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User Guide

January 202[illegible]

Contents

GETTING STARTED

This information can help you get started using the application. For more detailed information about each function within the application, see the relevant section of this user guide.

Click the links in each section to view the getting started information.

INTRODUCTION

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OVERVIEW

Welcome to the Manager view!

The Manager view is where you can access your contingent workforce information in the VMS application. All of the relevant data for your requests/engagements are available through the VMS, including a reporting functionality that can give insights, for example, on past contract work in your client organization. Also, you can access your user account information in your user profile, updating information as necessary.

Note: The VMS application is web based, but you can download a mobile version to use on a supported device. Mobile device access is dependent on your program's configuration.

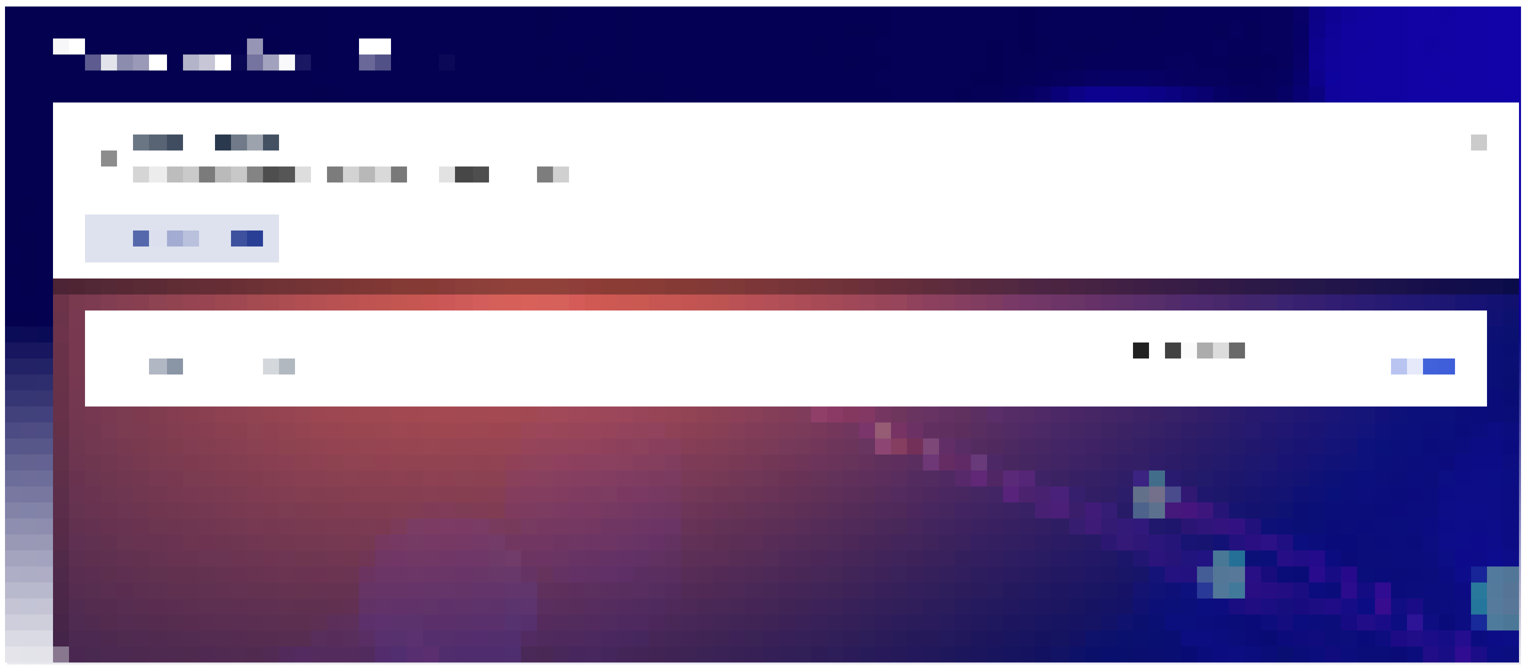
Note: The VMS application is configured and maintained by your program representative. Some of the features and functionality mentioned in this overview might not appear in your implementation. If you are interested in a feature, or have questions about application functionality, contact your program representative.

The VMS application presents a useful, configurable tool that helps you complete tasks with ease. The simple design focus places a left navigation to click through when traveling to different parts of the application.

You can customize the view on some pages, only showing you what you need. You can also collapse the navigation if you do not need it.

Some examples of important activities while using the VMS are: creating requests for work, reviewing time and expenses submitted by workers/suppliers/service providers, reviewing candidates or quotes submitted for open work requests, and monitoring ongoing engagements to track efficiency and spend. For submitted time, the VMS allows you to quickly review details for each line item, such as hours worked in a day, and approve the time by clicking icons in the application. For candidates, each submitted resume appears with a status, allowing you to review details and set up an interview for a correct fit. All engagements where you are assigned as the manager appear in your view, giving you up to date access to status and important details, such as estimated end dates.

A consolidated view of all your important tasks and information is presented on the application's Home page.



Most important (sensitive) items appear in the 'to do' action item section on the Home page. These are typically time sensitive, and should be taken care of quickly (think completing surveys or approving time). Each pane can be dragged to another position on the page to suit your needs. All panes display by default, but you can hide the sections that you do not need to see. To the right of the section is a calendar that displays upcoming dates that are important to the continent work that you have in your organization.

Note: If you need to find something quickly, you can use the Search function that appears at the top of every page in the application. The advanced search filters give you even more granularity when trying to locate information. See the sections below.

A Review Talent section appears below the top sections. In this section, you view submitted candidates for requests, and quotes for project/SOW requests. Review the candidate's resume information by clicking the candidate's name. Their resume information submitted to the request display (along with the candidate's history). Controls on this page give you the option, dependent on your program's configuration, to set up interviews, and assign or reject the candidate.

The interview features in the application make scheduling interviews simple. If a candidate meets requirements, clicking  triggers the interview configuration page where you set up the type (for example, one-on-one), format (for example, in person), and the contact details. The interview details are included in email notifications that are generated and sent out by the system (for example, when an interview is set up as well as confirmed). Configurable integrations with the interview feature allow you to sync interview times to a Google calendar, and integrate a third party video conferencing tool (for example, Microsoft Teams) to generate links for video style interviews.

Below the Review Talent panel is the Requests panel where you can view open requests and project RFIs. Clicking the request name in the panel opens the details, giving you options to view activity and history for the request. If you have permission to change any details, you can modify and save from this view. More importantly, you can view important request workflow information such as status.

Lastly, in the Engagements panel , you view your ongoing work engagements. Clicking the engagement title opens the engagement details where you can view approvals, allocations (for example, cost centers associated with the engagement, and billing submitted at the engagement level).

See the below sections for more information about functions in the Manager view.

APPROVING TIME AND BILLING

All time and billing that requires your approval can be viewed in the application. These items include changes to expense details as well. Each time can be approved or rejected from the Home page, or from the detail view.

The detail view displays two different things; timecards, which are a group of billings submitted for a designated time period, or individual billings, such as expenses (with or without receipts), project items, or adjustments to previously submitted billing.

You can approve/reject the entire timecard, or go billing by billing. Badges and icons next to values let you know if something is overtime, doubletime, and so on.

Expenses are usually broken out one billing at a time, giving greater granular depth when viewing details.

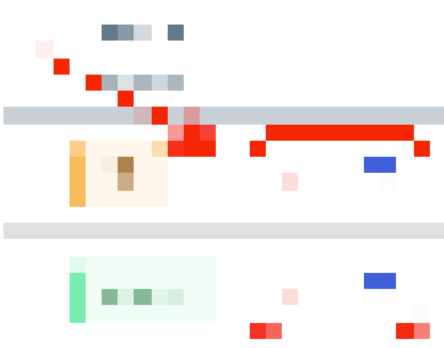
Like timecards, more than one item (receipts, etc.) can be attached to a submitted expense report. You can reject or approve one or many items.

Some billings have allocations associated. Allocations are, for example, cost centers or accounts that an item should be billed to, and appear as fields on a billing. Some allocations are added to an item by a worker, a vendor, or a program representative, and you can add additional values by clicking . Allocations are a way of billing to alternative areas or accounts that are not otherwise stated in the job information, for example, a worker is assigned a job in one department, but completes work for another department as part of the job. Allocations can also be used to track specific projects that resources are supporting. The allocation can be set to the department for whom the work was done. It should be noted that not all billings have allocation options, and if allocations are used, then input values are required.

REVIEWING CANDIDATES

All candidates that are submitted to open requests in your organization (and are vetted by a program representative if required) appear to you in the application. It is important to note that you can also be made aware of candidates by being notified through an email generated by the system.

Candidates appear in two places, the Home page, and the Review Talent page. Both places display candidates in the same way, as a table where you can take quick actions on by clicking buttons. The Review Talent view also has informational fields in additional to the buttons.



These buttons appear in the table, and let you either reject a candidate, or set up an interview. Clicking the candidate's name opens the details page where you can take the same actions, review a candidate in detail, and assign the candidate to a work request.

The other way that you can review candidates for a job is by opening the request itself. You do this by clicking a request on the Home page, or by navigating to the Requests page. Locate your work request using the search field, or by navigating the table. Once you locate the request, click the blue job title, opening the request details, then navigating to the Candidates tab. This displays all submitted candidates for that job only.

The Candidates tab features a search field to filter the view. An additional advantage to using this tab view is that you can compare two candidates using the compare functionality. Use the check boxes to make selections form the table, and then click . This opens a pop up with all details side-by-side to help you make a decision faster.

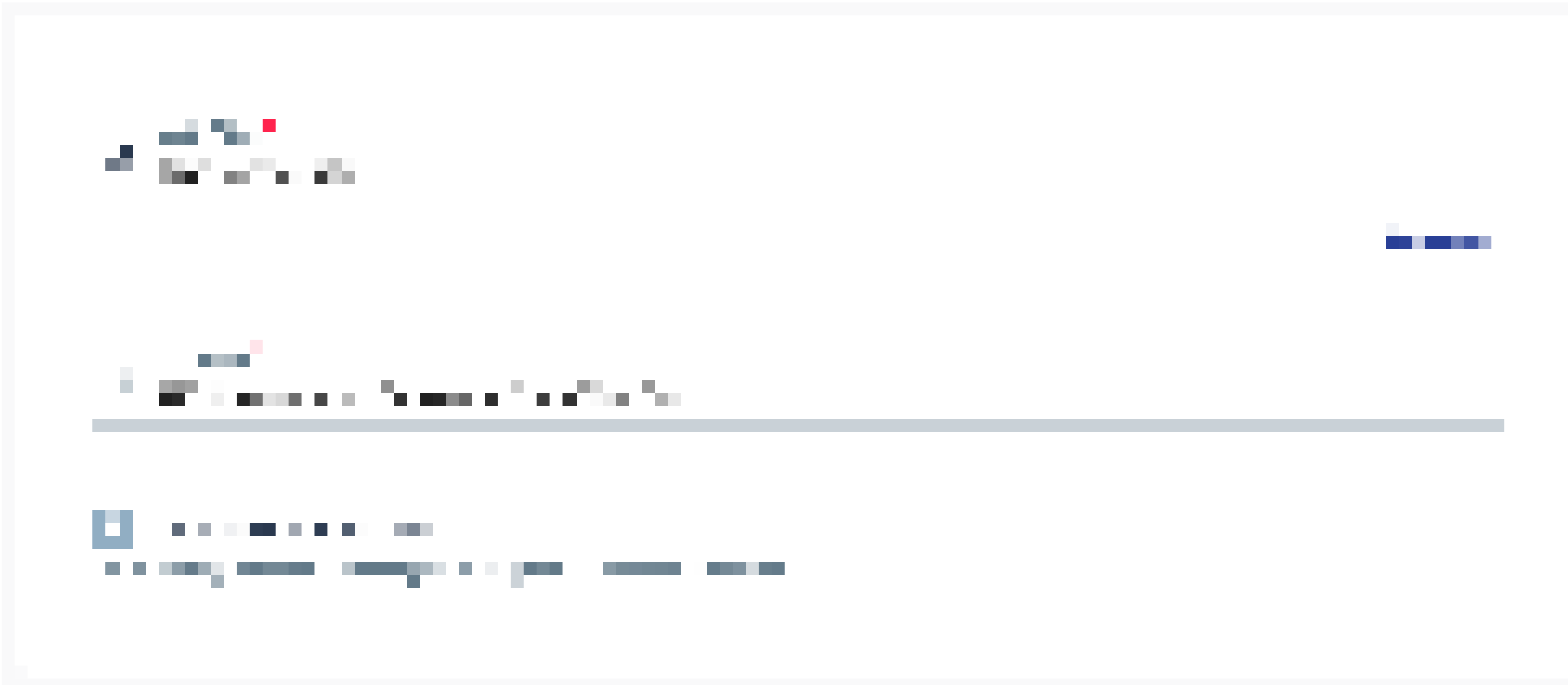
If a candidate meets your requirements, and has passed any tests or required interviews, you can assign the worker to the job. To assign the worker in the system, select the worker and open the details page, and then click . You need to confirm dates in the pop up before the worker can begin. You program administrator also needs to configure important details of the worker before onboarding can begin.

REQUESTS FOR WORK

The application lets you request people and proposals for work in your organization. Keep in mind that this process is highly configurable. You also might not be required to complete this workflow. At times, the process is completed by a program representative, where you would only review candidates that were submitted for requests, and interview those qualified candidates.

Another important note is that you might not have permission to modify data related to work that you are requesting. This data is information such as job titles, job descriptions, or minimum requirements for candidates. In this case, you can select a job that has been preconfigured for your organization and then select the dates of employment and location where the work is performed.

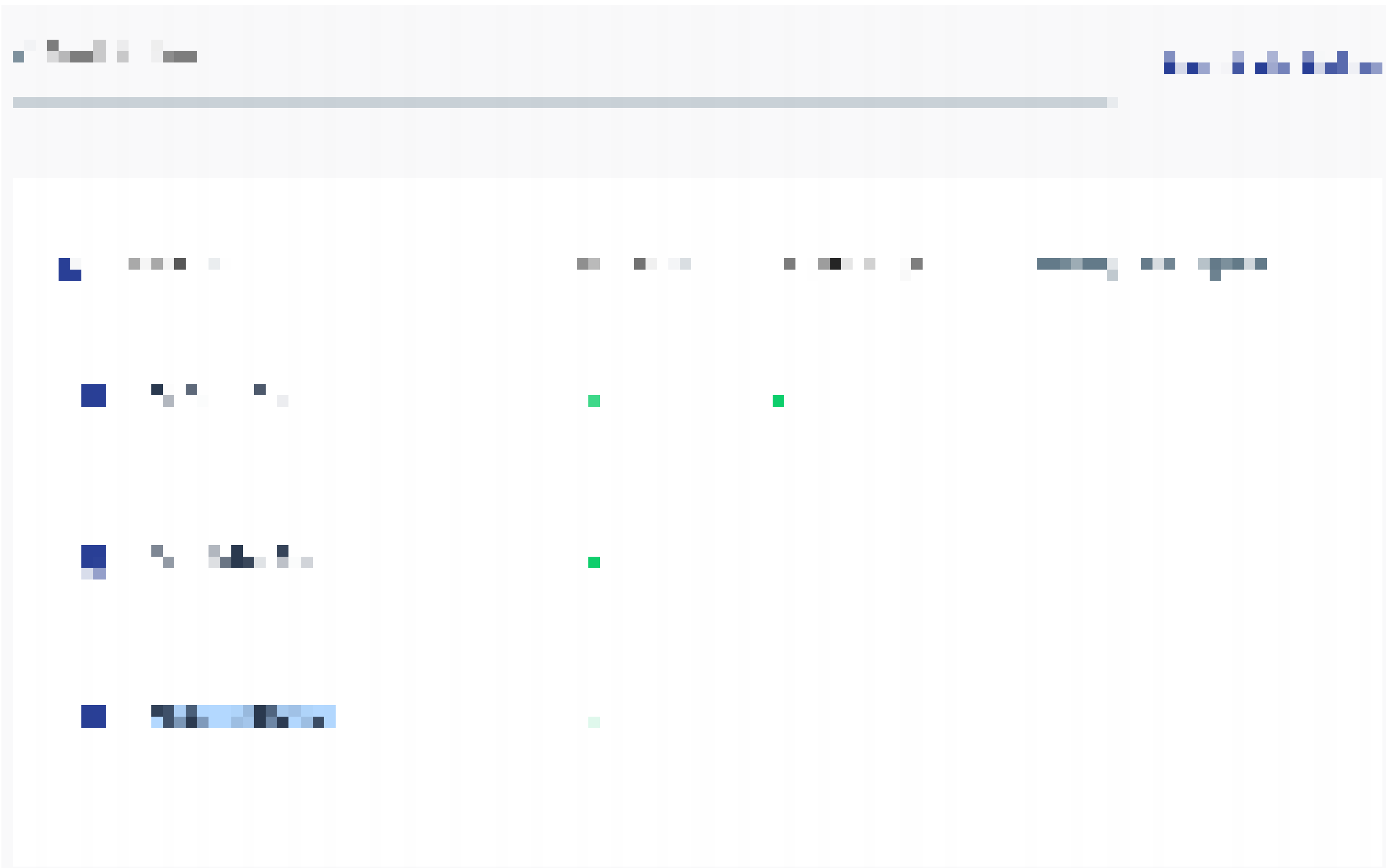
The application makes requesting work simple. Click a button in the left navigation menu on any page. You are taken to a 'Create Request' wizard that walks you through the required steps for your work request. You add your requirements to the request, which include the job title and location.



Next, set up the details of the job. Details include the dates, any required skills, languages, and so on. An important part of the job details is the financials for the position. The financials set the manner for payment, and the rates for the work that the worker is paid.

Note that the financials for a job are configured for your organization, and not all options will be available to you.

After you configure the job, select the source for candidates. Depending on how your organization is configured, you are shown a list of suppliers that have agreements configured in the system by your program provider. Suppliers/vendors that appear in this view are notified to submit candidates to the request.



Once your job request is filled out, review the details once more and submit it. You are notified of submitted candidates on the Home page, the Candidates tab, and by email (if configured).

YOUR PROFILE

Your profile is where you manage all of your personal information, that is, all of the information associated with your application account. The difference between your personal and organization information is that your personal information is managed in the profile by you, and your organizational information is managed by administrators, or by program representatives.

Your profile includes contact information, where your work location is, and application information as it applies to your username, language preference, etc.

Along with personal details, you can view and set your password for the application. Password recovery options are also available through your profile. See the 'Password Recovery Options' section in the Manager Knowledge Base for more details.

The application gives you the ability to integrate with 3rd party applications for greater work efficiency. You can sync an external calendar that will add important calendar items from the system (for example, interview blocks of time). You can also integrate your account with a video conferencing tool with the application. This integration configures meeting links in the external tool when schedule video-style interviews, and adds the conference details to the interview details.

For more information, see the 'Sync a Calendar' or 'Sync a Video Conference Tool' topics in the Manager Knowledge Base.

Another important feature to note in your user profile is the delegation functionality. Delegation allows designated members in your organization to take action on your behalf. When approval (or rejection) is required, the system routes the notification to your delegate. Delegates have to be manager users, and you can segment their permissions, such as approving billing, and permission to create a request for work on your behalf.

SUPPORTED REQUISITION TYPES

The application supports the following requisition types:

- Staffing-Recruited - Requisitions are forwarded to suppliers to identify a temporary worker for a client organization's staffing need(s). The client engages the worker for a temporary staffing assignment.
- Staffing-Referred - Requisitions are used to engage a worker that has been referred by a client manager for a temporary staffing assignment. Generally, these are workers who are sourced directly by the client manager and payrolled by [redacted] where [redacted] is the employer of record.

- Project Requisitions - Created when a client organization has a project assignment with a defined scope of work, and needs an independent contractor/business entity to complete a specific deliverable.
- Managed Services - Requisitions used for headcount tracking when the client organization wants to have visibility into the resource, but manages the contract and downstream financials outside of the application.
- Biz Val (Business Validation) - Requisitions used for the vetting of independent contractors to validate compliance and safe engagement.

The types of requests/engagements that you make are dependent on your client organization's configuration. Your configuration must be set up and tested for each request type before you can make requests. For more information about configuration, contact your Program Representative.

Note: The labels for request types can be customized for your client organization. This can change the title of the request type through out the application.

SUPPORTED LANGUAGE TYPES

This table describes the supported languages in the application, the user roles available for the language, the associated date format, and the monetary value for the language. You can set the language preference (localization) for your user account when you log into the application on the login page.

You can select the translation language from a preset list. This setting only applies to all views in the application.

Note: For users that access the application using single sign on (SSO), the language is set automatically. To localize the VMS when using SSO to log in, navigate to User Account > View Profile > Account Information > Platform Language Preference and select a supported language. See the following table for supported languages.

The application can only translate a set items in the user interface.

- Links
- Buttons
- Labels
- Some statuses and status reasons - For example, 'Worker Withdrawn' status is translated, but the status reason is not.
- Standard and customizable reports - Exported files with report output for these types are translated. Only report name, description, and so on, are translated. Report output data is not translated.
- Common values - For example, 'Yes' and 'No'.
- User guide (depending on language)

English (U.S.)	Client Manager, Supplier, Worker and MSP	MM/DD/YYYY	$xxx,xxx.xx
English (U.K.)	Client Manager, Supplier, and Worker	DD/MM/YYYY	xxx,xxx.xx$
German	Client Manager, Supplier, Worker and MSP	DD.MM.YYYY	xxx.xxx,xx$
French	Client Manager, Supplier, Worker and MSP	DD/MM/YYYY	xxx xxx.xx$
Spanish	Client Manager, Supplier, and Worker	DD/MM/YYYY	xxx.xxx,xx$
Latin American Spanish	Client Manager, Supplier, and Worker	DD/MM/YYYY	$xxx.xxx,xx
Korean	Client Manager, Supplier, and Worker	YYYY/MM/DD	$xxx,xxx.xx
French Canadian	Client Manager, Supplier, and Worker	MM/DD/YYYY	$xxx xxx.xx
Portuguese	Client Manager, Supplier, and Worker	DD/MM/YYYY	$xxx.xxx,xx

Dutch	Client Manager, Supplier, Worker and MSP	DD-MM-YYYY	$xxx.xxx,xx
Italian	Client Manager, Supplier, and Worker	DD/MM/YYYY	xxx.xxx,xx$
Chinese Simplified	Client Manager, Supplier, and Worker	YYYY-MM-DD	$xxx,xxx.xx
Chinese Traditional	Client Manager, Supplier, and Worker	YYYY-MM-DD	$xxx,xxx.xx
Japanese	Client Manager, Supplier, and Worker	YYYY/MM/DD	$xxx,xxx.xx
Swedish	Client Manager, Supplier, Worker and MSP	YYYY-MM-DD	xxx.xxx.xxx,xx kr
Polish	Client Manager, Supplier, and Worker	YYYY-MM-DD	xxx.xxx,xx$
Thai	Client Manager, Supplier, and Worker	YYYY-MM-DD	$xxx.xxx,xx

UPDATE YOUR SECURITY QUESTIONS

Your security questions are set when you first verify your application account. You can edit your questions and answers as needed.

1. Log into the application.
2. Navigate to Hello, <user_name> > View Profile.
3. On the GenInfo tab, scroll to the Security Questions section.
4. Click .
5. From the Question drop down, select the question to update.
6. In the Response field for the updated question, enter text that answers the question.

Note: You can update one or all of your questions.

7. Click .

MAGGI OVERVIEW

Maggi is AI-powered virtual assistant designed to enhance workforce management by serving as a central hub for information, automating routine tasks, and providing intelligent, data-driven recommendations. The agents are available to MSPs and client managers.

Maggi consists of two agents:

- Knowledge Agent - Maggi have access to all existing user guides, allowing users to quickly retrieve relevant information and streamline decision-making. See Maggi Knowledge Agent *(on page 40)*.
- Candidate Agent - An AI-powered feature that evaluates how well a candidate's resume aligns with a job description, helping hiring managers and MSPs make more informed selection decisions. The Candidate Agent is only currently available to use with Staffing requests. See Maggi Candidate Agent *(on page 43)*.

The AI feature requires configuration at the client organization level. Each agent is enabled separately from each other.

For more information about how to use the Candidate Agent, see Staffing Request *(on page 70)*.

MANAGER GUIDE

Features and functions available in the Manager view

The Manager view provides you access to the application, and the workflows that you use to manage your contingent workforce. From within this view, you can create requests for workers, set up interviews, and run reports to gain insights into your contingent labor programs. See the Overview *(on page 6)* for a summary of tasks and use cases in the Manager view.

The following screens are available in the Manager view, based on user permissions:

- User Profile *(on page 22)*
- Home Page *(on page 35)*
- Time + Billing *(on page 50)*
- Approvals Page *(on page 56)*
- Review Talent *(on page 58)*
- Surveys *(on page 60)*
- Requests *(on page 69)*
- Engagements *(on page 134)*
- Reporting *(on page)*
- On/Off Boarding Home *(on page 136)*

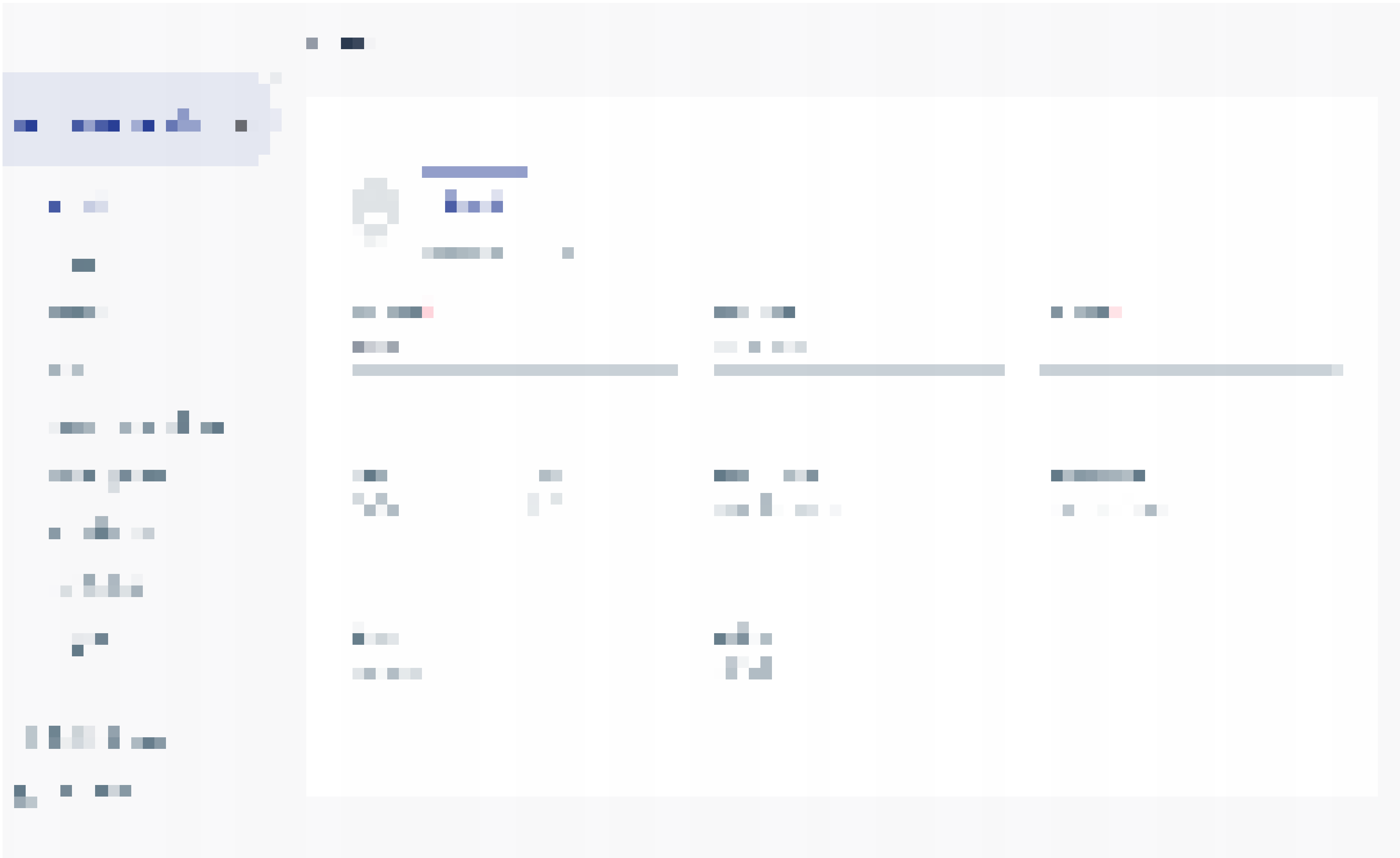
For a full list of available reports, see the 'Reporting' document.

USER PROFILE

Your user profile is used to add information to your user account, including personalization and customization, and manage your application settings. Interface personalization includes uploading an image as your account icon (See Personal Account Information *(on page 24)*).

You can access your user profile information by navigating to account icon > View Profile.

The User Profile page opens with all related personal user information and settings.



Along with your user information, you can set your email notification preferences. Emails are triggered by various actions in the application, for example, approval notifications. Email notifications are enabled by default for a user account, unless otherwise managed by an MSP in your client organization. You can disable notifications at the user account level as necessary.

If enabled, you can delegate workflow duties assigned to you. These workflows include billing approval and request management. Along with duty delegation, you can redirect email notifications for those duties to the delegate. For more information about delegation, see Delegation *(on page 33)*.

MODIFY YOUR USER ACCOUNT INFORMATION

You can modify any of your user account information at any time. Some information is read only, and cannot be modified. See the relevant user account section for more information about non-editable fields.

1. Click your account icon.
2. Click .
3. Modify any of the sections described in the following:

- Personal Account Information *(on page 24)*
- Contact Information *(on page 25)*
- Location Account Information *(on page 25)*
- User Profile Account *(on page 25)*
- Update Password Recovery Options *(on page 28)*
- User Account Security Questions *(on page 29)*
- Set Account Landing Page *(on page 29)*
- Sync a Calendar *(on page 30)*
- Email Preferences *(on page 32)*

4. Click .

PERSONAL ACCOUNT INFORMATION

These fields appear in the Personal section of your user profile. All fields in this section are free text entry, unless noted.

Note: A red asterisk (*) indicates a required field.

You can also upload a picture for your user account. To upload an image, click , and select a file from your local file browser.

Field	Description
First Name	Enter your first name.
Middle Initial	Enter your middle initial. Note: You can only enter one character (letter, number, and so on).
Last Name	Enter your last name.
Prefix	Enter your prefix.
Suffix	Enter your suffix.
Legal First Name	Enter your legal first name.
Legal Last Name	Enter your legal last name.
Nickname	Enter your nickname
Job Title	Enter your job title.

CONTACT INFORMATION

These fields appear in the Contact section of your user profile. All fields are free text entry, unless noted.

Field	Description
Email	Your contact email address. This field is automatically populated, and is not editable.
Work Phone	Enter your work telephone number.
Home Phone	Enter your home telephone number.
Mobile Phone	Enter your mobile telephone number.
Fax	Enter your fax number.

LOCATION ACCOUNT INFORMATION

These fields appear in the Location section of your user profile. All fields are free text entry, unless noted.

Field	Description
Country	From the drop down, select your country.
Address Line 1	Enter your location's address.
State/Province	Enter your location's state or province.
City	Enter your city.
Address Line 2	Enter your location's additional address information.
Postal Code	Enter your postal code.
Default Client Location	Enter your default location configured for the client organization. This address automatically populates in the Client Location field during request creation.

USER PROFILE ACCOUNT

These fields appear in the Account section of your user profile.

Setting	Description
Username	Displays the username associated with your user account. You can trigger a password reset by clicking [illegible]. A reset screen opens.  You must enter your current password in order to update your password. If you do not have your current password, you can use the 'Forgot Password' workflow.
Process Email	Not Applicable
Email Language Preferences	Use the drop down to select your language preference for emails.
Wand Language Preferences	N/A

2-STEP VERIFICATION WORKFLOW

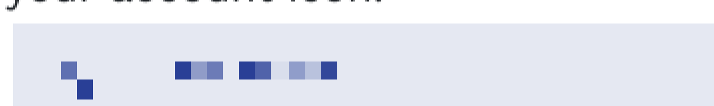
If your organization has enabled the 2-step verification workflow for your VMS account, you are required to provide password recovery information before you are granted access. The workflow requires you to register a telephone number where you can receive SMS messages or calls. A code is sent via text or call that you must enter when prompted.

Note that if your organization has enabled this feature, you are required to enter your username/password *AND* the verification code every time you access the VMS.

If you do not receive the code, you can click Resend. After you enter the code, click Securely Log In.

UPDATE PASSWORD RECOVERY OPTIONS

You can access your password recovery information and modify values as necessary. Your current password is *required* to update your recovery options.

1. Click your account icon.
2. Click .
3. Click Password Recovery Options from the side menu, or scroll to the Password Recovery Options section.
4. Click .
5. On the registration page, select the information to update.
Email information is required. You can also enter a mobile telephone number (optional information).
6. Click Continue.
A code is sent to the email address or telephone number (text) that you are updating. If you do not receive the code, you can get another code by clicking Resend Code.
7. On the verification page, enter the verification code. The code is sent to contact information (email or telephone) that you updated.

8. Click Continue to VMS.

USER ACCOUNT SECURITY QUESTIONS

You can modify your security questions for your account. Security questions are used to update your password and access your account if you are locked out.

Security questions are configured when you set up your account. They are stored in your account information, and you need to access your account profile to change them. If you are locked out of your account and do not remember your questions/answers, you can contact the Helpdesk for a reset.

A combination of three security questions and answers are required for a user account.

Questions are default for the application. You can use the drop down to select a question, and then enter text for the answer. Answer text is encrypted by default and cannot be decrypted. Answers are a minimum of two characters.

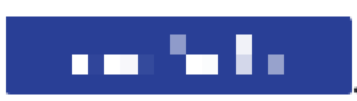
Note: You cannot save a user profile unless this data is provided.

SET ACCOUNT LANDING PAGE

You can set the application to open on a specified page each time you log in. This setting is controlled at the account level.

1. Click your account name.
2. Click .

3. In the left menu, click Set Landing Page.
You can also scroll to this section.
4. In the Set Landing Page section, use the radio buttons to select the default landing page.

5. Click .

SYNC A CALENDAR

You can sync a calendar with dates and information in the application. This action allows you to view your important dates such as interview times in one application.

In order to sync a calendar with your VMS calendar, the email address for your user profile (User Profile > Contact > Email) must match the email address associated with your calendar application user account.

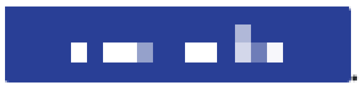
Note: Your client organization must have this option enabled in order to complete this action.

1. Click your account name.
2. Click .
3. In the left menu, click Calendar Sync.

You can also scroll to this section.

4. In the Calendar Sync section, click the 'Sync with ...' button. This step is determined by the calendar option setting in the client organization's configuration.

5. When prompted, enter user credentials. This step might not be required if your calendar application is configured with automatic log in, for example, 'Remember me' or 'Remember this device'.

6. Click .

Your calendar syncs with calendar information in the application. You can unlink you calendar by clicking Un-Link.

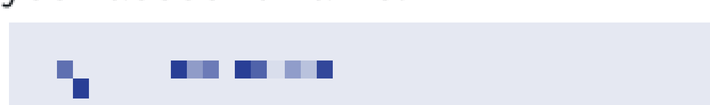
SYNC A VIDEO CONFERENCE TOOL

You can sync a video conferencing tool with the application. Syncing allows you to set up a video interview with a candidate (see Set Up A Video Conference *(on page 126)*) and add a repopulated link to the conference with a tool of your choice. The link is automatically added to the meeting details, and sent with the confirmation notification.

This profile configuration allows you to sync with any tool that your client organization is configured to use. You can also sync with more than one tool, allowing for multiple options (but only one link per interview request).

Note: Syncing your calendars and tools allows your Program Representative to view your calendar and configure interview time slots.

1. Click your account name.

2. Click .

3. In the left menu, click Video Conference Sync.

You can also scroll to this section.

4. In the Video Conference Sync section, click to sync with Teams or WebEx. This step is determined by the calendar option setting in the client organization's configuration.

5. Using the authentication pop up, enter your tool credentials and grant access to the application to sync with your account.

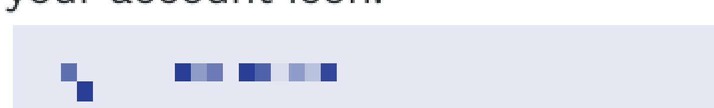
6. Click .

Note: Clicking  for any the configured tools unlinks the application from a video conference tool, but does not delete any saves meeting links in the application.

EMAIL PREFERENCES

Set up your email preferences in the application. Emails are sent to the email address tied to your user account.

You can additionally select the language for the emails that are sent to you. For more information about language preferences, see Supported Language Types *(on page 18)*.

1. Click your account icon.
2. Click .
3. In the left menu, click Email Preferences.
4. For each email preference category, expand the list by clicking .
5. For each email to enable, select the check box.

Note: You can enable all emails in a category by selecting the check box in the category header. You can also disable all emails in the category by deselecting the check box in the category header (clears all selections in the category).

Note: For Approval emails, you can toggle the Enable Daily Reminder Email to receive a single notification with a link to the Approvals page. This notification is sent at 5am PST when there are approvals in the 'Pending' status for your account. You cannot approve items in this notification. Enabling this feature disables all other configured approval notifications. For more information about approving items, see Approving or Rejecting Records *(on page 54)*.

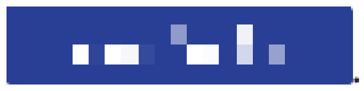
6. Click .

DELEGATION

You can delegate management of workflows to other client managers in your organization. This includes approving submitted billing items, or creating requests.

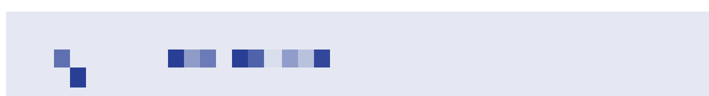
1. Click your account name.
2. Click .
3. Scroll to the Delegates section, or in the left menu, click Delegates.
4. In the Enter Manager Name field, enter the client manager to delegate the duty to. When you enter text, the application automatically suggests names.
5. Click .
The client manager is added to the delegates list.
6. Using the check boxes, select the duty categories which the delegate is responsible for.

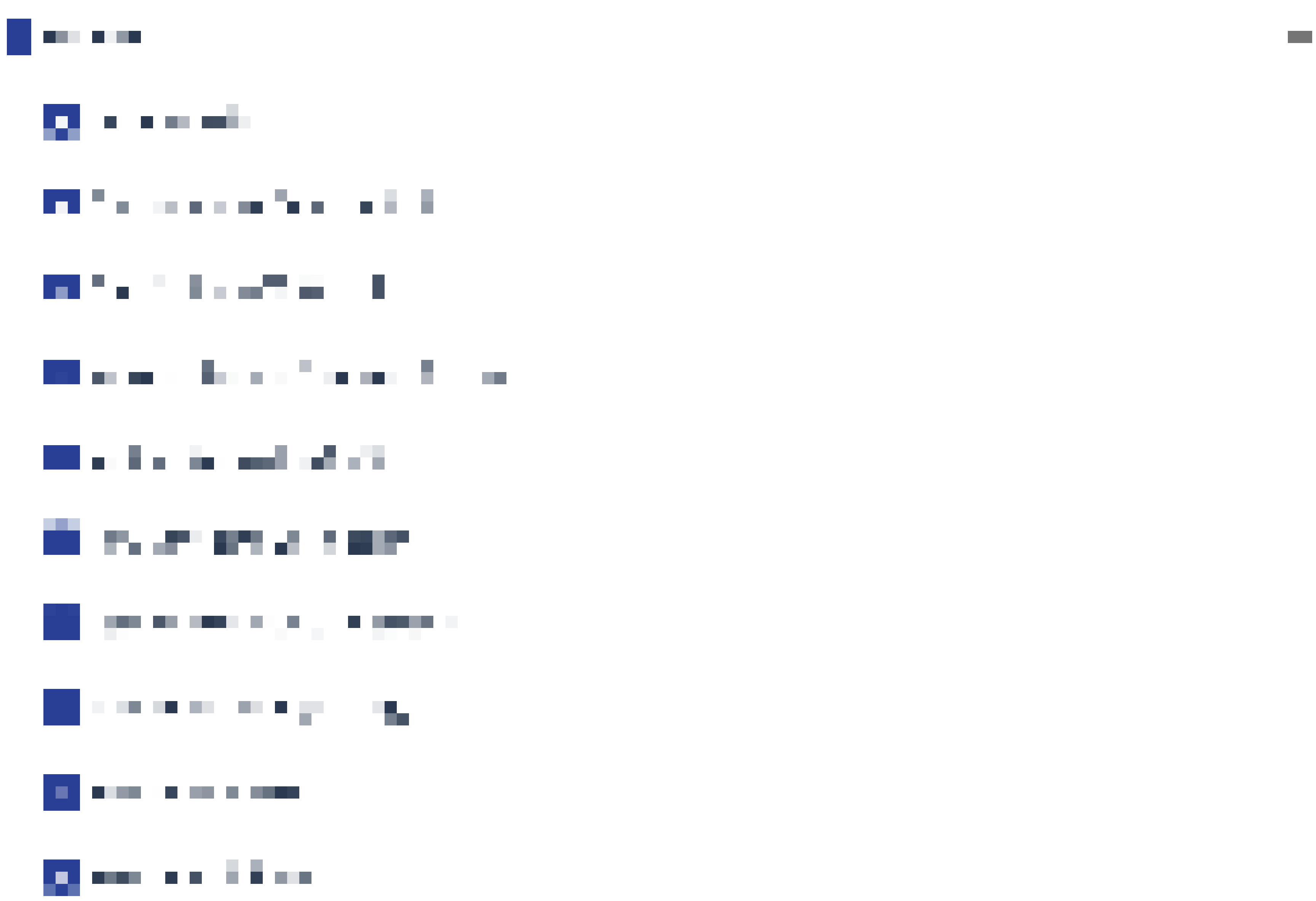
Note: Email notifications for each action in the system (if enabled) are not automatically set to 'Active' for the delegate. You must enable the notifications in the Email Preferences. For more information about this task, see Email Preferences *(on page 32)*.

7. Click .

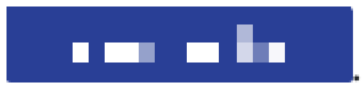
Enable Delegate Notifications

If you delegate duties to another client manager, you can additionally set up email notifications that are triggered by actions in the duty categories. For more information about delegation, see Delegation *(on page 33)*.

1. Click your account icon.
2. Click .
3. In the left menu, click Email Preferences.
4. Scroll to the Email On/Off Preferences for Delegate section.
5. Expand the duty category.
6. Select the check box for the notification to enable. You can also deselect a check box to disable the notification.

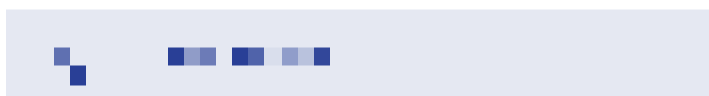
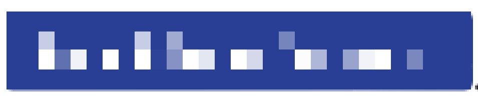


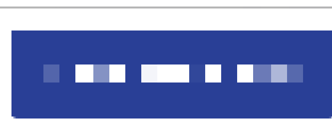
Note: You can select the check box for the duty category to enable all notifications associated with the category.

7. Click .

LINK USER ACCOUNTS

You can link user accounts if you have the log in credentials. Linking accounts allows you to toggle between accounts (possibly with different sets of roles) from a single user account.

1. Click your account icon.
2. Click .
3. In the left menu, click Link Account.
4. Click .
5. Enter the required credential information in the Link Accounts pop up.

6. Click .

HOME PAGE

The Home page displays a consolidated view of items that you need to take action on, and notifications that are relevant to the requests/engagements which you are assigned.

Note: If you have the Executive Home enabled for your user account, the KPIs display in this view.

Any section on the Home page can be expanded or collapsed using the up and down arrows in top right corner of each card. You can rearrange any of the sections on the page by clicking the dots icon in the top left corner of any section, and drag it to the desired position. You can also add or remove any of the three sections by clicking , and using the toggle switches:

The Action Items section, displays any actions items that you might have to take on workers or requests/engagements. You can filter the view by using the filtering tiles in the header row. Each card in the view displays details about he pending action, and allows you to navigate to the section where you can take action (approve a candidate, extend EOA, and so on).

The Updates section provides a list view of all candidates submitted for requests, and changes to requests and engagements. You can take action directly for interviews by clicking one the following options:

- - Opens the interview configuration page. You can set up a request in this page. For more information about setting up interviews, see Request an Interview with a Candidate *(on page 124)*.
- - Rejects the submitted candidate for the request.

You can click three dots icon to view Glider test results for the candidate. The Glider integration must be enabled for the client organization to complete this action. You can also click the candidate's name (blue text) to open a pop up displaying the candidate's resume information.

Note: The pop up allows you to add a note for the submitted candidate.

You can also click the request number (Manager column) blue text to open the request details.

The Activity & Upcoming Events calendar displays two tabs:

- Recent Activity - Events that have happened in the recent past, such as status changes.
- Upcoming Events - Scheduled, reschedule, and cancel interviews. Also, important engagement milestones within a selected range, such as engagement end dates. Use the date range selector at the bottom of the section to search through events.

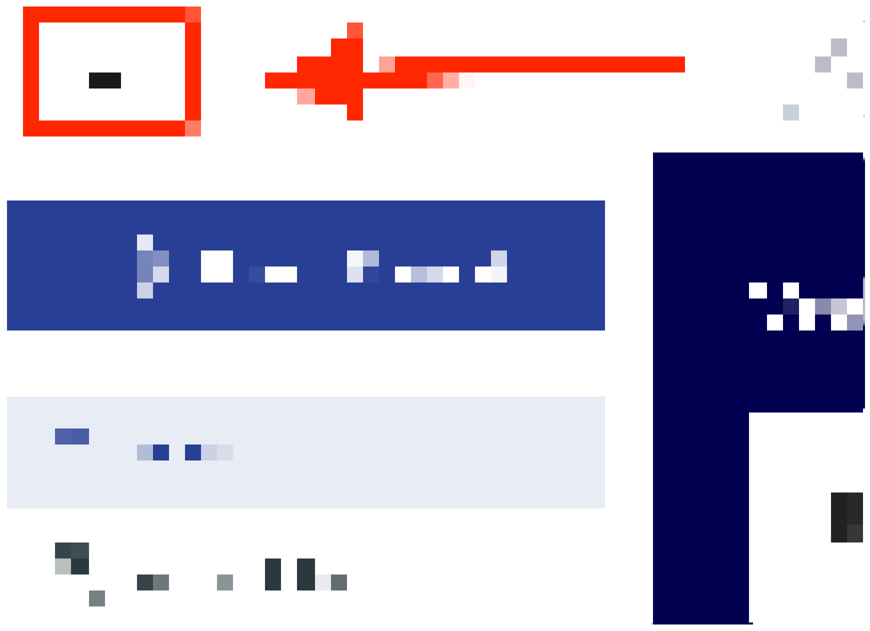
Note: When changing interviews, (for example, rescheduling), the supplier that submitted the candidate is notified immediately via email. This allows the supplier to notify the candidate of the change.

Use the application search to locate any information that you have access to view. You can enter any text that describes the element that you want to view (engagements, workers, locations, and so on). The search field (

) appears at the top of the Home, as well as at the top of all pages in the Manager view. Entering text prompts the VMS to suggest items that contain the text, allowing you to find items without knowing specifics. You can toggle between your records and records for which you are a delegate. You must be set up as a delegate in order for you to use this feature. For more information about delegation, see Delegation *(on page 33)*.

You can return to the Home page from anywhere in the VMS by clicking the icon in the menu side bar.

Note: You can expand the left sidebar by clicking . This action also expands the text labels on the button icons.



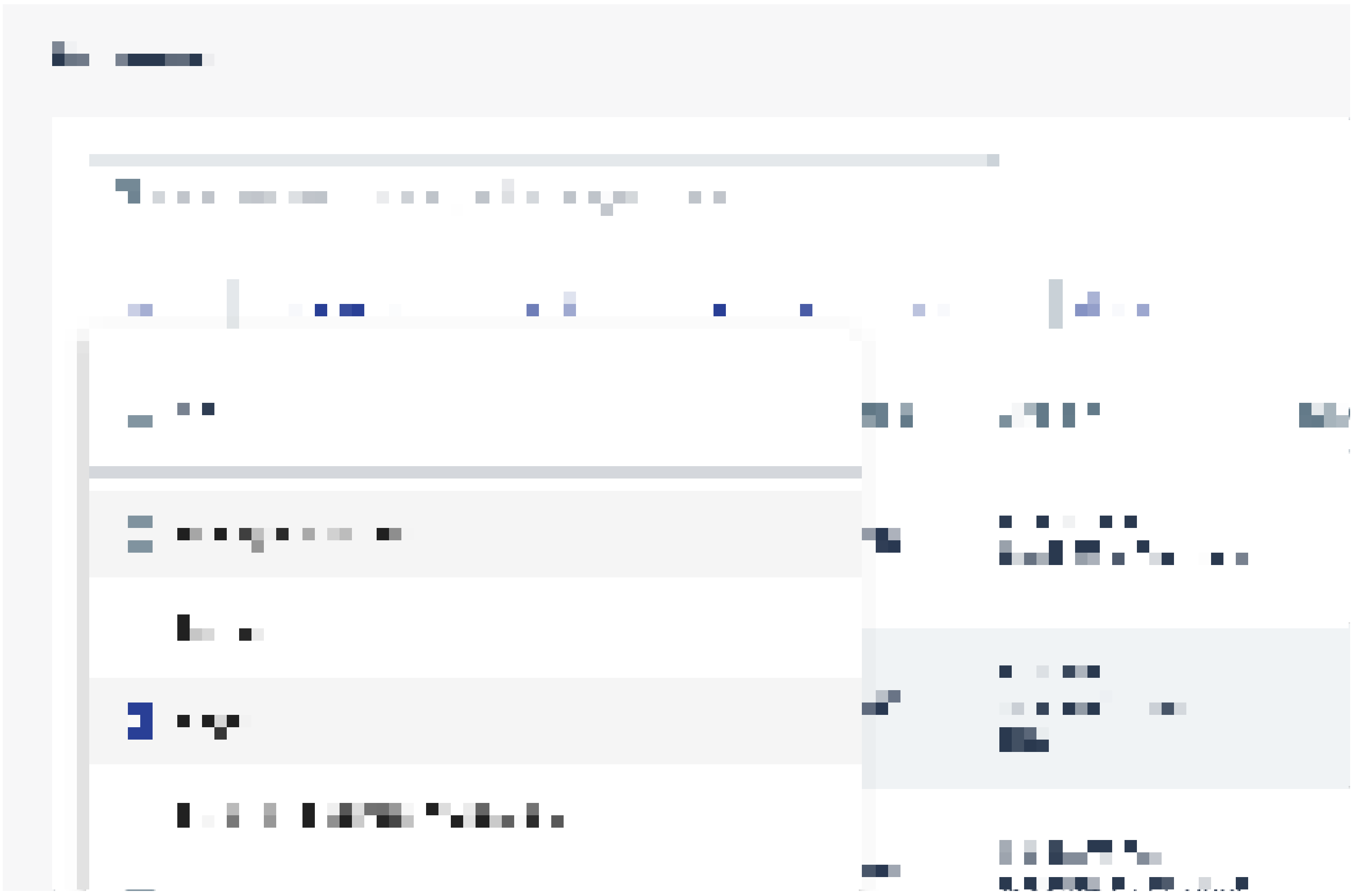
Note: If the Bring Your Own Key (BYOK) data encryption feature is enabled, some fields in the application do not off 'like' suggestions. For example, if you are adding a user name to a field, you can type in a few characters and the application searches available data to suggest existing name values. With encryption, you need to provide the exact name value because the system cannot search encrypted values. It is suggested that if you have the value, copy/paste it into the data field.

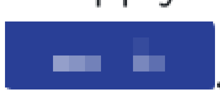
ADVANCED SEARCH FILTERS

These filters appear as options on the Requests *(on page 69)*, Engagements *(on page 134)*, Time + Billing *(on page 50)* and pages.

Each filter is a drop down with pre-selected values. Using the values allows you to filter out items that you do not want to view, or to locate a specific item based on your criteria.

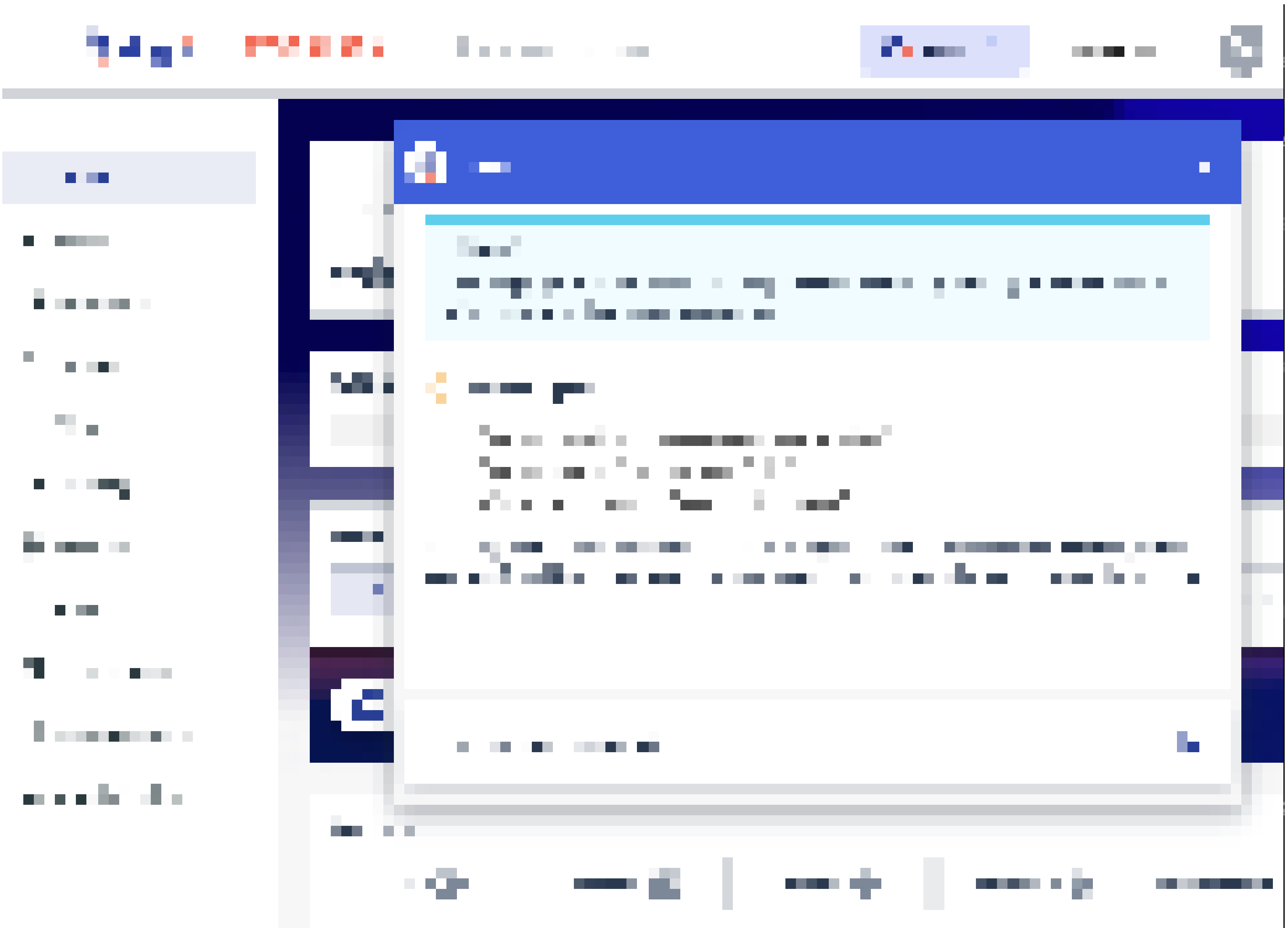
You can apply as many filters as necessary, or remove filters. When a filter is added to a view, the drop down displays the number of filter items actively applied.



To apply filters, click in the drop down, select the check box for the item, and then click .

MAGGI KNOWLEDGE AGENT

The Maggi Knowledge Agent uses generative AI to understand queries in the agent's chat window, and return information in natural language. To access the agent (if enabled), click . The agent chat window opens.



Enter text in the chat window. The agent considers your query and returns information.

You can continue to refine your query as you interact with the Knowledge Agent. The agent continues to provide information regarding what you ask it, or the suggestions that you provide based on a previous answer.

Note: If you think a particular answer is generally helpful, or is incorrect or unhelpful, you can use the thumb buttons in the bottom of the chat.

These buttons appear in the chat window for all agents.

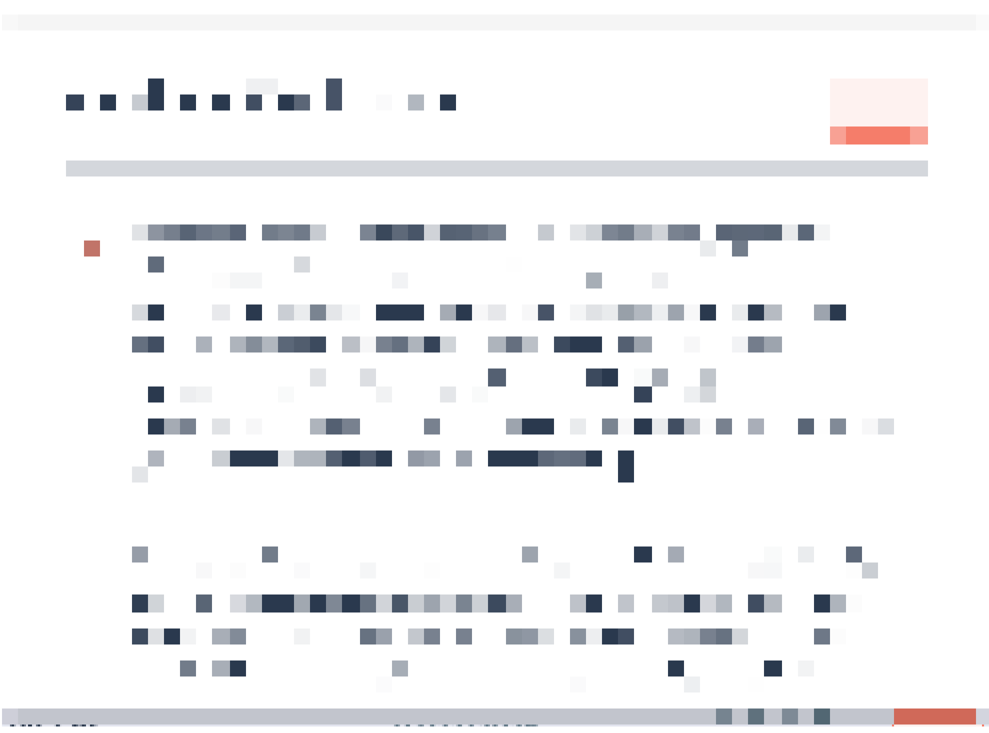
Maggi can also reference client-specific documents. Documents can be referenced in the knowledge agent, for example, when asking about a standard operation procedure for opening a staffing request. Documents can only be managed by MSPs in the client organization's Maggi configuration.

Market Rates in the Knowledge Agent

If the client organization has the Market Rates feature active (Pay Intel Configuration *(on page)*), the Knowledge Agent is able to provide data from the Market Rates Module, including the average bill rate for a position.

MAGGI CANDIDATE AGENT

The Maggi Candidate Agent is used to view and refine candidates submitted for staffing requests. The agent uses generative AI to present insights for candidates based on their resumes. The insights are accessed by hovering over the System Match column in the Candidates tab of a staffing request.



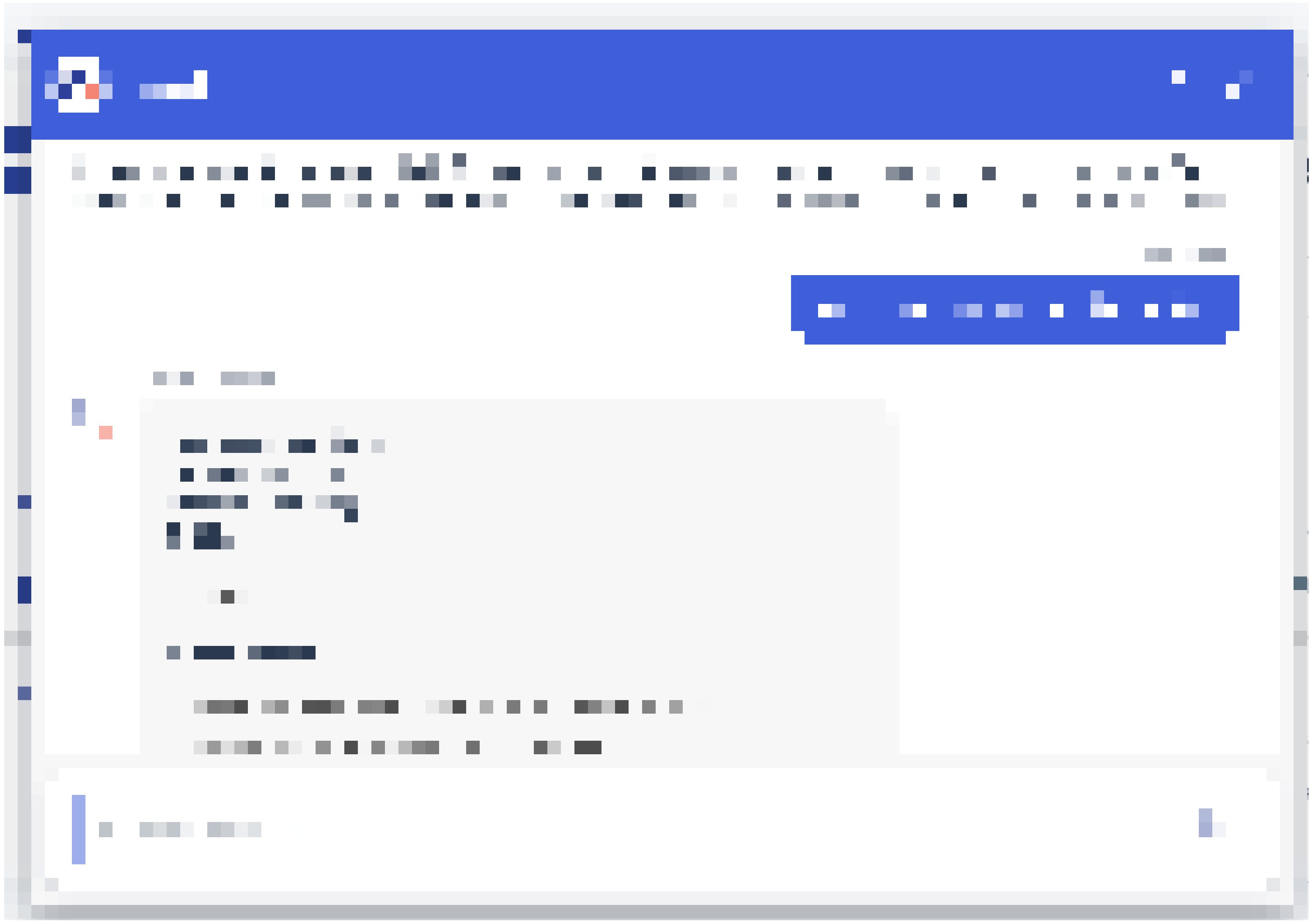
The VMS displays the rating for the candidate based on the requirements and skills requested for the job. Justifications for the rating is generated in plain language, allowing you to understand how the candidate might or might not be a correct choice before taking action (for example, requesting an interview).

In addition, you can use the agent to compare two submitted candidates. To compare candidates, select them from the list, and then click . The agent opens a popup with the comparison insights.

The agent assigns a rating based on skills match, experience relevance, and education. Skills match refers to how well the candidate's technical and soft skills align with the skills specified in the job description. Experience relevance refers to the degree to which the candidate's previous roles and projects are applicable to the responsibilities of the position. Education refers to whether the candidate's academic background meets the requirements specified in the job description. The ratings are as follows:

- Excellent - (Maggi Score from 91 to 100) - The candidate's qualifications strongly align with the job requirements. They are highly likely to succeed in the role.
- Good - (Maggi Score from 76 to 90) - The candidate meets most of the job requirements, with minor gaps. They are a strong contender for the position.
- Fair - (Maggi Score from 46 to 75) - The candidate has potential but demonstrates noticeable gaps in alignment. They may be suitable for consideration in specific circumstances.
- Low - (Maggi Score from 1 to 45) - The candidate's qualifications do not align with the job requirements, making them unlikely to meet the needs of the role.

Ratings can be manipulated by modifying the emphasis on qualifications or skills. This manipulation can be done in the Maggi chat window, if enabled for the Candidate Agent. The chat window allows a user to ask questions about a specific candidate, or two candidates if making a comparison.



If enabled, the Candidate Agent can validate if a candidate certification's are up to date. If the candidate is missing a certification, the MSP is warned on the Candidates tab, and must follow up to verify the information.

MAGGI WORKFLOW AGENT

The Maggi Workflow Agent is a request creation agent that can automatically generate some job details based on historical job data. The feature supports Staffing and Payroll job description generation and Project scope and deliverables generation. It can also be uses to find and reuse previously created requests.

For evaluation, the Workflow Agent can consider a supplier organization's data to create insights on strengths and weaknesses. Generated insight details can be viewed when selecting suppliers in the Sourcing step of the Create Request wizard. For quotes, the agent can use the project/SOW details to determine a score or quote level alignment.

The Workflow Agent must be enabled for a client organization (Configuration > Maggi > Maggi Assistant for Request Workflows). You can enable this agent for the MSP, or the MSP and client manager user. Additional Workflow Agent capabilities can be enabled as required. See Maggi *(on page)*.

Request Refinement with Workflow Agent

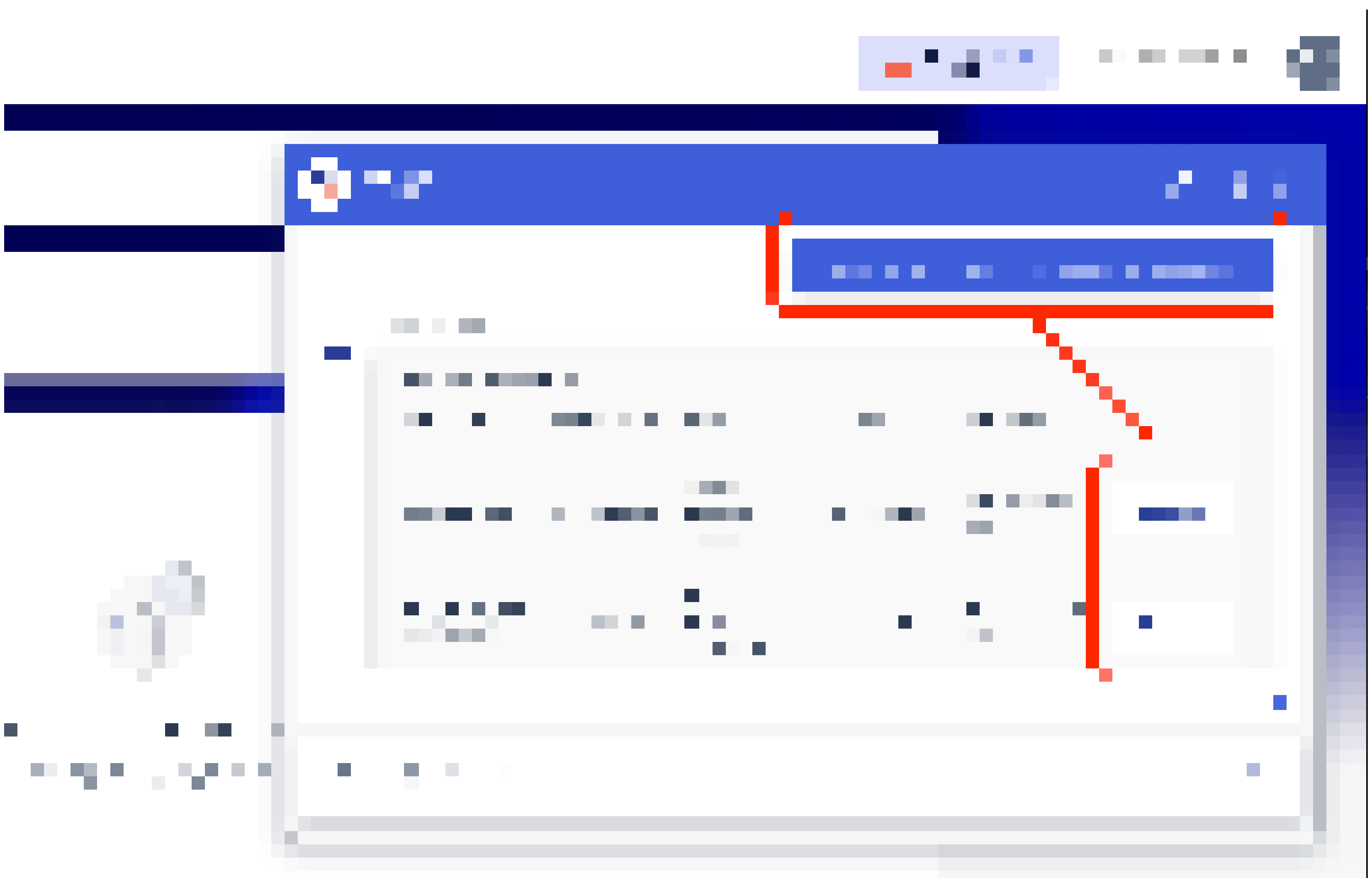
When using the Create Request wizard, and if the Workflow agent is enabled, you can click the Refine with Maggi button in applicable areas of the wizard to help you generate content.

The Workflow Agent uses historical inputs to suggest details that can be used in the request. See the applicable section in the Create Request wizard documentation.

Reuse Previous Request

The Workflow Agent can reuse previously created requests. Tell the agent in the prompt window that you need to open a request, and enter the job title or project/SOW title. The agent suggests recently used requests with the same job title or project title.

Note: 'Recently Used' is defined as used in the last 6 months.



Click Reuse next to the request. The system creates the request. You must complete and submit the new request details.

MARKET RATE INSIGHTS

The Market Rates option, if enabled, allows you to search for pay and bill rates for job titles and locations in your client organization. You can search for rates that apply to staffing requests, or use the rates tool to calculate project estimates based on criteria like locality.

The Market Rates search uses the Pay Intel integration. Pay Intel contains pay and hiring data from thousands of job titles. No additional configuration on the integration is required.

If any of the drop downs at the top of the page are changed, the results recalculate to consider the new setting.

You can take immediate action on rates displayed by clicking Create Staffing Request. This opens a staffing request in draft status. The search results automatically populate the request form. Your client organization must be configured for staffing requests, and you must have permission to open staffing requests on your account.

SEARCH FOR MARKET RATES

You can search for pay and bill rates.

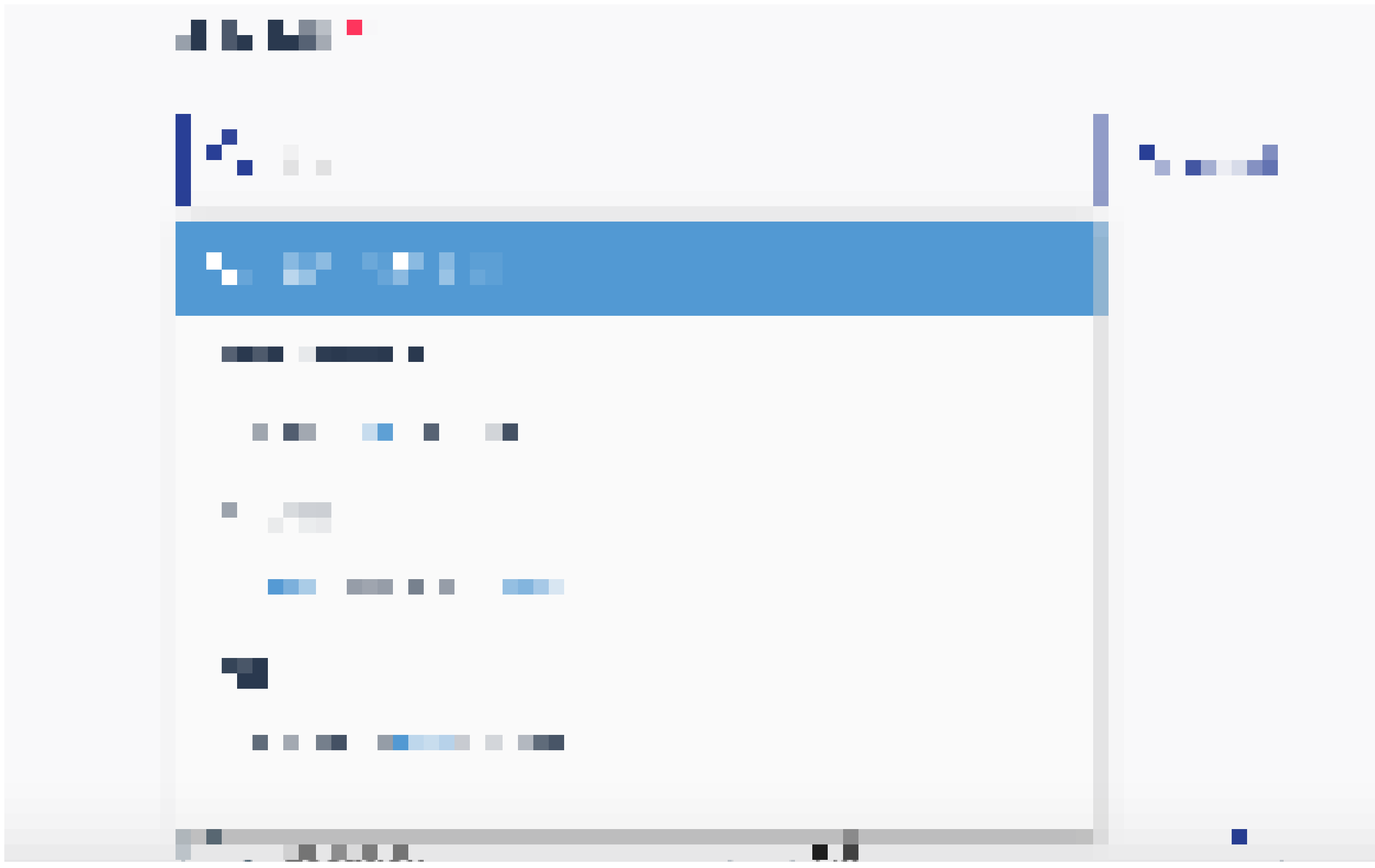
Note: This feature needs to be enabled for your client organization. Staffing requests also need to the enabled for your client organization.

1. Navigate to the Home page in the Manager view.
2. From the left menu, click Market Rate Insights.
3. In the form page, configure the search criteria:

Some fields are required, and marked with a red asterisk. You can make selections by clicking the tile selections. Some fields, for example, operational unit, display selections based on your client organization's configuration.

Note: Selecting FTE for the rate type disables the Bill Rate tab on the results page as it is not applicable.

4. In the Job Title field, enter text that describes your job. The VMS suggests job titles configured for your organization.



You can also click Advanced to open the advanced search function. This popup allows you to search job titles based on an configured organizational job category.

Clicking the job title (blue text) populates the search form with the job title details.

5. In the Years of Experience section, used the pills to select the experience range. You can only select one range at a time.
6. in the Rate Type field, select the rate type, full time or contract position.

7. In the Location field, enter text that describes the job location. The VMS suggests configured locations in your organization.
8. From the Industry drop down, select the industry for the job title.
9. In the Job Title and Skills field, view the job description, and/or skills related to the job title. This data is used to refine the results based on keywords.

> Note: If you have permission to edit job titles and descriptions, you can clear this field and enter a new job description, or edit the existing content that is automatically populated.

> Note: If you client organization does not have a job description for this job title, this field is empty. You are required to enter a job description and skills to perform your search.

10. Click [redacted].

TIME + BILLING

The Time + Billing page displays billing items submitted by workers for engagements that the client manager is responsible for. The page displays the same information that the Summary page displays, with the advantage of filtering the view to allow you to locate and evaluate the billing item with more detail.

Each item displayed gives you the simple option to approve or reject the time entered. If approved, the item is moved to the 'Pending Invoicing' status, and can be viewed on the Recent Activity tab. You can approve or reject items on the Summary page and the Time + Billing in the same way, but the Time + Billing gives you additional options for managing billing records. For records with cost allocation, you can view details, or modify allocation details for each line item. For more information about how approve or reject billing records, see Approving or Rejecting Records *(on page 54)*.

The general view is arranged into a table, organized by item category. The table contains tabs for each billing time type that is enabled for the client organization.

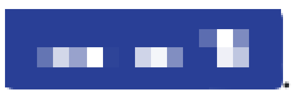
- Time - Displays time submitted by workers. Includes time card details by engagement.
- Project - Displays time submitted by workers, milestones, and materials, based on the project. Includes percentage spent of available budget for the project.

> Note: Time and expenses submitted by project workers display on the Time and Expense tabs. Time and expenses submitted by workers configured as project positions display on the Project tab.

- Expense - Displays expenses submitted by workers or suppliers, based on engagement type. Includes attachments for expenses (receipts, and so on).
- Recent Activity - Displays the last 7 days of approval/rejection activity for the client manager.
- Adjustment - Displays any adjustments added to an engagement that need to be approved by the client manager. Only displays if the MSP has taken action. For example,

if a client organization only uses staffing engagements, they only see three tabs, Time, Expense, and Recent Activity. If you adjust any item, and the client manager has permission to approve that adjustment, an Adjustment tab appears only for that client manager.

Using the Rows per page selector, you can control records displayed. You can also use the page navigation to toggle between pages of records.

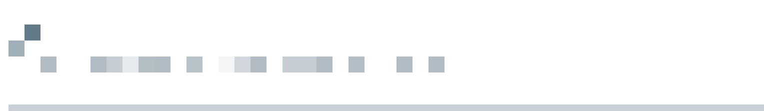
Tip: This control is useful if you are approving large numbers of records by clicking .

Note: You can access any attachments to a timecard by viewing the billing line details in the engagement (Billing tab), and then expanding the Attachments section.

PAGE FILTERING

You can filter the view on the Time + Billing page, depending on the tab selected.

Filtering is performed into ways, by using the search function or by using the filters. The search function allows you to search items by worker name. You can search by worker on all tabs. Enter at least two letters in the text field.



You can also filter the view by records, your approvals, or by records that have been delegated to you. Using the My Records drop down, select the record view.

If you select Delegate Records, you can view the manager and the time and expense approver for the record items in the details panel of the submission.

To filter the view using the column data, you can use data type filters, or sort by highest to lowest value (default) or lowest to highest. The data type filters allow you to select what time type is displayed, or if records with variances are displayed. These filters can only be used for records on the Time tab.

Note: By default, all data types are displayed.

To use the data filters, navigate to the Time tab, and then click the data type selector at the top of the table.

For time, you can filter by regular time, over time, and double time. For variance, you can filter by records with variance or without. Use the check boxes on the pop up to make selections, and then click OK. The filter options appear as chips.

To clear a filter, click the "X" on the chip. If not records apply to the filter results, the table is blank.

You can reset the page filters by clicking Reset Filters to default. To filter the column of the data type, click the label in the headers.

APPROVING OR REJECTING RECORDS

You can review and approve or reject records submitted by workers. If you do not need to review details of the submissions, you can approve all records assigned to you for review.

Note: You can also use the function on the Summary page.

Note: only applies to the visible records on the page. If you have, for example, 100 records, but have the pagination set to 20, then clicking only approves the visible 20 records.

1. Click .
2. Select a tab.
3. Using the filters or the worker search, locate the record review.

    Note: If you do not need to review record details, in the record row, use the and buttons to approve or reject the record.

4. Click the record to review.
5. For entry in the Pending Items section, approve or reject the entry using the and buttons.

If you reject an entry, enter a reason for the rejection in the pop up text box, or select a reason from the drop down. If both fields (drop down and text box) appear, you are required to complete both fields.

After you reject, it is moved to a Completed Items section at the bottom of the page, and demarcated with a rejected icon. The comment and timestamps are also added.

COST ALLOCATION FOR BILLING

You can set up cost allocation for billing items entered by a worker in the application. Allocation is used to 'mark' billing line items (time and expenses) with a particular cost center code, or other important allocation information that your business requires. Allocation information is added by using Billing custom fields and configuring those fields to reference a set of values. For more information about adding custom fields for your client organization, contact your Program Representative.

Values are added to billing items when the item is configured for a user type:

In this example, the two custom fields appear when a worker is entering expense information. Field input type (pick list, free form text, and so on), as well as validation (null values allowed/restricted, field input type) are configured at the field level.

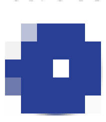
Allocation information is used in reporting only, and does not affect the application logic in any way.

APPROVALS PAGE

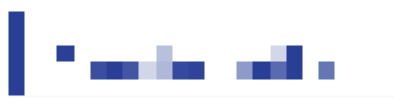
If your client organization is using approvals and if an item is assigned to you for approval, you can view assigned items on the Approvals page. Approvals are required sign offs on specific items in the request/engagement workflow.

Note: Billing items such as timecards and expenses are routed for approval on the Time + Billing page. For more information about approving billing items, see Time + Billing *(on page 50)*.

The page displays your approval items other than billing items, categorized by type of item. Each item category appears on a tab. Items in the table appear with a quick overview of the details that need approval (amount, date, and so on). To view full details, click the blue text of the item in the Approval column. The application opens the request/engagement's Approvals tab. In this view, you can approve/reject an item, leave a comment, contact an approver with a reminder email.

You can search for items by job title, worker name, or project name. You can also filter the table by items assigned to you, or by items delegated to you by another manager. Use the  and buttons to reject or approve each item.

You can view the approval history on the History tab. Clicking on items in this table opens the request/engagement Approvals tab, where you can expand an approval item to view individual approver actions.

Note: When reviewing items to be reviewed, you can choose to withhold action for an item by clicking the  to skip to the next approval item assigned to you.

REVIEW TALENT

The Review Talent page displays submitted candidates and quotes for requests. From this consolidated view, you can view details, or reject submissions.

Candidate details can be accessed by clicking on the request number (blue text). To access the submitted candidate's profile in the system (the information that was submitted to the request), click the candidate's name (blue text). To access all candidates submitted to the request, click the request number (blue text) to open the Reviewing sub tab.

You can click the file buttons in the Submitted Resume section to download files submitted with the candidate. You can also add notes to the resume record.

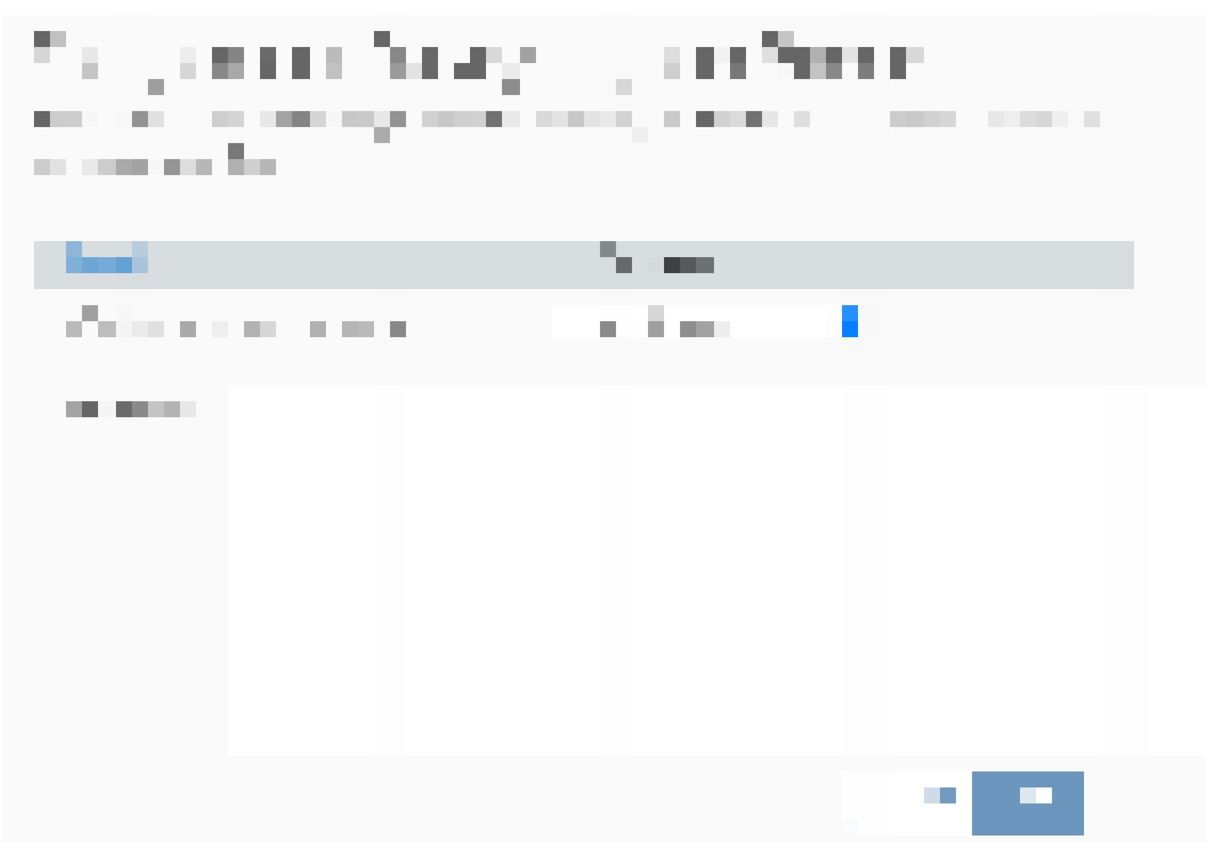
If you need to schedule an interview with a submitted candidate, you can access the interview functionality from the Review Talent page. In the table, in the row for the candidate, click the Request Interview button. For more information about the candidate interviews, see Candidate Interviews *(on page 122)*. You can also reject a candidate by clicking the icon.

SURVEYS

The Surveys page provides an overview of all assigned and incomplete surveys. Surveys are configured to gather feedback on workers, and for workers to leave feedback for engagements.

Note: You can also click Complete Survey on the Home page.

To complete a survey, click the blue text in the Survey Type column. The survey opens on a survey form page.



Complete the form questions, enter a comment in the Comments field (if enabled), and click .

REVIEW QUOTE COLLABORATION

After quotes are scored by collaborators, you can review their scores for the quote.

1. Click Collaboration.
2. Click Details for the quote.
3. Click the Quotes tab.

The Quote Collaboration tab only displays collaborator information. It also allows you to add collaborators to the request for information. For more information about adding a collaborator, see Add a Collaborator *(on page 62)*.

4. In the Request for Information section, click Review Scoreboard. The scoreboard opens.

You can export the scorecard data by clicking Export.

Note: If your client organization requires a business validation screening for the supplier/vendor of a quote, click .

ADD A COLLABORATOR

If you need to add additional collaborators to an active Questionnaire, you can edit the Quote Collaboration tab on the quote.

Note: You cannot modify the request for information dues date, only the scoring due date.

Note: You can email a collaborator using your default email application by clicking Contact in the collaborator's icon tile.

1. Click Request.
2. Click the Quote Collaboration tab. The current collaborators are displayed.
3. Click Edit.
4. From the Add Collaborator drop down, select Search Client or Search MSP.
5. In the blank field, enter the name of the user to invite. The application automatically suggests client manager or MSP names, depending on the collaborator type for the search and the client organization/OpUnit.
The user is added to the table of active collaborators.
6. In the Scoring Due Date field, enter the due date for the scores. You can also click the calendar icon to open a calendar pop up that allows you to select the date.
7. If you require the collaborator's score to be considered in the Questionnaire scoreboard, select the Score check box. For more information about the scoreboard, see Review Quote Collaboration *(on page 61)*.
8. Click Save.

BUDGETS PAGE

The Budgets page allows you to view any configured budgets for a client organization. In this view, you can hide any inactive budgets that have been depleted.

You can filter the view on the page by using the Rows per page drop down (number of displayed rows), and the Display Inactive Budgets toggle switch. To view the budget information, click the budget title blue text.

To view the engagements associated with the budget, scroll to the Engagements tab. All engagements in the budget appear. To view engagement details, click the engagement job title blue text.

Note: You can only view details for engagements that you are assigned to. If you are not assigned as a manager, the budget name (blue text) appears in grey.

If you have the appropriate permissions on your account, you can modify budget details (funds), or add/remove engagements to a budget. For more information about performing these tasks, see the following:

- Add Funds to Budget *(on page 65)*
- Add New Budget *(on page 67)*
- Add Engagement to Budget *(on page 66)*
- Remove Engagement from Budget *(on page 68)*

If your client organization is using the Approval Routing module, on the Approvals tab, you can view budget-specific approval items that require you to take action. These items include adding funds to a budget, or the creation of a new budget. Approvals are routed to you depending on the workflow configuration.

Funds in budgets do not credit or deplete until an invoice is created with billing items.

ADD FUNDS TO BUDGET

You can add funds to a budget. This action also allows you to modify any values on a budget.

1. Click .
2. On the Budgets page, click the budget title blue text.
3. In the budget details section, click .
4. In the Add Additional Funds field, enter the amount to add to the existing budget.

You can modify other fields for your budget modification when you add additional funds to your budget.

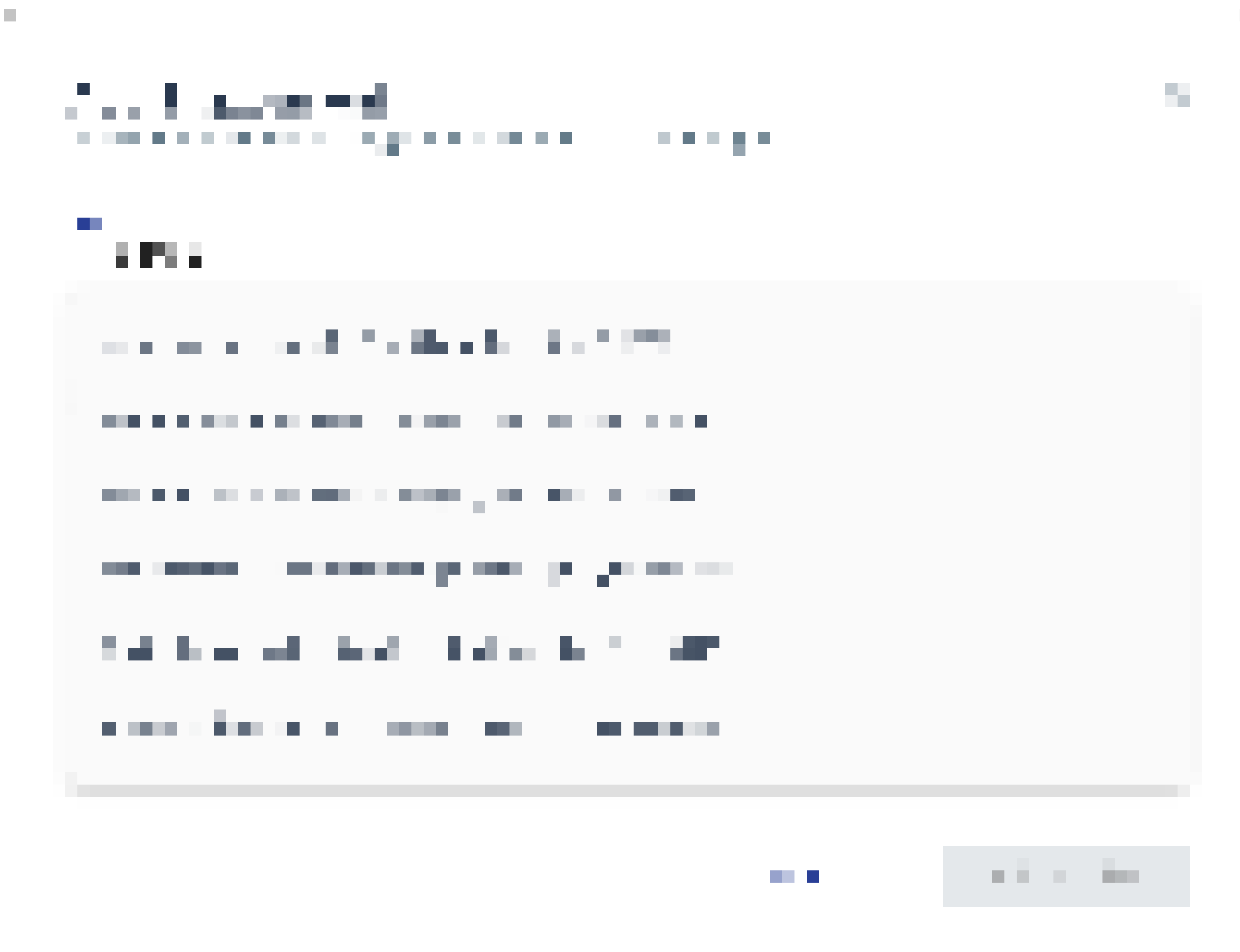
5. Click .

ADD ENGAGEMENT TO BUDGET

You can add engagements to a budget on the Budget page, or you can edit the engagement Financial section and modify the budget values in the Budget Amount section.

Note: Permission is required to edit engagement details.

1. Click .
2. On the Budgets page, click the budget title blue text.
3. On the Engagements tab, click .
4. In the Add Engagement pop up, enter the job title, engagement number, or worker name. The application automatically suggests engagements.



5. Select the engagement to add from the results.

Note: Clicking + Enter a new one clears the search results.

6. Click .

ADD NEW BUDGET

You can configure a budget and add it for association to engagements.

Note: A red asterisk (*) indicates a required field.

1. Click .
2. On the Budgets page, click .
3. Configure the following fields:

Field	Description
Op Unit	Select an operational unit from the drop down. You can only associate one OpUnit per budget.
Title	Enter a title for the budget.
Budget Description	Enter a description for the budget.
Budget	Enter the budget amount.
Currency	Select the currency for the budget from the drop down. You can only select a currency configured for the client organization. The budget can only have one currency.
Start Date	Enter a start date for the budget. You can also click the calendar icon to open a calendar pop up that allows you to select the date.
End Date	Enter an end date for the budget. You can also click the calendar icon to open a calendar pop up that allows you to select the date.
Owner	Enter the owner for the budget. When you enter text, the application automatically suggests manager names.

Field	Description
	You can associate multiple managers as owners for the budget.
Department	Enter the departments for the budget. The application automatically suggests configured departments in the client organization/OpUnit. You can associate multiple departments with a budget.
Engagements	Associate existing engagements by entering a job title, engagement number, or worker name. When you enter text, the application automatically suggests engagements. You can add engagements to a budget in the Financials section. For more information about adding engagements, see Add Engagement to Budget *(on page 66)*.

4. Click .

REMOVE ENGAGEMENT FROM BUDGET

You can remove engagements from a budget. An engagement must be removed from the engagement details (Financials section). You can access an engagement from the Budgets page (consolidated view of all engagements associated with a budget), or from the Engagements page. For more information about the Engagements page, see Engagements *(on page 134)*.

1. Click .

Note: You can also locate the engagement using the search functionality.

2. On the Budgets page, click the budget title blue text.
3. In the Engagements section, click the blue text for the engagement to remove.
4. In the Financials section, click Edit.
5. Click Remove.

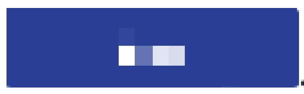
This action clears the value in the Total Available Amount field (available budget amount). It does not remove any spend amount already calculated for the budget.

6. In the Effective Date field, enter the effective date.

You can also click the calendar icon to open a calendar pop up that allows you to select the date.

Note: The effective date has to be equal to or before the end date of the engagement.

7. In the Justification field, enter text describing the justification.

8. Click .

REQUESTS

The Requests page gives you a consolidated view of all your requests. This allows you to review requests and their associated status.

Note: Only requests that are assigned to you display in the Requests page.

You can access the request information by clicking anywhere in the request row in the table. To search your requests, enter text in the search field. If no matches for your search are found, you can create a request in the results page by clicking the text. To return to the table view, clear the search field.

Note: If the Enable client organization hierarchy visibility setting is enabled, you can view data for your reports, and the reports of your reports according to your client organization's reporting structure.

The view can be filtered by number of requests by using the Rows per page control in the bottom right of the table. You can navigate between pages by using the page navigation options icons.

You can add the following requests (if enabled):

- Create a Payroll Request *(on page 87)*
- Create Request - Staffing/Sourced *(on page 71)*
- Create a Project Request *(on page 94)*

The request/engagement names for the request/engagement types in the application are default, but can be modified to suit a client organization's business requirements. For example, 'staffing' can be relabeled 'contractor', where it would appear for the default label.

Note: When you are creating a request, you have the option (if enabled) to select a recently created request. These are request that you created, and not at an organizational level. Selecting a recently used request populates the request with previously configured job information. You must input new start and end dates for your new request.

STAFFING REQUEST

You can create a request for workers and send that request to contracted vendors. A 'Staffing' request is defined by a need for a worker, where that worker is not known to the client organization, and must be sourced. A notification is sent to vendors that have a relationship with the client organization. Each vendor that is notified can submit candidates for the request, and you can set up and manage interviews with these candidates in the application.

If you have a specific person or persons in mind for a staffing position, you can enter their information in the application and contact them using the application's email functionality. This option is only available if configured for your client organization.

Selected vendors are contracted with your organization. Rates and fees are determined in the agreement for a job title, and must be defined before that job title can be used by a client organization. Once the job data is set up, you can use each job category as is, or if you have edit permission, you can modify details as necessary. Permissions for you user account type are defined in the client organization's configuration, and the MSP Admin role is required to access these configurations.

Create Request - Staffing/Sourced

Create a staffing request that is sent to contracted vendors. The options that are available in this workflow depend on the options enabled for your organization. To modify these options, the MSP Admin role is required. If you require this role, contact your Program Representative.

Note: When creating a request, the application automatically saves the request as a draft until it is completed and sent for sourcing.

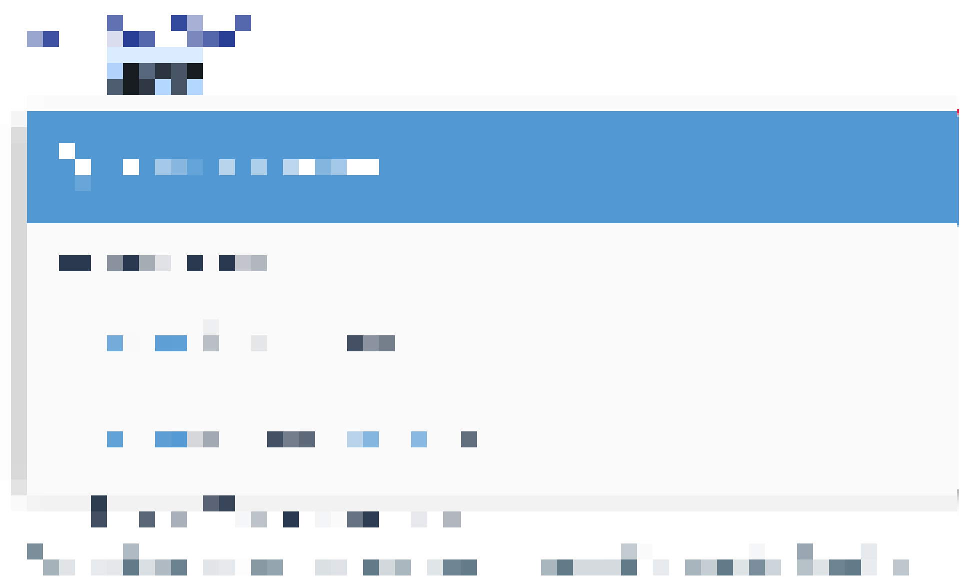
Note: A red asterisk (*) indicates a required field.

1. In the menu, click .
2. Optional: If configured, select the operational unit for the staffing request.
3. On the Create Request page, click the Staffing - Supplier Sourced tile.

When you create a request, your name automatically is inserted as the hiring manager.

You can remove your name and use the search field to locate and insert a different hiring manager's name for the request. The application automatically suggests names that are configured for your client organization.

4. In the Job Details section, enter the job title.
The application automatically suggests job titles configured in the job categories that are defined for your organization.



You can also click Advanced to search by category.

The search pop up allows you to search by a category. Job titles for each category can be clicked to populate the Job Title field.

If you are self sourcing the job, that is, you know the person/people that are going to complete the work, you can fill in their information. For more information about this task, see Self Source a Position *(on page 77)*.

5. In the Location field, enter the location where the job is performed.

The application automatically suggests defined locations.

Job locations are defined for your organization prior to request creation. If the job site is not a defined location, you can specify the details by a combination of country, state/province, and city. To enter this information, select the Work Completed Offsite check box, and using the drop downs, select the location details.

6. Optional: You can modify the defined job description if you have the correct permissions. To modify the fields, click .

If you need to replace the job description, and if enabled, you can upload a descriptor file with the new information.

The application parses the uploaded file and replaces the skills information in the Skills section. To upload a file, click Upload New One, and select the file from your file browser. Uploading a new file automatically updates the required and additional skills for the request.

7. Click .

8. In the Skills section, add at least one required skill for the request.

Enter text in the search field to locate skills. The application automatically suggests skills. After you add skills, you can drag the tiles to recategorize as necessary.

Note: This section is disabled/removed from the request creation workflow if the Ideal Experience feature is enabled.

9. On the Position Details page, in the Start Date field, enter the start date for the job.

Note: This is the earliest date that a worker can enter time. This date is different from the date that the request is filled, converting it to an engagement.

You can also click the calendar icon to open a calendar pop up that allows you to select the date.

10. In the End Date field, enter the end date for the job.

Note: This is the last date that a worker can enter time.

You can also click the calendar icon to open a calendar pop up that allows you to select the date.

Note: Worker length of stay must conform to the worker tenure setting in the client organization configuration (number of days.

11. In the Total Number of Positions field, enter the number of workers required for the job.
This field defaults to '1'.
12. In the Time & Expense Approver field, enter the billing approver for the job. This is the user in your organization that approves time cards submitted by workers for the job.

Note: Approvers require the correct permissions for this role.

13. In the Schedule section, use Full Time or Part Time button to define the engagement as full time or part time.
14. In the Hours Per Week field, enter the number of hours a week required by the engagement.
If you select Part Time, enter values in the Hours Per Day and Hours Per Week fields. Optionally, you can select the required days per week from the drop down.
The number of hours a week for a job is used to determine eligibility for a worker (overtime, thresholds, and so on) if configured for your client organization.
If your client organization is using piece or multiple rates, the Full Time/Part time selector is disabled.
15. Click the Add Schedule Notes link to open a text field for adding notes to the job schedule.
16. In the Reason for Hire section, from the Reason drop down, select the hiring reason.
17. In the Financials section, from the Currency drop down, select the currency (denomination) for the request.
This setting determines how the financial values for the request are calculated. These values include the rates of pay for a worker, and the denomination of the values

generated in reporting. The Total Estimate value at the bottom of the Financials section displays the calculated value in the selected currency.

Note: Changing this value from one currency to another does not recalculate any financial values previously entered.

18. In the Bill Rate field, enter the job bill rate. If configured for staffing requests, you can optionally enter a value in the Pay Rate field.

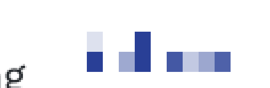
Note: If your client organization disables the Bill Rate field, you can only enter a value in the Pay Rate field.

These fields are dependant on each other and automatically calculate based on the fees and markup configured for your organization. If visible for staffing requests, you enter a value in one field, the other is automatically populated by the application.
If you have the Market Rate Module activated, the market low rate, the proposed rate, and the market high rate is displayed. This can be either the bill rate for the job title, or the pay rate for the job title, depending on the module configuration.

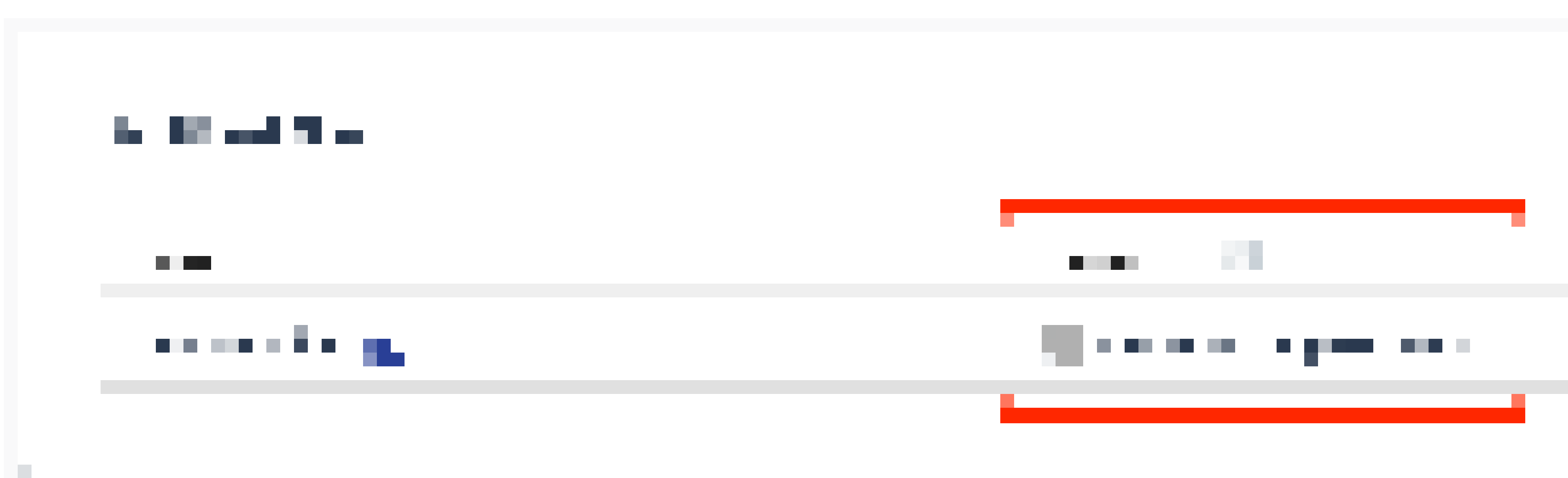
For more information about the Market Rate Module, contact your Program Representative.
19. Optional: If enabled, you can click Show Additional Cost Estimations to input values to further calculate the bill rate.
These fields are used to calculate any additional funding and include that funding for approval. For more information about these fields, see Additional Cost Estimation Fields *(on page 77)*.
20. In the Select Department section, from the Department drop down, select the department for the engagement.
Only departments that are assigned to you are available for selection.

21. Click .

22. In the Sourcing section (Supplier tab), you can view configured suppliers for the request.
If enabled, you can select the suppliers to notify by selecting the check box in the Supplier column for the supplier. You can additionally filter the table by selecting the Show Only Selected Suppliers.
If enabled, you can add a supplier by clicking Request Supplier Not Shown. This action opens a configuration panel to add the supplier's contact information (Name and Email fields).

You can add request additional suppliers by clicking .

23. Click .
24. If configured, enter additional information on the Additional Information page. This page might be disabled by an administrator.
You can upload files to a request based on business need. Files can also be hidden from suppliers/vendors in the Supplier view. Select the Visible to Supplier Users check box to make the document visible. If your client organization is not configured to share documents with suppliers, this option is disabled by default and cannot be edited.



Your organization might restrict entry in this field to only names in your client organization.

25. Review the request information and edit if required.
26. Click .

Additional Cost Estimation Fields

You can add advanced calculation values to further refine the rates for a job. This table describes the fields in the Financials section of the request.

Field	Description
Standard Time	Non-editable field. Displays the calculated amount for the job before additional calculation parameters are included.
Premium Time%	Enter the percentage of premium time that is anticipated for the job.
Expenses Per <period>	Enter the expected expenses in USD of the worker for the job. Note: For hourly, weekly, and daily, the period is 'Week'. For monthly, the period is 'Monthly'.
Tax Rate%	Enter the percentage of taxes to include in the funding calculation for the job.
Fees	Non-editable field. Displays the estimated MSP fee for the job.
Budget Padding %	Enter the percentage to add to the overall value to create a margin in the budget.

Self Source a Position

If you know the person or person's that you want to fill an open position in the application, enter their information to contact them without going through the supplier workflow.

1. Complete steps 1 and 2 as described in Create Request - Staffing/Sourced *(on page 71)*.
2. After completing job details on the Job Description page, enter the following information:

- Name - Enter the name of the worker to contact. This information is required.
- Email - Enter the email address of the worker to contact. This information is required.
- Phone - Enter the telephone number of the worker to contact.
- Pay Rate - Enter the pay rate for the worker in the position.

If you do not have this information, or are not self sourcing, deselect the I have the worker details check box.

3. Optionally, you can click Add Worker to add another person.

4. Complete the workflow.

Candidates for a Staffing Request

Once a request is created and sent to suppliers, candidates can be submitted for consideration. Candidates can be viewed on the Candidates tab of the request (Review Talent > (Request) > Candidates tab). They can also be viewed on the Review Talent page. For more information about reviewing submitted candidates on this page, see Review Talent *(on page 58)*.

You can perform actions on the Candidates tab of the request, such as assign/reject, and set up interviews. The Candidates tab features sub tabs that display candidates within the submission workflow by status (for example, 'Assigned'). From within this tab, you can manage interviews, and review candidate details. For more information about the actions in this view, see Candidates Tab *(on page 115)*.

If you have identified the worker that you want to fill a position in the request, you can invite the worker to the request. This worker can be an existing worker in the system (previous engagement), or a new worker (if you have the worker's contact information). For more information about requesting a specific worker, see Requested Candidate *(on page 80)*.

Note: Your client organization might not be configured to assign candidates to requests. In this case, you need to contact your Program Representative to assign candidates. If you require this ability, you can make a request for this action to be enabled in your system configuration. Contact your Program Representative with this request.

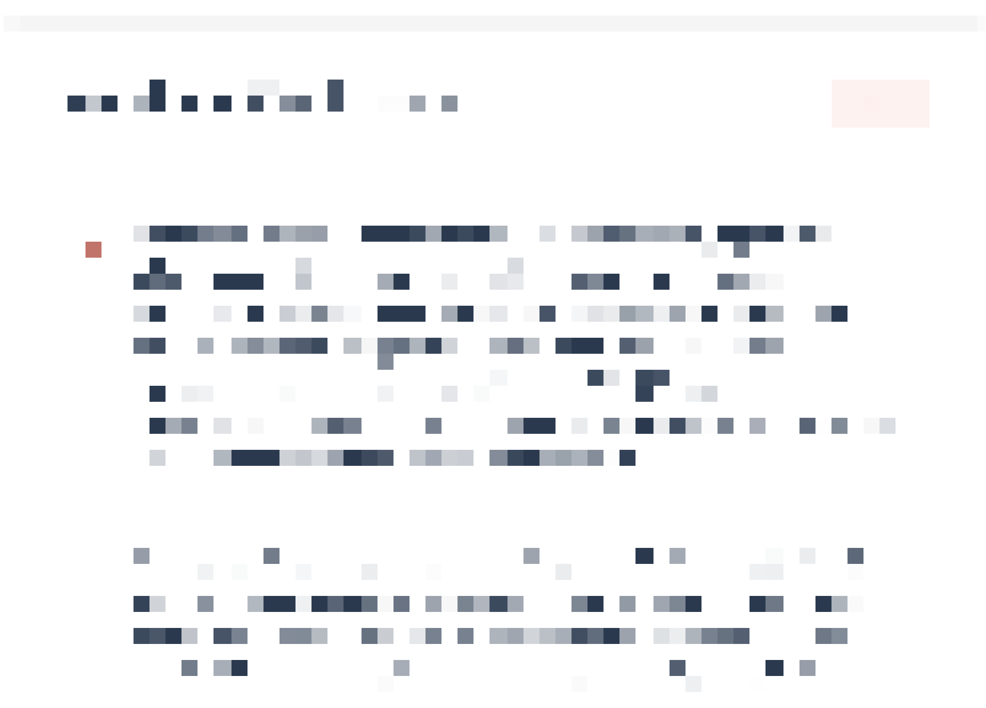
Note: The requesting workers functionality is only available if your client organization has the Self Sourcing option enabled.

Requested Candidate

If you know the worker that you want to invite to the request, or if that worker is in your worker pool, you can also add the candidate's details to the Candidate tab using the Request Candidate action. This action allows you to contact a worker through the system using an email, or search through workers in your system already. For more information about using this action, see Request Candidate Not Shown *(on page 82)*.

Maggi Candidate Agent

The Maggi Candidate Agent is used to view and refine candidates submitted for staffing requests. The agent uses generative AI to present insights for candidates based on their resumes. The insights are accessed by hovering over the System Match column in the Candidates tab of a staffing request.



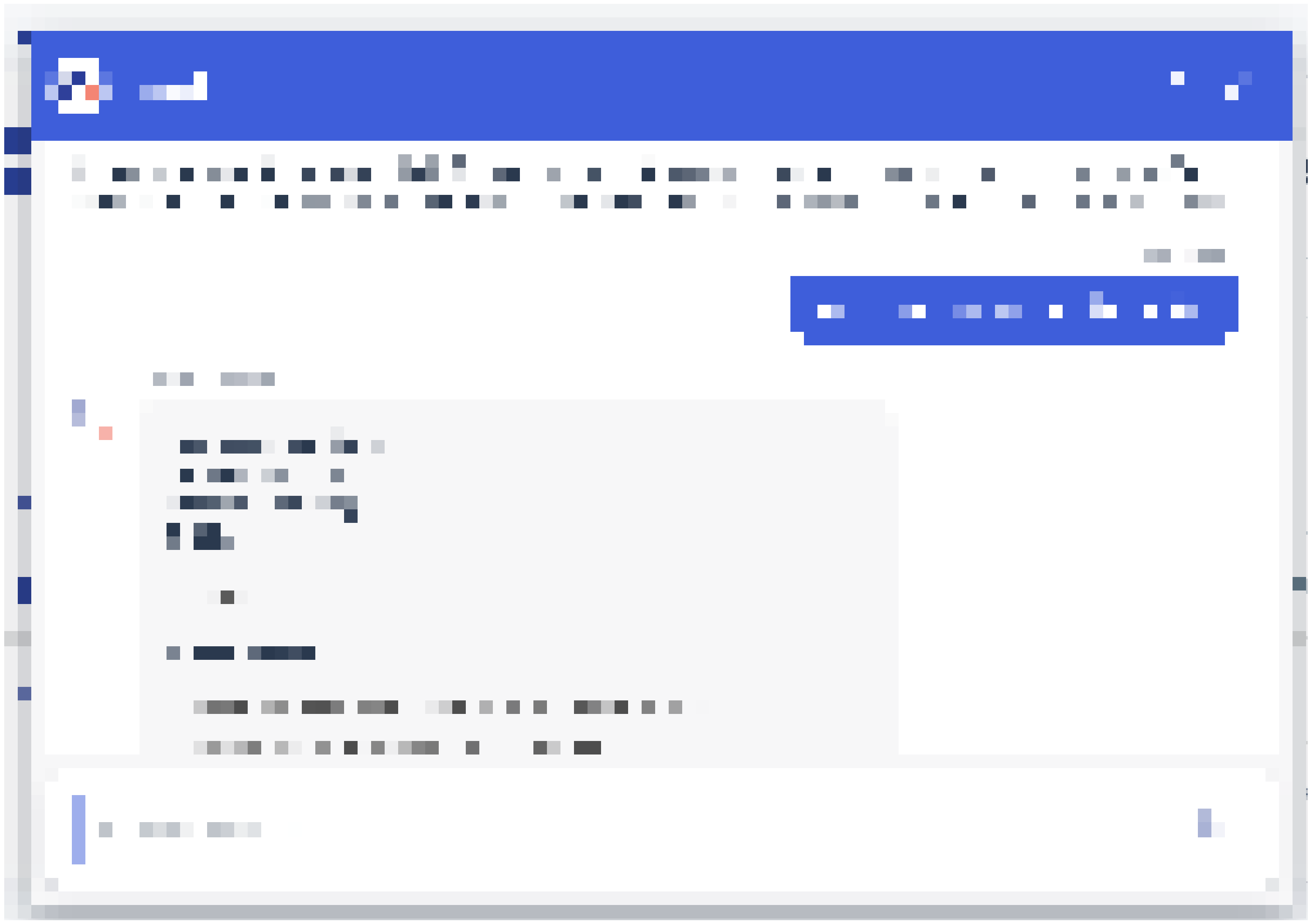
The VMS displays the rating for the candidate based on the requirements and skills requested for the job. Justifications for the rating is generated in plain language, allowing you to understand how the candidate might or might not be a correct choice before taking action (for example, requesting an interview).

In addition, you can use the agent to compare two submitted candidates. To compare candidates, select them from the list, and then click . The agent opens a popup with the comparison insights.

The agent assigns a rating based on skills match, experience relevance, and education. Skills match refers to how well the candidate's technical and soft skills align with the skills specified in the job description. Experience relevance refers to the degree to which the candidate's previous roles and projects are applicable to the responsibilities of the position. Education refers to whether the candidate's academic background meets the requirements specified in the job description. The ratings are as follows:

- Excellent - (Maggi Score from 91 to 100) - The candidate's qualifications strongly align with the job requirements. They are highly likely to succeed in the role.
- Good - (Maggi Score from 76 to 90) - The candidate meets most of the job requirements, with minor gaps. They are a strong contender for the position.
- Fair - (Maggi Score from 46 to 75) - The candidate has potential but demonstrates noticeable gaps in alignment. They may be suitable for consideration in specific circumstances.
- Low - (Maggi Score from 1 to 45) - The candidate's qualifications do not align with the job requirements, making them unlikely to meet the needs of the role.

Ratings can be manipulated by modifying the emphasis on qualifications or skills. This manipulation can be done in the Maggi chat window, if enabled for the Candidate Agent. The chat window allows a user to ask questions about a specific candidate, or two candidates if making a comparison.



If enabled, the Candidate Agent can validate if a candidate certification's are up to date. If the candidate is missing a certification, the MSP is warned on the Candidates tab, and must follow up to verify the information.

Request Candidate Not Shown

You can add a candidates to a request that are not submitted by a supplier. To complete this task, you need to know the worker that you want to add (worker's name).

1. Click .
You can also view request information in the Requests section of the Manager view's Home page.
2. Locate the request from the Requests table. You can also use the search functionality to locate the request.
3. On the Request page, click the Candidates tab.
4. In the Candidates area, click . A pop up opens.

5. If you are requesting a new worker, enter the worker's Name and Email information in the respective fields. If you want to search through existing talent in the system (previous worker record, Talent Network worker, and so on), toggle the selection criteria window to Search Worker Pool.

Enter the name of the worker in the Name search field. The application automatically suggests worker names.

6. If you need to request additional workers, click Add Candidate, and repeat step 5 for every additional worker.

7. Click .

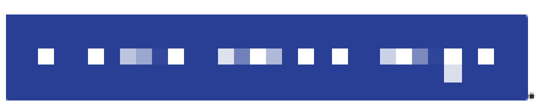
Assign a Candidate

You can assign a candidate to a request. You can complete this task on the Candidate Profile page, when reviewing profile from the Review Talent page, Home page or the Request page. For more information about the Review Talent page, see Review Talent *(on page 58)*.

1. Click or .
2. If you are accessing the candidate in the Review Talent page, first click the candidate's name (blue text) to open the candidate's profile. If you are accessing the candidate in the Requests page, first locate the request, and then in the request details, click the Candidates tab, then the candidate profile that you want to assign.

3. In the candidate profile, click .
4. In the pop-up, review the Requisition Start Date and Estimated End Date fields, and modify as needed.

You can also click the calendar icon to open a calendar pop up that allows you to select the date.

5. Click .

The engagement is created. You are navigated to the engagement if this is a last position that is being filled, or the only position for the engagement. You are navigated to Assigned sub tab if there are more open positions. The engagement link is displayed next to the assigned candidate. Click on the link to make sure that all engagements approvals are done if needed.

Reject a Candidate

You can reject a submitted candidate to a request. You can complete this task on the Candidate Profile page, when reviewing profile from the Review Talent Page, Home Page or the Request page. For more information about the Review Talent page, see Review Talent *(on page 58)*.

Note: Rejecting a candidate automatically cancels any interview that are pending with that candidate.

Note: You can also reject multiple candidates by selecting the candidate check boxes on a sub tab (Reviewing or Interviewing), and clicking .

1. Click or .
2. If you are accessing the candidate in the Review Talent page, first the candidate's name (blue text) to open the candidate profile. If you are accessing the candidate in the Requests page, first select the request, and then click Candidates tab.
3. At the bottom of the candidate profile, click .

You can also reject a candidate from the summary view in the Review Talent page.

4. In the pop up, enter a text reason for the rejection. This step is required.

If the client organization is using custom rejection reasons, then a drop down appears in this pop up. Select a reason from the drop down, and/or enter text.

5. Click .

PAYROLL REQUEST

You can create a payroll request for your client organization if you know the person or persons that you want to complete the work.

Note: Submitted candidates appear on the Candidates tab on the request. For more information about this tab, and actions that can be taken for candidates, see Candidates Tab *(on page 115)*.

You create the request, and enter the candidate's name and contact information. The candidate is contacted and prompted to fill out employee data required for pay and tax purposes. After the candidate completes this information, the financial information for the request is completed by the MSP or supplier/vendor assigned to the request, and the request is filled.

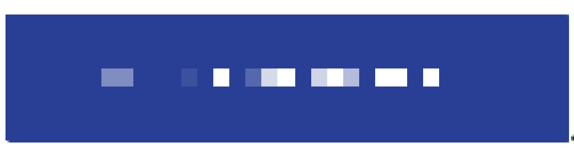
If a worker does not exist in the system (but you still have the person's contact information), their worker record needs to be entered by a supplier/vendor with an active payroll agreement for your organization. Payroll request financials can then be configured for the worker, and their user account can be set up.

Note: Your client organization might not be configured to assign candidates to requests. In this case, you need to contact your Program Representative to assign candidates. If you require this ability, you can make a request for this action to be enabled in your system configuration. Contact your Program Representative with this request.

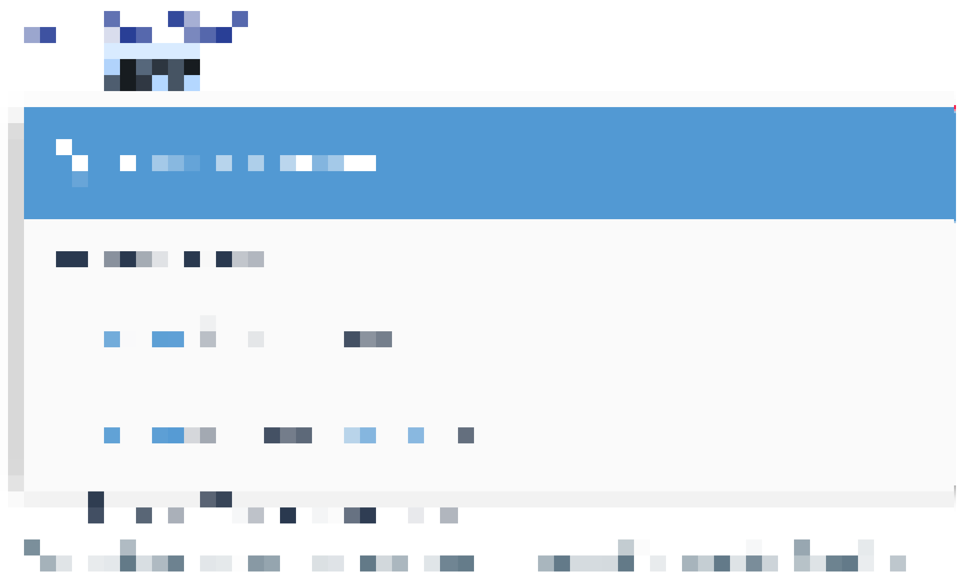
Create a Payroll Request

You can set up a request for a worker if you have identified the worker for the position.

Note: A red asterisk (*) indicates a required field.

1. Click .
2. Optional: If configured, select the operational unit for the payroll request.
3. On the Create Request page, click the Payroll tile.

4. In the Job Description & Worker section, in the Job Title, enter the job title.
The application automatically suggests job titles configured in the job categories that are defined for your organization.



You can also click Advanced to search by a category. Job titles for each category can be clicked to populate the Job Title field.

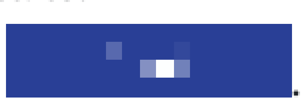
5. In the Location field, enter the location where the job is performed.
The application automatically suggests defined locations.
Job locations are defined for a client organization prior to request creation. If the job site is not a defined location, you can specify the details by a combination of country, state/province, and city. To enter this information, select the Work Completed Offsite check box, and using the drop downs, select the location details.
6. Optional: You can modify the defined job description if you have the correct permissions. To modify the fields, click the icon.
7. In the worker section, add the worker details.

Enter the following information:

- Name
- Email - Contact email address for the worker
- Phone - Worker's contact telephone number
- Pay Rate - Suggested worker's pay rate. The pay rate is finalized in the engagement financials.

This information is sent to the payroll supplier/vendor.

Note: Worker details are not required to submit a payroll request. If you do not have the details, but need to submit the request due to a business reason, deselect the I have the worker details check box and continue through the workflow. You can add the worker details by navigating to the request, and then on the Sourcing tab, click Request Candidate Not Shown. For more information about adding workers, see Request Candidate Not Shown *(on page 82)*.

8. Click Attach Resume/CV to add a resume/cover letter for the worker. From your file browser, select the file.
9. Optional: If the request requires multiple workers, click Add Worker and enter the worker details.
10. Click .

11. On the Details page, in the Start Date field, enter the start date for the job.

Note: This is the earliest date that a worker can enter time. This date is different from the date that the request is filled, converting it to an engagement.

You can also click the calendar icon to open a calendar pop up that allows you to select the date.

12. In the End Date field, enter the end date for the job.

Note: This is the last date that a worker can enter time.

You can also click the calendar icon to open a calendar pop up that allows you to select the date.

Note: Worker length of stay must conform to the worker tenure setting in the client organization configuration (number of days.

13. In the Total Positions field, enter the number of workers required for the job.
This field defaults to '1'.

14. In the Time & Expense Approver field, enter the billing item approver for the job.
This is the user in your organization that approves time cards submitted by workers for the job.

Note: Approvers require the correct permissions for this role.

15. In the Schedule section, use Full Time or Part Time button to define the engagement as full time or part time.

16. In the Hours Per Week field, enter the number of hours a week required by the engagement.
If you select Part Time, enter values in the Hours Per Day and Hours Per Week fields.
Optionally, you can select the required days per week from the drop down.
The number of hours a week for a job is used to determine eligibility for a worker (overtime, thresholds, and so on) if configured for the client organization.
If your client organization is using piece or multiple rates, the Full Time/Part time selector is disabled.

17. Click the Add Schedule Notes link to open a text field for adding notes to the job schedule.

18. In the Reason for Hire section, from the Reason drop down, select the hiring reason.

19. In the Financials section, from the Currency drop down, select the currency (denomination) for the request.

This setting determines how the financial values for the request are calculated. These values include the rates of pay for a worker, and the denomination of the values generated in reporting. The Total Estimate value at the bottom of the Financials section displays the calculated value in the selected currency.

Note: Changing this value from one currency to another does not recalculate any financial values previously entered.

20. In the Bill Rate field, enter the job bill rate.
If you have the Market Rate Module activated, the market low rate, the proposed rate, and the market high rate is displayed. This can be either the bill rate for the job title, or the pay rate for the job title, depending on the module configuration.

Note: If your client organization disables the Bill Rate field, you can only enter a value in the Pay Rate field.

21. Optional: If enabled, you can click Show Advanced Calculations to input values to further calculate the bill rate.
These fields are used to calculate any additional funding and include that funding for approval. For more information about these fields, see Additional Cost Estimation Fields *(on page 77)*.
22. In the Select Department section, from the Department drop down, select the department for the engagement.
Only departments that are assigned to you are available for selection.
23. In the Budget section, from the drop down, select a budget to associate the job with.
24. Click .
25. Optional: On the Additional Info page, in the Email Alerts section, click  to add additional contacts for email alerts.

26. Optional: In the Attach Additional Files section, click Attach File to add additional files/documentation to the request. Choose your file from your file browser.
27. Click [redacted].
28. On the Review & Submit page, review the request details and edit if required.
29. Click [redacted].

Note: If a client organization is using approval routing for requests, then the submitted request nigh be routed to another manager or an MSP before the request can be filled.

Additional Cost Estimation Fields

You can add advanced calculation values to further refine the rates for a job. This table describes the fields in the Financials section of the request.

Field	Description
Standard Time	Non-editable field. Displays the calculated amount for the job before additional calculation parameters are included.
Premium Time%	Enter the percentage of premium time that is anticipated for the job.
Expenses Per <period>	Enter the expected expenses in USD of the worker for the job. Note: For hourly, weekly, and daily, the period is 'Week'. For monthly, the period is 'Monthly'.
Tax Rate%	Enter the percentage of taxes to include in the funding calculation for the job.
Fees	Non-editable field. Displays the estimated MSP fee for the job.
Budget Padding %	Enter the percentage to add to the overall value to create a margin in the budget.

PROJECT REQUEST

Projects are jobs that are completed by an external agency, contracted to complete some work by a defined date. This agency manages it's own workers, and can enter time and expenses for these workers in the system.

The details of the project are defined in the quote that a vendor submits for the project. These details are converted to details in the engagement when the vendor is contracted by the client organization to complete the work. Details include positions (types of workers and rates), materials (used to complete the project and their cost), and milestones (project completion dates and rates for completion).

You can review submitted quotes on the Quotes tab of the project request.

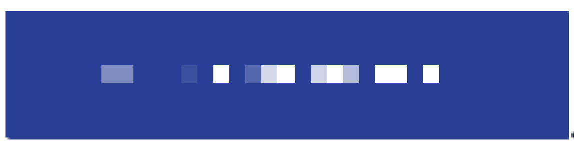
After you review details, you can accept the quote, reject, and request that the vendor/ supplier resubmit the quote. For more information about reviewing quotes, see Review Project Quotes *(on page 101)*.

Create a Project Request

You can create a project request for a client organization, and send the request to a vendor for a quote.

Note: A red asterisk (*) indicates a required field.

Note: Required custom fields can appear in sections of the request creation workflow.

1. Click .
2. Optional: If configured, select the operational unit for the project.
3. In the Request Type section, click .
4. From the Select SOW Workflow popup, select the workflow template to populate the project settings.

    Note: If you are creating a new request by reusing an existing request, ensure that the workflow on the existing request is active. You cannot reuse a request with an inactive workflow.

5. In Project Description > Project Job Details, configure the following:
    - Category - From the drop down, select a job category.

        Note: Selecting the category can determine the selection some sub-fields. If you change the category, the system resets the selections.

    - Attach Supporting Documents - Click the blue text to open a local file browser. Select and attach relevant documents for the request.
6. In Project Description > Details Project, configure the following:
    - Project Title - Enter text that describes the project.
    - Project Scope - Enter text that describes the scope of the project.
    - Project Deliverables - Enter text that describes the deliverables for the project.

7. In Project Description > Details, configure the following:
   - Billing Events Approver - This field defaults to the Engagement Manager (Hiring Manager). Clear the field and enter the name of the time & expense approver. The application automatically suggests names based on your input.
   - Location - Enter the location where the work takes place. You can make a location default by toggling the Set as Default switch to on.
   - Business Justification - From the drop down, select the business reason for the project.
   - Add Comment - Click the blue text to enter a free form comment. You can remove the comment by clicking the X icon.

     CAUTION: All users can view this comment.

   - Start Date - In the text field, enter the project start date. You can also click the calendar icon to open a calendar pop up that allows you to select the date.
   - End Date - In the text field, enter the project end date. You can also click the calendar icon to open a calendar pop up that allows you to select the date.

Custom fields, if configured, appear after these fields.

8. In Project Description > Financials > , configure the following:
   - Department - From the drop down list, select the department. If you do not see your department, you can toggle the entry to Search Department. In the text field, enter the department. The application automatically suggests departments based on your input.
   - Currency - From the drop down, select the currency for project. Costs and rates in the project are denominated in this currency.
   - Estimated Budget - Enter the estimated budget for the project.

Custom fields, if configured, appear after these fields.

9. Click .

10. In Sourcing > Supplier Selection, review the suppliers listed.

You can filter the list view by using the drop down. If you do not see a supplier that you require a bid from, click . See Request Suppliers Not Shown *(on page 98)*.

11. Click .

12. Optionally, if your organization is using preferred pricing, on Cost & Quality, enter the milestones, positions, and materials. For more information about configuring preferred pricing, see Set Up Preferred Pricing Details for a Project *(on page 99)*.

13. Optionally, if your organization is using a RFI (request for information) workflow, in the Do you want to create a vendor Questionnaire? section, select Yes.

The Questionnaire feature allows you to create questions with optionally preconfigured answers. For more information about setting up Questionnaire for vendors, see Set Up Vendor Questionnaire *(on page 100)*.

14. Click [redacted].
15. If you are using the statement of work (SOW) functionality, on Additional Information > Select Template, select the Create SOW Contract check box. This step might be required by your organization.
16. If your organization is using the Business Validation workflow (BizVal), you must complete a screening questionnaire. See Complete Screening Questionnaire *(on page 97)*.
17. If configured, configure the field in the Custom Fields section.
18. On Additional Information > Bidding Event, if required, set up a bidding parameters. Configure the following:
    - Quote Due Date - Require invited suppliers to submit quotes by a certain date.
    - Create Bidding Event - Select the check box to create a bidding event (start and end date). This allows invited suppliers to submit, revise, and resubmit quotes. Configure the start and end dates. To allow invited suppliers to view submitted quotes, select Display Competitor Quotes.
19. On Additional Information > Contact Information, add additional contacts for the project by clicking [redacted].

Your organization might restrict entry in this field to only names in your client organization.

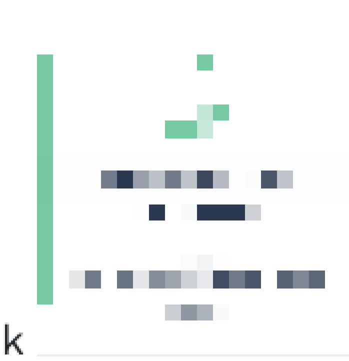
20. Click [redacted].
21. Review the request information and edit if required.
22. Click [redacted].

Create a Business Validation Request

If your organization is using the business validation workflow, you are required to complete an extra step to open a Project request. The Business Validation workflow adds questionnaires for both you (client organization), and suppliers your organization wants to contract with.

Data from the questionnaires are reviewed by the [redacted] Global's Contractor Compliance Cervices (CCS) team. For more information, contact your Program Representative.

1. Navigate to the Home page in the Manager view.
2. Click Create Request.

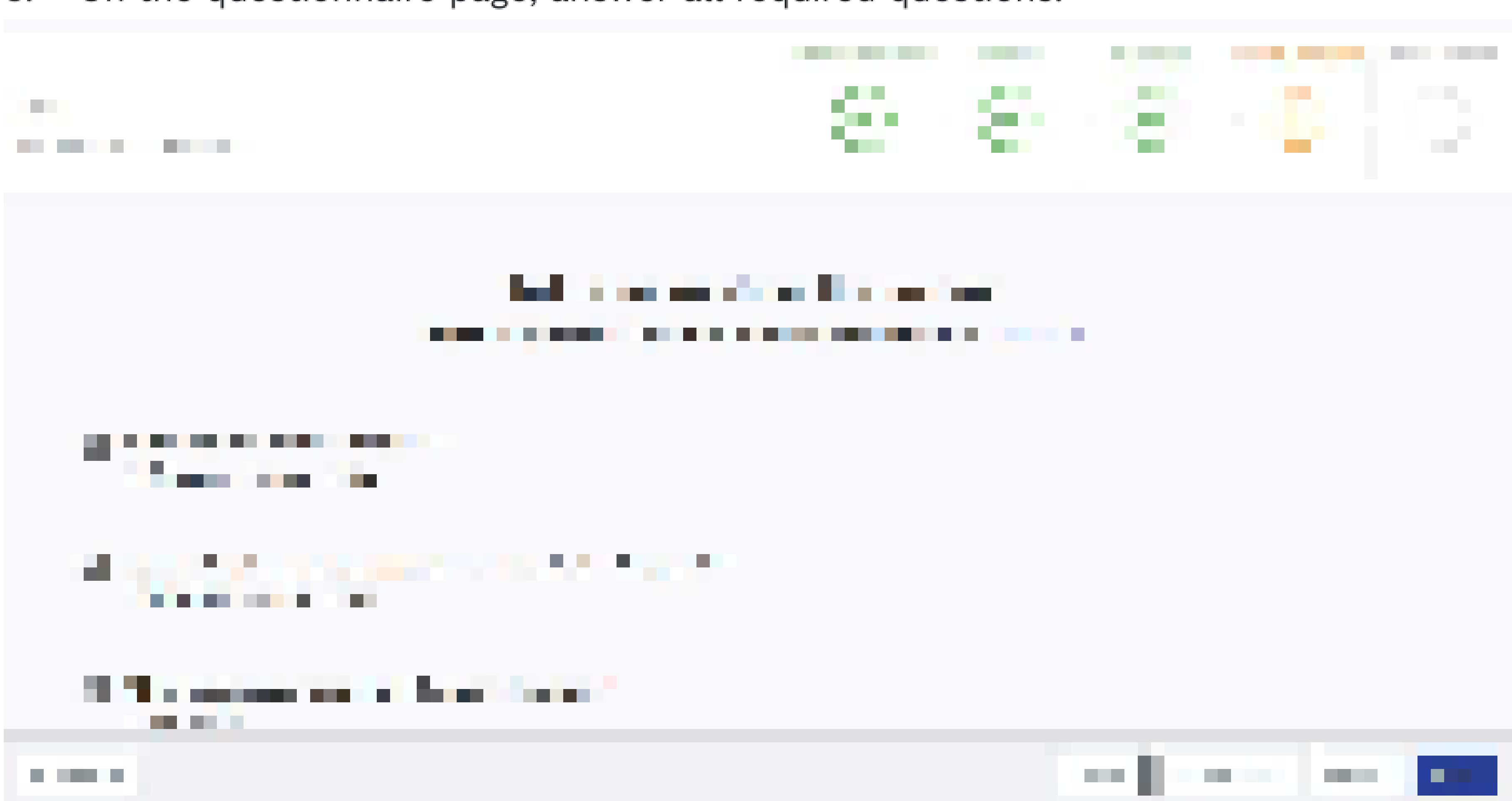
3. On the Create Request page, click .
4. Complete the steps described in Create a Project Request *(on page 94)*.
5. After you submit your request, you must complete the questionnaire described in Complete Screening Questionnaire *(on page 97)*.

Complete Screening Questionnaire

The Contractor Compliance Services (CCS) screening can be required by the request creation workflow, or send to you to complete manually. All information is collected through the application.

CCS is a service provided to [redacted] MSP organizations. The validation workflow is used for project requests, and it screens potential suppliers/vendors based on applicable criteria to determine if a supplier should be engaged as an contractor (1099) or as a W2. This determination can help reduce legal risk and penalties. For more information about CCS, contact your Program Representative.

1. Navigate to the Home page in the Manager view.
2. In the Action Items section, click the Questionnaire button.
3. On the questionnaire page, answer all required questions.



The information that appears on this questionnaire is configured for your client organization in the configuration.

The questionnaire information is recorded and displayed on the Business Validation tab for a project request.

Request Suppliers Not Shown

Search for suppliers that contract with the client organization to send the request to. The suppliers might not initially appear in the Sourcing section because of a tier configuration.

Note: If your organization is using a Business Validation (BizVal) compliance workflow, you add the supplier organization using this process. Suppliers that have already been vetted by [redacted] and your organization have agreements configured, and their information displays in the Supplier list.

1. Complete the set up steps in Create a Staffing Request for a Worker *(on page)*, Create a Project Request *(on page)*, or Create a Business Validation Request *(on page 96)*, depending on your workflow.
2. In the Sourcing section details, click Request Suppliers Not Shown (Staffing) or [redacted] (Project).
3. In the Search Supplier Pool section of the pop-up, add text to the Supplier Name field (Staffing).
If you are adding a supplier for a Project request, a pop up opens allowing you to enter the supplier's details.

After you enter the supplier's details, to complete this task for projects, click .

4. Add the suppliers details.

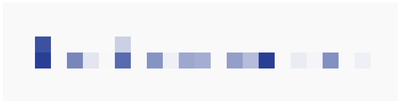
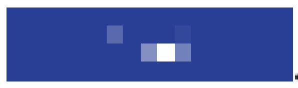
5. Click .

Set Up Preferred Pricing Details for a Project

You can set up preferred pricing details for a project. Preferred pricing is a guideline for vendors/suppliers when constructing a quote for submission. Adding due dates to any preferred pricing items sorts the display by due date. If no due date is configured, the items are sorted by created date.

Note: The sum total of these items must match the estimated project amount, or you receive an error. However, you can still submit your project for quotes.

1. Complete setup steps as described in Create a Project Request *(on page 94)*.

2. On the Preferred Billing Options page, in the Milestones section, click .
3. In the configuration view, enter the required milestone details.
4. In the Positions section, click .
5. In the configuration view, enter the required position details.
6. In the Materials section, click .
7. In the configuration view, enter the required material details.
8. Click .

Complete the remaining required steps for project setup.

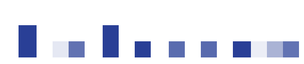
Set Up Vendor Questionnaire

If you require the vendor/supplier to provide basic information, you can set up a questionnaire that needs to be completed prior to submitting a quote for a project.

The configuration section allows you to upload a preconfigured template. The template must conform to upload data standards. You download a blank template file here.

1. Complete set up steps as described in Create a Project Request *(on page 94)*.
2. For Do you want to create a endow Questionnaire? question, select Yes. A configuration section opens at the bottom of the page.
3. In the Questionnaire Due Date field, enter the due date for the information.
4. In the Question field, enter text for your question.
5. In the Weight field, enter the weight of the question/answer.
6. From the Answer Type drop down, select from the following:
   - Radio Button (Single Select) - You can configure multiple answers. Suppliers/ vendors are only allowed to submit one answer to the question.
   - Text Area (Multi-Line Text) - Configures a text box for the answer (free text entry).
7. Select to Required check box to require an answer to the question.
8. If you select 'Radio Button', configure at least two answers.

For each answer, you can enter text and select a score (0-10) to allow your to better quantify each answer.

You can add another answer (radio button selection), click .

9. To configure another question, click  and repeat steps 3-7.

Review Project Quotes

Once quotes are submitted by vendors for your project, you can review the quote details.

1. Click Requests.

You can also scroll to the Requests section of the Home.

2. Click the row for the project request. The row highlights blue when you hover over it.

> Tip: You can use the search functionality to locate the project request. Enter text that describes the project to automatically filter the table.

3. On the Quotes tab, select the quote to review. The row highlights blue when you hover over it.
4. Review the quote details.

If you have enabled the Workflow Agent to generate quote evaluations, you can review the score in the Quote Evaluation section.

5. Do one of the following:
    - Accept Quote - Clicking this button accepts the quote. The request is converted to an engagement.

      > Note: If you are using the Approval Routing module, the approval workflow must be completed before the request is converted to an engagement, depending on the workflow.

    - Award Quote - If the Enable Supplier Acceptance setting in the SOW workflow is enabled, clicking this button awards the quote to the selected supplier.

      Awarding the quote to a supplier that was invited, but has not completed onboarding enables a Proceed option. Clicking this button notifies all organizational representatives via email. The supplier must acknowledge the award and take action to indicate their organization's intent to proceed with onboarding.

◦ Reject - Clicking this button rejects the submitted quote. A pop up allows you to select a reason for rejecting the quote, and whether you want to send the quote back to the supplier for revision.

◦ Withdraw - Withdraws the quote.

Compare Project Quotes

If more than one quote is submitted for a project, you can compare quote details.

1. Click Requests.
You can also scroll to the Requests section on the Home page.
2. Click the row for the project request. The row highlights blue when you hover over it.

Tip: You can use the search functionality to locate the project request. Enter text that describes the project to automatically filter the table.

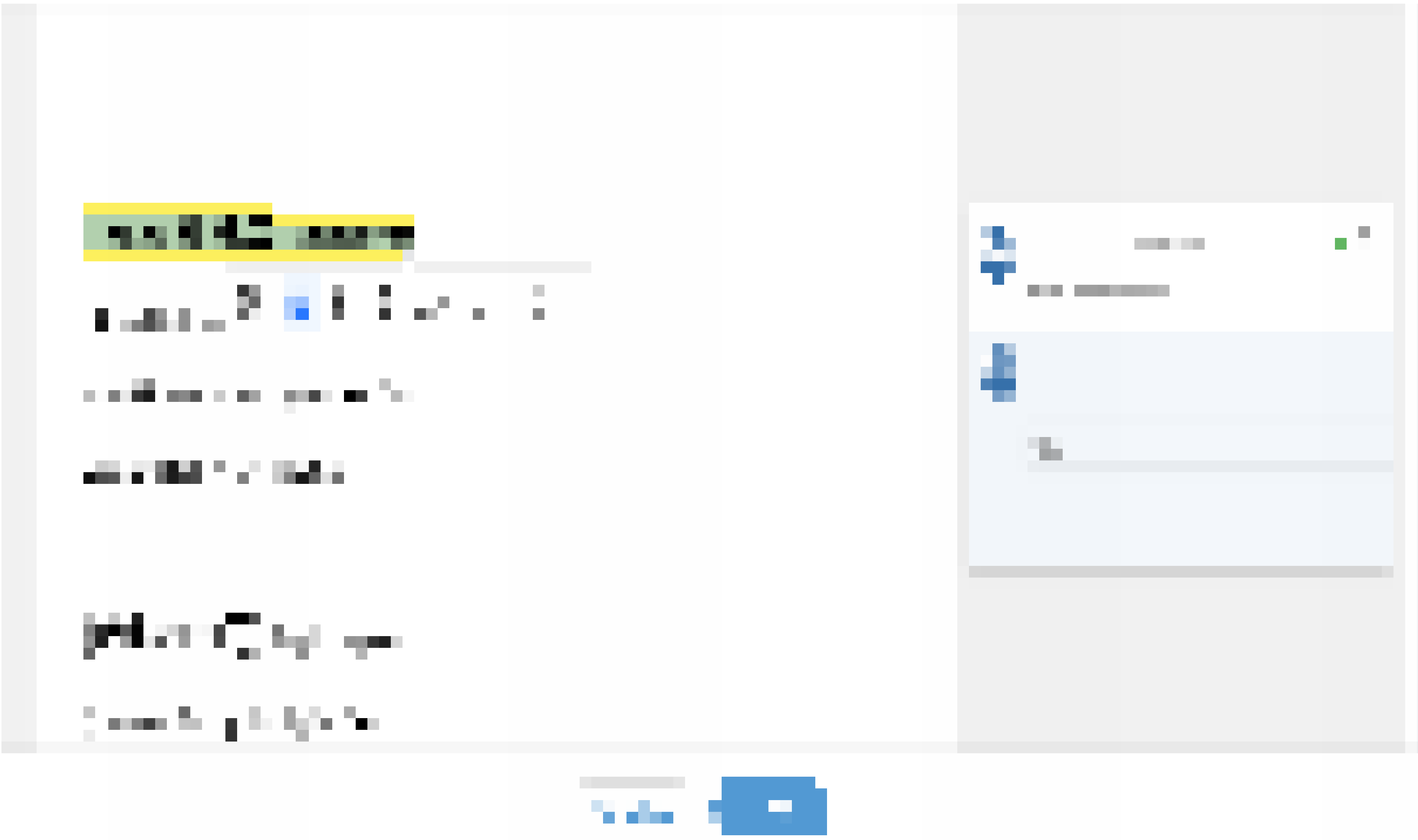
3. On the Quotes tab, select the quote to review. The row highlights blue when you hover over it.
4. In the Quote List table, click Compare Quotes.
5. On the Compare Quotes tab, click the check boxes of the quotes to compare.

Note: You can compare up to three quotes.

6. Click Compare Quotes.
7. Compare the quote details in the pop up.

Redline a Document in the VMS

The redlining feature for project requests allows you to collaborate on the SOW document within the VMS. You can collaborate with the program representative assigned to the project request, and the supplier of the accepted quote.



While you are collaborating on the document, only one user is allowed to add comments or edit items in the document. The document is 'checked out' to that user. The program representative assigned to the request can accept changes to the document.

Note: The program representative can pause, restart, or cancel the redlining process based on business need.

While collaborating on the document, you can use the control bar in the editor section on the SOW Document tab. The editor allows you to make changes to the document, save the changes, and leave comments.

It is important to note that your program might require you to electronically sign the SOW document when the negotiation process is completed.

Redlining History

The redlining feature preserves activity from the redlining process. You can access the history by navigating to the engagement's SOW Document tab, scrolling to the content, and then aliening History.

SOW Contract Document

When the SOW redlining process is complete, the document file is attached to the engagement details.

Edit a Document

Stakeholders added to a document by the document owner can collaborate on the document content before it is signed or eSigned. Once comments are added to the document, only the document owner can accept changes to the document.

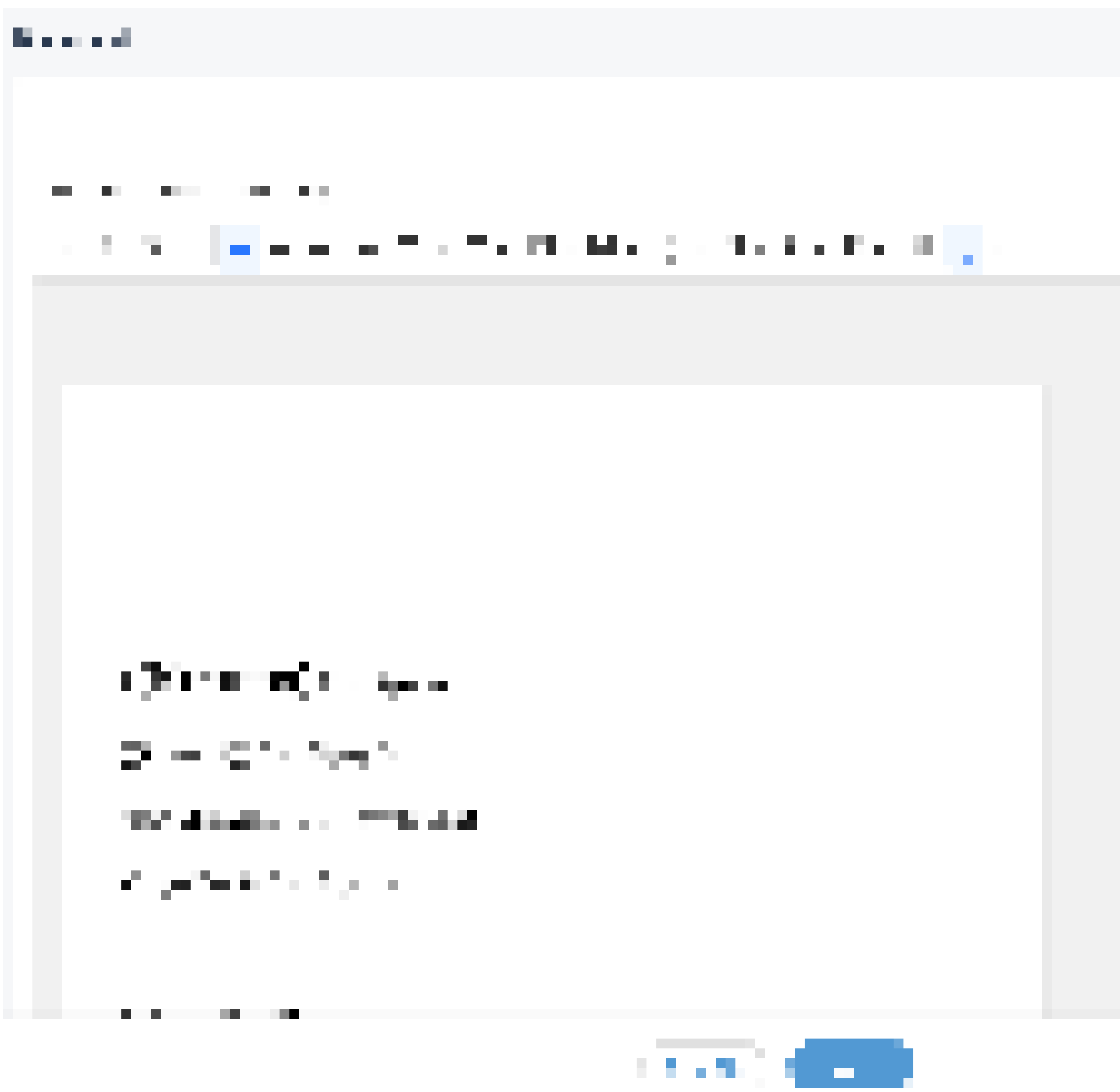
Note: Quotes on the project request must be accepted before redlining begins.

Note: While a document is being edited by one user, the document is 'checked out' to that user. No other users can add comments or edit the document until that user saves their work.

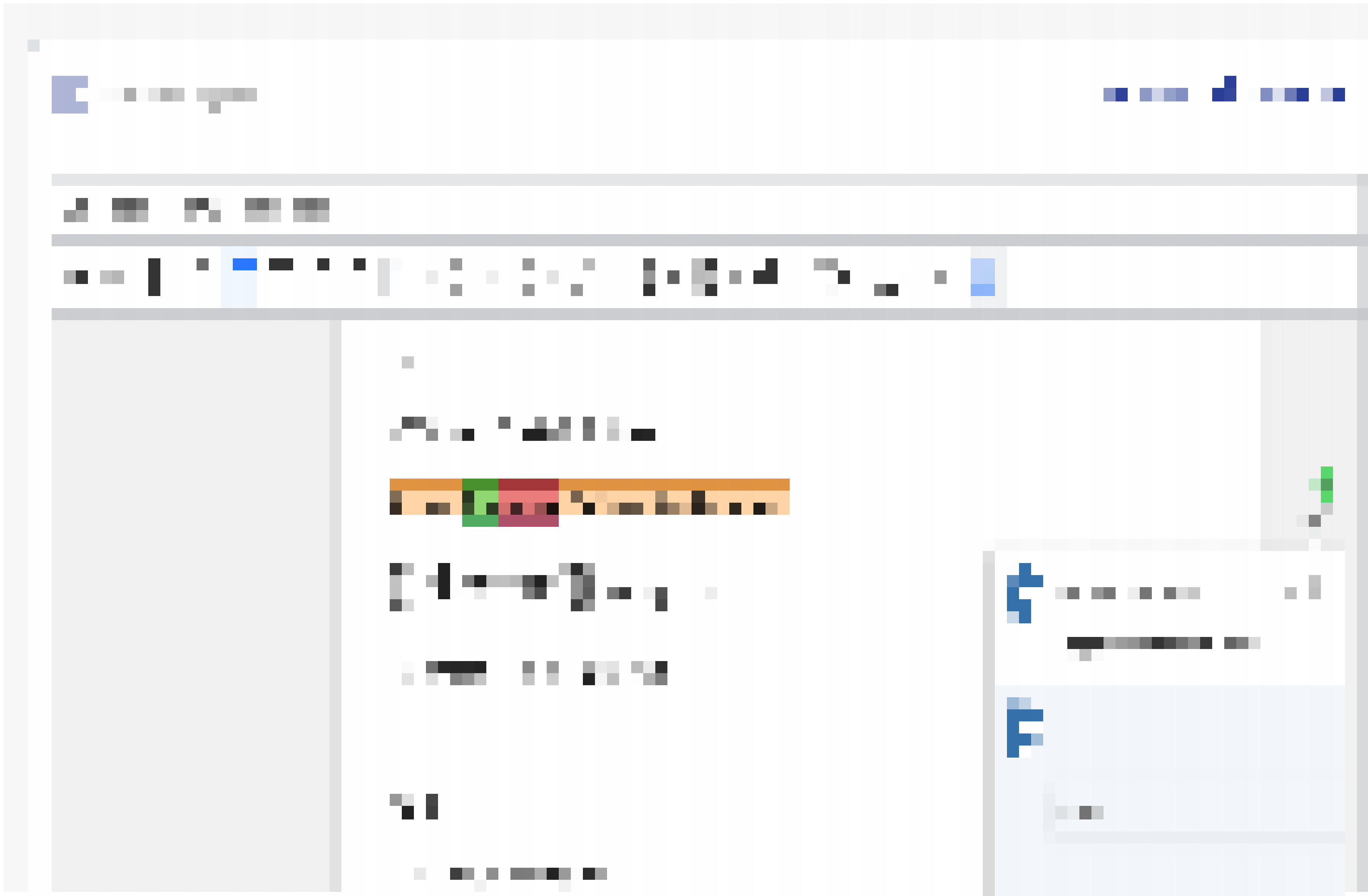
1. Navigate to the Home page in the Client view.
2. Click Requests.

You can also enter the request number, or project name in the search bar. For more information about searching in the VMS, see Search Function *(on page)*.

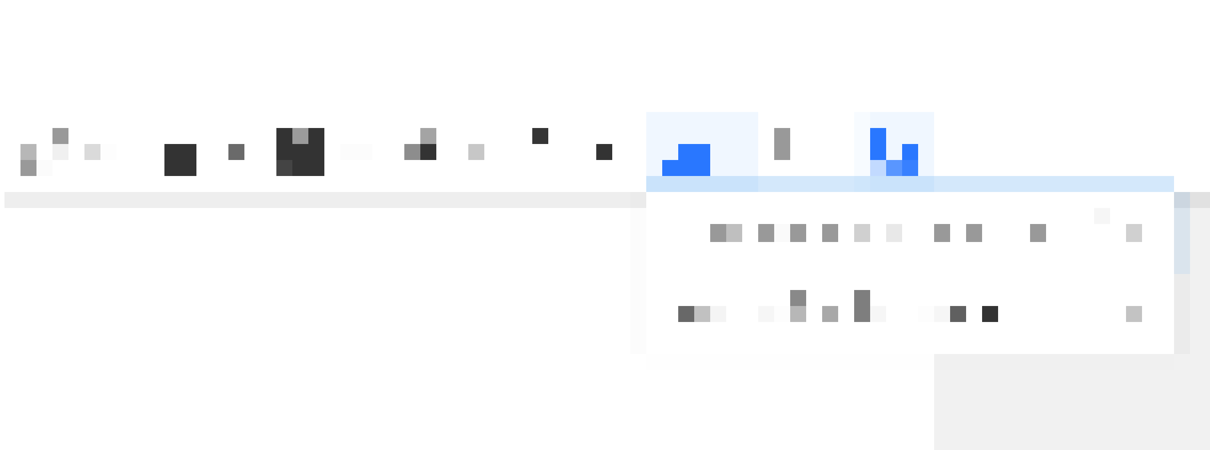
3. From the table, select the request.
4. On the SOW Document tab, scroll to the Document section.
5. Click .
6. In the document editor, make edits to the document as needed.

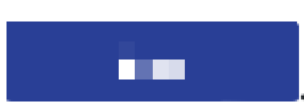


The MSP organization can restrict certain sections of the document for editing. This restriction is indicated if the Restricted Editing Mode setting at the top of the editor is enabled. If enabled, the editable sections are highlighted.



You can navigate between edible sections using the navigate icon options in the toolbar.



7. Click .

MANAGED SERVICES REQUESTS

You can use the VMS application to track engagements that might not fit a client organization's core business spend. For example, auxiliary workers such as gardeners or custodians. Managed Services (headcount tracking) engagements are primarily used to track workers that are on site, but do not require financial information or billing.

Managed services engagements do not follow the request workflow as other request types do. When you add a worker (new or existing) to a request and select an existing supplier, the request is automatically converted to an engagement (Status='Filled'). When you enter a new supplier, instead of selecting an existing supplier, the MSP receives the request for review. If configured, the application still performs all configured approval routing and duplicate worker checks.

Managed service workers do not enter time in the system, but you can set up details at the engagement level in order to create billing items (fees with the 'Adjustment' or 'Benefit' billing type). You can only add billing items for a managed services engagement at the engagement level. The Billing page only allows you to add billing items for a worker or a supplier.

Create a Managed Services Request

You can create a request for a worker where the primary use is to track the worker in the system.

Note: The application creates a request record that is saved as a draft by clicking  and completed at a later date. The request record can be accessed by clicking on the Draft button link on the Requests tab.

1. Navigate to the Home page in the Manager view.
2. Click .
3. In the Create a New Request for field, enter the manager that will managed the request. The application automatically pre-populates the field with your name. You can remove yourself and enter another manager.
4. Using the buttons, select the operational unit (if applicable) for the request.
5. Click the  tile.

   Note: This tile can be customized by your client organization and can appear with different text.

6. Using the request creation wizard, configure the following:
   - Job Details *(on page 109)*
   - Worker Details *(on page 110)*

- Position Details *(on page 113)*
- Financials *(on page 113)*
- Additional Info *(on page 114)*

7. Confirm the details for the request.

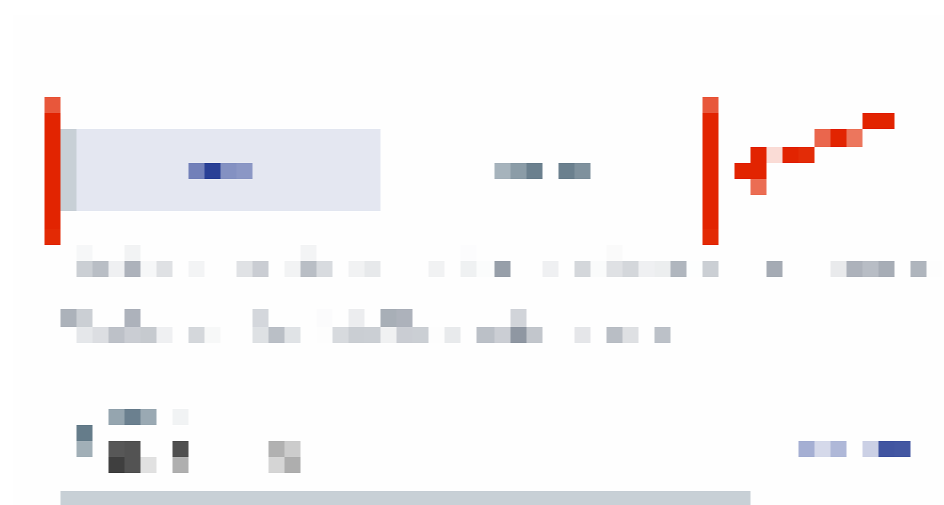
Once you have confirmed the request and approvals and onboarding are completed (if configured), the request is converted to an engagement.

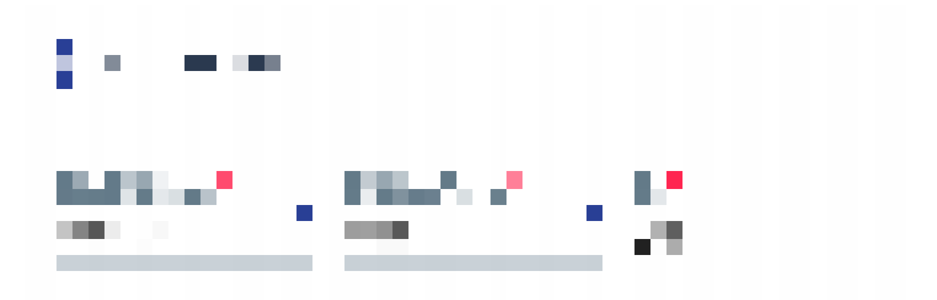
8. Click .

Job Details

These fields appear in the Job Details section.

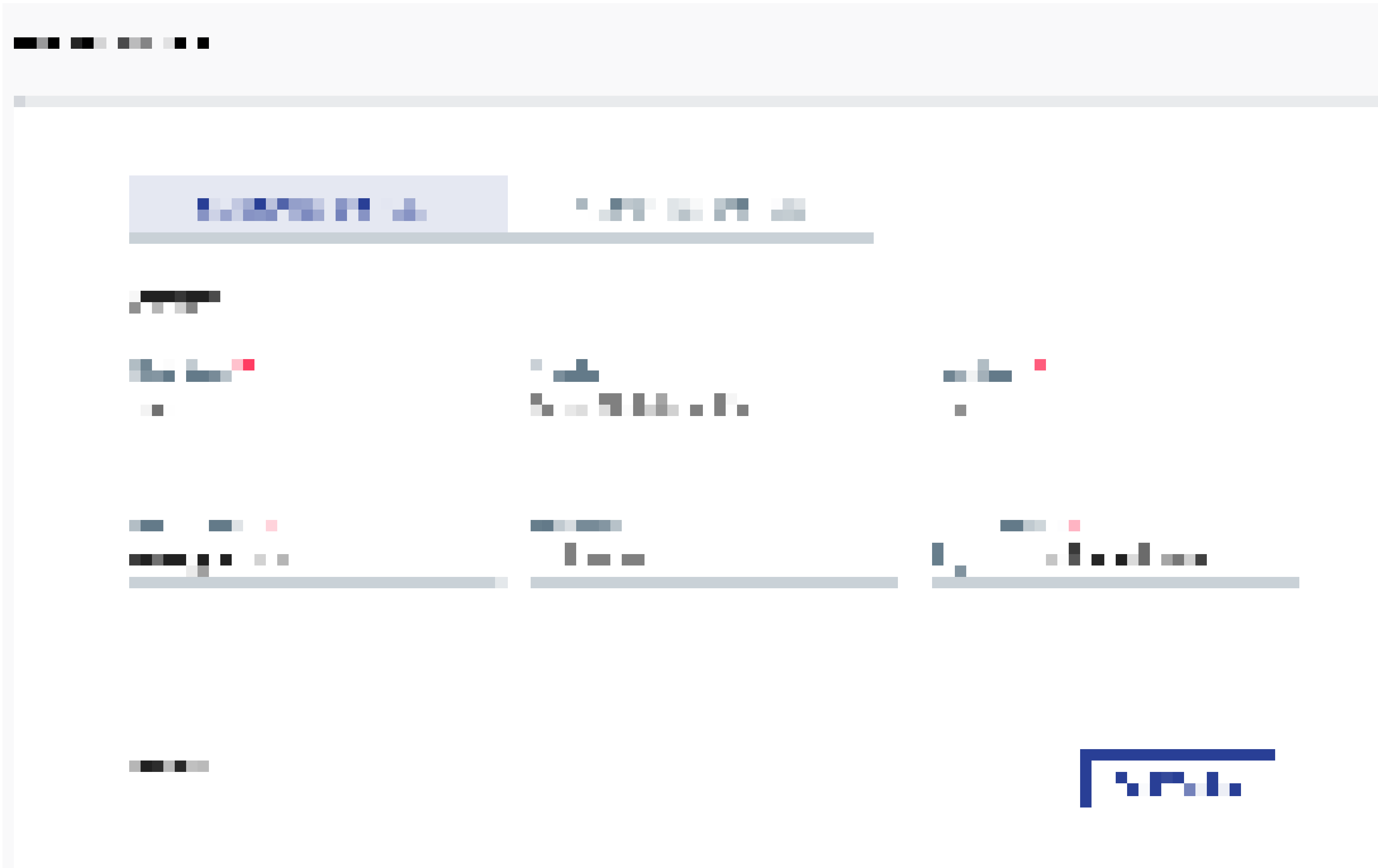
After you enter the required information, click to advance to the next page of the wizard.

Field	Description
Job Title/Request Title	Select job title for the request, or if configured, enter the request title (parent level), and then configure a job title for each position (worker level) configured for the request. See Position Details *(on page 113)*.  If the Request Title option is selected, enter the request title and select the job details at the worker level.
Job Title	Form the drop down, select the job title. This field is required and/or editable based on the MSP/client manager setting (Job Title Edit Access for MSP and Manager on Managed Services Request) in the client organization's configuration.

Field	Description
	If the 'Request Option' is used, select this value at the worker level.
Work Completed Offsite	If the work is completed offsite, select the check box, and configure the additional fields:  Only configured locations for your client organization in the Managed Services supplier/vendor contract are available for selection.
Attach (file)	Click  and use your local file browser to select and attach a file for the request. Attachments are require based on the setting (Require User to add attachments during req create) in the client organization's configuration.

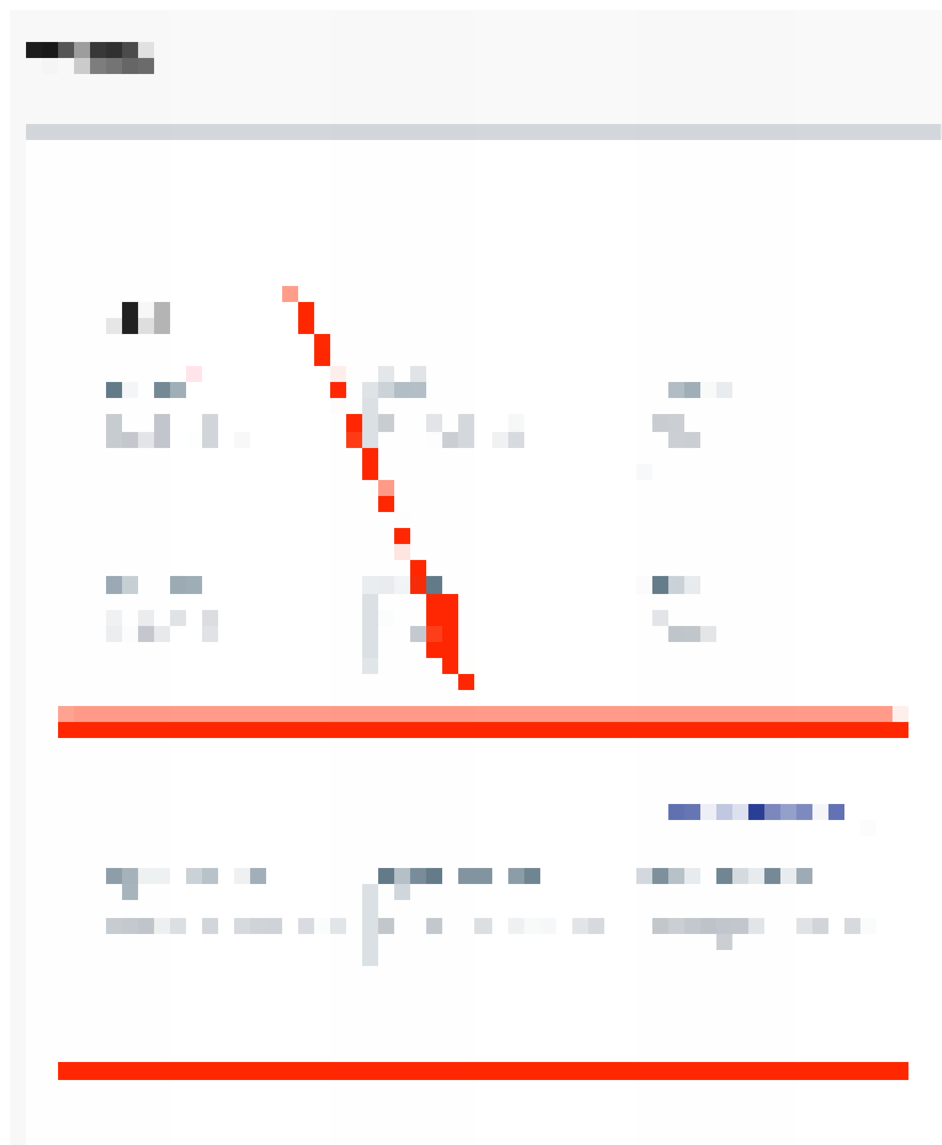
Worker Details

This section allows you to enter the workers that you want to assign to the managed services request, or send the details to the MSP or supplier/vendor for worker details.



After you enter the required information, click  to advance to the next page of the wizard.

Field	Description
Provide Worker Details/Send for Worker Details	This option only displays if configured for your client organization. If you select Provide Worker Details, you enter the worker during request creation. If you select Send For Worker Details, you provide the supplier/vendor that will add the worker details after the request is submitted.
First Name	Enter the first name of the worker.
Middle Name	Enter the middle initial of the worker.
Last Name	Enter the last name of the worker.
Worker Email	Enter the worker's email address. Email address must be entered in a valid format, for example, must include the domain extension.

Field	Description
Nickname	Enter the worker's nickname.
Supplier	Providing Worker Details The Supplier field is a suggestive search field that displays active supplier/vendor organizations with an active managed services agreement. If the supplier organization is not set up in the system, click Request New Supplier, and enter information in the Supplier Contact Name, Supplier Contact Phone, and Supplier Contact Email fields.  Sending for Worker Details The Supplier drop down appears. Select the supplier organization that adds the worker information to the request. Note: The supplier is required if sending for worker information.

Position Details

These fields appear in the Position Details section.

Field	Description
Start Date	Enter the start date in the date field. You can also click the calendar icon to open a calendar pop up that allows you to select the date.
End Date	Enter the end date in the date field. You can also click the calendar icon to open a calendar pop up that allows you to select the date.
Reason	From the drop down, select the reason for the engagement.

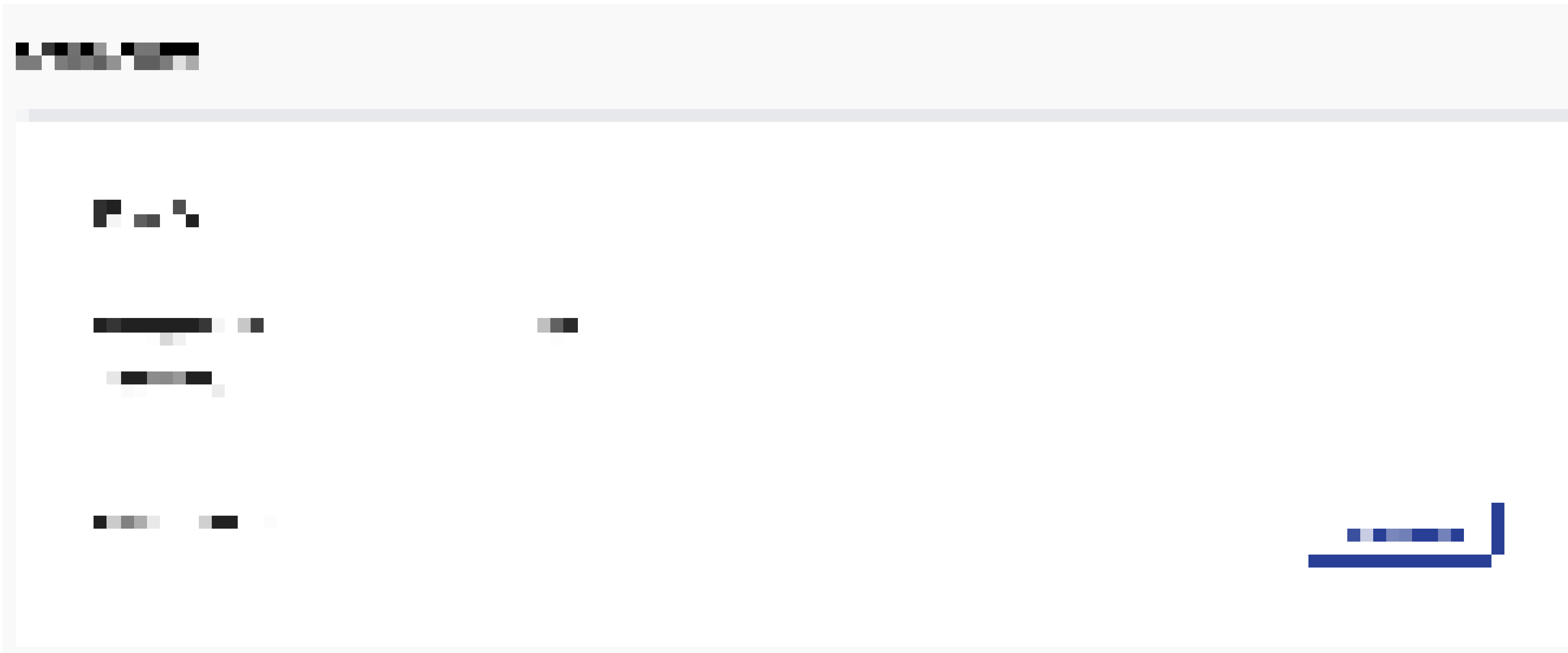
Financials

These fields appear in the Financials section.

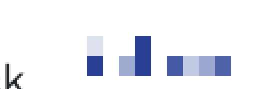
Field	Description
Bill Rate	Enter the bill rate for the managed services engagement.
Rate Type	Enter the bill rate type for the engagement.
Select Currency	Select the currency for the bill rate.
Select Department	Enter the department in the text field. The application automatically suggests configured departments. You can add a department using the search functionality. To each for a department, click Add New.

Additional Info

This section displays all additional information required for the managed services request.



Note: This section also contain custom fields configured for your client organization.

Field	Description
Other Contacts	Any names configured at this level receive email notifications based on the notification trigger. To add a new contact, click . Your organization might restrict entry in this field to only names in your client organization.

CANDIDATES TAB

These actions/fields appear on the Candidates tab for requests.

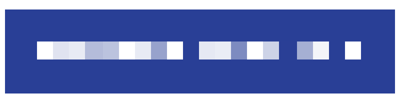
The dashboard data in the Candidates area displays totals for all candidate activity on the request. You can use the Search Candidates field to locate any submitted candidates (search on a specific tab). You can sort the columns in the search results similar to the columns that appear in the tab by default.

Tip: The search can be useful in locating duplicate candidates submitted to the request.

You can also add candidates to a request if you have the worker's name and contact information. For more information about adding candidates, see Request Candidate Not Shown *(on page 82)*.

You can perform actions for a worker (assign to a position, reject a resume, and so on) on the candidate's profile page. For more information about taking these actions, and fields on the profile page, see Candidate Profile *(on page 118)*.

Action/Field	Description
	Use the status filter to display by different statuses: • Requested - Displays candidates requested for the request. You can enter a new worker's name, or search for existing worker names in the system. Note: This sub tab only displays if your client organization has enabled the Self Sourcing feature. • Reviewing - All candidates ('Pending', 'New') that are submitted by suppliers or MSPs. • Interviewing - All candidates that are invited to interview. For more information about interviews, see Candidate Interviews *(on page 122)*. If a request is closed, then all pending interviews are automatically cancelled. Note: Candidates with cancelled interviews remain on the Interviewing sub tab. • Rejected/Withdrawn - All candidates that are rejected or withdrawn by the MSP or the client manager. The action adds the candidate to the Reviewing tab. If the request is closed, then all unassigned candidates are set to 'Not Assigned' and added to this sub tab. • Assigned - Displays candidates that are assigned to positions defined in the request (status = 'Assigned'). The engagement number is added in this sub tab.

Action/Field	Description
	The number of candidates within each sub tab displays next to the tab name. To access each tab, click the sub tab button.
	Click to compare candidates based on their Match Score data. You must first select more than one submitted candidate.
	Rejects all selected candidates.
	Opens the Select Interview Details pop-up to configure an interview request with selected candidates. For more information about this task, see Request an Interview with a Candidate *(on page 124)*.
	Click the star icon to 'favorite' the candidate. This action allows you to sort the candidates on each sub tab my toggling the view in the Favorite column.
	Indicates that the candidate is a new submission. This icon disappears after you view the candidate details. Tip: If you want to mark the candidate for easy location by sorting in the table, use the Favorite ( ) icon.

CANDIDATE PROFILE

The Candidate Profile page displays all relevant candidate information.

Sections can be expanded/collapsed using the arrow icons in the header for each section. If one or more candidates appears on a sub tab (for example, 'Reviewing'), and you access the profile from that sub tab, then you can navigate between the profiles by clicking the candidate name (blue text) in the left hand panel. You can also navigate between pages of candidates in this panel by using the arrow icons.

The following table describes the sections on the page.

Note: If you are accessing a candidate profile from the Candidates tab, a sidebar with navigation the sub tab name, and additional candidates displays. If you are accessing a profile from the Review Talent page, only the selected candidate profile displays.

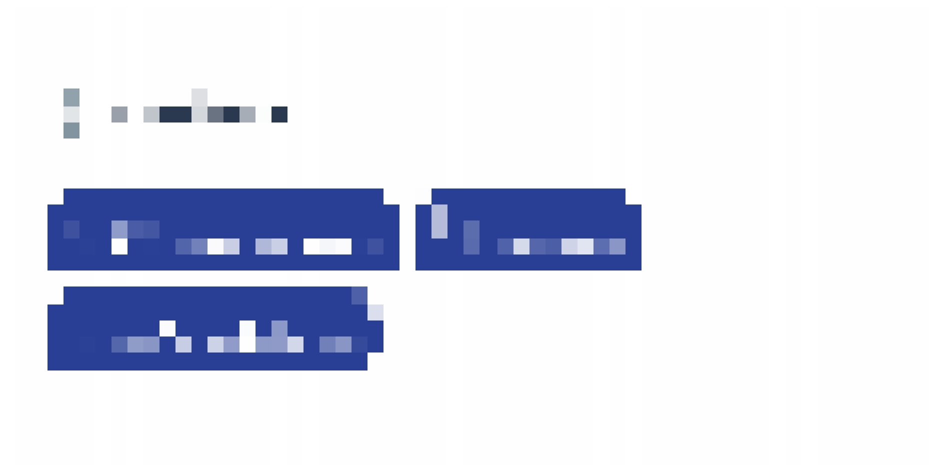
Note: Sections that do not have data do not display.

Note: Some sections (for example, Military History) do not display unless they are required worker information by your client organization.

Section	
Candidate Details	Displays candidate address and contact details. Also contains links to a worker's external profile information and portfolio (if applicable). If your client organization has enabled the Forward Resume functionality, you can click the Forward icon, and send the candidates

Section	
	resume via email. A pop up opens to configure the email message.  Note: A red asterisk (*) indicates a required field. After configuring the email, click Send.
Maggi Candidate Scoring and Matching 	If the client organization has the Maggi Candidate Agent enabled, an AI generated insight and score for the candidate. See Maggi Candidate Agent *(on page 43)*. Note: You can opt out of using the Candidate Agent to score the quality of the candidate. Opting out of the scoring does not use the candidate's data in the system (Use Maggi to Score and Refine Candidate=`No`). If opted out, the score column reflects this. This action must be done when submitting the profile.
Hiring Activity	Displays the current candidate status, and the submission information for the candidate's resume record. This section also displays interview activity.

Section	
	
Highlights	You can add a text note to this section by clicking Add Internal Note. The note text is only viewable to you (account that entered the note. After entering your comments, click Save. Note: The maximum character limit is 800.
Worker Custom Fields	Displays any client configured custom fields. This field might be encrypted depending on the setting in the client organization's config-uration.
Submitted Resume	Displays the submitted documentation for a candidate. Files can be resumes, or addition-al supporting documentation. You can download files by clicking on the icon for the document.
Previous Engagements	Displays a list of previous engagements with the client organization.
Interview List	Displays interview activity for the request.
Summary	Displays the worker's resume summary.
Skills	Highlights the skills and number of years of experience with each skill highlighted in the submitted resume.

Section	
	 The top 5 skills for the worker appear in the top section.
Experience	Displays the worker's work experience, as listed on their respective resume.
Education	Displays the worker's education, as listed on their respective resume. Only the most recent degree in the most recent major is listed.
Languages	Displays the languages that the worker can speak, read, and write. Each proficiency has a marked check box. Note: These fields are not editable.
Certifications and Licenses	Displays any licenses or certifications (and their dates). Any information in this section is submitted by the supplier, and is relevant to the open position.
Military History	Displays a worker's military service history.
Publications	Displays any publications (and their publishing dates) authored by the worker.

CANDIDATE INTERVIEWS

After suppliers submit candidates, and candidates are reviewed, you can set up interviews with them through the application. You can set up initial interviews with newly submitted candidates, or follow up interviews with existing candidates. Multiple interview styles are supported, as follows:

- Group - Multiple candidates for one interviewer.
- Blitz - Multiple candidates meet with one or more interviewers at the same time, or at individually selected times.
- Sequential - Individual candidate meets with several interviewers back-to-back.
- One on One - Individual candidate meets with an interviewer at a specific time.
- Panel - Individual candidate meets with multiple interviewers at the same time.

Interview styles are individually enabled for the client organization.

You can select the candidate to interview from the list on the Reviewing tab, of you can select the check box for the candidates and click Request Interview. Once you schedule an interview, the candidate is moved to the Interviewing tab. For more information about setting up interviews, see Request an Interview with a Candidate *(on page 124)*.

The party setting up the interview selects interview parameters in the Select Interview Details pop-up.

You can select the type of interview style, the client manager/s that meets with the candidate, and the method. Methods include the following:

- Phone - Have the candidate call you at the number listed, or call the candidate at the number listed.
- In Person - Select the client location for the interview.

• Video - Add the host link and dial in details for the video interview.

Note: The limit for this field is 1000 characters.

The Interviewing tab in the Candidates section of the request allows you to review interview-specific details. To view details, click the Status column for the candidate. You can reschedule, confirm, and update an interview in this view. You can also leave interview feedback.

Note: The interview status remains in the 'Completed' status, even if the candidate is withdrawn or rejected.

Request an Interview with a Candidate

You can set up interviews with submitted candidates.

Note: If you sync your calendar with an external calendar application, the application only shows suggested interview times based on existing blocked time from the external calendar. This is helpful in avoiding double booking when scheduling interviews.

1. Click .
2. Click the request job title text to open the request details.

You can also enter the request number in the search field.

3. On the Request page, click the Candidates tab.

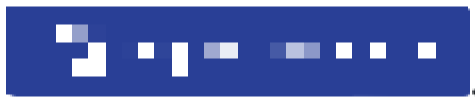
Note: Requests with submitted candidates have the 'Sourcing - Resume Review' or 'Sourcing - Interview' status.

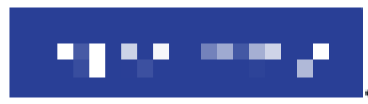
Note: You can set interviews with candidates on the Reviewing and Interviewing sub tabs.

Note: You can schedule interviews from the candidate profile.

4. Select the check box in the candidate row.

You can select multiple candidates if you are setting up a group interview, or if you are scheduling multiple interviews in the same action.

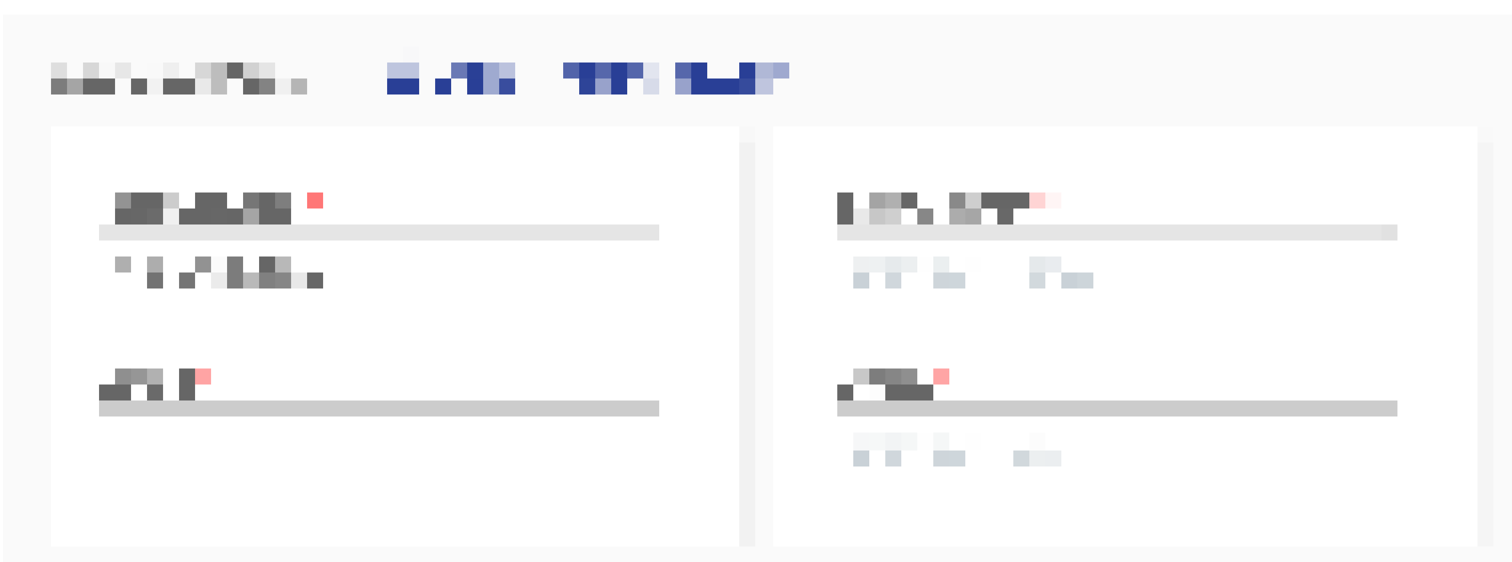
5. Click .
6. In the Select Interview Details pop-up, from the Type drop down, select the interview type.

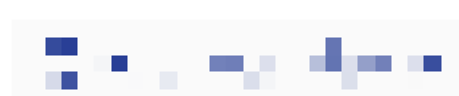
If you select One-on-One, from the Duration drop down, select the interview length. The hiring manager for the request is automatically populated for the interviewer, but you can click , and enter the Interviewer Name and Interviewer Email details. After you add the details, click .

In the Propose Available Time-slots pop-up, use the calendar to locate the interview time.

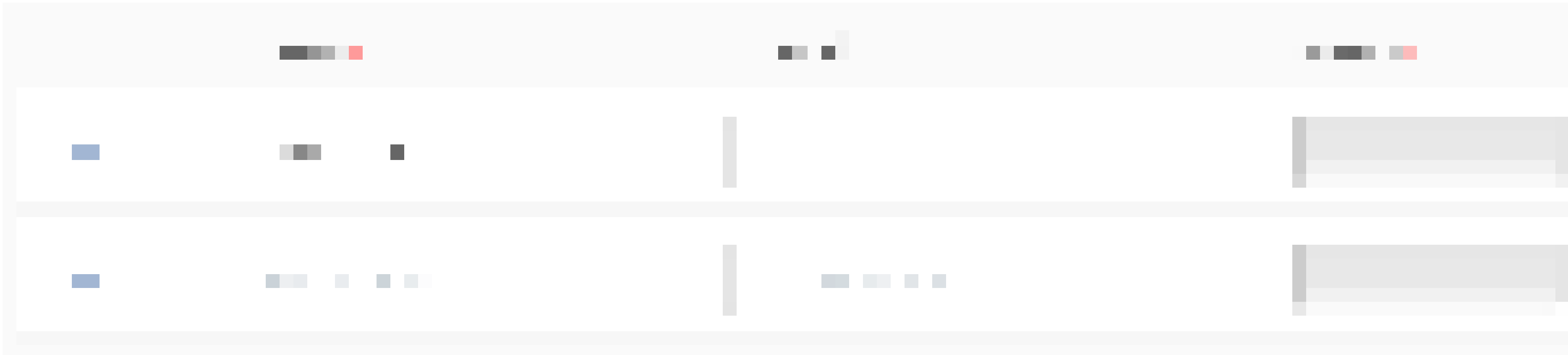
Note: The interviewer email address is used to notify and confirm details with the interviewer.

If you select Panel, from the Duration drop down, select the interview length. In the Interview Panel section, add the interviewer name and email details.

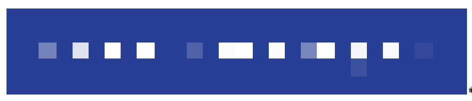


To add additional panel interviewers, click .

If you select Sequential, click . In the Choose Interviewers pop-up, configure the Start Time and the Time Zone from the drop downs. In the Interviewers section, add the interviewer's names, emails, and the duration of their interview.



You can reorder the interviewers by clicking and dragging the Reorder icon in the Interviewers column.

7. Click .

Once the interview time is accepted/confirmed by the supplier/vendor and the candidate, you must confirm the time. To confirm the interview times, access the interview information on the Interviewing sub tab by clicking the Interview Details icon. For more information about confirming interview times, see Confirm Interview Times *(on page 127)*.

If you cancel an interview, for historical reference, the interview remains for the candidate (sub tabs and profile). The status is set to cancelled, and the information has a line through the details. See Cancel Interview *(on page 129)*.

Set Up A Video Conference

You can set up an interview using a third-party video conferencing app. Scheduling the interview using this method automatically adds the link to the video meeting to the interview details.

Note: You must have at least one integration synced that uses video conferencing. See Sync a Calendar *(on page 30)*.

1. Select (Review Talent).
2. On the Candidates tab, for the candidate to interview, click .
3. Ensure the Method drop down, ensure that the interview method is set to the preferred method.

   Note: This field defaults to the third party app that is integrated with your account. The meeting link generated by the third party app is included in the Additional Details field by default.

4. Click .
5. In the calendar view, select the interview time.
6. Click .

The video conference link is included in all notifications sent to email recipients.

Note: If you reschedule the interview, a new meeting link is generated and sent in the new interview confirmation notification.

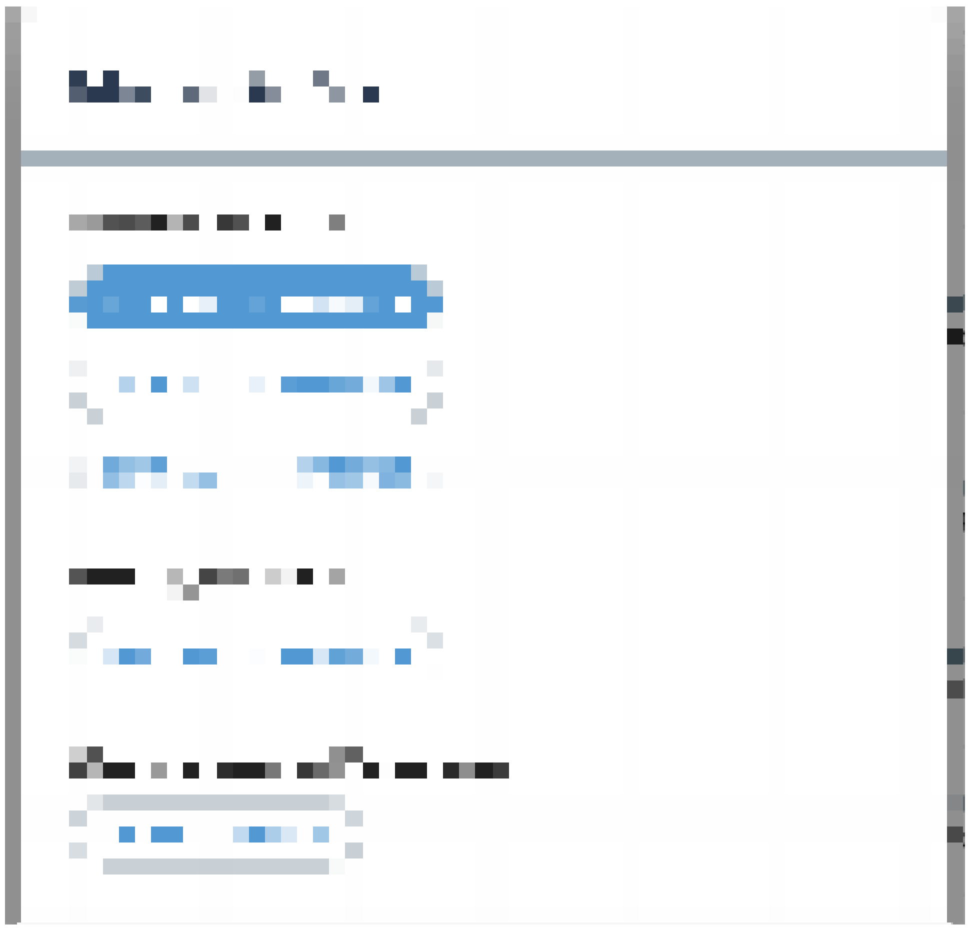
Note: If you assign a candidate (permissions required), the interview is not automatically cancelled and the meeting link stays active. To remove the meeting link from the system, you must manually cancel the interview. See Cancel Interview *(on page 129)*.

Confirm Interview Times

Candidate interviews require confirmation after the proposed time is accepted by a candidate or a supplier/vendor. You can confirm details in the Interviewing sub tab of the request's Candidate tab, or on the candidate profile in the Hiring Activity section.

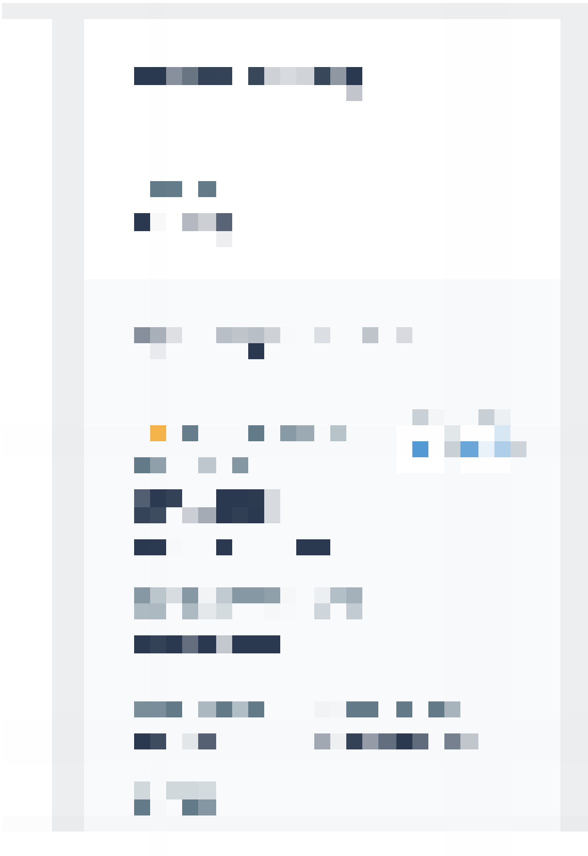
To view details, navigate to the Interviewing sub tab, and then expand the proposed interview section by clicking the arrow icon.

To confirm the accepted time, click Interview Details. A pop up opens with accepted times.



Select a time or times, and then click Confirm, or propose a new time by clicking + Propose Time. The proposed time must be accepted by the supplier/vendor or MSP before it is available for confirmation.

You can also access the confirmation functionality on the candidate profile.



Reschedule Candidate Interview

You can reschedule a candidate interview from the candidate details.

Note: You can reschedule an interview using a link in the dashboard's Upcoming Events section.

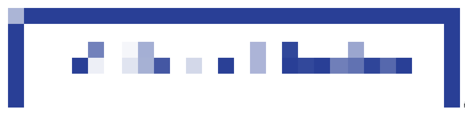
1. Click Requests.
2. Click the request job title text to open the request details.
You can also enter the request number in the search field.
3. On the Request page, click the Candidates tab.
4. Click the Interviewing sub tab.
5. Click the candidate's name (blue text) from the candidate list to open the candidate's profile.
6. In the Upcoming Interviews section (Hiring Activity), click Interview.
7. The interview configuration dialogue opens.
8. Complete the time and date configurations, and click Reschedule.

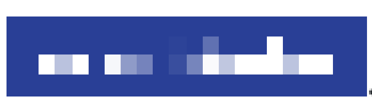
Cancel Interview

You can cancel scheduled interviews with candidates in the Candidates tab for a request.

Note: You can cancel an interview using a link in the dashboard's Upcoming Events section.

1. Navigate to the Requests page of the Manager view.

2. Click .
3. Locate the request with the candidate's scheduled interview in the table.
You can also use the search field at the top of the page to enter search parameters to filter the view.
4. Click the blue text request description.
5. On the Candidates tab, click .
6. Locate the candidate with a scheduled interview, and click the blue text to open the candidate's resume details.
7. Click .
8. In the Cancellation pop up, add text that describes why the interview is cancelled.

9. Click .

Complete Interview Review Form

Once an interview completes, you complete the interview record in the system by completing an interview feedback form. The feedback form contains feedback settings and text fields.

Note: The Home page alerts you when the interview is complete and the feedback form is available. Interviews that have passed the scheduled time and date are automatically marked 'Complete'. You can access the form by clicking .

1. In the Requests section, locate the request with the candidate that you interviewed.
You can also locate the request by doing the following:

- Click , then click Candidates > Interviewing, then select the candidate resume.
- Click and then click the open request from the table. You can also use the search functionality to locate the request on this page. Click click Candidates > Interviewing, then select the candidate resume.

2. Click .
3. In the feedback form, from the Outcome selection, select the outcome that describes the current candidate's interview status.

Note: A red asterisk (*) indicates a required field.

Select from the following:

- - Candidate is continuing the interview process. Select the Recommendation, enter a Supplier Comment, and Internal Feedback. The interview is marked 'Complete', and feedback is saved. The candidate remains as 'Pending', and remains on the Interviewing sub tab. You can schedule another interview time.
- - Candidate is rejected by the interviewer. Select the Rejection Reason and the Recommendation, and enter a Comment to Supplier and Internal Feedback. Additional Reject Reason or Reject Comment inputs depend on client organization configuration. Candidate is moved to the Rejected/Withdrawn sub tab.
- - Candidate is assigned to an open position on the request. Enter the Engagement Start Date, the Engagement End Date, and Internal Feedback.

  Note: This option is only visible if your client organization has the workflow enabled in the configuration.

- - Cancels the interview. Enter a Cancellation Reason.

4. Complete any other necessary information on the feedback form.

5. Click .

CANDIDATE STATUS

The following table describes each status for a candidate, and how that status affects the candidate in a workflow. The following conditions apply to candidates in all statuses:

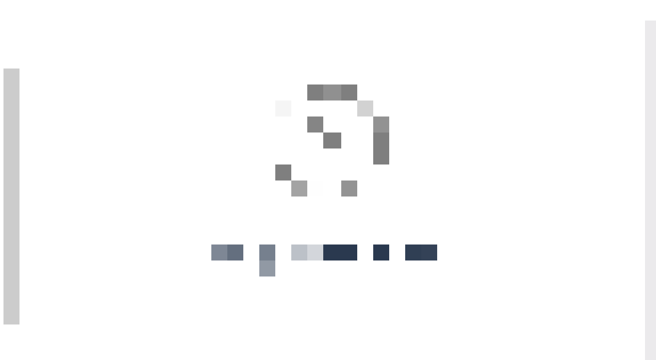
- If the number of open positions for a request is equal to 0, then all candidates are automatically set to 'Not Assigned'

Status	Description
Pending	The candidate has been submitted by a supplier/vendor, or by any other party allowed to submit candidates to the request. The fol-

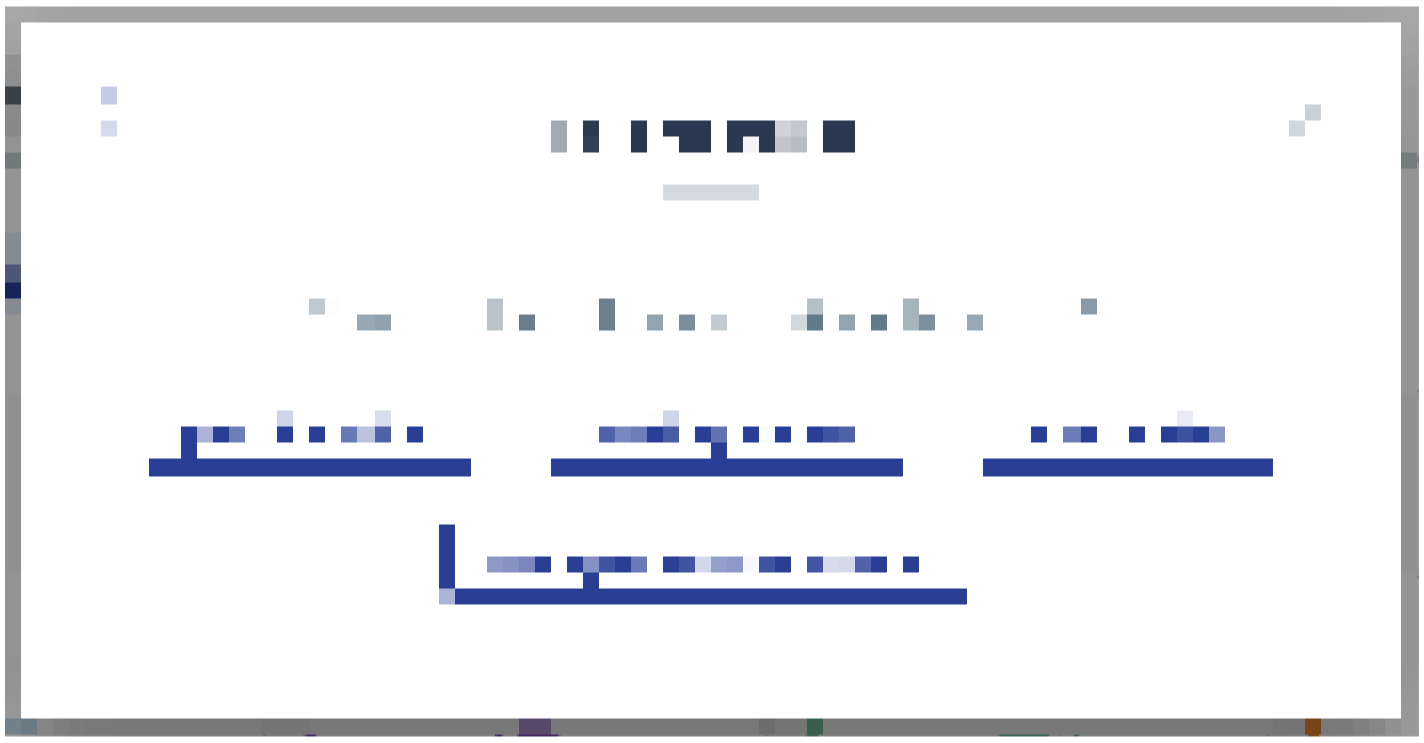
Status	Description
	lowing statuses can be assigned to a candidate: • Client Review - Candidate is not waiting on MSP review, and must be reviewed by the client manager. • Interviewing - Candidate has at least one interview set up. This reason is set even if the interview is cancelled.
Rejected	Candidate has been rejected for any reason. A rejection reason is entered manually by the user rejecting the candidate.
Withdrawn (or Withdrawn: Pre-Interview, or Withdrawn: Post-Interview)	Candidate has been withdrawn from the request. a withdrawn reason is entered manually by the user withdrawing the candidate.
Assigned	Candidate is assigned to a position.
Not Assigned	Candidate was in 'Pending' status, but another candidate was selected and no other positions are open on the request. Request is closed (converted to engagement).

HELP ME DECIDE

You can use a algorithm to facilitate faster request creation. The Help Me Decide tile opens a pop up that asks a series of questions about the job request. Based on the answers that you provide, the algorithm then decides which request is best suited for your job.



A pop up asks questions about the worker and job information, and asks additional questions based on the request types that are enabled for your client organization.



REUSE RECENTLY CREATED

If enabled for your client organization, you can reuse a recently created (12 month time span) request as a template to create a new request. This saves time by reusing known data, such as client location and job requirements. If you reuse a request, you must update the engagement start and end dates.

To reuse a request, click Create Request, and then select the request in the Reuse Recently Created section. The application opens a request for configuration.

ENGAGEMENTS

The Engagements page gives you a view off all engagement records both assigned to you, and to all records that you have access to. Your access is based on the data permissions that are configured for your user account.

Note: If the Enable client organization hierarchy visibility setting is enabled, you can view data for your reports, and the reports of your reports according to your client organization's reporting structure.

You can filter the view by using the Filters pop up (click Filters). You can export a .csv file of the view by clicking Export. The file automatically downloads to your local machine.

If your organization is using an approval routing configuration that requires approval for revisions to existing engagements, modifying any values prompts you to enter a revision reason in a text field. A revision reason is required for each saved revision, and is visible to approvers.

MANUALLY CLOSE AN ENGAGEMENT

You can close an engagement, removing it from the Engagements page. You can only perform this action of you have permission to close/terminate an engagement.

Note: Some selection values for this workflow are hard coded (default), and cannot be modified.

1. Click .
2. Click the job title or the engagement number.
You can use the search functionality to locate the engagement.

3. On the engagement Details tab, at the bottom of the page, click .
A Change Status pop up opens.

4. From the Status drop down, select Closed.
5. From the Status Reason drop down, select the reason for closing the engagement.
6. In the Date End field, enter the actual date the engagement was closed.
7. Click .

ON/OFF BOARDING HOME

Onboarding and offboarding items can include any tasks to be completed in order of the engagement to begin, or after the engagement is complete. You can specify if an items required before the engagement can begin.

The On/Off Boarding Home displays any configured onboarding or offboarding items in all of the various statuses for the client organization's engagements.

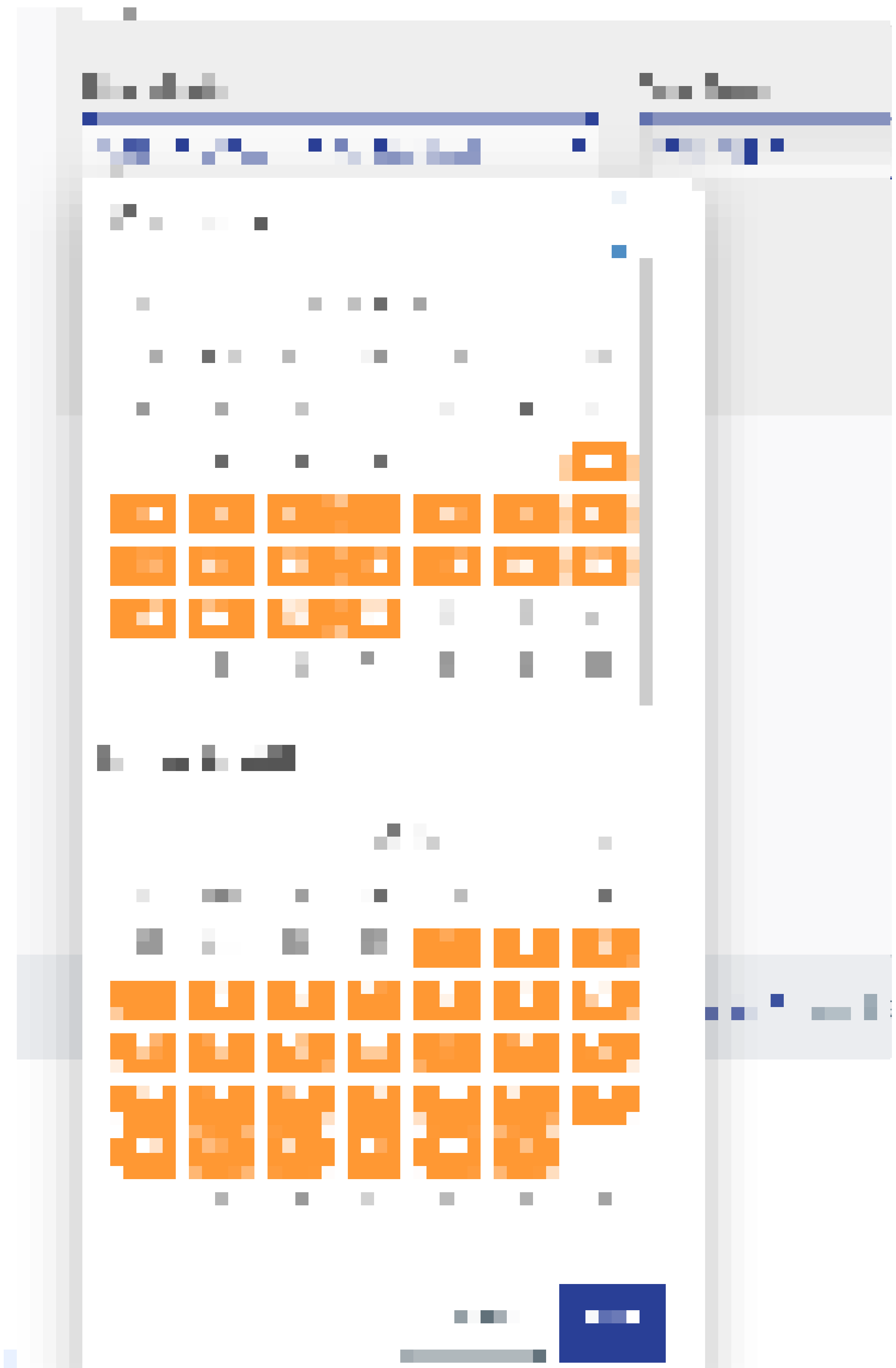
Items are assigned to filled engagements based on the client organization's business requirements, including worker identification verification. If enabled, email notifications are sent informing responsible parties to review and confirm onboarding and offboarding items.

You can access your onboarding or offboarding items using the On/Off Boarding Home.

Note: If the Enable client organization hierarchy visibility setting is enabled, you can view data for your reports, and the reports of your reports according to your client organization's reporting structure.

The dashboard provides an overview of workers with items in various statuses. You can use the filters on the dashboard to locate a specific worker with a specific item. You can use the following filters:

- Worker search field - enter text to search for workers in the client organization with configured onboarding or offboarding items.
- My Records drop down - Toggle the items in the dashboard between items for engagements that you are a hiring manager for (My Records) or items that are delegated to you by another hiring manager (Delegate Records). The delegate must have the correct permissions to view or modify details (take action), or download item attachments.
- Start Date pop up - using pop up calendars, configure a date range to search.



To configure a range, enter the beginning date and the end date where the start date falls within the configured range. All dates in-between turn orange.

Tip: You can change the calendars in the pop up display by entering the date or changing the year in the top field.

- Req Type - Use the drop down to select the engagement type to filter by.
- Operational Unit - Use the drop down to select a configured op unit to filter by.
- Eng Onboarding Status - Use the drop down to filter the view by the status of onboarding items.

For more information about managing items for a worker, see Manage Onboarding/Offboarding Items *(on page 139)*.

Onboarding and offboarding items are configured at the country level, given the location's compliance considerations. Items assigned for a country cannot be assigned to engagements located in other countries. Some items are marked specifically for compliance, where view/edit access might be restricted to users with specific permissions.

You can attach documentation to each item as needed, and view management history for each item. Documentation (attachments) view/edit permission is restricted at the item level. For more information about attachments, see Upload an Attachment for an Item *(on page 139)*.

To view the history for an item, click . The item history appears on a pop up, with a log of changes to the item.

MANAGE ONBOARDING/OFFBOARDING ITEMS

You can manage a worker's items from the On/Off Boarding Home. The correct permissions are required to manage attachments, or to change the status of an item. For more information about managing attachments, see Upload an Attachment for an Item *(on page 139)*.

Note: Some items must be configured and managed by the MSP.

1. Click .
2. Use the filters to locate the worker with the items to manage.
3. In the Worker column, click the blue name text. All onboarding and offboarding items in all statuses open for the engagement.
4. Click .
5. Using the drop down, set the new status of the item.
6. Click .

You can remove an item by clicking the X next to the status drop down.

UPLOAD AN ATTACHMENT FOR AN ITEM

You can download files for an onboarding or offboarding item if the item is configured for downloads. The correct permission is required to managed attachments for items.

Note: The number that appears next to the attachment icon is the number of attachments uploaded for the item.

Note: Recommended file types include .pdf, .txt, .doc, .docx, .jpg, .xls, .xlsx, or .html of 15MB or less.

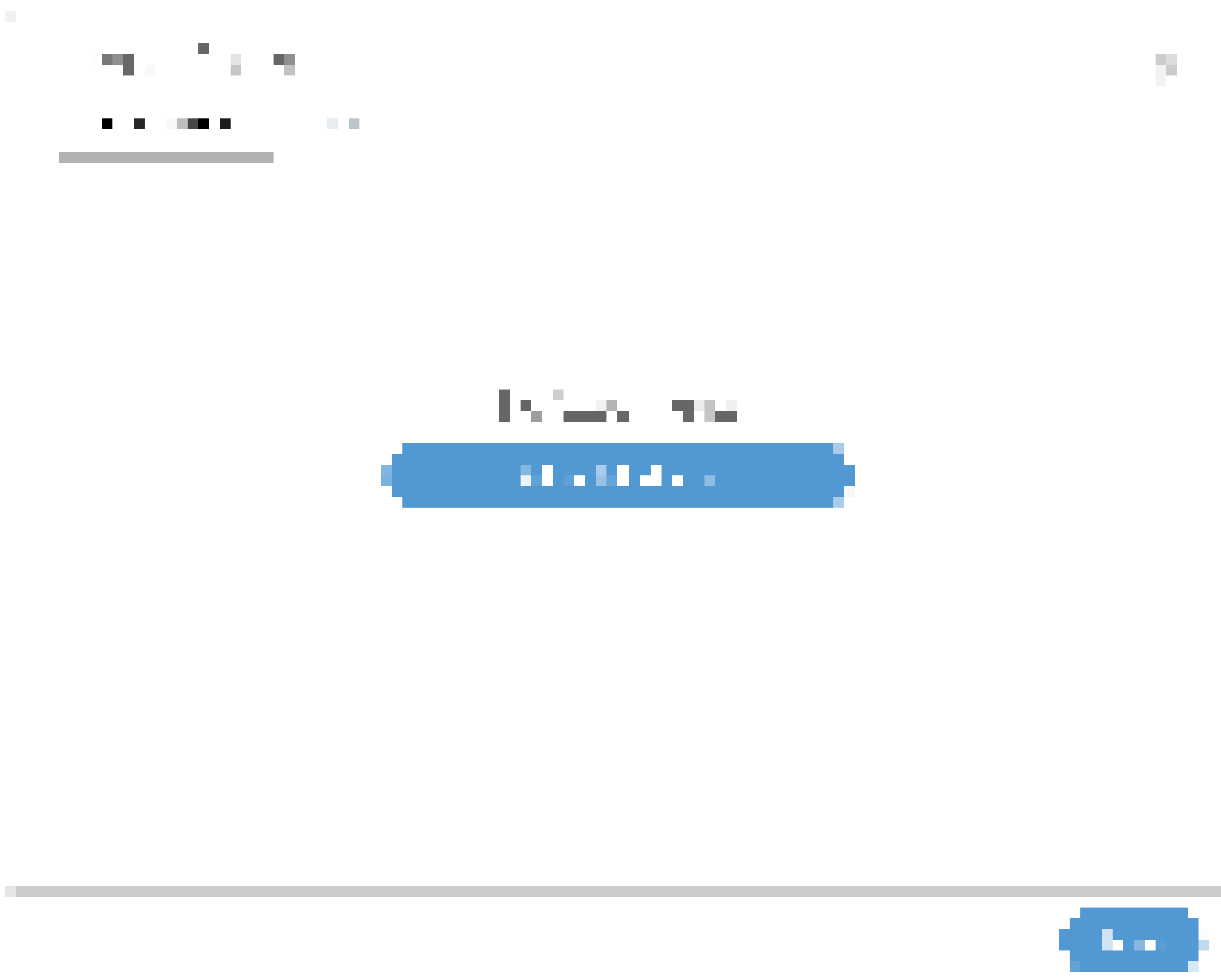
1. In the left navigation, click .
2. Click More > On/Off Boarding.
3. Use the filters to locate the worker with the items to manage.
4. In the Worker column, click the blue name text. All onboarding and offboarding items in all statuses open for the engagement.
5. For the item to upload to, click .

Note: This icon must appear in order to upload attachments. If no icon appears, the 'Attachments' permission is not assigned to the item.

Note: You can also click in the Attachments tab to upload an item.

6. Click Upload Attachment .
7. Drag the file to the Drag file here area of the pop up, or click Choose File.

The file is added to the item's attachment window.



8. To download the file, in the Attachments tab table, click Download.
9. Click Done.

Uploaded files can be downloaded by clicking Download in the file row. You can also remove a file by clicking the X in the file row.

BRING YOUR OWN KEY ENCRYPTION

The Bring Your Own Key (BYOK) feature in VMS allows you to encrypt data for a client organization where the client has custody of the encryption key and controls the encryption process. Sensitive data fields in the application's database are encrypted. The encryption includes 48 data fields that may contain personal data for candidates, workers, managers, engagements and client organizations.

Once the feature is enabled at the parent level, the encryption is applied to all operational and business units configured in the client organization. The bulk encryption/decryption is performed by the system according to the following schedule:

- 8-00 PM - 08-00 AM CET for EU VMS
- 6-00 PM - 08-00 AM PT for US VMS

The system uses the AES (Advanced Encryption Standard, ISO/IEC 18033-3). The key can be either AES-256 or AES-192. A key can be generated by the system, or input by a user. The key may be uploaded as an encrypted file using a public key.

It is important to note that enabling encryption affects the Reporting module in the VMS. Once enabled, only reports that support the reading of encrypted fields in the database are visible to users. See Reporting *(on page).*

An BYOK Admin user role within the client organization is required to manage the encryption details once the feature is enabled. This admin role has access to a control panel within the Manager view that allows the user to create, modify, or revoke a key value that the system uses to encrypt the data. This role needs to be applied separately to a manager user during the feature set up.

Note: Client managers with the BYOK Admin role are required to complete the 2-Step verification workflow every time that they log in. This requirement applies to client organizations that use SSO integrations.

Along with sensitive field visibility in the user interface, you can also apply encryption to your client organization's custom fields using the feature. Only new custom fields configured after the feature is enabled can be encrypted. The list of encrypted custom fields is included on the key management page. If you need to set up encrypted custom fields, contact your Program Representative.

The encryption does not include passwords, security answers, or supplier banking information. It is also important to note that an administrator can rotate a key value as needed, or remove a key value with or without encryption. If an administrator revokes a key value without setting the decryption option, any native or custom fields that have been previously encrypted remain encrypted in the user interface. See Rotate Encryption Key *(on page 142)* and Revoke Encryption Key *(on page 142)*.

The system uses email notifications to BYOK administrators when actions are taken within the feature (for example, key changes). See Encryption Notifications *(on page 143)*.

ROTATE ENCRYPTION KEY

You can rotate the key that you use to encrypt your data in the database. Your client organization is required to have the BYOK feature enabled in the configuration, and you are required to have the BYOK Admin role assigned to you. If you require the encryption feature, or the key admin user role, contact your Program Representative.

Rotation the encryption key is the process of replacing an older key value based on client requirements. You can either generate a key value using a system process, or copy/paste/enter the key value in the user interface.

1. Navigate to the Home page in the Manager view.
2. Click .
3. In the Key Management area, click .
4. Select the key size, AES-256 or AES-192.
5. In the Encryption Key area, do one of the following:
   - Generate Key - Click the Generate Key link to use a system process to automatically generate the key value based on the key size setting.
   - Enter encryption key - Populate the key value field by copy/pasting the value, or manually entering the value in the field.
6. Click .

REVOKE ENCRYPTION KEY

You can revoke an encryption key. This process is different that rotating a key due to a business requirement (see Rotate Encryption Key *(on page 142)*). Revoking a key erases the key value. The application is not able to read encrypted data once a key has been revoked. You can create a new key to decrypt the data after a key value is revoked.

1. Navigate to the Home page in the Manager view.
2. Click .
3. In the Key Management area, click .

4. Optionally, select the Decrypt data before the key is revoked check box to remove any encryption. If you do not select this option, the key value is erased and the application is not able to read the encrypted data.

5. Click [redacted].

ENCRYPTION NOTIFICATIONS

Email notifications are used to alert BYOK administrators of activity within the feature. Notifications are sent to all non-blocked admin users. The following email templates are sent:

- BYOK key changes
- BYOK bulk data encryption / decryption started
- BYOK bulk data encryption / decryption completed
- BYOK key set to be revoked without data decryption
- BYOK key revoked
- BYOK key revoke cancelled
- BYOK bulk data encryption / decryption failed