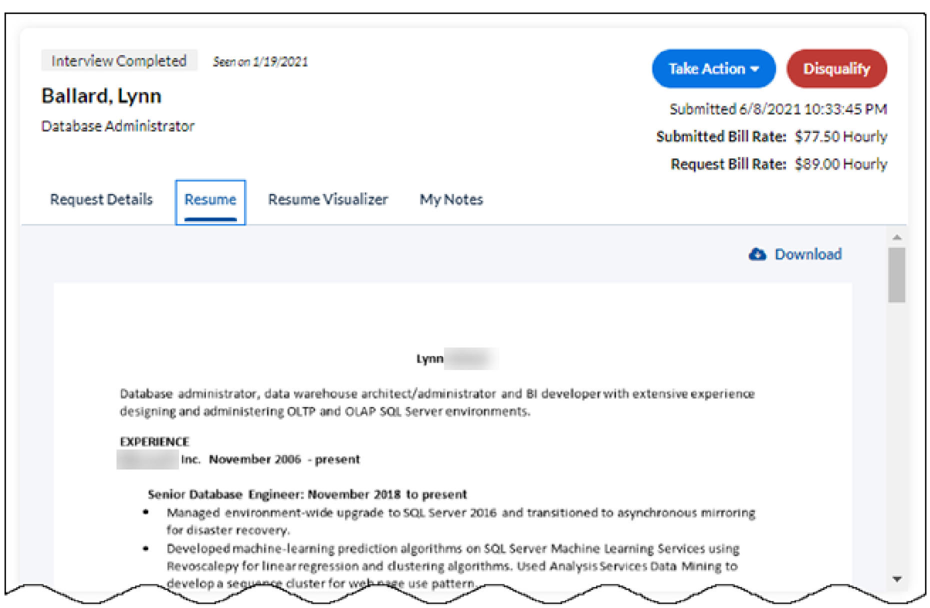
• Request Details

Click to view summary information related to the initial Request with the ability to drill down to the full Request record.



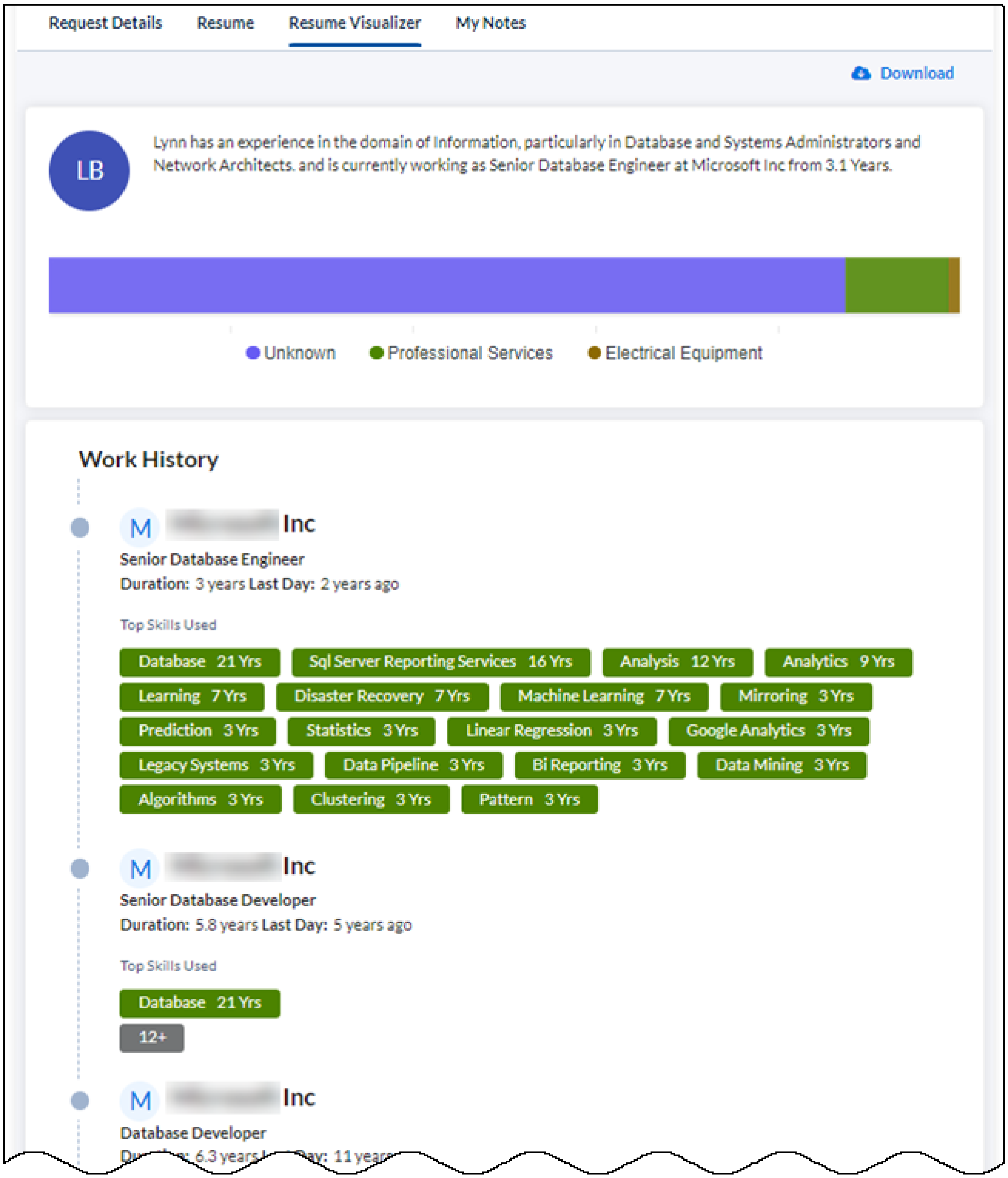
• Resume

Click to view the full resume attached by the Supplier.



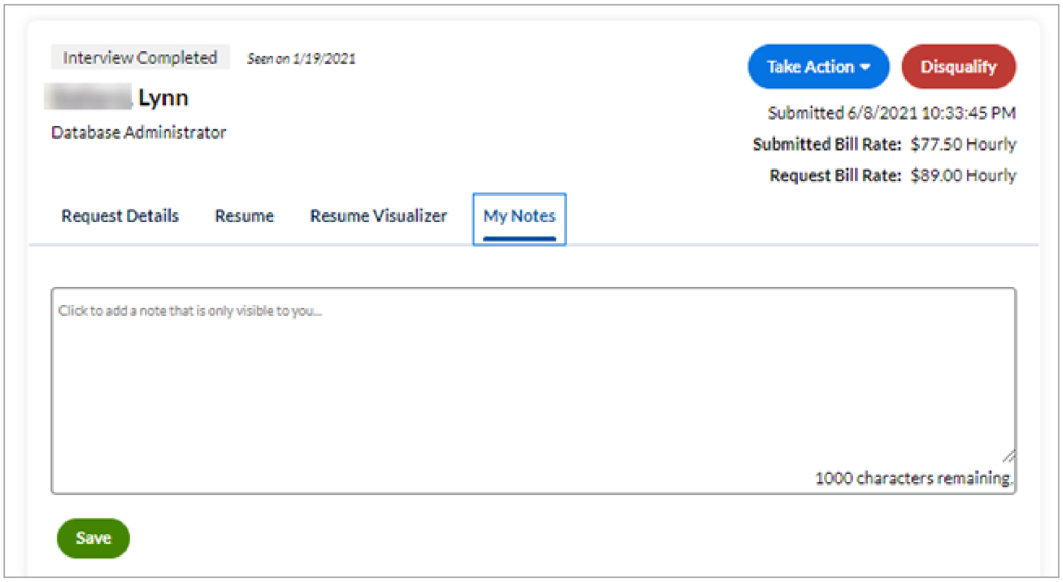
• Resume Visualizer

Minimize your resume reviewing time by using the Artificial Intelligence powered insight of our Resume Visualizer. Submitted resumes are quickly scanned and analysis results display to highlight key aspects of the candidate's profile. Summarizations are consistent regardless of the format of the original resume making it much easier to compare candidate qualifying factors. Starting at the top with a profile summary of the candidate, it continues with additional sections for Work History, Recommended Job Types & Skill Summary, and Skill Concentration & History.



• My Notes

Use this feature to take notes throughout the evaluation process for your private use.



Candidate Flags and Icons					
	Candidate Actions	**Icon**	**Candidate Flags**	**Flag**	**Flag Color**
Single Action	Approve		DNR (Do Not Rehire)		Red
	Reject		DNR Alert		Orange
	View More		Duplicate		Orange
	Compare Candidates		Former Contingent Worker		Gray
	Evaluate Candidates		Former Employee		Gray
	Recommend Candidate		High Bid		
	Setup Interview		History		Orange
	Setup Interview Using Outlook		Ineligible Candidate		Red
	Rate Candidate		Low Bid		
	Manage Interviews		Pay Rate Card Exceeded		Red
	Withdraw Candidate		Rate Care Exceeded		Red
	Resubmit Candidate		Supplier Comments		Gray
	Change Point Of Origin		Request Flags		
	Contact Vendor		Open Request Not Released		Lt. blue
	Set Candidate Status		Open Request Released No Candidates		Red
	Modify Background Checks		Candidate Interview	Icon	
Group Action	Reject Candidate		Interview Candidate		
	Submit Order		Interview Candidate Outlook		
	Withdraw Order		Interview Outlook Video		
	Forward Profile		Cancel Interview		
	Change Start Date		Manage Interview		
	Download Resumes				

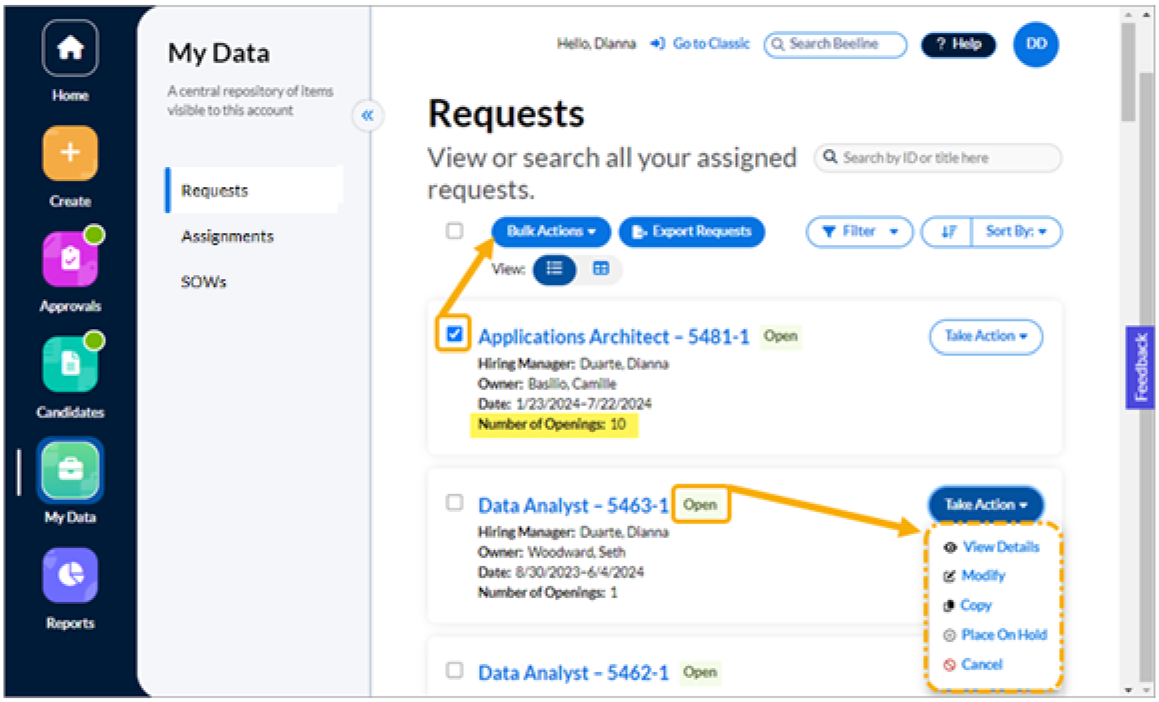
My Data

The My Data app highlights YOUR records and YOUR actions. Request, Assignment, and SOW records are visible to both the Hiring Manager as well as the Hiring Manager's manager, making these records visible and actionable by both.

Requests

◈ Card View

The Card View displays each record as a separate section (card) in a scrollable list.



Each card displays summary information for a single Request record. Click the hyperlinked Job Title and the screen refreshes to display the Request Dashboard with access to full details as well as the visual Process Graph.

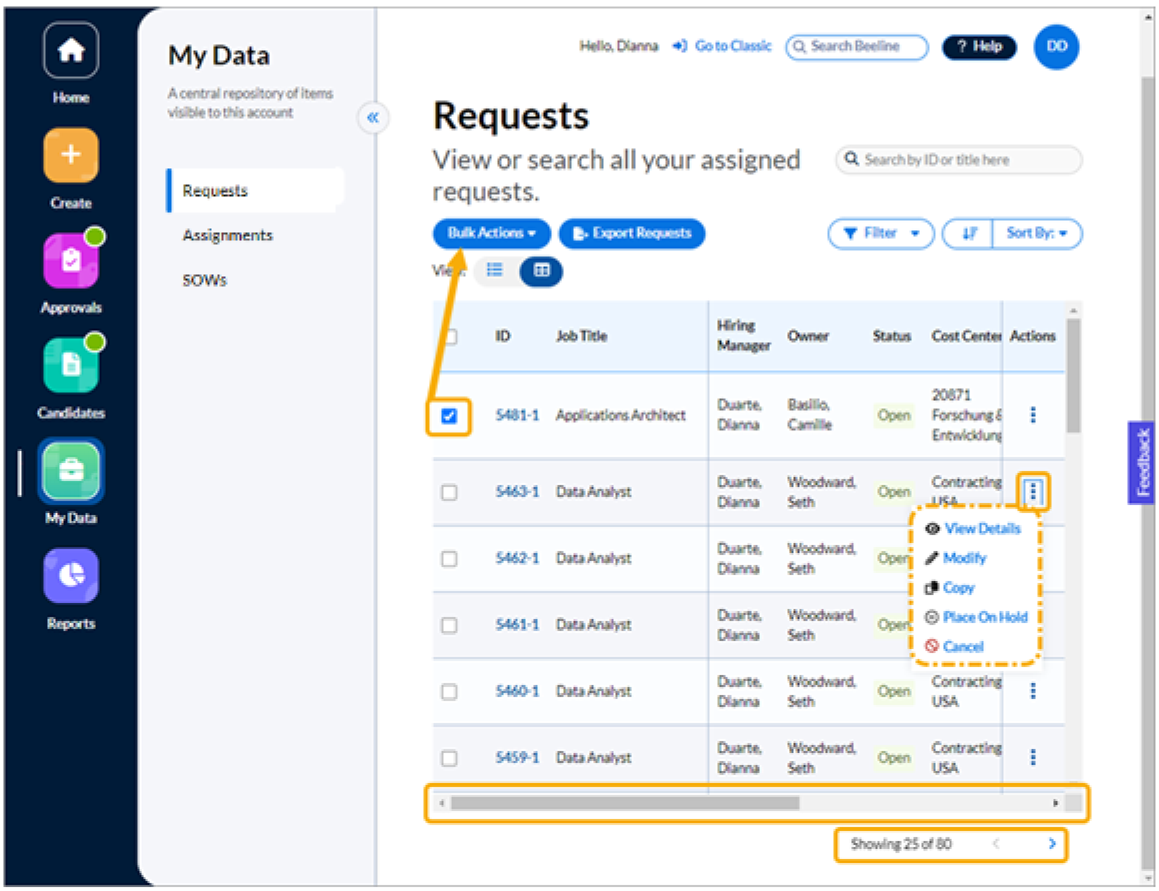
Other features include:

- **Search by ID or title here –** This search field filters your results to display Requests with an Open status. Use the **Search Beeline** field at the top of the screen to make unfiltered searches.
- **Filter –** Lets you select which requests to display in your card list by status. Pick any combination (or limitation) by Pending, Open, On Hold, Cancelled, Filled, Rejected, Not Submitted, or Correction Required. Multiple statuses can be selected—remember to click Apply to activate your selection(s).
- **Sort By –** Gives you the option to arrange your card list by Request Number, Job Title, or Status.
- **View** – Click the respective icon to easily switch from Card to Table View.
- **Take Action** – Click the button to reveal which action options are valid for the respective request. The Action options change depending on the current status of the request record.

- **Checkbox / Bulk Actions** – Click the checkbox for each Request you want to group together for a bulk (batch) action. The **Bulk Actions** button only activates when at least one checkbox is 'checked'. Batching requests that need the same action taken is a productive way to save time and effort!
- **Export Requests** – Need to extract a list of your requests? A single click of the **Export Requests** button and your requests list is exported as a download in xlsx format.

◈ Table View

The alternate display option is the Table View. This option lets you see more data by using less vertical space. If you need to view a group of Requests in rows and columns, or want to easily compare one Request to another, the Table View would be your better option.



The Table View retains several of the features of the Card View including:

- **Search by ID or title here –** This column filters your results to display Requests with an Open status. Use the **Search Beeline** field at the top of the screen to make unfiltered searches.
- **Filter –** Lets you select which requests to display in your card list by status. Pick any combination (or limitation) by Pending, Open, On Hold, Cancelled, Filled, Rejected, Not Submitted, or Correction Required. Multiple statuses can be selected—remember to click Apply to activate your selection(s).
- **Sort By –** Gives you the option to arrange your card list by Request Number, Job Title, or Status.
- **View** – Click the respective icon to easily switch from Card to Table View.

- **Checkbox / Bulk Actions** – Click the checkbox for each Request you want to group together for a bulk (batch) action. The **Bulk Actions** button only activates when at least one checkbox is ‘checked’. Batching requests that need the same action taken is a productive way to save time and effort!
- **Export Requests** – Need to extract a list of your requests? A single click of the **Export Requests** button and your Requests list is exported as a download in xlsx format.

Additional Table View features include:

- **Actions** is now a locker column on the right side of the table. Click the kebab icon (⋮) to reveal which actions can be taken on any given row. The Actions options change depending on the current status of the request record.
- **Tally Numbers** – The “Showing” text below the table layout indicates how many records are displayed out of how many total records available.
- **Horizontal scroll bar** -- The scrollbar beneath the table layout gives you full access to all columns included in the table for those who have screen displays not able to accommodate the full width of the table. The **ID, Job Title,** and **Actions** are locked columns.

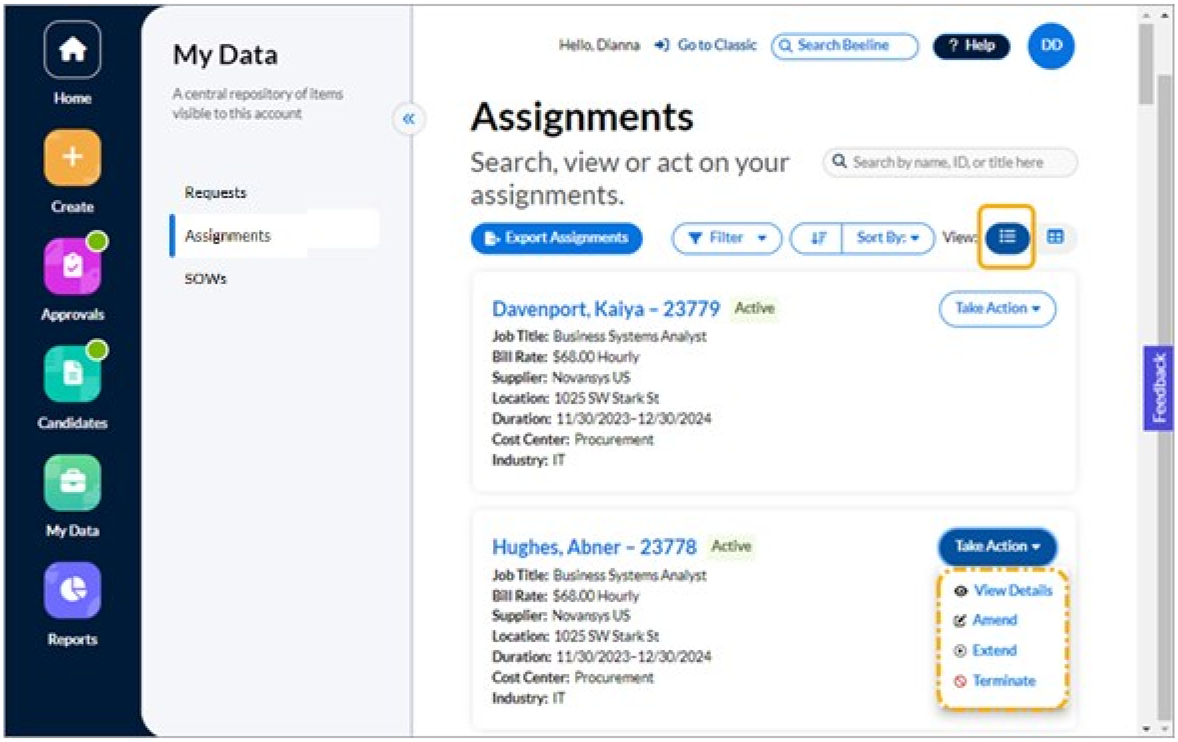
TIP: You can maximize your table layout space by hiding the **My Data** slide-out panel. Just click the slider button («) to hide it, then click it again to restore it.

Assignments

It may seem curious, but the Assignment process in Beeline Enterprise starts once the Supplier has accepted the Offer. The assignment record is then created with a status of **Scheduled** and stays in this state of anticipation until the **Assignment Start Date** is reached. Once the worker is onboarded, the assignment becomes **Active** and stays in this status until the scheduled **Assignment End Date**—unless the assignment is amended. Reasons to amend an assignment might include an Assignment Extension or an Assignment Early Termination. In some instances, an Assignment Amendment may be to change the assigned Hiring Manager or Timesheet Approver. Timesheet reprocessing can also generate an assignment amendment. Throughout the duration of any amendment process, the assignment has a status of **Pending Approval** until the amendment is complete.

◈ Card View

The default view for the My Data app is the Card View where each record displays in a list as a separate card.



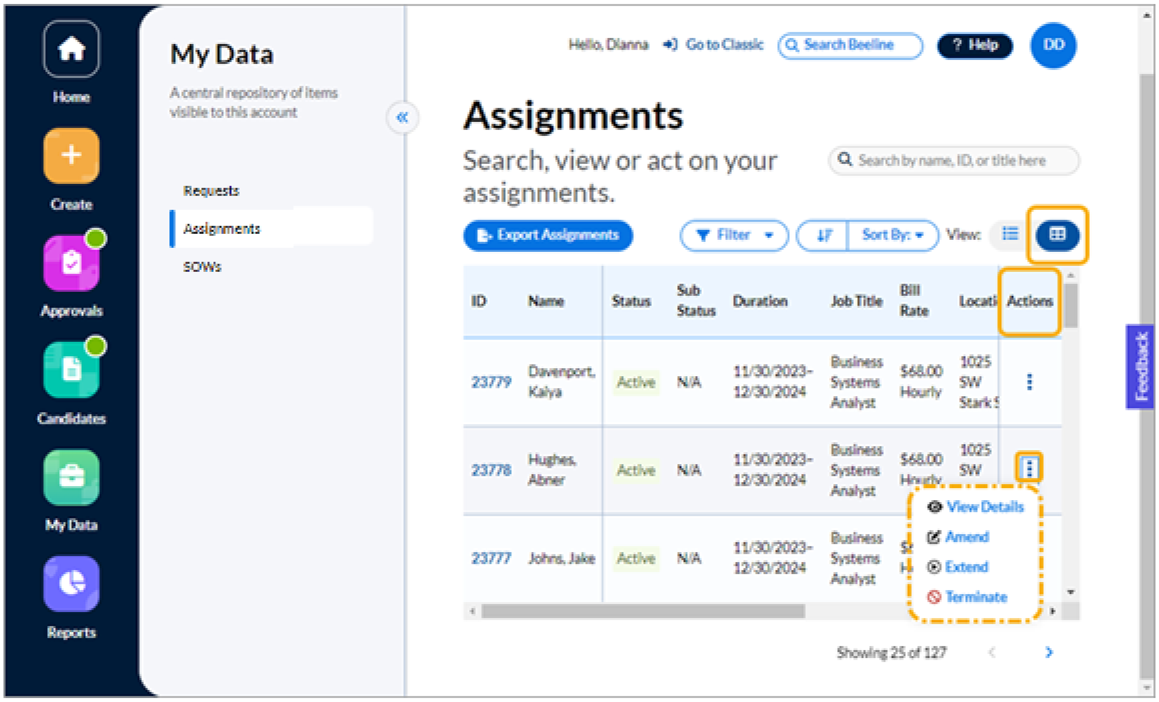
Each card displays summary information for that assignment record. Click the worker's hyperlinked name and the screen refreshes to display the Assignment Dashboard with access to full details.

Other features include:

- **Search by name, ID, or title here –** This search field filters your results to display active assignments only. Use the **Search Beeline** field at the top of the screen to make unfiltered searches.
- **Filter –** Lets you select which assignment statuses to display in your card list. Pick any combination (or limitation) by Active, Scheduled, Expired, or Cancelled.
- **Sort By –** Gives you the option to arrange your card list by Assignment ID, End Date, Job Title, Name, Start Date, or Supplier.
- **View** – Click the respective icon to easily switch from Card to Table View.
- **Take Action** – Click the button to reveal which action options are valid for the respective assignment. The Action list will change depending on the current status of the assignment record.
- **Tally Numbers** – The "Showing" text at the bottom of the screen indicates how many records are displayed out of how many total records available.
- **Export Assignments** – Need to extract a list of your assignments? A single click of the Export Assignments button and your assignments list is exported in xlsx format.

◈ Table View

The alternate display option is the Table View. This option lets you see more data by using less vertical space. If you need a full range of assignment information, or want to easily compare one assignment to another, the Table View would be your better option.



The Table View retains several of the features of the Card View including:

- **Search by name, ID, or title here –** This column filters your results to display active assignments only. Use the **Search Beeline** field at the top of the screen to make unfiltered searches.
- **Filter –** Lets you select which assignment statuses to display in your card list. Pick any combination (or limitation) by Active, Scheduled, Expired, or Cancelled.
- **Sort By –** Gives you the option to arrange your card list by Assignment ID, End Date, Job Title, Name, Start Date, or Supplier.
- **View** – Click the respective icon to easily switch from Card to Table View.
- **Export Assignments** – Need to extract the table in xlsx format? Just click the Export Assignments button.

Additional Table View features include:

- **Actions** is now a static column locked on the right side of the table layout. Click the kebab icon (**⋮**) to reveal which actions can be taken on any given row. The Actions options change depending on the current status of the assignment record.
- **Tally Numbers** – The “Showing” text below the table layout indicates how many records are displayed out of how many total records available.
- **Horizontal scroll bar** -- The scrollbar beneath the table layout gives you full access to all columns included in the table for those who have screen displays not able to accommodate the full width of the table. The **ID, Name,** and **Actions** are locked columns.

TIP: You can maximize your table layout space by hiding the **My Data** slide-out panel. Just click the slider button («) to hide it, then click it again to restore it.

Assignment Status

Some data remains constant throughout the lifecycle of the assignment while other data may change depending on the current status of the assignment. Checking the Status first is a way to remember which data may be "temporary".

TIP: **ALWAYS CHECK THE AMENDMENT HISTORY SECTION** of the assignment record to verify whether there are any other "open" amendments! You can have multiple active amendments but the time durations should not overlap or one could negatively impact the other. You cannot take action on an assignment when it is in a "Pending Approval" status. Always check the status BEFORE processing an assignment amendment!

- Assignments Pending Approval

An assignment can be amended for any number of reasons. Some amendments are simple information updates while others are event/budget related such as extensions or terminations. Regardless of the reason for the amendment, once it is submitted any amendment that requires approval (financial or administrative) is placed in the Pending Approval queue.

- Scheduled Assignments

An assignment record has a status of **Scheduled** from the date the Supplier accepts the Offer until the Assignment Start Date when the worker is onboarded. This may be just a transitional waiting period although it is typically used to complete pre-onboarding activities (e.g., background checks, badging, etc.)

- Active Assignments

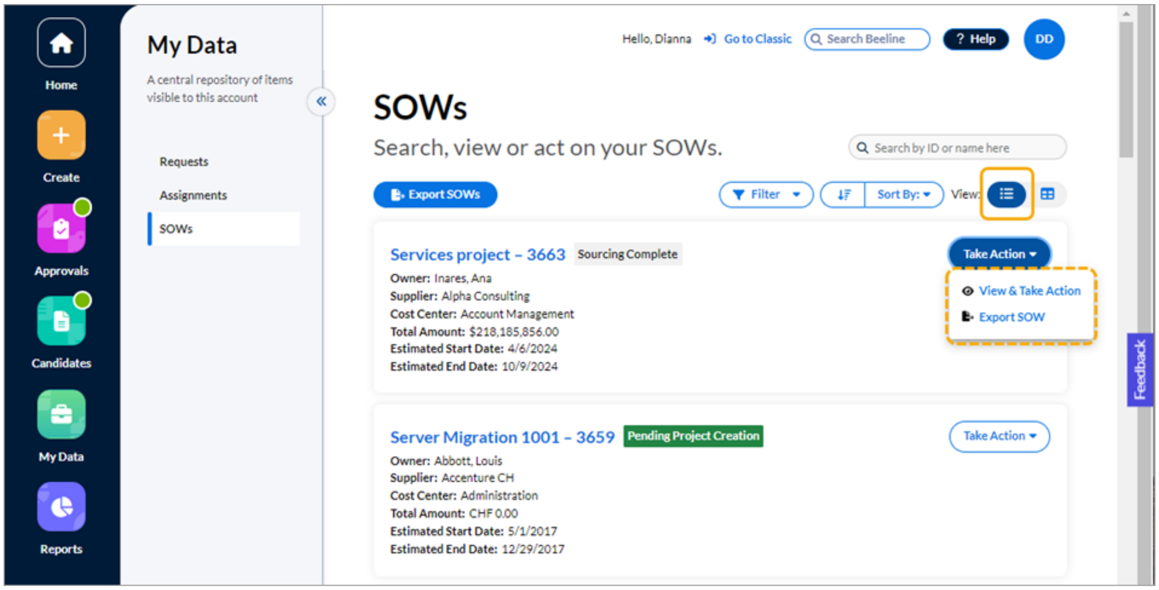
An assignment is "active" from the Start Date until its End Date. Either of those dates can be adjusted using the assignment amendment process, but the time period between those two dates will always determine the "active" status.

SOW

The SOW (Statement of Work) is a phase of the Services Procurement solution used to scope out the terms and conditions of the proposed work Project. Once the terms and conditions are agreed upon between the client and the vendor, the SOW is promoted to an active Project. The Project is used to manage the terms and conditions detailed in the SOW.

◈ Card View

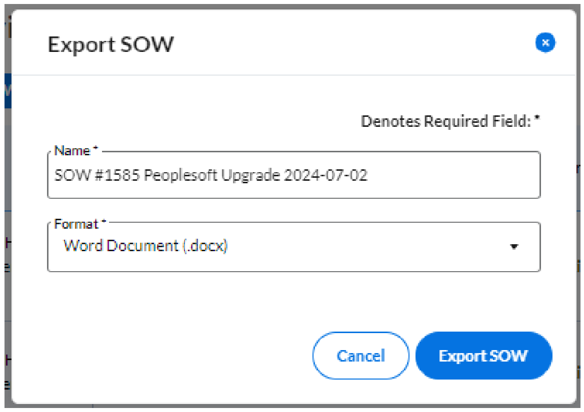
The default view for the My Data app is the Card View where each SOW displays in a vertical list as a separate card.



Each card displays summary information for that SOW record. Click the SOW name - ID and the screen refreshes to display the SOW Dashboard with access to full details.

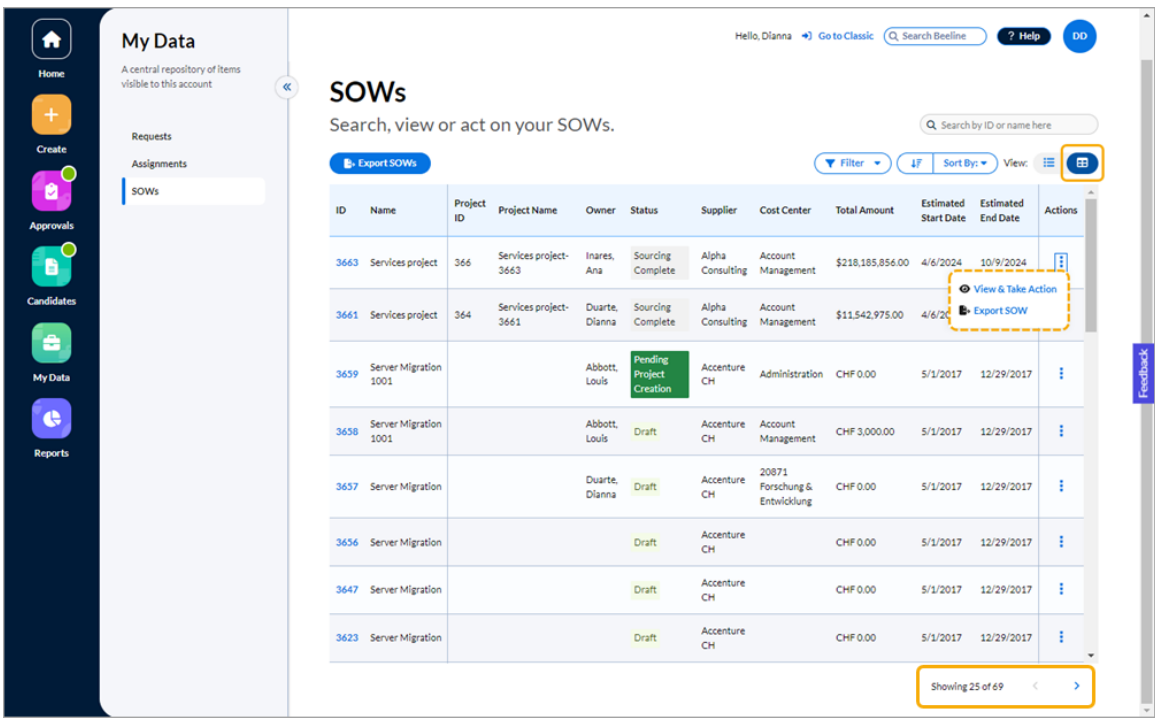
Other features include:

- **Search by ID or name here –** This search field filters your results to display SOWs active within the prior 365 days. Use the **Search Beeline** field at the top of the screen to make unfiltered searches.
- **Filter –** Lets you select which SOW statuses to display in your card list. Pick any combination (or limitation). The **Project End Date** filter at the top of the list is active by default to focus on active SOWs—if you need to include historical records in your search results, just uncheck this box. Be aware that your record retrieval time could be impacted!
- **Sort By –** Gives you the option to arrange your card list by SOW ID, Status, or Supplier. The arrow on the left will switch the display order from descending to ascending, click again to switch it back.
- **View** – Click the respective icon to easily switch from Card to Table View.
- **Take Action** – Click the button to reveal which action options are valid for the respective SOW. The standard options are **View & Take Action** and **Export SOW**.
- **Tally Numbers** – The "Showing" text at the bottom of the screen indicates how many "cards" are displayed out of how many total records available. The standard display is 25 cards per screen. Click the "Load next ##" button to ADD more cards to your screen display. Repeat as needed if you want to create a list of ALL records that match your filter selections.
- **Export SOWs** – Need to extract a list of your SOWs? A single click of the **Export SOWs** button and your SOW list is exported as a download in xlsx format.
- **Download SOW** – Need a copy of the SOW document? Click the "Export Sow" option on the **Take Action** menu to retrieve a copy of the SOW document in either docx, doc, or pdf format.



◈ Table View

The alternate display option is the Table View. This option arranges the data in columns to display more information in less space. If you want to easily compare one SOW to another, the Table View would be your better option.



The Table View retains several of the features of the Card View including:

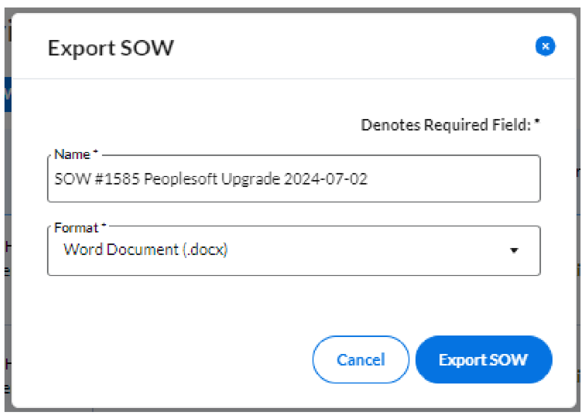
- **Search by ID –** Click the **ID number** in the ID Name column to navigate to the **SOW dashboard** to view full details. This column filters your results to display SOWs active within the prior 365 days. Use the **Search Beeline** field at the top of the screen to make unfiltered searches.
- **Export SOWs** – Need to extract a list of your SOWs? A single click of the **Export SOWs** button and your SOW list is exported as a download in xlsx format.
- **Filter –** Lets you select which SOW statuses to display in your table view. Pick any combination (or limitation). The **Project End Date** filter at the top of the list is active by default to focus on

active SOWs—if you need to include historical records in your search results, just uncheck this box. Be aware that your record retrieval time could be impacted!

- **Sort By –** Gives you the option to arrange your table view by SOW ID, Status, or Supplier. The arrow on the left will switch the display order from descending to ascending, click again to switch it back.
- **View** – Click the respective icon to easily switch from Table to Card View.

Additional Table View features include:

- **Actions** is now a static column locked on the right side of the table layout. Click the kebab icon (⁝) to reveal which actions can be taken on any given row. The standard SOW options are **View & Take Action** and **Export SOW**
- **Tally Numbers** – The "Showing" text at the bottom of the screen indicates how many records are displayed out of how many total records available. The standard display is 25 records (rows) per screen. Click the arrow symbol to change your table display to the next 25 records. Repeat as needed to cycle through ALL the records. Unlike the card view, the table view does not expand to display more than a 25 record max limit.
- **Download SOW** – Need a copy of the SOW document? Click the "Export SOW" option on any **Take Action** menu to retrieve a copy of the respective SOW document in either docx, doc, or pdf format.



- **Horizontal scroll bar** -- The scrollbar beneath the table layout gives you full access to all columns for those who have screen dimensions not able to accommodate the full width of the table. The **ID, Name,** and **Actions** are locked columns.

  TIP: You can maximize your table layout space by hiding the **My Data** slide-out panel. Just click the slider button () to hide it, then click it again to restore it.

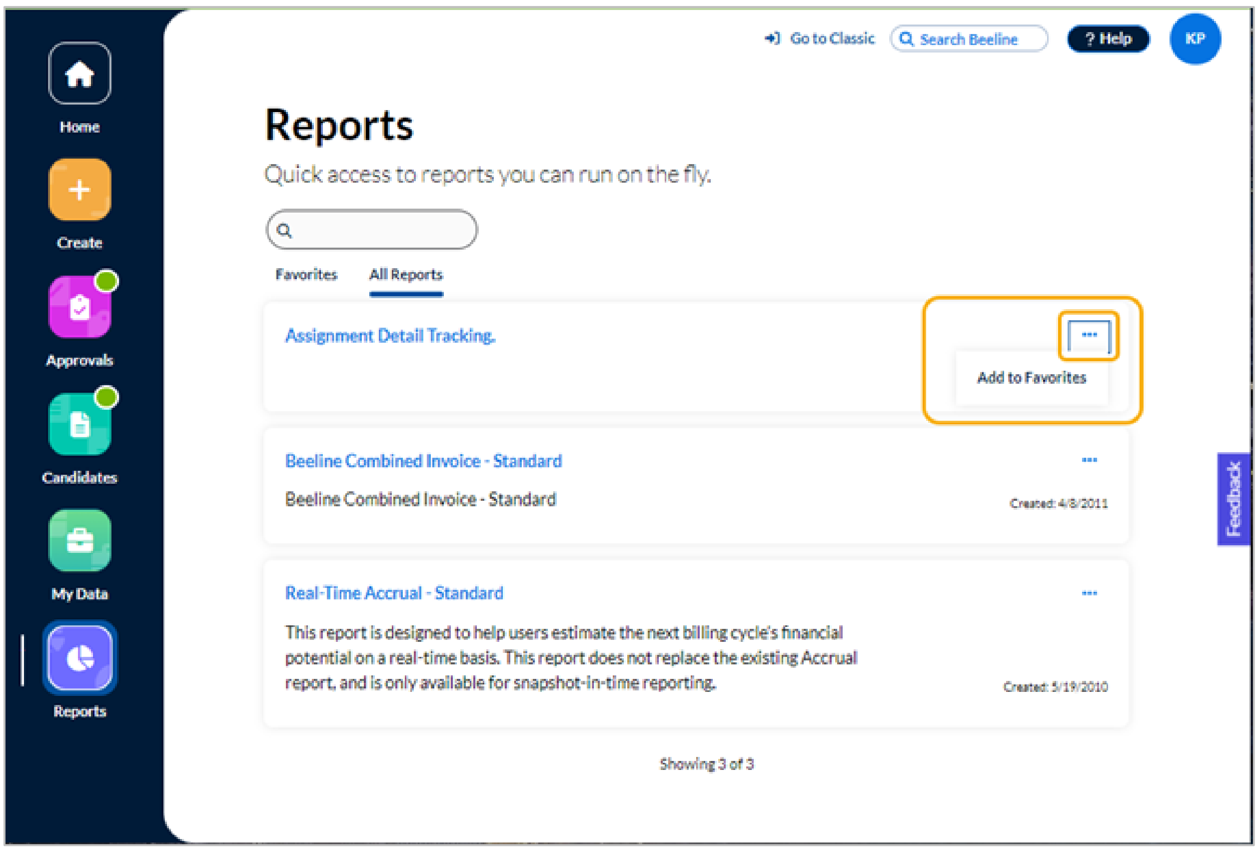
Reports

There are two tabs in the **Reports** app. One is a list of system reports (**All Reports**). The other tab is a collection of reports you create yourself (**Favorites**). The Favorites list is unique to YOU. Any report listed under the “All Reports” tab can be saved to your Favorites list. From your Favorites list, you have the option to <Edit> the report if you want to modify it from the original (system created) version. The modified report can be saved as a new Favorite, shared with other platform users, or even set up as a scheduled report.

All Reports

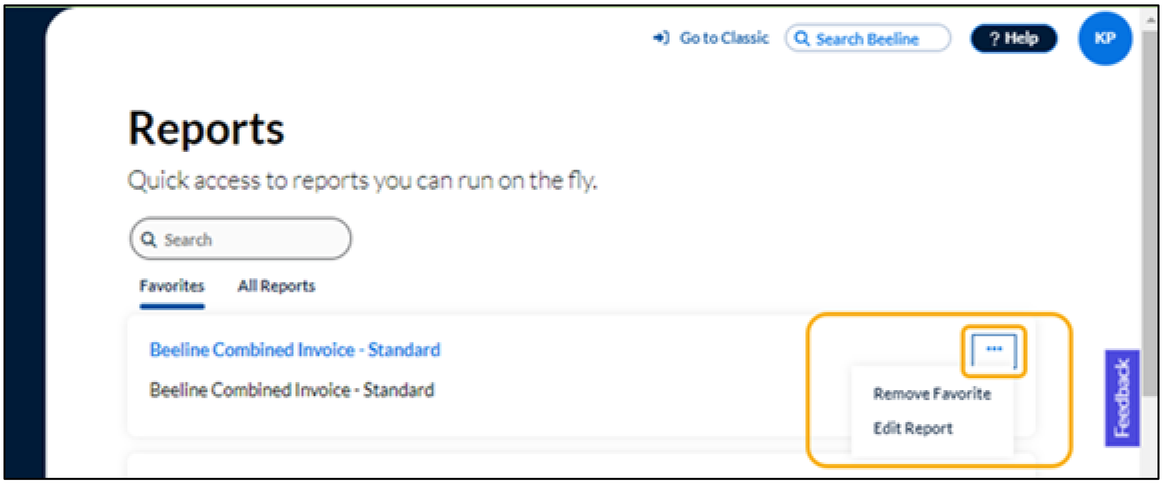
Click the ellipsis (…) to reveal the option to **Add to Favorites**. Click **Add to Favorites** and a copy of the report posts into your Favorites list.

Click the report title to view any report. From the displayed report click **← Back to My Apps** to return back to the **Reports** screen.



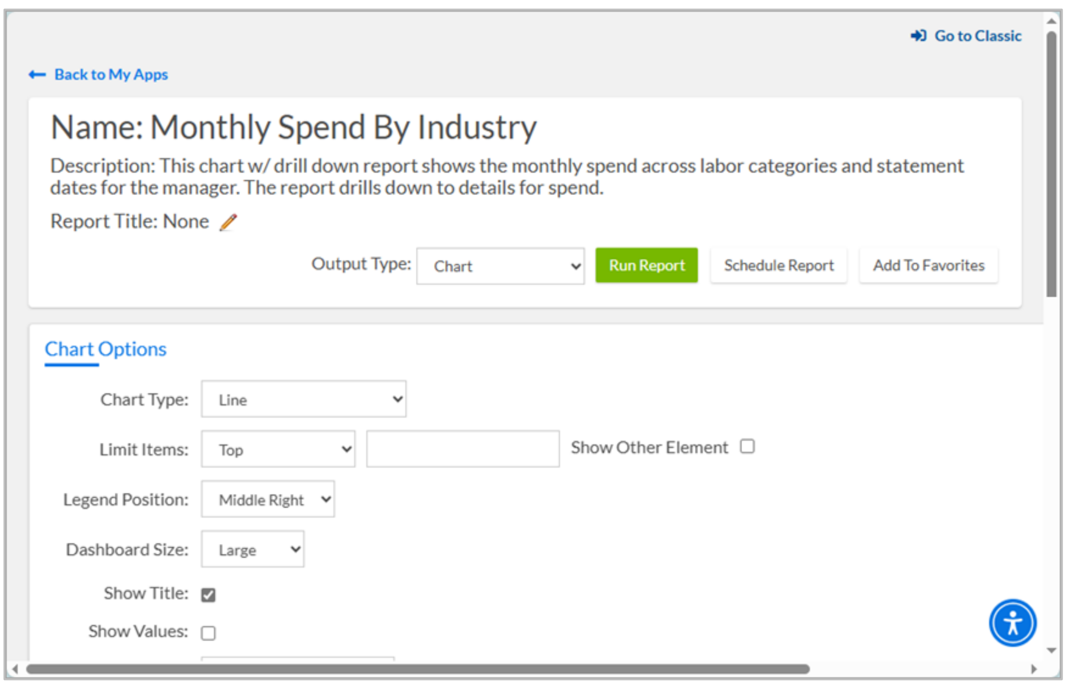
Favorites

Click the ellipsis (…) to reveal the options list. You can **Remove Favorite** or **Edit Report**. Removing a Favorite does not remove the original version from the “All Reports” list, only the copy you made.



Edit Report

Click **Edit Report** and the system takes you directly to the Beeline Report Builder. If you have never used Report Builder, take the time to click through the **Showcase Tour** to become familiar with the range of features and variety of tools. A collection of video tutorials for various reporting features is also available in the online **Beeline Help**. Click **← Back to My Apps** to return back to the Reports app when you're done.

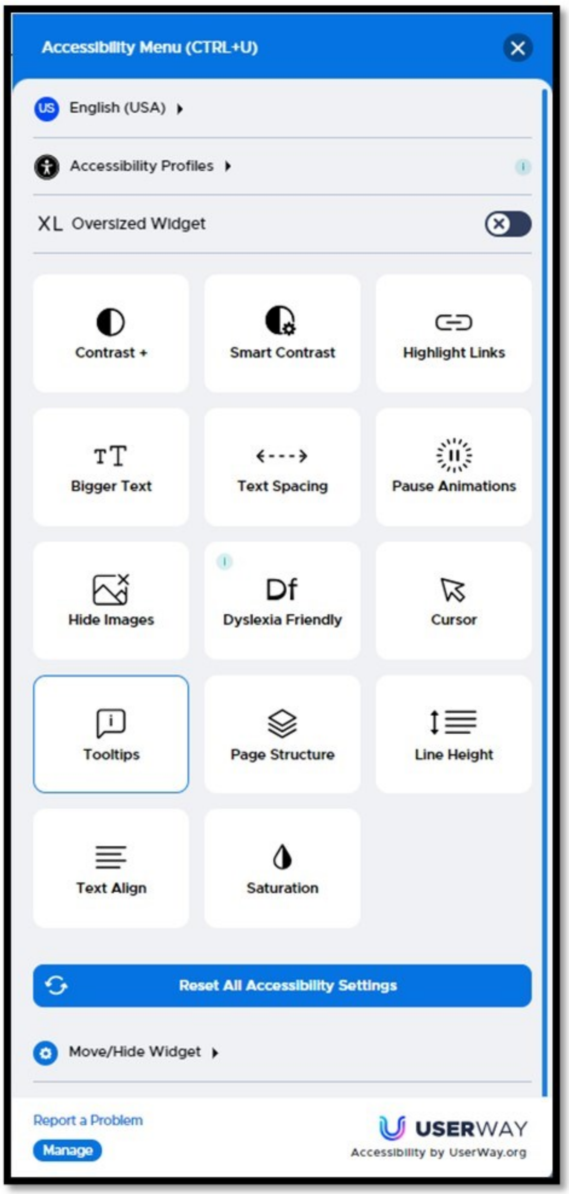


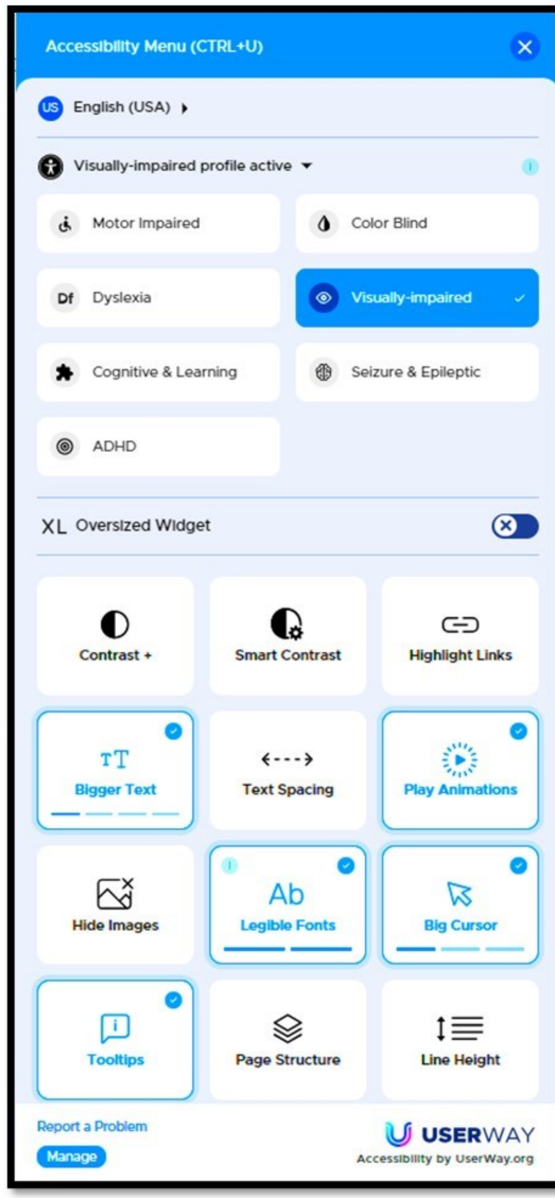
Appendix

UserWay® Accessibility Widget

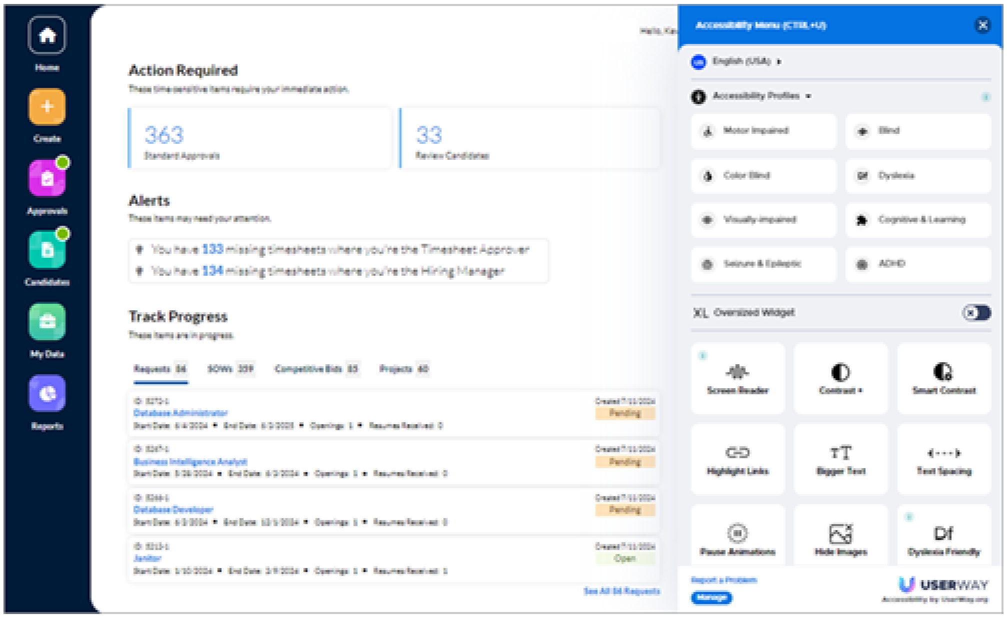
Users can personalize their Hiring Manager Experience using the features of the **UserWay Accessibility Widget**. This widget gives users the ability to adjust accessibility features and functionality to accommodate a variety of common disability profiles and to tailor settings to their personal preferences. The widget conforms with the latest Web Content Accessibility Guidelines (WCAG Level A and AA) and other global standards.

The widget's **Home** screen is displayed below on the left. It includes the option to select the language of choice in addition to other accessibility settings. The image on the right displays how the widget highlights options associated with a specific Accessibility Profile, in this instance those for Visually impaired.





To adjust the widget's settings to meet your specific preferences follow the instructions below:



1. **Access the Widget Settings:**
   - Click the widget icon located in the lower right-hand corner of your HMX screen to open the slide-out panel.
   - Click the X button located in the upper right corner of the slide-out panel to close the widget once you have made and saved your selections.
2. **Explore Available Options:**
   - Review the widget menu to become familiar with the various accessibility features and options.
   - Explore the available functions, such as text resizing, contrast adjustments, keyboard navigation, and more.
3. **Customize Features:**
   - Enable or disable specific features based on your preferences.
   - Adjust settings like font size, color contrast, and navigation shortcuts.
   - Reorder or hide certain features.
4. **Save Changes:**
   - Be sure to save your changes once you've customized the widget. The widget will now reflect your preferred settings across the application.
   - Please note: your selections are saved to your internet browser and not to the Beeline Enterprise application. If you use different browsers to access Beeline Enterprise, you may need to repeat your widget settings.