



TempWorksUser Guide

A How-To Guide for Suppliers

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Intro

As a supplier, this document will define the use of TempWork for JM Family and it's partners. The document outlines the step by step process from handling requests for non-associates to entering time for a non-associate.

Familiarizing yourself with TempWorks

This change impacts the supplier's process of placing non-associates within JM Family.

Supplier Admin: Add a New Supplier User

To add a new staff user to your supplier organization:

1. Login to TempWork using your *username* and *password*. Your Home screen appears.
2. Click the Admin drop-down arrow located in the Header Menu bar and select User Administration.

The User List Screen displays.

3. Click **+ Add New** in the action bar. The Add User – Details screen displays.
4. Complete all the required fields as indicated by the asterisk (*). Some fields will auto-populate based on your supplier organization settings. Adjust if needed.

- Enter an email address to which you want this user's system notifications sent.
- Verify that the Culture setting is accurate since this will determine how dates display to the user (e.g., MM/DD/YY for en-US, DD/MM/YY for en-GB).

5. Complete other fields as needed.

- Set the Time Zone to match the user's home base. The system will then automatically adjust time and date settings where users are located in different time zones.
- Adjust the Currency default setting if the user needs to see financial data in a different currency.
- Verify that the Active setting is check marked (default setting). Only active users can perform tasks within the system.
- "Check" the Password Does Not Expire checkbox if your policy does not require that system users regularly update their passwords.

6. Be sure to assign both a Role and a User Type! (Users can be assigned more than one depending on their assigned tasks.) Use the selection lists to assign roles and click Search next to User Types to open the selection dialog box.



User roles determine which actions a user can take within TempWork VMS in addition to their visibility to system data. User types determine which system-generated notifications (email, dashboard, mobile) they receive.

7. Click OK. The screen refreshes and asks you to confirm key fields on the user profile. Re-enter these fields to match your original settings.
8. Click OK. An alert message will display if there are any errors that need to be corrected. Make the adjustments and click OK again. If there are no errors, the message will state that your changes have been applied. An email is sent to the new user with login instructions.

Supplier Admin: Deactivate/Reactivate User

As a supplier Admin, you may need to deactivate or reactivate a user profile.

To deactivate/reactivate a user profile record:

1. Login to TempWork using your *username* and *password*. Your Home screen appears.
2. Click the Admin drop-down arrow located in the Header Menu bar and select **User Administration**. The User List Screen displays.
3. Enter identifying information for a user account, then click **Search**.
4. Click directly on the name in the results list. The View User Details – Summary screen displays.
5. Click **Edit**. The Edit User – Details screen displays.
6. Check the status of the Active checkbox in the User Information section.
 - A checkmark indicates an Active profile.
 - A blank checkbox indicates an Inactive profile.
7. Set the profile record to the status of your choice.
8. Click **OK**. A status message indicates the changes were saved. **NOTE:** If you inactivate a user while they are logged in, changes will only take effect after the user logs out.

Supplier Admin: Reset Passwords

Supplier users who have admin rights are able to reset login passwords.

To reset login passwords:

1. Login to TempWork using your *username* and *password*. Your Home screen appears.
2. Click the Admin drop-down arrow located in the Header Menu bar and select **User Administration**. The User List Screen displays.
3. Enter identifying information for the user that needs the password reset, then click **Search**.
4. Click directly on the name in the results list. The View User Details – Summary screen displays.



It's always wise to check the Account Status when processing a password reset request since the user may be unaware that they might have locked their account by too many failed password attempts. The lock icon in the

action bar displays as "closed" for locked accounts. Or, scroll down to the Account Status section and check the Is Locked Out status.

5. Verify that the Email field in the Information section reflects the user's current email address. The password reset notification will be sent to this email address!
6. Click **Reset Password**. A confirmation dialog window appears. **NOTE:** If the Reset Password link is inactive (i.e., "grayed out") for a Resource user, you will need assistance from the program office to complete this task.
7. Click **OK** to confirm. A status message displays to indicate: **An email has been sent to the user with instructions on how to reset their password.**

Supplier Admin: Unlock User Account

To unlock user accounts:

1. Login to TempWork using your *username* and *password*. Your Home screen appears.
2. Click the Admin drop-down arrow located in the Header Menu bar and select **User Administration**. The User List Screen displays.
3. Enter identifying information for the locked user account, then click **Search**.
4. Click directly on the name in the results list. The View User Details – Summary screen displays.



It's always wise to check if the user also needs a password reset. Frequently, the reason for a locked account is that the user made too many failed password attempts.

5. Click **Unlock Account**. A status message displays to indicate the account is unlocked and the lock icon switches back to "open".

Supplier: How to View a New Request

As a supplier user, you are able to view a new request after it is released by the program office.

To view a released request:

1. Log in to TempWork using your *username* and *password*. Your Home dashboard appears.
2. In the My To Do quadrant, click the *number* link within the alert sentence, "*You have # New Request tasks awaiting action.*" The Review Alerts window opens.
3. Review the list to locate the request you want to view in detail.
4. Click the Action dropdown arrow for that request, then, click **View Details**. The screen refreshes to display the full request record.

By default, View Details opens at the Candidate tab on the request record
To view additional information related to the request, click the respective
tab:



Summary: Use this tab to view a quick overview of the request.

Details: Use this tab to view a detailed description of the open position request.

Candidates: Use this tab to submit candidates or view previously submitted candidates.

Notes: Use this tab to add, or review, notes that are associated to this request.

5. Click Return to go back to the Review Alerts window or click the client's logo above the Header Menu bar to return to your home dashboard.

Supplier: How to Submit a Candidate for and open Request

To submit a candidate:

1. Login to TempWork using your *username* and *password*. Your Home dashboard appears.

2. Locate the request record to which you want to submit a candidate.

- If you know the request to which you want to submit a candidate:

Enter key information that identifies the request (e.g., Request Number, Job Position Title), in the Simple Search text box located above the Header Menu bar (make sure to set the category to Search Requests), then click the matching record link when it displays in your results list. The screen refreshes to display the full request record with the Summary tab active. Click Candidates to make it the active tab.

- If you want to review all open requests before you make a selection:

Click the *number* link within the alert sentence, "You have # New Request tasks awaiting action." in the My To Do quadrant on your home dashboard, the Review Alerts window appears with a list of all open requests. Click the Action dropdown arrow for the request you want to review, then, click View Details. The screen refreshes to display the full request record with the Candidates tab active.

3. Click Search Resource Pool. The Select Profiles to Submit screen displays. Scroll through the list or use Search Options to locate the resource you want to submit as a candidate.

If the candidate of your choice already has a profile record in the Resource Pool:

4. Click the checkbox next to the resource name.



You can click multiple checkboxes to submit multiple candidates at the same time. Be aware that candidate submission limits may have been set by the client. These restrictions can vary by labor category and/or request type. Take care when reviewing Resource Pool records. Is it possible that an individual's name has changed due to marriage or divorce? Try to avoid creating duplicate Resource records for the same individual. This can negatively affect both tenure and candidate history tracking. When in doubt, click on the resource name to view their complete profile record and use the edit option to make adjustments/updates if needed.

5. Click Submit Profiles. The Submit Profiles screen displays.
6. Complete the fields as indicated, required fields are indicated by an asterisk (*). Follow the prompts to complete the Rates section since data entry formats can vary by request type.
7. Click Submit. A status message displays to indicate your submission is successful and the Candidates section shows a line item for each candidate.



If your submission was not successful, an error message displays to indicate any adjustments you need to make. Make the adjustments and click Submit again. Keep repeating this process until your submission passes the validation process.

8. Click Return to go back to the Review Alerts window or click the client's logo above the Header Menu bar to return to your home dashboard.

If there is no profile record for the candidate of your choice:

4. Click from the Select Profiles to Submit screen or from the View Job-Title – Candidates screen. The Add Candidate – Details screen displays with the Details tab as active.



The importance of consistent data entry when creating Resource Pool records cannot be overstated. Develop standard protocols and enforce them! Avoid duplicate entries since they can negatively affect downstream system functionality such as resource matching, tenure tracking, candidate history, and budget-related reporting. For example: JOE SMITH, Joe Smith, and joe smith may be the same individual, but the system will accept these names as entered and could create a separate record for each version. If you copy/paste name entries from a third-party source, take care that the original does not include letters with diacritics. The system will accept the "copy" as entered and although the subsequent resource record can be selected/submitted, any name search will never generate a match since a standard English keyboard does not include diacritic letters and search results must be an EXACT match.

5. Complete the Candidate information fields as indicated, required fields are indicated by an asterisk (*). Take care to follow the format prompts provided for any ID fields. These format requirements can vary from client to client.

6. Use the link in the Attachments section to include supporting documentation such as a resume.

7. Click OK. A status message displays to indicate, "Your changes were saved."



If your submission was not successful, an error message displays to indicate the adjustments you need to make. Make the adjustments and click OK again.

Keep repeating this process until your candidate profile passes the validation process.

Once you have successfully created a candidate profile, you still need to submit the candidate to the request. Follow the steps below to submit your candidate.

9. Click Submit Profile. The Submit Profiles screen displays.

10. Complete the fields as indicated, required fields are indicated by an asterisk (*). Follow the prompts to complete the Rates section since data entry formats can vary by request type.

11. Click Submit. A status message displays to indicate your submission is successful and the candidate is added to the display list in the Candidates section of the request record.



If your submission was not successful, an error message displays to indicate any adjustments you need to make. Make the adjustments and click Submit again. Keep repeating this process until your submission passes the

validation process.

- Click Return to go back to the Review Alerts window or click the client's logo above the Header Menu bar to return to your home dashboard.

Supplier: Manage Interviews (Standard Configuration)

To manage candidate interviews in TempWork:

1. Login to TempWork using your *username* and *password*. Your Home screen appears.

2. Click the *number* link within the alert sentence, "*You have # Candidate - Interview tasks awaiting action.*" in the My To Do quadrant on your home dashboard. The Review Alerts window opens with a list of all candidate interview requests. Continue with one of the options provided below.

To accept an interview request:

3. Scroll through the Review Alerts list to locate the request with the candidate interview you plan to accept.

4. Review the information displayed in the Details column. If the details are acceptable, click the Action dropdown arrow, then, click **Accept Interview**. A Candidate Interview – Accept Interview dialog box appears.
5. Select the desired interview date/time from the drop-down Proposed Interview Times list. Enter comments as needed.
6. Click **Accept Interview** to confirm your acceptance and close the dialog box. A notification is sent to the hiring manager and the screen refreshes back to the Review Alerts window.

To propose an alternate time for an interview request:

3. Scroll through the Review Alerts list to locate the request associated to the candidate.
4. Click the Action dropdown arrow, then, click **Decline/Suggest Alternate Time**. A Candidate Interview – Decline/Suggest Alternate Time dialog box appears.
5. Enter your alternate date and time, or enter multiple date/time options in the comments box. Enter additional information as needed.
6. Click **Decline/Suggest Alternate Time** to close the dialog box. A notification is sent to the hiring manager and your screen refreshes to display the Review Alerts window.

To reject an interview:

3. Scroll through the Review Alerts list to locate the request associated to the candidate.
 4. Click the Action dropdown arrow, then, click **Decline/Suggest Alternate Time**. A Candidate Interview – Decline/Suggest Alternate Time dialog box appears.
 5. Enter your reason for rejecting the interview in the Comments box.
- Click **Decline/Suggest Alternate Time** to close the dialog box. A notification is sent to the hiring manager and your screen refreshes to display th

Supplier: Manage Interviews (Enhanced Interview Experience)

As a supplier you are able to respond to and manage interviews based on the enhanced interview experience. This streamlines the process steps and provides better visibility to manage all your candidate interview requests.

Access to Interview Manager:

Multiple access points to Interview Manager give you easy access within TempWork VMS. Options include:

From your Home dashboard:

- 1.Login to TempWork VMS using your username and password. Your Home screen displays.
- 2.In the My To Do quadrant, click the number link located within the alert sentence, "You have # New Request tasks awaiting action". The Review Alerts window opens and displays a list of active Requests.
- 3.Click the Action drop-down arrow for a specific Request and select View Details.
- 4.Click Schedule Interviews on the View Position – Candidates screen to go directly to the Schedule Candidate Interviews screen (i.e., Interview Manager).



Note: VMS adjustments are "in process" to change all current "Schedule Interviews" labels to "Manage Interviews." In addition, the Schedule Candidate Interviews screen will be re-labeled to Manage Candidate Interviews.

- 5.Optional If you have no Requests tasks, you can access Interview Manager from the My Activity section of your dashboard. Click the number link indicating Open Requests. A dialog window opens with a list of all open Requests.
 - a.Click the link in the ID column to open the View Position - Summary screen.
 - b.Click the Candidates tab. The View Position – Candidates screen displays.
 - c.Click Schedule Interviews to go directly to the Schedule Candidate Interviews screen (i.e., Interview Manager).

From a Request search:

- 1.Log in to TempWork VMS using your user name and password. Your Home screen displays.
- 2.Select Search Requests from the drop-down selection list in the Simple Search box located above the Header Menu bar.
- 3.In the Search box, enter all or a portion of the Request number, Request name, or Request owner.



As you type, the auto suggestion/type ahead feature begins displaying search results.

- 4.Click the Request you want to access from the list of suggestions. The View Position - Summary screen appears.
- 5.Click Schedule Interviews on the View Position – Candidates screen to go directly to the Schedule Candidate Interviews screen (i.e., Interview Manager).

From a Candidate search:

1. Login to TempWork VMS using your username and password. Your Home screen displays.

2. Select Search Candidates from the drop-down selection list in the Simple Search box located above the Header Menu bar.
3. In the Search box, enter all or a portion of the Request number, Candidate name, or Job Title.



As you type, the auto suggestion/type ahead feature begins displaying search results.

4. Click the Candidate you want to access from the list of suggestions. The Candidate Compare screen appears.
5. Click the Action drop-down arrow and select Schedule Interviews. The Schedule Candidate Interviews screen (i.e., Interview Manager) appears.

Interview Manager Overview

The Schedule Candidate Interviews screen is a summary screen divided into two sections, Request Information and Accept or Reject Interviews.

Home (Supplier) > Candidate Compare: 1028-1 - Product Manager

Schedule Candidate Interviews

Request Information

1028-1	Product Manager	Temporary Worker - US	2/5/2017	[Redacted]	Open
ID	Position	Type	Start Date	Hiring Manager	Status

Accept or Reject Interviews

> [Redacted]	Submitted	12/19/2016	W2 Exempt	Onsite	Pending
noemail@noemail.com	Status	Date Available	Resource Type	Interview Type	Interview Status
> [Redacted]	Submitted	12/19/2016	W2 Exempt	Onsite	Completed
noemail@noemail.com	Status	Date Available	Resource Type	Interview Type	Interview Status
> [Redacted]	Submitted	12/19/2016	W2 Exempt	Onsite	Pending
noemail@noemail.com	Status	Date Available	Resource Type	Interview Type	Interview Status

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- Request Information: acts as a header and displays key details related to the Request including Request ID, Job Title, Job Type, Desired Start Date, Hiring Manager, and current Request Status. Notice that the column labels display BELOW these key details.

- Accept or Reject Interviews: is the interactive section and displays a list of candidates with interview activity. Click anywhere in the row to expand it to display the calendar view for that candidate. Click in the row again to toggle back to the condensed view. This section includes details as to Candidate Name and Email, current Candidate Status, Date Available, Resource Type, Interview Type, and current Interview Status. Candidate records can also be easily expanded or contracted by clicking the arrow () located to the left of the Candidate name.

Get Familiar with the Calendar View Features:

The calendar view provides easy access to key interview details.

The screenshot displays the 'Schedule Candidate Interviews' interface. At the top, there is a navigation bar with 'New', 'My Beeline', 'Quick Links', 'Report Gallery', and 'Admin'. Below this is a breadcrumb trail: 'Home (Supplier) : Candidate Compare: 1028-1 - Product Manager'. The main heading is 'Schedule Candidate Interviews'. Underneath, there is a 'Request Information' section with a table:

1028-1	Product Manager	Temporary Worker - US	2/5/2017	Temporary - US	Open
ID	Position	Type	Start Date	Hiring Manager	Status

Below this is the 'Accept or Reject Interviews' section, which is currently expanded to show a calendar view for February 2017. The calendar shows proposed interview times for various dates:

- February 24: 10a
- February 26: 11a, 2p


At the bottom left of the calendar view, there is a 'Reject Interview' button and a note: 'Don't see a time that works?'. The bottom of the interface shows a navigation bar with 'Submitted', '12/19/2016', 'W2 Exempt', 'Onsite', and 'Completed'.

From this expanded display you can review:

- Proposed Interview Times (located in the left-hand sidebar) which shows the total number of requested interview dates, by month.

- Attachments (located in the left-hand sidebar) which displays links to any attached documentation related to the interview. This could be directions to the interview location or any supplemental documentation.
- Calendar where the requested interviews display on the corresponding days and include the Candidate's name and the proposed interview start time. Notice that the Request Information section remains visible at the top of the screen in this expanded view and the Candidate information is highlighted in the horizontal color bar above the calendar layout.

Navigation Features:

- Use the buttons located above the right side of the calendar layout to switch your display from month, week, or day format.
- Use the forward or back navigation buttons located above the left side of the calendar to move forward or back by month, week, or day depending on the active format selection. Click 'today' to reset the calendar display to the current date.
- Click either the View Interview Details link or the interview record link on the calendar to open a pop-up window with detailed interview information. Click either the "x" in the upper right-hand corner or anywhere outside the window area to close the pop-up display.
- Click the attachment file name in the Attachments section (left-hand panel) to download a listed file for viewing.
- Click the down arrow () to the left of the Candidate's name or anywhere in the colored horizontal bar to exit the Calendar view.
- Click the 'Home' text located near the top of the screen beneath the Header Menu to exit Interview Manager and return to your Home screen (or your My To Do task list if you used that access option.)

Accept, Reject, or Propose New Time Slot for Interview Requests:

The action to accept, reject, or propose a new time slot is made from the Calendar screen. You can click View Interview Details and review all the interview details and proposed time slots in a pop-up window (as shown below) but any adjustment will need to be made from the calendar. (Note: You can check the information in the View Interview Details pop-up window throughout the interview process to verify both the current status and any adjustments to interview-related details.)

The screenshot shows the 'Schedule Candidate Interviews' screen in the TempWork VMS. The interface includes a top navigation bar with 'New', 'My Beeline', 'Quick Links', 'Report Gallery', and 'Admin'. The main content area is titled 'Schedule Candidate Interviews' and displays a 'Request Information' section with details like 'Interview Type: Onsite', 'Location', and 'Contact'. Below this is a 'Date and Time Options' table with columns for Date, Start, End, TimeZone, and Selected. A calendar view is shown below the table, with a yellow highlight on Friday, February 24, 2017, from 10:00 AM to 11:30 AM. A 'Confirm' button is visible at the bottom left, and a 'Reject Interview' button is at the bottom center.

Date	Start	End	TimeZone	Selected
2/24/2017	10:00 AM	11:30 AM	(GMT 05:00) Eastern Time (US, Canada)	No
2/27/2017	11:00 AM	12:30 PM	(GMT 05:00) Eastern Time (US, Canada)	No
2/28/2017	2:00 PM	3:30 PM	(GMT 05:00) Eastern Time (US, Canada)	No

To accept an interview:

1. Login to TempWork VMS using your username and password. Your Home screen displays.
2. In the My To Do quadrant, click the number link located within the alert sentence, "You have # New Request task awaiting action". The Review Alerts window opens and displays a list of active Requests.
3. Click the Action drop-down arrow for a specific Request and select View Details. The View Position – Candidates screen displays.
4. Click Schedule Interviews. The Schedule Candidate Interviews (i.e., Interview Manager) screen displays.
5. Click the expand arrow (>) to the left of the Candidate name in the Accept or Reject Interviews section to display the calendar view. (You can click anywhere in the row with the candidate's details to toggle to the calendar view.)
6. Review the information posted in the Proposed Interview Times section. This indicates how many TOTAL time slots have been proposed for the interview.

7. Select your preferred time slot by clicking the invitation link displayed on the respective calendar day. The link will turn green and a new bar link appears adjacent to the calendar.

8. Click the bar link to confirm your acceptance. A pop-up alert bar indicates that your changes were saved and the calendar view closes. The Candidate record now indicates an interview status of "Scheduled." A notice is generated to all designated interview attendees. No action needs to be taken for any of the other proposed interview time slots.

9. Optional. Depending on the Interview Type, you may be asked to provide contact information for the interview before you can complete the confirmation.

- Enter the required information in the 'Provide the information below to proceed' dialog box.
- Click the Confirm bar again to finalize your acceptance.

To reject an interview:

1. Log in to TempWork VMS using your user name and password. Your Home screen displays.

2. In the My To Do quadrant, click the number link located within the alert sentence, "You have # New Request task awaiting action". The Review Alerts window opens and displays a list of active Requests.

3. Click the Action drop-down arrow for a specific Request and select View Details. The View Position – Candidates screen displays.

4. Click Schedule Interviews. The Schedule Candidate Interviews (i.e., Interview Manager) screen displays.

5. Click the expand arrow () to the left of the Candidate name in the Accept or Reject Interviews section to display the calendar view. (You can click anywhere in the row with the candidate's details to toggle to the calendar view.)

6. Review the information posted in the Proposed Interview Times section. This indicates how many TOTAL time slots have been proposed for the interview.

7. If none of the proposed time slots are acceptable, click the Reject Interview button () at the bottom of the screen. A dialog window appears.

8. Enter your comments (required) and click Reject Interview to confirm. The dialog window closes and you return to the Schedule Candidate Interviews screen. Notice that the Candidate record is no longer listed in the Accept or Reject Interviews section. Although you can "accept" a single time slot, a "reject" impacts the interview invitation as a whole and removes the candidate listing from this screen. A notice is generated to all designated interview attendees and the candidate's interview status updates to "rejected". Note: An interview can only be cancelled by the Program Office or the designated Point of Contact.

To propose alternate interview time(s):

1. Login to TempWork VMS using your username and password. Your Home screen displays.

2. In the My To Do quadrant, click the number link located within the alert sentence, "You have # New Request task awaiting action". The Review Alerts window opens and displays a list of active Requests.

3. Click the Action drop-down arrow for a specific Request and select View Details. The View Position – Candidates screen displays.
4. Click Schedule Interviews. The Schedule Candidate Interviews (i.e., Interview Manager) screen displays.
5. Click the expand arrow () to the left of the Candidate name in the Accept or Reject Interviews section to display the calendar view. (You can click anywhere in the row with the candidate’s details to toggle to the calendar view.)
6. Review the information posted in the Proposed Interview Times section. This indicates how many TOTAL time slots have been proposed for the interview.
7. If you want to propose an alternate interview time, click the Don't see a time that works? link at the bottom of the screen. A dialog window opens.
8. Use the data field prompts to designate the Date, Start time, End time, and Time Zone for your proposed interview time slot. Click the + Add Date and Time Option link if you want to include multiple options. Comments are optional.
9. Click the Suggest New Interview Times button to confirm. The dialog window closes and a notice is sent to the interview’s designated Point of Contact. Be Aware! Take care not to click anywhere outside the dialog window BEFORE you click the ‘Suggest New Interview Times’ button or you will lose your entries and have to start over.

Provide Contact Information based on Interview Type:

The list of Interview Types has been expanded to include several Web-based options. Each interface requires contact information specific to its access portal. The Program Office or client manager has the option to require that the candidate and/or supplier provide contact information for the candidate interview based on the following criteria:

Interview Type	Contact Information Options
GoToMeeting™	<ul style="list-style-type: none"> · The GoToMeeting link is provided by the Program Office/Hiring Manager. · This option does not include a checkbox to require the candidate/supplier to provide the contact information.
Google™ Hangouts	<ul style="list-style-type: none"> · The Hangouts ID is provided by the Program Office/Hiring Manager unless the checkbox option to require the candidate/supplier to provide this contact information is selected.

On Site (default)	<ul style="list-style-type: none"> · The interview meeting location information is provided by the Program Office/Hiring Manager. · This is the designated default interview type since it is the most frequently selected method.
Phone	<ul style="list-style-type: none"> · The interview phone number is provided by the Program Office/Hiring Manager unless the checkbox option to require the candidate/supplier to provide this contact information is selected.
Skype™	<ul style="list-style-type: none"> · The Skype ID is provided by the Program Office/Hiring Manager unless the checkbox option to require the candidate/supplier to provide this contact information is selected.
WebEx™	<ul style="list-style-type: none"> · The WebEx invite/meeting information is provided by the Program Office/Hiring Manager. · This option does not include a checkbox to require the candidate/supplier to provide the contact information.
Other	<ul style="list-style-type: none"> · Interview details (including contact information) is provided by the Program Office/Hiring Manager. · This option does not include a checkbox to require the candidate/supplier to provide the contact information.

Notifications

Interview Manager – Interview Requested

Subject: Candidate Interview Approval

Message: Candidate Interview Approval

A Candidate Interview has been submitted for your approval.

Candidate Name: [name]

Candidate Interview Type: [Interview Type]

Interview Times: 2/27/2017 09:00 AM-10:30 AM (GMT-05:00) Eastern Time (US, Canada), 3/2/2017 02:00 PM-03:30 PM (GMT-05:00) Eastern Time (US, Canada), 3/7/2017 10:15 AM-11:45 AM (GMT-05:00) Eastern Time (US, Canada)

Date Submitted: MM/DD/YYYY

Submitted By: [Interview Coordinator]

Request Number: 1033-1

Job Title: Software Development - Product Manager

Location: [Street Address]

Contact Name: [Interview Point of Contact Name]

Comments: [Any comments entered by Interview Coordinator] Example: Directions to the interview location have been attached to the interview record.

Other Information:

Interview Manager – Interview Accepted

Subject: Candidate Interview Scheduled

Message: Candidate Interview Approved

An interview has been scheduled for the candidate below,

Candidate Name: [name]

Candidate Interview Type: [Interview Type]

Date Submitted: MM/DD/YYYY

Submitted By: [Interview Coordinator]

Request Number: 1028-1

Job Title: Software Development - Product Manager

Location: [Street Address]

Contact Name: [Interview Point of Contact Name]

Comments: [Any comments entered by Interview Coordinator] Example: Please direct candidate to Bldg. 200

Selected Interview Time: 2/2/2017 10:00 AM-11:30 AM (GMT-05:00) Eastern Time (US, Canada)

Interview Manager – Interview Updated

Subject: Candidate Interview Updated

Message: Candidate Interview Updated

The candidates interview information has been updated as below,

Candidate Name: [name]

Candidate Interview Type: [Interview Type]

Interview Times: 2/24/2017 10:00 AM-11:30 AM (GMT-05:00) Eastern Time (US, Canada), 2/27/2017
11:00 AM-12:30 PM (GMT-05:00) Eastern Time (US, Canada)

Date Submitted: MM/DD/YYYY

Submitted By: [Interview Coordinator]

Request Number: 1028-1

Job Title: Software Development - Product Manager

Location: [Street Address]

Contact Name: [Interview Point of Contact Name]

Comments: [Any comments entered by Interview Coordinator]

Selected Interview Time:

Other Information:

Interview Manager – Interview New Times Proposed

Subject: New Interview Times Proposed

Message: New Interview Times Proposed

New interview time slots have been proposed for the candidate as below,

Candidate Name: [name]

Candidate Interview Type: [Interview Type]

Interview Times: 2/24/2017 10:00 AM-11:30 AM (GMT-05:00) Eastern Time (US, Canada), 2/27/2017
11:00 AM-12:30 PM (GMT-05:00) Eastern Time (US, Canada)

Date Submitted: MM/DD/YYYY

Submitted By: [Interview Coordinator]

Request Number: 1028-1

Job Title: Software Development - Product Manager

Location: [Street Address]

Contact Name: [Interview Point of Contact Name]

Comments: [Any comments entered by Interview Coordinator]

Interview Manager – Interview Cancelled (Supplier Rejected)

Subject: Candidate Interview Cancelled

Message: Candidate Interview Cancelled

The interview for the candidate has been cancelled. Details as below,

Candidate Name: [name]

Candidate Interview Type: [Interview Type]

Interview Times: 2/6/2017 02:30 PM-04:00 PM (GMT-05:00) Eastern Time (US, Canada), 2/6/2017 02:00 PM-03:30 PM (GMT-05:00) Eastern Time (US, Canada)

Date Submitted: MM/DD/YYYY

Submitted By: [Supplier]

Request Number: 1028-1

Job Title: Software Development - Product Manager

Location: [Street Address]

Contact Name: [Interview Point of Contact Name]

Comments: [Any comments entered by Supplier]

Supplier: Manage Offers

To manage candidate offers:

1. Log in to TempWork using your *user name* and *password*. Your Home screen appears.
2. Click the *number* link within the alert sentence, "*You have # Candidate – Offer Pending tasks awaiting action.*" in the My To Do quadrant on your home dashboard. The Review Alerts window opens. Continue with one of the options provided below.

To accept an offer:

3. Scroll through the Review Alerts list to locate the request with the candidate offer you plan to accept.
4. Click the Action dropdown arrow, then, click View Details. The Candidate Offer screen displays.
5. Review the offer details as presented. Take note of any adjustments to the rate and/or pending background checks.



Background checks are client specific. Review this section of the offer to ensure that all requested background checks are completed as requested. Use the checkbox in the Completed column to verify completed status. Enter Comments as needed. Click OK to save your updates.

6. Click Accept Offer to accept the terms. A Candidate Offer – Accept Offer dialog box appears.

7. Click **Accept Offer** to confirm your acceptance. (Entering comments is optional.) The screen refreshes and returns you to Review Alerts window.

To reject an offer:

3. Scroll through the Review Alerts list to locate the candidate offer.
4. Click the Action dropdown arrow, then, click **View Details**. The Candidate Offer screen displays.
5. Review the offer details as presented. If the terms presented are not acceptable, click **Reject Offer**. A Candidate Offer – Reject Offer dialog box appears.
6. Select a Reason from the selection list.
7. Enter Comments as needed.
8. Click **Reject Offer** to confirm your intent to decline the offer. The screen refreshes and returns you to Review Alerts window.

Supplier: Impersonate User

This document provides supplier users with the steps necessary to impersonate a user.

To impersonate a user:

1. Log in to TempWork using your *user name* and *password*. Your Home screen appears.
2. Click the Admin drop-down arrow located in the Header Menu bar and select **User Administration**. The User List Screen displays.
3. Enter identifying information for the user you need to impersonate, then, click **Search**.
4. Locate the user in the results list and click the checkbox to the left of their name.
5. Click **Proxy** in the action bar. (NOTE: An alternate label may be **Impersonate**.)



Your assigned user role and security permissions determine which users you can impersonate. In general, a supplier user can only impersonate a user who is assigned to the same organization unit at the same, or a lower level, user role.

6. The screen refreshes and displays content as if you were that user. Notice that the Welcome salutation above the Header Menu bar changes to display **Impersonating** and the name of the user being impersonated.



All actions in TempWork VMS are date, time, and user stamped. This includes actions taken while in impersonation mode. The user stamp will indicate the name of both the active user and the impersonated user. All date, time, and user stamps are retained in the archival database for audit purposes.

7. To stop impersonating a user, simply click on their name displayed above the Header Menu bar next to the **Impersonating** label.

Supplier: How to Enter Time on behalf of a non-associate

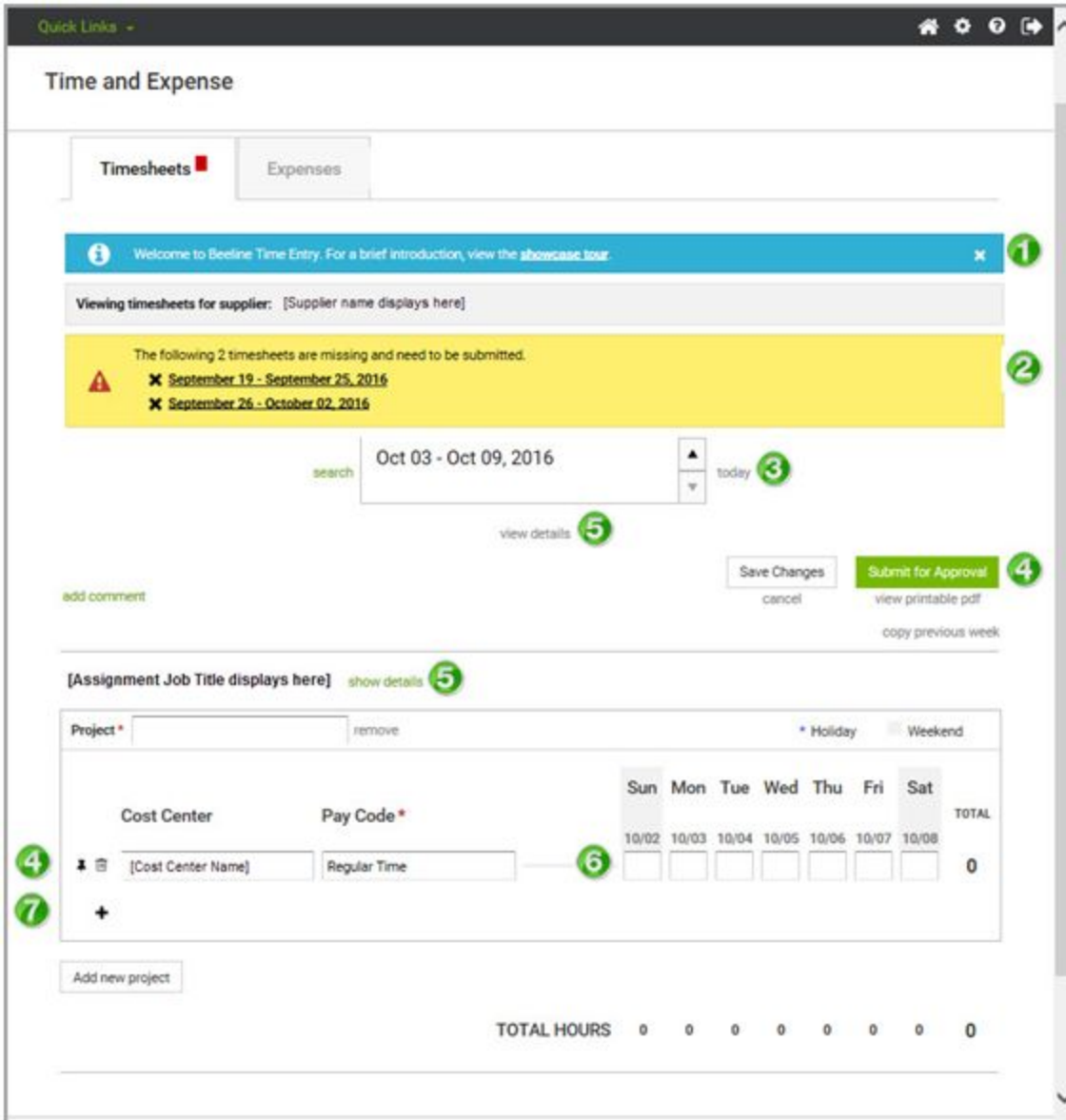
To enter time on behalf of a non-associate :

1. Log in to TempWork using your user name and password. Your Home screen appears.
2. Select Search Timesheets as the search category for the Simple Search option located above the Header Menu bar.
3. Enter key information to identify the non-associate (e.g., Name, TempWork ID), in the Simple Search text box, then click the matching record link when it displays. The screen refreshes to show the timesheets time entry view. Check the Resource section to make sure you are viewing the correct non-associate record.



The TempWork Time and Expense (BTE) module is designed to manage both time and expense based on client preference. Some clients only permit time entry. If you are using a client account that permits BOTH time and expense entry, be sure that the correct tab (i.e., Timesheets, Expenses) is the active tab when making entries.

4. Review the Showcase Tour to get familiar with all the BTE time entry features and options. An overview is provided below.



Time Entry Features Include:

1. Showcase Tour

To become familiar with standard timesheet features, start by viewing the showcase tour. Once you are familiar with these features, click the "x" to hide this section from displaying in the future.

2. Alerts

An alert displays to notify you of any missing or rejected timesheets. Click the timesheet link to view each referenced timesheet. A small red box also displays in the Timesheets tab when there are alerts. The number in the red box indicates the total number of alerts.

3. Navigation

The Date Picker provides for easy navigation between timesheets. Use the “up” or “down” arrows to locate previous or future timesheets. Click the “today” link to return to the current timesheet.

4. Actions (Timesheet)

The Save Changes button lets you make multiple adjustments to your timesheet before you submit it for approval. When you save changes, the Date Picker section updates to a status of “not submitted” and indicates the total number of hours for the week. Multiple changes may be made to a timesheet before submittal.

When the timesheet entries are complete, click Submit for Approval. The status will update in the Date Picker section and the timesheet is forwarded to the timesheet approver. To save a copy of the submitted timesheet, click the “view printable pdf” link and then use the save feature.

Actions (Line Item)

Individual line items in a timesheet include the ability to “pin” them so they appear on each subsequent timesheet. Click the pin icon to select which line items should repeat. Use the trashcan icon to select which line items to delete.

5.Details

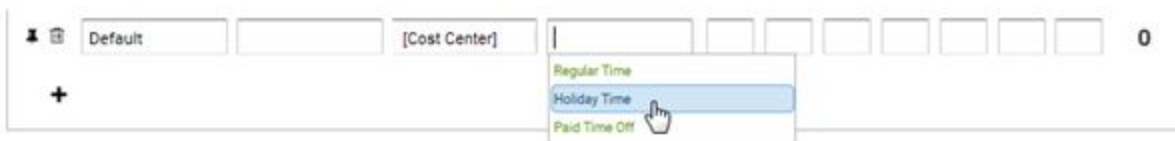
There are two “details” links on the timesheet. The “view details” link below the Date Picker displays a log for timesheet history. The “show details” link next to the assignment job title name displays additional details related to the assignment record.

6. Hours

Enter the total number of hours worked under the date for the matching day of the week. There is an optional Comment box if needed. The total number of hours entered for each day will also display beneath the timesheet entry section and indicate the total for that calendar week.

7. Add New Task or Project

Click the “+” (plus) sign to add a new line item (i.e., task) to the existing project or use the “add new project” link to add a new section (i.e., project) to the timesheet. A new line item needs be added for each task or Pay Code (e.g., Holiday Time or Paid Time Off). To make selections for Project, Task, etc. just start typing and a list of suggestions appears for your selection.



Remember to click Submit for Approval when the timesheet is complete!

Supplier: Reports

Standard Reports

TempWork provides a broad range of Standard Reports based on preset criteria. These Standard Reports were developed in collaboration with our clients. Suppliers are provided with similar, client-approved reports. These reports are designated as SV or Supplier View and only include data specific to each supplier's business organization. Contingent Staffing reports are arranged by type: Sourcing, Management, Administrative, and Financial. Standard reports may be used as base reports to create custom reports. Users have the ability to schedule reports to run once, daily, weekly, or monthly to designated email distribution lists and can designate to send a report only when data is generated. This guide is based on standard TempWork VMS configuration. Client-specific configurations may vary slightly from what is explained here.

To access standard reports:

1. Login to TempWork using your *user name* and *password*. Your Home screen appears.
2. Expand the Reports drop-down selection list in the Header Menu bar.
3. Click to open the report of your choice.
4. *Optional:* Adjust settings in the Parameters section to modify report.
5. *Optional:* Click Create Report update report to match new parameters.
6. *Optional:* Click Add to Favorites to save revised report for future use.
7. *Optional:* Click Schedule Reports to set distribution rules and report schedules.

Schedule Report

The Schedule Reports feature allows the report creator to designate when and to whom a report will be delivered. This feature is only available to client accounts that have active ad hoc 2.0 functionality. Follow the prompts carefully when setting up the schedule options and reach out to the client's program office if you need assistance.

Be sure to complete all format changes to your report before you select this option.

Step 1. Click Schedule Report. A Schedule Report dialog window opens.

Step 2. Use the General section to enter a report title and description.

Step 3. Use the Destination to set delivery method.

Step 4. Use the Format drop-down arrow to select the format of your choice. NOTE: Choices may be limited based on report type.

Step 5. Enter the email address of the user to whom you wish to send this report. If you plan to send it to multiple users, separate the email addresses with a semicolon (;).

The screenshot shows a section titled "Destination" with the instruction "Select where you would like to send this report". It contains three rows of controls: "Destination:" with a dropdown menu set to "Email" and a help icon; "* Format:" with a dropdown menu set to "Excel", a help icon, and a "Compress:" checkbox; and "Culture Name:" with a dropdown menu set to "Current Culture" and a help icon.



Report results are based on the data visibility settings of the person who schedules the report. Reports sent to users with higher visibility rights will only see data that reflects the sender—not the recipient.

Step 6. Enter an email title in the Subject field.

Step 7. Enter an email message in the Body field.

Schedule Type

Select how you would like to schedule this report.

The screenshot shows a control for "* Schedule Type:" with a dropdown menu set to "Now" and a help icon. To the right is a checkbox labeled "Run Only When Data Exists:" which is currently unchecked.

Email

Enter your information to email this report. Email should not exceed 20 MB

The screenshot shows an "Email" section with the instruction "Enter your information to email this report. Email should not exceed 20 MB". It contains four input fields: "* To:" with "msp@noemail.com" entered; a sub-instruction "Enter in email address ; delimited"; "From:" with "msp@noemail.com" entered; "* Subject:" which is empty; and "Body:" which is a large empty text area.

Step 8. Use the Schedule Type drop-down arrow to select how frequently the report will be sent.

Step 9. Check "Run Only When Data Exists" to ensure that a report is sent only when there is data.

Step 10. Review all fields and adjust as needed.

Step 11. Click Schedule Report. The dialog window closes.



To view, edit, copy, or cancel scheduled reports, click the My TempWork drop-down arrow in the Header Menu bar, scroll down and select Scheduled Reports.

Up to 10 reports are saved at any given time. When you save the 11th report, the first report drops from your list

Ad hoc Reports

To access ad hoc reports:

1. Log in to TempWork using your *user name* and *password*. Your Home screen appears.
2. Expand the Reports drop-down selection list in the Header Menu bar.
3. Scroll to the Ad hoc section and click the report title to open the selection of your choice. Your selection opens in Report Builder.
4. Use the Report Builder features to adjust as needed. View the showcase tour for an overview of this feature. A link to the showcase tour is located near the top of the screen.