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VMS Request to Onboard Guide



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Contents

Welcome.....	1
Standard Dashboards.....	2
Getting Started	4
Section 1: Creating a Request.....	4
Section 2: Approve an Item	5
Section 3: Release to Supplier	5
Section 4: Request Actions.....	6
Viewing a New Request	6
Adding a New Candidate	6
Submitting Existing Candidates	6
Section 5: Program Office Candidate Pre-Screen	7
Reviewing a Candidate from the Candidate List.....	7
Section 6: Candidate Review/Compare	8
Reviewing a Candidate from the Candidate List.....	8
Candidate Action Dropdown	8
Selecting a Candidate	9
Disqualifying a Candidate	9
Compare Candidates	9
Setup Interview	10
Rate a Candidate	10
Send Candidate Profile	10
Section 7: Program Office Submit an Offer.....	11
Submit an Offer	11
Section 8: Accept Interviews and Offers	12
Accepting an Interview	12
Rejecting an Interview.....	12
Accepting an Offer	12
Rejecting an Offer	12
Section 9: Program Office Onboard.....	13
Candidate Onboarding	13
Section 10: How to Search the System	14
Section 11: Assignments	15

Amending	15
Extending	15
Terminate/Cancel	16
Section 12: Beeline Time and Expense	17
Entering Time on behalf of a contractor	17
Entering Expenses on behalf of a contractor	17
Approving Time	17
Approving Expenses	17
Section 13: Reports	18
Standard Reports	18
Ad hoc Reports	18

Welcome

Welcome to VMS Request to Onboard Guide.

Purpose

The purpose of this guide is to provide participants a broad overview of how to use the Beeline Vendor Management System (VMS). The guide will also demonstrate how to complete the most basic functions within the application.

Objectives

At the end of this module you will be able to execute the most common tasks using the Beeline application.

Using the Participant Guide

This Participant Guide will provide you with a step-by-step description of how to complete certain functionality within the Beeline application. You will be asked to complete several activities as part of the training. Please use the Participant Guide to help you complete these activities.

 **Note:** *Some of the displays and options may differ from what is illustrated in this guide, as Beeline displays and options vary according to user roles and configurations.*

Standard Dashboards

Homepage Overview - Hiring Manager Home Dashboard

The Hiring Manager Home Dashboard is comprised of four quadrants:

My To Do

This quadrant provides meaningful alerts to items requiring your action and informative notifications. These items contain an active link allowing a user to access detailed information and to take action.

My Activity

This quadrant is a collection of the most popular Hiring Manager queries. Users can click the link for each query listed to review results that are specific to the user

My Calendar

This quadrant contains a month view that highlights assignment start dates, assignment end dates, and scheduled interviews.

Launch Pad

This quadrant includes quick links to additional dashboards specific to the items listed. These dashboards are comprised of list reports and charts.

My To Do

- You received 1 new résumé
- You have 1 request to approve
- You have 2 Competitive Bids Submitted for Initial Approval
- You have 1 SOW rejected at Initial approval to review
- You have 1 SOW ready to send to vendor
- You have 1 SOW returned from Vendor for review
- You have 2 Interview Evaluation - Pending Action tasks awaiting action
- You have 2 Project - Milestone Payment Pending MSP Approval tasks awaiting action
- You have 2 SOW submitted for final approval tasks awaiting action
- You have 3 Unanswered Competitive Bid Question tasks awaiting action

My Activity

Snapshot 1 My Team's Data 1

Active Requests 13

My Calendar

February 2019

Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	1	2

Legend: ● Assignment Start ● Assignment End ● Interview

Launch Pad

- Requests & Candidates
- Time & Expense
- Approval Tracking
- Assignments
- Financial

Indicators

These indicators highlight important information.

- Alert** - item is at risk, you need to take action
- Caution** - item could become at risk, you may want to investigate
- Good** - item meets or exceeds a target

- Neutral** - item is informational, may or may not require your attention or action, but is not deemed urgent

Did you know? - important information that may help you in making a decision is available.

Homepage Overview - Supplier Home Dashboard

The Supplier Home Dashboard is comprised of four quadrants:

My To Do

This quadrant provides meaningful alerts to items requiring your action and informative notifications. These items contain an active link allowing a user to access detailed information and to take action.

My Activity

This quadrant is a collection of the most popular Supplier queries. Users can click the link for each query listed to review results that are specific to the supplier organization.

My Calendar

This quadrant contains a month view that highlights assignment start dates, assignment end dates, and scheduled interviews.

Launch Pad

This quadrant includes quick links to additional dashboards specific to the items listed. These dashboards are comprised of list reports and charts.

My To Do

-  You have 1 SOW ready for editing or needing to be sent to client
-  You have 4 New Request tasks awaiting action
-  You have 1 SOW Available for Negotiation task awaiting action
-  You have 1 Competitive Bid Released task awaiting action

My Calendar

February 2019						
Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	1	2

Legend:  Assignment Start  Assignment End  Interview  Milestone End

My Activity

Open Requests	20
Interviews on Open Requests	2
Active Projects	7
Milestones Ready For Payment	33

Launch Pad

-  Resource Pool Management
-  Workflow Distribution
-  Requests & Candidates
-  Assignments
-  Time & Expense
-  Financial

Indicators

These indicators highlight important information.

-  **Alert** - item is at risk, you need to take action
-  **Caution** - item could become at risk, you may want to investigate
-  **Good** - item meets or exceeds a target

-  **Neutral** - item is informational, may or may not require your attention or action, but is not deemed urgent

Did you know? - important information that may help you in making a decision is available.

Getting Started

Accessing the System

Step	Action
1.	Access the Beeline Application by using the link that was provided to you
2.	Enter your User Name
3.	Enter your Password
4.	Click Login to access the Beeline Application

Section 1: Creating a Request

Create a Request

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

To create a new request:

Step	Action
1.	From the Hiring Manager Homepage, click the New menu drop-down arrow
2.	Click the New Request drop-down arrow to select a job title from a list of recently created requests or begin typing in the Job Title box to search for a job title by name or job description keyword. The auto suggestion/type ahead functionality recommends job titles that match what you type
	<i>To review the job description and rate for a job title hover over the i-bubble</i>
3.	Select a <i>job title</i> from the list of options. The Create Request screen appears
	<i>To perform an enhanced job title search, click the Advanced Search link at the bottom of the list of suggested job titles. The Advanced Search allows a user to expand their search by job title, job class, industry, and job description keyword.</i>
4.	Select a <i>position option</i> by clicking the respective option button
5.	Select the <i>position contacts</i> if they do not appear by default
6.	Click Next . The Create New Request: Update Details screen appears
7.	Complete all of the <i>required</i> (*) fields
8.	Click Next . The Create New Request: Submit for Approval screen appears
9.	Review the request details
10.	Click Submit . The Request Group Summary screen appears and displays, "Your Request Has Been Submitted."

Section 2: Approve an Item

Approving a Request

Step	Action
1.	From the Approver Homepage, click Request to Approve
2.	Click the Action dropdown of the request you would like to approve
3.	Click Approve
4.	An additional window will appear. Enter comments (if necessary)
5.	Click Approve

Section 3: Release to Supplier

Releasing a Request

Step	Action
1.	From the Program Office Homepage, click Request – Ready for Release
2.	Click the Action dropdown of the request you would like to release
3.	Click View Details
4.	The Release to Supplier window appears where you can view suppliers previously released to or you can select suppliers to release to. Click “Add Item” to view the list of suppliers. Click the name of the supplier to have it added to the list to release to.
5.	Click OK .

Section 4: Request Actions

Viewing a New Request

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action										
1.	From the Supplier Dashboard, click New Request located in the My To Do quadrant on the home page. The system will display a Review Alerts screen										
2.	Click on the Action dropdown for the appropriate request. Click View Details										
	<i>The screen defaults to the Candidates tab. To view additional information you will need to select the appropriate tab</i>										
	<table border="1"> <tr> <td>Tab</td><td>Details</td></tr> <tr> <td>Summary</td><td>Provides a quick overview of the request.</td></tr> <tr> <td>Details</td><td>Provides more detailed information of the request.</td></tr> <tr> <td>Candidates</td><td>Allows you to add candidates to the request and see previously submitted candidates.</td></tr> <tr> <td>Notes</td><td>Allows you to view notes that are associated with this request.</td></tr> </table>	Tab	Details	Summary	Provides a quick overview of the request.	Details	Provides more detailed information of the request.	Candidates	Allows you to add candidates to the request and see previously submitted candidates.	Notes	Allows you to view notes that are associated with this request.
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Details	Provides more detailed information of the request.										
Candidates	Allows you to add candidates to the request and see previously submitted candidates.										
Notes	Allows you to view notes that are associated with this request.										

Adding a New Candidate

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	Follow Steps 1-2 from Viewing a Request
2.	Click Add Resource
3.	Complete all required information
4.	Click OK . The system will return a confirmation message of "Your changes were saved."
	<i>This action will only add the candidate to the resource pool. You must follow the next steps to submit the candidate to the request.</i>
5.	Click Submit Profile . The system will display a Submit Profiles screen
6.	Complete all required fields and set rates in the Candidate information
	<i>All required fields will have an * next to the left of the field</i>
7.	Click Submit

Submitting Existing Candidates

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	Complete Steps 1 and 2 from Viewing a Request.
2.	Click Search Resource Pool
	<i>You can do one of two things. You can scroll down through all the candidates or you can narrow your search by entering in any of the search criteria</i>
3.	Click the box next to the candidate name
4.	Click Submit Profiles
5.	Complete all required fields and set rates in the Candidate information
	<i>All required fields will have an * next to the left of the field</i>
6.	Click Submit

Section 5: Program Office Candidate Pre-Screen

Reviewing a Candidate from the Candidate List

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	From the Program Office Homepage, click the Number link or the green New icon  within the new resumes alert sentence. The Candidate Management Tool box opens.
2.	The columns of the Candidate Submission dialog box provide the user with information/links/icons - Click the Request ID link to navigate to the Request Profile screen. - Action dropdown allows you to take action on the candidate. Action options are based on the status of the candidate, the user's role, and the workflow configuration of the client. - Hover over the i-bubble icon for more information. - If a flag is provided for the candidate, a flag icon  appears in this column. Hover over or click the flags to display alert, warning, or informational data. - Click the Candidate Name to navigate to the Candidate Details screen. - If a resume or other attachment is provided for the candidate, a document icon  appears in this column. Click the icon to review the document. - Click the Submitted Rate link to view the rate card details. - If an interview is pending or scheduled, detailed information appears in this column: - Click the Setup Interview icon  to schedule an interview. - Click the Pencil icon  to add a scheduled interview to your calendar. - The History and Note column allows you to easily see if the candidate has any history or notes in the application. Click on the Blue link to review detailed information.
3.	Based on candidate's qualifications, you can click to Qualify or Disqualify the candidate.
4.	Complete the information in the pop-up window.
5.	Click OK.
	<i>Qualified candidates will go to the Manager for review.</i>

Section 6: Candidate Review/Compare

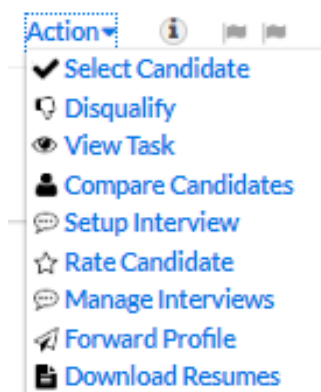
Reviewing a Candidate from the Candidate List

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	From the Hiring Manager Homepage, click the Number link or the green New icon  within the new resumes alert sentence. The Candidate Management Tool box opens.
2.	The columns of the Candidate Submission dialog box provide the user with information/links/icons - Click the Request ID link to navigate to the Request Profile screen. - Action dropdown allows you to take action on the candidate. Action options are based on the status of the candidate, the user's role, and the workflow configuration of the client. - Hover over the iBubble icon for more information. - If a flag is provided for the candidate, a flag icon  appears in this column. Hover over or click the flags to display alert, warning, or informational data. - Click the Candidate Name to navigate to the Candidate Details screen. - If a resume or other attachment is provided for the candidate, a document icon  appears in this column. Click the icon to review the document. - Click the Submitted Rate link to view the rate card details. - If an interview is pending or scheduled, detailed information appears in this column: - Click the Setup Interview icon  to schedule an interview. - Click the Pencil icon  to add a scheduled interview to your calendar. - The History and Note column allows you to easily see if the candidate has any history or notes in the application. Click on the Blue link to review detailed information.

Candidate Action Dropdown

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.



Selecting a Candidate

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	From the Hiring Manager Homepage, click the Number link or the green New icon  within the new resumes alert sentence. The Candidate Management Tool box opens.
2.	Click the Action dropdown and Click Select Candidate.
3.	Enter comments, such as Offer details.
4.	Click Select Candidate.

Disqualifying a Candidate

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	From the Hiring Manager Homepage, click the Number link or the green New icon  within the new resumes alert sentence. The Candidate Management Tool box opens.
2.	Click the Action dropdown and Click Disqualify.
3.	Complete required fields in the pop-up window.
4.	Click Disqualify.

Compare Candidates

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	From the Hiring Manager Homepage, click the Number link or the green New icon  within the new resumes alert sentence. The Candidate Management Tool box opens.
	<i>You can also access your candidate submissions by using the Search Candidates dropdown.</i>
2.	Click the Action dropdown and click Compare Candidates
3.	The Candidate Compare screen appears with a snapshot view of each of your candidates for that request. Each candidate card provides the user with the same information/links/icons as on the Candidate Management Tool, but with some additional information. • If ratings are provided for the candidate, a star icon  appears. Click the icon to review. • Click View Detail to view more information. • Click Flip Card to view candidate skills
4.	Filter: You can filter your candidates by Rate, Skills, Status, etc.
5.	Compare Bin: The compare bin allows you to compare multiple candidates in a side by side detail view. • To add a candidate to the bin, click Add to Bin on their card or Drag and drop the card into the bin. • Once all candidates are in the bin that you want to view, click Compare.

Setup Interview

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	From the Hiring Manager Homepage, click the Number link or the green New icon  within the new resumes alert sentence. The Candidate Management Tool box opens.
2.	Click the Action dropdown and Click Setup Interview.
3.	Enter in the proposed date and time for your availability. To add multiple dates/times, click Add Item and repeat steps. Complete the additional fields in the pop-up window.
4.	Click Submit.

Rate a Candidate

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	From the Hiring Manager Homepage, click the Number link or the green New icon  within the new resumes alert sentence. The Candidate Management Tool box opens.
2.	Click the Action dropdown and Click Rate Candidate.
3.	Select the number of stars by clicking on the star rating. The score will average based on ratings. 
4.	Click Complete Rating.

Send Candidate Profile

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	From the Hiring Manager Homepage, click the Number link or the green New icon  within the new resumes alert sentence. The Candidate Management Tool box opens.
2.	Click the Action dropdown and Click Send Profile.
3.	Complete the requested information. De-select any information that should not be sent.
4.	Click Send.

Section 7: Program Office Submit an Offer

Submit an Offer

The steps below reflect standard configuration. Specific setup is based on a client’s configuration and may vary slightly.

Step	Action
1.	From the Program Office Homepage, click the Candidate – Ready for Offer
2.	Click on the Action dropdown of the candidate you would like to view
3.	Click Submit Offer
4.	Click Negotiate Rates
5.	If satisfied with the supplier submitted rate, just click Save. If you wish to negotiate rates, click the box to Override rates.
6.	If Overriding the rate, enter in the new rate, then click Save.
7.	Click Submit Offer

Section 8: Accept Interviews and Offers

Accepting an Interview

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	From the Supplier Homepage, click the Candidate-Interview Requested
2.	Click on the Action dropdown of the interview request you would like to view
3.	Click Accept Interview
4.	Click the drop-down arrow to display a list of the suggested interview times and select desired date/time.
5.	Enter comments as needed
6.	Click Accept Interview

Rejecting an Interview

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	From the Supplier Homepage, click the Candidate-Interview Requested
2.	Click on the Action dropdown of the interview request you would like to view
3.	Click Decline/Suggest Alternate Time
4.	Enter comments indicating alternate dates and times
5.	Click Decline/Suggest Alternate Time

Accepting an Offer

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	From the Supplier Homepage, click the Candidate-Offer Pending
2.	Click on the Action dropdown of the offer request you would like to view
3.	Click on View Details
4.	Click Accept Offer
5.	If there are any pending background checks you will need to complete them now by clicking OK . This will open the background checks to mark the box complete. Then click OK
6.	Click Accept Offer
7.	An additional window will pop up. Click Accept Offer

Rejecting an Offer

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	From the Supplier Homepage, click the Candidate-Offer Pending
2.	Click on the Action dropdown of the offer request you would like to view
3.	Click on View Details
4.	Click Reject Offer
5.	Click the dropdown arrow to display a list of reasons and click the appropriate reason
6.	Click Reject Offer

Section 9: Program Office Onboard

Candidate Onboarding

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	From the Program Office Homepage, click the Candidate – Initiate Onboarding
2.	Click on the Action dropdown of the candidate to onboard
3.	Click Onboard .
4.	Complete the required/optional information.
5.	Click Onboard .

Section 10: How to Search the System

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Simple Search – Requests

To search for a request:

Step	Action
1.	Click the Search drop-down arrow and select Search Requests from the list
2.	In the Search box, enter all or a portion of the <i>request ID</i> , <i>job title</i> , or <i>hiring manager name</i>
3.	Click the Request from the list of suggestions. The Request Profile screen appears where you can view detailed information relating to this request in the four quadrants

Simple Search – Assignments

To search for an assignment:

Step	Action
1.	Click the Search drop-down arrow and select Search Assignments from the list
2.	In the Search box, enter all or a portion of the <i>assignment number</i> , <i>contractor name</i> , or <i>supplier</i>
3.	Click the Assignment from the list of suggestions. The Assignment Summary page appears where you can take action on this assignment or view any details

Simple Search – Candidates

To search for a candidate:

Step	Action
1.	Click the Search drop-down arrow and select Search Candidates from the list
2.	In the Search box, enter all or a portion of the <i>request ID</i> , <i>candidate name</i> , or <i>job title</i>
3.	Click the Candidate from the list of suggestions. The Candidate Detail screen appears where you can view candidate information and take necessary action

 With Beeline's new Simple Search, as you type, the auto suggestion/type-ahead feature begins suggesting search results. For detailed search results, leave the box blank and click the  icon. A screen appears which allows you to narrow your results or browse all items in the application

Manage/Search

To use the Manage/Search:

Step	Action
1.	Click the Manage/Search drop-down arrow and select one of the following: Assignments, Candidates, Requests, Resource Pool
2.	Set the existing search parameters. Click Search . Detailed search results matching the set parameters display OR Browse through the list by clicking the arrows at the bottom of the page.

Section 11: Assignments

Amending

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	Click the Simple Search drop-down arrow and select Search Assignments
2.	Enter the assignment number, resource name, or supplier name in the search box
3.	Click on the assignment when it appears in the search drop-down
4.	From the Assignment screen click Amend (You can extend at the same time by selecting the Extend option)
5.	Click the box next to Amend . Enter an Effective Date; this is the date the amendment should start. (If you selected Extend, you will need to enter an extension date as well)
6.	Click Next
7.	Click the Reason drop-down arrow and select a reason and Enter a Comment
8.	Click the Budget Adjustment drop-down arrow and select appropriate budget information ❖ <i>Do Not Adjust Budget:</i> no additional budget is required for the amendment. ❖ <i>Adjust Budget Based on Amendment:</i> System will automatically calculate additional monies needed for the amendment. ❖ <i>Manually Increase Budget:</i> Allows you to enter a specific amount needed for the amendment. ❖ <i>Adjust Budget Decrease Only:</i> Allows you to enter a specific amount needed for the budget decrease.
9.	Select and change Amendment items as needed
10.	Click Next . The system returns a Modify Assignment screen for review
11.	Click OK

Extending

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	Click the Simple Search drop-down arrow and select Search Assignments
2.	Enter the assignment number, resource name, or supplier name in the search box
	<i>You can also use the advanced search to find your assignment</i>
3.	Click on the assignment when it appears in the search drop-down
4.	From the Assignment screen click Extend
5.	Click the Reason drop-down arrow and select a reason and Enter a Comment
6.	Select a New Extension Date by manually entering the date or clicking in the date box and selecting the new end date from the calendar.
7.	Click the Budget Adjustment drop-down arrow and select appropriate budget information ❖ <i>Do Not Adjust Budget:</i> no additional budget is required for the amendment. ❖ <i>Adjust Budget Based on Amendment:</i> System will automatically calculate additional monies needed for the amendment. ❖ <i>Manually Increase Budget:</i> Allows you to enter a specific amount needed for the amendment. ❖ <i>Adjust Budget Decrease Only:</i> Allows you to enter a specific amount needed for the budget decrease.
8.	Click Next . The system returns a Modify Assignment screen for review
9.	Click OK

Terminate/Cancel

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	Click the Simple Search drop-down arrow and select Search Assignments
2.	Enter the assignment number, resource name, or supplier name in the search box
	<i>You can also use the advanced search to find your assignment</i>
3.	Click on the assignment when it appears in the search drop-down
4.	From the Assignment screen click Terminate/Cancel
	Click the Type drop-down arrow and select the type
	<i>Depending on the choice you select, you may need to fill in additional required fields</i>
5.	Click the Reason drop-down arrow and select a reason and Enter a Comment
6.	Click Next . The system returns a Terminate Assignment screen for review
7.	Click OK

Section 12: Beeline Time and Expense

Entering Time on behalf of a contractor

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	Click the Search Timesheets from the Simple Search down arrow
2.	Type in the Name of the contractor. Click directly on the name of that contractor to bring you into their view.
3.	Make sure you are on the Timesheet Tab.
4.	Review the Showcase Tour for additional timesheet information
5.	Complete the timesheet as needed
6.	Click Save Changes if additional information is needed. OR click Submit for Approval

Entering Expenses on behalf of a contractor

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	Click the Search Timesheets from the Simple Search down arrow
2.	Type in the Name of the contractor. Click directly on the name of that contractor to bring you into their view.
3.	Click the Expenses Tab to go to the expenses section.
4.	Review the Showcase Tour for additional expense information
5.	Complete the expense as needed
6.	Click Save Changes if additional information is needed. OR click Submit for Approval

Approving Time

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	Log in to Beeline using your <i>user name</i> and <i>password</i> . The Hiring Manager Home page appears
2.	In the My To Do quadrant, click the <i>number</i> link within the alert sentence, " <i>You have X timesheets to approve.</i> " The Timesheet Approval dialog box appears
3.	View detailed information by clicking the arrow to the left of the contractor's name for a selected period
4.	Review all information related to the timesheet
5.	To enter comments, click the icon in the comments column
6.	Click Approve or Reject. (Comments must be entered to complete a rejection)

Approving Expenses

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	Log in to Beeline using your <i>user name</i> and <i>password</i> . The Hiring Manager Home page appears
2.	In the My To Do quadrant, click the <i>number</i> link within the alert sentence, " <i>You have X expenses to approve.</i> " The Expense Approval dialog box appears
3.	View detailed information by clicking the arrow to the left of the contractor's name for a selected expense period
4.	Review all information related to the expense report
5.	To enter comments, click the icon in the comments column
6.	Click Approve or Reject. (Comments must be entered to complete a rejection)

Section 13: Reports

Standard Reports

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	Click the Report drop-down arrow and click on the desired Standard report
2.	Select desired search criteria in the Report Details section
3.	Click Create report

Scheduling

Step	Action
1.	Click the Report drop-down arrow and click on the desired Standard report
2.	Select desired search criteria in the Report Details section
3.	Click Schedule Report and Schedule section will appear
4.	Select Schedule Type
5.	Select the desired dates and times based on the schedule type selected
6.	Click OK
7.	Click on the Scheduled tab to view any report that you have scheduled
	<i>The application will save up to 10 reports. When you are ready to save the 11th report the first report that you have saved in the application will drop off</i>

Ad hoc Reports

The steps below reflect standard configuration. Specific setup is based on a client's configuration and may vary slightly.

Step	Action
1.	Click the Report drop-down arrow and click on the desired Ad hoc Report
2.	Select desired search criteria in the Report Details section
3.	Click Create report
4.	Enter the field that you want to select in the Available box. The system will narrow your choices based on what is entered
5.	Double click on the field name to move to the selected box. Selected items are the parameters for your report
6.	Add conditions and sorts as desired
7.	Click the drop-down Output Type and select the desired output type