Vendor Management System User Guide

Oregon Managed Service Provider for IT Professional Services

Agreement to Agree #0483

The Covendis Help Desk is available from
Monday through Friday 8:00 a.m. – 5:00 p.m. PST
Telephone 1.855.268.3634 or Email to ormsp@covendis.com

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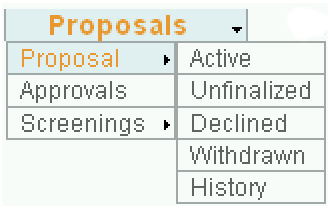
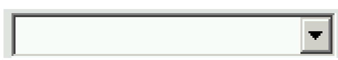
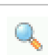
Security Roles & Rights

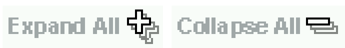
ROLE	ACCESS	DESCRIPTION
Buyer Admin		Full Access. Highest level security role which has full access to all pages of the Authorized Purchaser application including setup screens. This user is an internal contact for resolving routine issues which may arise for other authorized users. This user has the ability to view Main Reports and Data Cube Reports. (See page 26 for Report Types)
Buyer Read Only		Viewing Only. User has the ability to view all of the pages as a Buyer Admin. User does not have the ability to add or delete any information from the System.
Engagement Manager		Has similar access as a Buyer Admin with the exception of the setup screens and Add User pages. The user may view reports containing data for Subcontractors which the user is listed as a contact.
HR Manager		Same abilities as the Engagement Manager.
Business Manager		Similar to the Engagement Manager and HR Manager role, but unable to access Evaluations and Time and Expanse bills.
Support Leader		This role is designed primarily for running reports. User has the ability to access most of the setup screens with the exception of the approval setup and Subcontractor pricing agreement pages.
Accounting		Allocates and authorizes invoices.
Accounts Payable		Views, authorizes, and allocates invoices only.
Project Support		Views time and expense bills.
Finance Manager		May access reports, view, authorize, and allocate invoices.
Time Bill Approver		Has the ability to approve time bills for a Subcontractor. May view and complete evaluations.
Restricted Time Bill Approver		Has the ability to approve time bills for a Subcontractor. May also view and complete evaluations. Unable to view the Subcontractor's rates on any time and expense bill.

Vendor Management System (VMS) Legend

Throughout the system certain actions or messages are used to facilitate events. Some actions even act as shortcuts to getting to other functions. To make the material in this guide more user-friendly, consistent use is also made of standard text formats. These conventions are described below:

<table>
<tr><td>
</td><td>At the top of every page the application provides a flexible and easy to use navigation menu. If the main menu has a black down arrow to the right of the caption, this indicates that there is a sub menu below the main. If the sub menu has a black right arrow next to the caption, this indicates that there is a sub menu below that. Active menus with hyperlinks will change from an arrow to a hand. Once the arrow changes to the hand this link is clickable.</td></tr>
<tr><td>
</td><td>A red asterisk indicates that the marked item is required.</td></tr>
<tr><td></td><td>This is a drop down list box. It contains a list of choices the user will select from. Click on the desired option to select it. The value will appear in the field.</td></tr>
<tr><td>
</td><td>Multi-select search fields are located at the top of each list page and operate in the same way as Look-up fields.

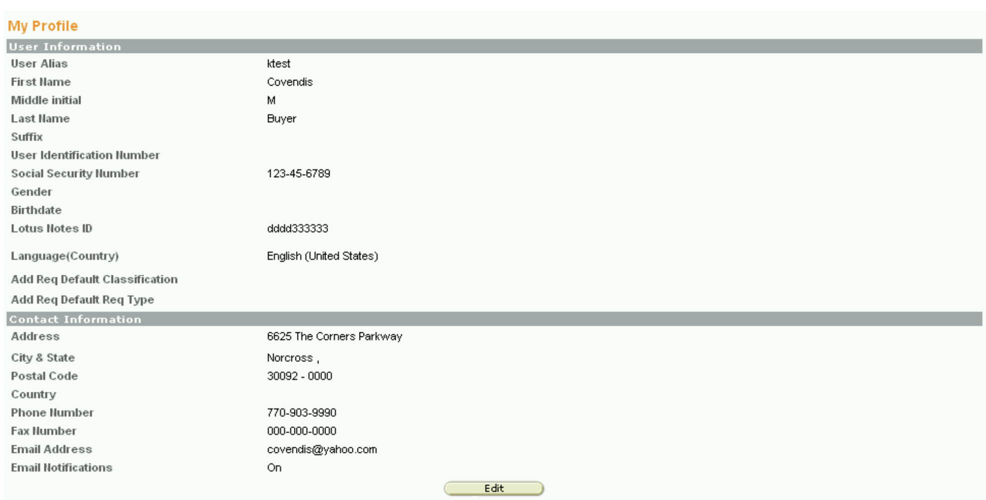
When selecting or entering options from the Search window, you will be able to click on more than one option. When you have finished adding entries, click the Search link to return the proper results.</td></tr>
<tr><td>
</td><td>The top left portion of each screen contains the name of the current screen, or page. To return to a previous screen or page, without clicking on the navigation button, click on any of the Save, Cancel or Return buttons at the bottom of each page.</td></tr>
<tr><td>
</td><td>Oval command buttons will appear at the bottom (and sometimes the top) of data entry pages. Examples include save, cancel, next, undo, return. To save data entered in the system, the Save button must always be clicked. The Cancel button will discard your changes and the work will not be saved. The Next button will save the data on the page and take you to the next page.</td></tr>
<tr><td></td><td>This icon when clicked on deletes any data from the system, which has already been saved.</td></tr>
<tr><td></td><td>Pages that look fine in Internet Explorer do not always print out correctly. There may be toolbars or menus that are not needed when printing. Most pages have a printable version. To access this click on the icon shown to the left. This will open another page from which you can print. To do this click on File | Print and then press the Print button.</td></tr>
<tr><td></td><td>This icon when clicked on inserts a new activity into the page or table you came from.</td></tr>
<tr><td></td><td>Sometimes the tables for each page contain large amounts of data and can’t be displayed all at once.</td></tr>
</table>

	This icon when clicked on displays a view page of all the details in a single grid.
	This icon when clicked allows you to update or attach a file.
	This icon when clicked allows you to pick from a list of options to update the record you came from.
	This icon when clicked allows you to edit the details of a particular record.
 	These icons when clicked allow you to either expand or collapse a particular table on the detail page.

Maintaining Your Profile

Access to your account has been set up by an account administrator. The first time you login, it is strongly recommended that you confirm the entries in your account profile. Click on the **My Profile** button on the top menu bar above your name.

1. Before you login for the first time though, you will be prompted to change your password. Enter your user ID and temporary password, and then enter a new password that you will easily remember. Type the password a second time to confirm and click **Save**. (Note: your password can be 5-10 alphanumeric characters.) Your password will expire in the timeline set by your System Administrator and you will be prompted to choose a new one. After three successive attempts to enter an incorrect password, your user ID will be locked for security purposes. If this happens please select the **Forgot Password** option on the Login page and a new password will be emailed to the address on record.
2. After you select the My Profile menu. The My Profile screen with your current account data will appear. Verify all information, complete any missing items and click **Save**.



My Profile

User Information	
User Alias	ktest
First Name	Covendis
Middle initial	M
Last Name	Buyer
Suffix	
User Identification Number	
Social Security Number	123-45-6789
Gender	
Birthdate	
Lotus Notes ID	dddd333333
Language(Country)	English (United States)
Add Req Default Classification	
Add Req Default Req Type	
Contact Information	
Address	6625 The Corners Parkway
City & State	Norcross ,
Postal Code	30092 - 0000
Country	
Phone Number	770-903-9990
Fax Number	000-000-0000
Email Address	covendis@yahoo.com
Email Notifications	On

Edit

Turn Email Notification On/Off

Any user can manage the email notification process by electing to turn this notification on or off. System users receive multiple email notifications from vendor proposals to time approval and each system user can turn this notification on or off by following these steps:

1. Select the My Profile  menu.
2. Select the On or Off radio button next to the Email Notification option.
3. Click Save.

Company Profile Setup (Buyer Admin Role Only)

If you have a Buyer Admin role, you will have a Setup menu. The details in the Profile section determine most of the company details. Please validate the information in the Profile by following these steps:

1. Select the Setup menu. You will begin on the Profile page. Complete all the required company information marked with an asterisk (*), including Company name, Tax ID, Language (Country) and Time Zone.
2. For the Email Notification Information fill out the Application URL (where you want users to login), Application Name (SPA Application), Email Notification From (the From address for email notifications), Customer Care Email Address (your companies CC address), and Customer Care Phone Number (your companies CC phone number).
3. Under Requisition Information, select the default classification and default requisition type that is most often used. (You can also default this per user as well, see Add New user. If there are no classifications to select from please see below #4.)
4. Check all the boxes corresponding to desired requisition requirements.
5. Enter the default start and end times and a description for each shift, if applicable.
6. Please note that when selecting the check box for cost centers - if both the "Cost Center Required" and "Use Folder Cost Center" Check boxes are selected the Folder Cost center will be the primary cost center.
7. The Buyer has the option of allowing Subcontractors and Candidates the ability to enter tax items associated with each activity on the expense bill by checking the Allow Taxes for Expenses check box.
8. If desired, enter a standard message that should appear in each candidates onboarding email within the Onboarding Information section.
9. Check off the Use Cost Center for Time/Expense Bills options if you wish to allow candidates to charge time and or expenses to company Charge to Cost Centers.
10. Invoice Information section - Refer to Control Engagement Manager's Access to Invoicing below for further details on this option.
11. If you Allocate Invoices, choose the appropriate drop down to allocate on. Net – Taxes allows you to allocate only the invoice net amount, excluding taxes. Gross allows you to allocate the gross invoice amount not including taxes. Net allows you to allocate on the net amount that includes taxes.
12. In the Security Information section, enter the length of time (in days) after which the users password expires.
13. If you wish to hide the users Tax ID or Social Security Number, check off the boxes appropriately.
14. If desired, enter additional comments in the box provided under Miscellaneous Information.
15. Click **Save**.

Control Engagement Manager's Access to Invoicing (Buyer Admin Role Only)

The Buyer Administrator may wish to restrict the Engagement Manager's ability to view invoices. In addition, if Engagement Managers are able to view/allocate invoices, these invoices are only from those folders, which they manage. To control the Engagement Manager's access to the invoices, follow these steps:

1. As a Buyer Admin, select the Setup menu.
2. Check the "Allow Engagement/Bus.Mgr. to view Invoices" check box.
3. Un-check the check box to turn this capability off.

Allow Expenses (Buyer Admin Role Only)

The Buyer can choose whether or not to allow candidates' to submit expense bills for approval. To allow expense bills follow these steps:

1. As a Buyer Admin, select the Setup menu.
2. Check the "Expenses Allowed" check box.
3. Un-check the check box to turn this capability off.
4. Click Save.

Note: *If you wish to turn this off at the Profile level it will deactivate all Classifications and Types that have Expenses Allowed.*

Setup Company Locations (Buyer Admin Role Only)

Business Addresses are your company's main address types usually associated with Corporate and Billing locations. Work Addresses are those addresses that are associated with either branch locations and or working facilities. Business Addresses and Work Addresses can be the same however; they will need to be added to both menus.

1. As a Buyer Admin, select the Setup menu.
2. Select the Locations menu, select the Business Addresses sub menu and then the address you wish to view. Enter the required information and click Save. To insert additional business addresses, click Insert, select an Address Type, enter the required information and then click Save.
3. Select the Work Addresses sub menu.
4. Click Add New Address. Enter the Location, Region and Address.
5. Click Save.
6. Select the Phone / Email menu. Click Insert and enter the required information.
7. Click Save.
8. Select the Regions sub menu and enter the appropriate regions. To insert additional Regions, click Insert, enter the required information, then click Save.

Setup Custom Fields (Buyer Admin Role Only)

Custom fields allow you to setup certain internal fields at the Requisition, Contract and User level. To setup custom fields, follow these easy steps:

1. As a Buyer Admin, select the Setup menu.
2. Select either the Requisitions or Users Custom Fields menu.
3. To add a new custom field, click the insert a new custom field icon at the top right.
4. Enter the Order# in which you wish this field to appear in and fill in the caption and description of the field.
5. Select to either have this displayed as a Section Header, Check Box, Text Box, Pick List, or Drop-down and enter the max character length. *To setup a Pick List or Drop-down, you must first create a List Group***.** *Choose a list group by selecting the binoculars in the List Group column then Select link by the List to choose.* If not setting up a Pick List or Drop-down, skip to step 13 below.
6. To setup a List Group, select List Group from the Custom Fields menu.
7. Select the 'Add New List Group' link.
8. Enter a List Group name and Description and Save.
9. Select the Edit link under the Values column.
10. Select the 'Add New Value link.
11. Enter a Group Value and Description and Save. Repeat Steps 10 & 11 to add more Values.
12. Select the *Custom Fields>Requisitions* menu and follow steps 3 through 5 above.
13. If you wish to display this on either the Requisition or the contract please check these options. If this field is required please check this option as well.
14. Click Save.
15. If you wish to update all existing requisition/contract captions, click on the icon. If you wish to inactivate the custom field click on the icon.

Add Approval Roles (Buyer Admin Role Only)

Various organizational structures and reporting hierarchies require that information workflow go from one level to another for review or approval. Prior to creating these steps a company is required to define the different levels of approval roles. To create requisition approval roles follow these steps:

1. As a Buyer Admin, select the Setup menu.
2. Select the Approvals menu and then the Approval Roles sub menu.

3. Click Insert and enter the approval name and description. Click insert again to add another approval role. If you made a mistake click Undo.
4. Click Save.
5. To delete the approval role, click the delete icon to the far right. Delete is only allowed if this role has not been assigned to an approver already.

Add an Approver (Buyer Admin Role Only)

Once the approval roles are created at the Setup level you may now assign approvers to these roles. If approval roles have not been created please refer to the Add Approval Roles above. Approval roles assigned to a user enable him/her to participate in the approval workflow process for requisitions, proposals and/or invoices. To assign an approval role to a User please follow these steps:

1. As a Buyer Admin, select the Setup menu.
2. Select the Approvals menu and then the Add Approvers sub menu.
3. Select the role you wish to add for these users.
4. Select the approver from the list of active Users.
5. Click Save.
6. To update an already existing approvers role or make inactive click the edit icon to the right, update and click Save.

Note: *If your system administrator has enabled Email Approval please follow these steps to assign an approval role to a system or non system user:*

1. As a Buyer Admin, select the Setup menu.
2. Select the Approvals menu and then the Add System or Non System Approvers sub menu.
3. If you selected the System Approvers menu; select the role you wish to add for these users.
4. Select the approver from the list of active Users.
5. Click Save.
6. If you selected the Non System Approvers menu; enter the name, email address and role for the approver and click Save to update the approvers list. Click Insert to add another approver or if finished with adding the approvers click Return to return the approver list.

Add Approval Steps (Buyer Admin Role Only)

Various organizational structures and reporting hierarchies require that information workflow go from one level to another for review or approval. Each company can define the steps that requisitions are required to flow through before being posted to the Subcontractor community or accepted and onboarded. To create requisition/proposal/invoice approval levels follow these steps:

1. As a Buyer Admin, select the Setup menu.
2. Select the Approvals menu and then the Add Approval step sub menu.
3. The Add Approval Steps selection page displays. From the drop down list select an approval type of either Requisition or Proposal or Invoice. Select the Requisition Type and Classification. i.e. Time & Materials, Information Technology
4. Assign this step a unique step number. This is the order in which the approval will have to go through.
5. Select an approval role from the drop down list. The approval roles were setup above under Add Approval Roles.
6. Enter step name and description.
7. You may wish to select a default approver. By clicking on the magnifying glass all users with an assigned approval role from the company user roster will display.
8. Click Save.
9. Enter an amount for estimated spend or the max rate or duration or invoice amount. The values entered here will determine the threshold for when a requisition/proposal/invoice of this type and classification requires approval.
10. Click Save.

Edit an Approval Step (Buyer Admin Role Only)

1. Select the Setup menu and then click the Approvals sub menu.
2. Select the type of approval step and the corresponding requisition type you wish to edit.
3. Click Next.
4. You may also select view all steps and the entire list of approval steps will display.
5. From the list of approval steps, select the approval step you wish to edit. By clicking the blue "Edit" link on the left hand side of the approval step.
6. Make the required changes; ensure the active flag at the bottom is selected.
7. Click Save.
8. You will be returned to the list of approval steps.

Deactivate an Approval Step (Buyer Admin Role Only)

1. Select the Setup menu and then click the Approvals sub menu.
2. Select the type of approval step and the corresponding requisition type you wish to edit.
3. Click Next.
4. You may also select view all steps and the entire list of approval steps will display.
5. Click the blue "Edit" link next to the approval step you wish to deactivate.
6. The Approval step will display.
7. Uncheck the Active flag at the bottom of the step listed.
8. Click Save.
9. You will be returned to the list of approval steps.
10. Checking this flag again at anytime may reactivate this step.

Add a Message (Buyer Admin Role Only)

1. Select the Setup menu icon and then click the **Messaging** menu**.**
2. Click the **Add Message** link**.**
3. Enter the message in the **Message** field.
4. Select the Urgent checkbox if the message is urgent.
5. If you wish for those that view the message to accept the message, check the *Require Acceptance* box
   Users may not proceed with normal actions in the system upon initial login before accepting the message if this box is checked.
6. Select the **Start** and **End Date** for the Message to appear (if needed).
   Do not enter an **End Date if **Require Acceptance** is checked.**
7. Enter the **Order** number in which the Message will appear on the Messaging section of the Home Page.
8. Select the **Attach/Modify File** link attach a File if desired.
9. In the **Viewable By** field, choose if the message will display either to Buyers, Subcontractors, Candidate/Contractors or All.
10. Select the User **Role** the message will display to *or* choose the All option to display to All User roles.
11. Click **Save**.
12. View the message at the bottom of the Home page (icon  in top right of page).

Add a New User (Buyer Admin Role Only)

It is the responsibility of the Buyer Administrator to add users who need access to the application. If you do not have the Users menu, contact your System Administrator to add a new user. Buyer Administrators, please follow these easy steps:

1. Select the Users menu.
2. Click Add New User.
3. Select the default role you would like to add.
4. Complete the registration of the user by entering all of the required information.
5. Under the Enter Setup Information area, enter the Default Classification and Default Req Type that will be used during the Add Req process. This is only applicable to those roles that can Add a Requisition.
6. Click Save.
7. If the e-mail address is correct, click OK; otherwise click Cancel and correct the email address for the user.

8. In the User Registration screen, click Insert to enter additional users.

   Note: *Each new user will automatically be sent a welcome email giving them their Login ID and temporary password, along with instructions for how to access the application.*

Edit an Existing User's Email Address (Buyer Admin Role Only)

The Buyer Admin has the ability to edit and existing User's email address. In order to do this, please follow these steps:

1. Select the User Roster menu.
2. Click the User Name of the user whose email address you would like to edit.
3. The User Details page displays. Enter the correct email address.
4. Click Save.

Review Dashboard Action Items (Buyer Administrator, Engagement Manager & Business Manager Role Only)

Every time you log in to the application, you will begin your session on the Dashboard screen. This dashboard is intended to keep you up-to-date with action items and activities that you need to monitor and most frequently use in the application. It is refreshed in real-time and every change in the application that affects dashboard items is updated as the change occurs.

The items on the dashboard are all hyperlinks. These links take you to the appropriate areas of the application where you might need to take action. For example, if the dashboard shows that you have three (3) time to approve, you can click on the number "3" link, and you will be directed to the three time that need to be approved.

Add a New Folder and Requisition

The application uses a folder/requisition/candidate hierarchy for data setup. This means that all requisitions are assigned to a folder and all candidates are assigned to a contract for that requisition. Once a folder has been set up, you may add as many requisitions and contracts under that folder as you need. To set up a folder and requisition, follow these steps:

1. Select the Folders menu.
2. Click Add Folder.
3. Enter all required information about the new folder and click Next to add a requisition.
4. Verify the pre-filled Classification for the requisition. The classifications indicate what type of requisition you will be submitting to the Subcontractors. Also, if your pricing agreements are configured with sub-agreements the classification selected at the requisition level will determine which Subcontractors receive the posted requisition.
5. Once you have selected the requisition classification, choose the type of requisition you wish to create. The options are:
6. · Group Time & Materials
   · Project/Milestone
   If your company's pricing method is based on rate cards, there will be a rate card section on the Add a requisition page. Once you select the classification you will then need to select the correct rate card from the list of rate cards by selecting the magnifying glass icon.
7. If you wish to attach files, select the "Attach Files" check box.
8. If you wish to add multiple charge to cost centers ensure the check box is selected.
9. The Add Qualifications check box will default to the same value as the Allow Qualifications check box set at the Classification Requisition Type level within the Setup. If you wish to edit the default value you may do so.
10. Choose between creating a new requisition (click Next) or to copy from a template that has previously been created (click Req Template).

11. If you indicated that you wanted to use a template, you will be brought to a list of existing templates for your company for that classification (i.e. all Clerical/Administrative templates will be displayed). Choose the appropriate template and the requisition information from the template will be pre-populated.
12. If you indicated that you wanted to create a new requisition, you will be brought to a blank requisition details screen.
13. If there is a rate card on file for the requisition, much of the billing, work schedule and location information will be pre-filled. Additional Requisition requirements and posting preferences may also be pre-filled, depending on whether your company administrator specified parameters for all requisitions.
14. Complete the required information as applicable.
15. Enter shift information, including shift start and end times. If the shift is active, then click the appropriate check box.
16.
17. of all your Subcontractors will be available for selection.
18. Click Next.
19. Enter the Assignment and Billing information (Name, Index, PCA, etc.). Select the manager which will approve the time submitted in the VMS.
20. Select the appropriate approver for each approval step (There may be default approvers listed).
21. If you selected the "Attach Files" check box, you have the ability to link a file that details the requisition description and requirements. Click Next.
22. If the Add Qualifications check box is checked the Assign Qualifications page will display during the requisition creation process. Complete the qualifications information, if applicable to the type of requisition you are filling. Click Definitions to view an explanation of the competency levels. Click Next.
23. If you are ready to post the requisition, click Post Requisition. If not, click Save. Selecting Post Requisition will send the requisition through the approval steps.

Add a New Manager to an Existing Folder

Once a folder has been set up, you may add as many managers to the folder as you need. If you have an existing folder to which you want to add a new manager, please follow these steps:

1. Select the Folders menu.
2. Click on the name of the folder to which you would like to add a manager.
3. Scroll to the section labeled Folder Team and click the Add New Manager link  from the right hand side of the page.
4. Click the magnifying glass and select a manager.
5. Select whether or not you want this individual to also "Receive T&E Email for All Reqs Within Folder". If unchecked only the Contract Contacts will receive Subcontractor/Candidate T&E email notifications.
6. Click Save and return to the list of managers for the folder.

Add a Folder Manager to *Active* Contract within a folder

1. From the *Folders* Menu select the **Managers** sub-menu
   (This menu lists Folders, Reqs and Contracts managed for all Folder Mgrs)
2. Enter folder name in search field. *This action lists all managers on that folder team.*
3. Select 'Contracts Managed' number link next to mgr name you wish to add.
   The screen will progress to a ***'Contracts Managed By'*** *page.*
4. Select the 'Add New Contracts for this Mgr' icon.
5. Click the checkbox to the left of the contract(s) to add.
6. Select Ok then click Save.

Inactivate or Delete Folder Manager from Active Requisition or Contract

1. From the *Folder* Manager sub-menu, search by manager name.
2. Select the Contract or Reqs Managed number link from Folder Managers page.

3. Inactivate folder mgr from active reqs or contract by checking *boxes* in Manager Active column.

   (***Note:*** *If no box appears, the manager is the only mgr name active on the req. You must add a new mgr on the req first or reactivate an inactive mgr shown on req, then follow step 3 above.*

Delete a req contact from an active contract for a req by clicking red ***X*** *icon to the right of the manager name.*

Add or Remove a Requisition Contact

Once a requisition has been created, you may add as many contacts to the requisition as you need. These contacts are setup so that they may receive email notifications pertaining to the details of that requisition. E.g. Subcontractor proposal submission email. If you have an existing requisition to which you want to add a new contact, please follow these steps:

1. Select the Requisitions menu.
2. Click on the name of the requisition to which you would like to add or edit a contact.
3. Scroll to the section labeled Contacts and click the Add New Contact link from the right hand side of the page.
4. Check off the contacts you wish to add or click the Select All icon on the bottom left and click Ok.
5. If you wish o add this contact to all contracts for this requisition please click the "Add this Contact to all Contracts for this Req" icon on the right hand side of the page.

Deactivate/Activate a Folder

A folder may be activated/deactivated at any time by changing the status of the folder. To change the status of the folder, follow these steps:

1. To deactivate a folder select the Folders menu, select the Active menu and select the folder you wish to deactivate. Choose the appropriate Folder Status from the drop down list and click Save.
2. To activate a folder select the Folders menu, select the Inactive menu and select the folder you wish to activate. Choose the appropriate Folder Status from the drop down list and click OK.

Add a New Requisition Template

The ability to setup requisition templates prior to adding a requisition in the system saves the buyer user time and prevents users from posting invalid requisitions. To create a new Requisition Template, follow these steps:

1. Select the Requisitions menu.
2. Select the Templates menu.
3. Click Add Template.
4. Select the Classification you wish to use for the template.
5. Select the Options of whether you would like to Attach Requisition files or Add Qualifications.
6. If you have existing templates in the system and wish to copy from one, click Copy from a Template and select an existing template. The template details will be pre-filled but you may edit the template with your new requirements. Click Next to proceed with adding Documents or Qualifications and Save the template.
7. If you did not Copy from a Template, select Next and complete the required requisition template information.
   Note: *If you wish to allow other users within the organization to use this template check Yes for the* ***Global Template.*** *If you do not wish to make this template Global you will be the only user with the ability to select this particular Template during the Add Req process.*
8. Click Next.
9. Attach files and add Qualifications if you chose to do so.
10. Name the Template and give it a Description.
11. Click Save to complete the process.

Add a New Requisition to an Existing Folder

Once a folder has been set up, you may add as many requisitions to the folder as you need without setting up a new folder each time. If you have an existing folder to which you want to add a new requisition, please follow these steps:

1. Select the Requisitions menu and click the Add Requisitions sub menu.
2. Select the name of the folder to which you would like to add a requisition.
3. Select a Classification for the requisition i.e. Information Technology.
4. You must also choose between creating a new requisition (click Next) and setting this requisition up from a template that has previously been created (click Select a Template).
5. If you have indicated that you wanted to use a template, you will be brought to a list of existing templates for your company for that classification (i.e. all Clerical/Administrative templates will be displayed). Choose the template to be used and you will be taken the next screen with the requisition information from the template pre-populated.
6. If you indicated that you wanted to create a new requisition and not use a template, you will be brought to a blank requisition details screen.
7. Complete the required information as applicable paying close attention to the * required fields including, quantity and billing information. If there is a rate card on file for the requisition, much of the billing, work schedule and location information will be pre-filled. Requisition requirements and posting preferences may also be pre-filled, depending on whether your company administrator specified parameters for all requisitions.
8. If approvals are required select the appropriate approver, click Next.
9. If you chose to attach a file please do so and click Next.
10. Complete the qualifications information, if applicable to the type of requisition you are filling. Click Next.

Move a Requisition to an Existing Folder

Once a requisition has been created, you may wish to move this requisition and the associated contracts to a new folder. This may occur during a reorganization of your business structure or you simply made a mistake when setting up the requisition. If you want to move requisition to a new folder, please follow these steps:

1. Select the Requisitions menu.
2. Click the requisition you wish to move.
3. Click the binoculars icon next to the folder name.
4. Select the folder you wish to move to and click Select.

   Note: *Once this requisition is moved to his new folder all of the history is moved as well. This includes any proposals and contracts along with those managers and req/contract contacts. If you made a mistake by moving this requisition you may follow the steps above to move it back.*

Requisition Approval (Buyer Administrator or Approval Role Only)

Depending upon the requisition approval steps and roles setup in the Setup, different users may need to approve the requisition. Based upon the approval hierarchy setup, the requisition flows through the approval workflow from one approver to the next. Any user with the appropriately assigned role is able to approve the requisition. To approve a requisition, follow these steps:

1. Select the Requisitions menu.
2. Select the Approvals sub menu.
3. Click on the name of the requisition you wish to view from the Requisition Approval list.
4. Click the Approve button to approve the requisition.
5. If the requisition is rejected, the user must enter a reason and then click Reject.

Deactivate/Activate a Requisition

A requisition may be deactivated/activated at any time by changing the status of the requisition. To change the status of the requisition, follow these steps:

1. Select the Requisitions menu.
2. Select the Active Req sub menu.
3. Select the name of the requisition you would like to deactivate/activate from the requisition list. Active requisitions are those with a status of Planned or Active. Inactive requisitions are those with a status of Hold, Assignment Completed, Contract Terminated or Candidate Terminated.
4. Choose the appropriate status from the drop down list and then click Save.
5. An email notification will automatically be sent to all notified Subcontractors indicating that this requisition has now either been closed or reactivated.

Associate Two Requisitions

This feature allows old requisitions to be linked to new requisitions for historical purposes. This allows you to keep an audit trail of previous requisitions associated to the new requisition you are creating. To link one requisition to another please follow these steps:

1. Select the Requisitions menu.
2. Select the requisition you would like to link to another requisition.
3. Scroll to the section labeled "Linked Requisition Information".
4. Select the magnifying glass icon next to the text "Parent Requisition".
5. This will display a list of all previously entered requisitions for the company.
6. Select the appropriate requisition.
7. You will be returned to requisition details.
8. Enter a reason for associating the two requisitions.
9. Click Save.

Create a Best Resource Match

Best Resource Match is a feature that helps the Buyer company gauge how close a proposal comes to the required qualifications on a posted requisition. The term "Best Resource" suggests that the Buyer is quickly able to look at all of the proposals on the active proposal list from various Subcontractors and decide which ones are potentially the best match for the requisition. Proposals that more closely match the requested or required qualifications have a higher score, expressed as a percentage. The Buyer is able to sort proposals by score or may selectively click and view each proposal for further details on which qualifications were requested that the proposal matched. It is important the Buyer request For proposals to be scored.

The Buyer Company must specify the desired qualifications at the time of creating a requisition. Please follow these steps:

1. Please see instructions above on how to create a new requisition.
2. On the initial add requisition page select the check box to "Add Qualifications"
3. Click Next.
4. Complete the Add Requisition page.
5. Continue through the pages until you reach the Qualifications page.
6. Select the desired qualifications for the requisition on this page.
7. Post the requisition. (Note * The requisition may be required to go through an approval process depending upon the approval steps previously determined.)

   Once the requisition is posted to the Subcontractor - the Subcontractor user performs the proposal process for the requisition by selecting the appropriate candidate. Once the Subcontractor selects Submit Proposal with the best individual the Buyer may rely on the Match% column in the active proposal list to determine the closest match of the desired skills and proposed candidate.

Respond to a Proposal

As Subcontractors propose candidates to fill your open requisitions, the proposal process begins. You will be notified via email when the MSP submits proposals over your review. To respond, follow these steps:

1. Select the Proposals menu.
2. Select the Active menu.
3. To review the specific details of the proposal, click on the name of the requisition.
4. Once you've reviewed a specific proposal, you may respond to the Subcontractor by choosing one of the options at the bottom of the page: Accept, Decline or Counter (see further instructions below for Counter). If you do not wish to respond to the proposal, simply click Return to return to the list of proposals.

To Counter a Proposal:

1. Select the **Counter** button at the bottom of the Proposal or from the sliding menu on the right.
2. Change the rates if needed on the Proposal Details page displayed.
3. Update the Estimated Start and/or End Date under the **Work Schedule and Billing Information** section. This will automatically update the Start and End Date at the top of the screen.
4. Update any other needed data on this screen.
5. Click Submit.
6. The Subcontractor Contact listed on the original Proposal will receive an e-mail notice for the Countered Proposal which they may Accept, Reject, or Counter.

Review a Proposed Candidates Qualifications

When a Subcontractor proposes candidates for your review, they may complete an online profile of the Candidate or attach a file that contains information about the candidate. If you would like to review this information, follow these steps:

1. Select the Proposals menu.
2. Click on the candidate alias to review the candidate's online resume, if provided.
3. For Group Time and Materials requisitions drill down into the proposal details, and then click the candidate name to review the candidate's online resume, if provided.
4. To view the details of an attached resume file, click View Resume under the Candidate Alias on the Skills Summary page.
5. Click Return to return to the active list of proposals or for Group Time and Materials to return to proposal details.

Create a Screening Template

You may set up screening templates that can be used each time you screen a candidate. To create a new template, follow these steps:

1. Select the Proposals menu.
2. Select the Screenings Templates menu.
3. Click Add Template to create a new screening template.
4. Complete the template by entering a list of questions and click Save.

Screen a Candidate

As part of the process of assessing candidates proposed by Subcontractors, you may send the candidate a list of questions, called a screening, to obtain additional information. To send a screening questionnaire to a candidate, follow these steps:

1. Select the Proposals menu.
2. Select the Active menu.

3. Click the "S" next to the name of the candidate you would like to screen.
4. For Group Time and Materials screenings drill down into the proposal details, and then click the “S” next to the name of the candidate you would like to screen.
5. If you would like to use a Template to create your screening, click on the magnifying glass to select a screening template.
6. If you do not wish to use a Template then you may type in the questions in the spaces provided.
7. If you would like to attach a file, click on the 'Attach/Update Screening File' link and select the appropriate document.
8. Complete the screening form by including an expiration date to indicate the time by which you need a response.
9. Click Send to save your work and send a notification automatically via email to the Candidate/Supervisor.

    Note: *The notification email will be sent to the Candidate, with a copy to their Supervisor, only if the Candidate has the authority to respond to screenings. Otherwise, the Supervisor will complete the screening.*

Review the Status of a Screening

The Subcontractor or Candidate asked to complete a screening has the option to respond or decline the screening. If they choose to decline, you will be notified via email of this decision. If they choose to respond, then you will receive an email notification that the response is available for you to view. To view the responses, follow these steps:

1. Select the Proposals menu.
2. Select the Screenings menu.
3. The list of screenings you have sent to Candidates will be displayed along with their status.
4. Select the screening you want to review.
5. If you like the responses and wish to interview the individual click Interview. Fill out the interview details and click Send.
6. From the Screening Response page click Return to return to the list of screenings.

Interview a Candidate

As part of the process of assessing candidates proposed by Subcontractors, you may request to interview the candidate either by phone or in person. To send an interview request, follow these steps:

1. Select the Proposals menu.
2. Select the Active menu.
3. Click the proposal id number link next to the name of the candidate you would like to interview.
4. Select the Request Interview icon from the line item where the candidate name appears.
5. Provide all of the necessary information on the **Request for an Interview** page. Select the time from the Pick a time! icon *or* enter the time in the entry box {be sure to enter the format of the time as time, followed by a space then either AM or PM. (i.e. 9:00 AM or PM)}.
6. Click **Send** to send the interview request via email to the Candidate/Supervisor. Interview and Screening requests may be sent simultaneously by selecting the **Send & Screen** button instead of the Send button at the bottom of the interview page. The screening page will appear if this option is selected.

    Note: *The notification email will be sent to the Candidate, with a copy to their Supervisor, only if the Candidate has the authority to receive interview requests. Otherwise, the interview request will be sent to the Supervisor.*

Approve a Proposal (Buyer Administrator or Approval Role Only)

Depending upon the proposal approval steps, roles and amounts indicated during Setup, different proposals would now require the approval of a different user (role). The proposal flows through the approval process based upon the approval hierarchy setup. To approve a proposal, follow these steps:

1. Select the Proposals menu.
2. Select the Approvals sub menu.
3. Click on the name of the requisition you wish to view from the List of Active Proposals Requiring Approval.
4. If the requisition has a Proposal Type of Renewal the Proposal Details for Approval page will state that it is a renewal.
5. Click Approve to approve the proposal or Decline to decline the proposal.
6. If the proposal is declined complete the process by entering a decline reason and clicking Submit.

   Note: *If the proposal has not been approved then it cannot be finalized.*

Finalize a Proposal and Bring a Candidate Onboard

Once you have accepted the candidate you wish to engage, you must still finalize the details of the transaction and notify all appropriate parties of the details of the engagement. To do this, follow these steps:

1. Select the Proposals menu.
2. Click on the name of the requisition you wish to finalize from the list of Active Proposals.
3. Click Finalize to move to the Finalize Proposal screen.
4. Attach onboard files if you chose to do so. The files will be viewable from the Contracts menu after onboarding is complete.
5. Remember to enter the Candidate start date.
6. Complete the Onboarding information regarding purchase order information, information for the candidate on where and when to report, and special instructions etc. and click OK.
7. If you wish to decline outstanding proposals for this particular requisition, check “Decline outstanding proposals” and input decline comments. The decline comments will be sent to the particular Subcontractors in the decline email.
8. Click OK. An email will automatically be sent to the Subcontractor, with a copy to the Candidate if allowed by the Subcontractor. You will receive a copy of this email as well as any other parties you indicated should be notified while finalizing the proposal.

Auto Onboard After a Proposal is Accepted

Auto finalize and onboard after a proposal is accepted and/or approved. This option is set at Classification level.

View Contracts for a Folder

You may view a listing of all the candidates associated with a particular folder. If you want to view a candidate’s detail, please follow these steps:

1. Select the Folders menu.
2. Click on the name of the folder for which you would like to view the candidates.
3. Select the Active Filled Req you would like to view. Click on the Req ID & Name of the requisition you would like to view
4. Update the Active filled requisition Details as needed and click Save.

Add or Remove a Contract Contact

Once a contract has been created, you may add as many contacts to the contract as you need. These contacts are setup so that they may receive email notifications pertaining to the details of that contract. E.g. Time and Expense approval email. If you have an existing requisition to which you want to add a new contact, please follow these steps:

1. Select the Contracts menu.
2. Click on the name of the Contracts to which you would like to add or edit a contact.

3. Scroll to the section labeled Contacts and click the Add New Contact link from the right hand side of the page.
4. Check off the contacts you wish to add or click the Select All icon on the bottom left and click Ok.

Terminate a Contract and/or Replace a Contract by Reposting A Requisition

If a candidate is terminated from a contract there may be a need for the Buyer to find a replacement for that contract. To replace a candidate upon termination, follow these steps:

1. Select the Contracts menu.
2. Select the name of the requisition you would like to replace.
3. Enter an End Date and Termination Reason.
4. Click Save.
5. If you wish to replace this contract check the “Repost Req” check box and then click Save.
6. The requisition will maintain the original requisition number and reduce the filled quantity by a count of one.
7. All Subcontractors that were originally notified will now see this requisition in the Subcontractor's listing of Open Requisitions.

Attention: Once a contract has been replaced it can no longer be renewed or reactivated.

Amend a Contract

Throughout a contract candidate contract details may change. At this time you may choose to amend the contract with the new details. Please follow these steps to amend a contract:

1. Select the **Contracts** menu.
2. Open the contract you would like to amend.
3. Scroll to the bottom of the contract details page and click the "Renew" button.
4. A Renewal details page will display.
5. Enter any changes required to the Bill Rate, Overtime (OT) and/or Double Overtime Rate (DT).
6. Once the changes are complete click the **Submit** button. Clicking Submit will send this Renewal Proposal to the Subcontractor for approval.
7. A Renewal Proposal confirmation page will display. Select the **Continue** button. You will be returned to the *original* contract.
8. View the pending renewal from the **Proposals** menu > **Active** submenu; it will have a Proposal Type of Renewal and the Proposal Details page will state that it is a Renewal.
9. *After* the Subcontractor accepts the renewal proposal, you will receive an email notification.
10. Select the active proposal list and click on the proposal with the Proposal Type of Renewal.
11. At this time you only have the option to Finalize, Modify or Withdraw.
12. Selecting Finalize will display the Finalize Proposal page.
13. Review the details and terminate the Original Contract by entering an **End Date** and **Termination Reason** for each candidate.
14. Click the **OK** button at the bottom of the page.
15. An Onboard Information page displays noting the Proposal is Complete. Click the **Return** button on the page, then go to the Contracts menu>Active submenu to view the new Contract.

Attention: Once a contract has been renewed it can no longer be replaced or reactivated.

Time Bill Status Definitions

Submitted - A time bill that has been submitted for review and is no longer editable by the Subcontractor or candidate.

Rejected - A time bill that has not been approved for one reason or another and is now editable by the Subcontractor Admin or Candidate for resubmission.

Resubmitted - A time bill that has been resubmitted for review after being rejected and is no longer editable by the Subcontractor or candidate.

Approved - A time bill that has been accepted and is ready for billing. This time bill however, can be edited and resubmitted prior to invoicing.

Approved/Pending Invoice – A time bill is included on an invoice, yet the invoice has not been submitted.

Invoiced - A time bill that has been billed on an invoice and is no longer editable by the Subcontractor or candidate.

Partially Rejected - A time bill that has had one of its days rejected by the Subcontractor during the invoice process. The time item day that was rejected is editable for resubmission and approval.

Partially Invoiced - A time bill that has had one, but not all, of its days billed by the Subcontractor during the invoice process. The time item day that was not billed may be editable for resubmission and re-approval.

Multiple - A single time bill that contains more than one status per activity. i.e. Submitted, Resubmitted, Rejected…

Duplicate - If more than one time bill or expense bill, with the same Start Date, Candidate Name, Candidate ID, Activity, Cost Center, Type, and Billable exists an icon will be displayed following the Status column.

Review Time Bills

Candidates complete time bills online and submit them to the Buyer to accept or reject. Once time has been submitted an email is sent to the Requisition Contact indicating that a time bill awaits approval or reject. You must accept each time bill prior to being invoiced by the Subcontractor. This gives you the ability to reject disputed items and prevent them from being invoiced.

To review time bill information, follow these steps:

1. Select the Bills menu.
2. Select the Active Time Bills sub menu.
3. Select the time bill you wish to review from the list of time by clicking on the Period Start Date. Once all time bill items have been approved or billed, you cannot change its status.
4. From the right side of the page, check off the Activity line items that you wish to Accept or Reject.
5. Click the Accept/Reject button.

Attention: If you do not check any items prior to clicking Submit the system will automatically submit all items. However, you will be prompted and asked if you wish to continue prior to submission. Please pay close attention to this, once you click Ok all items will be accepted/rejected and this cannot be undone. If you wish to only accepted/rejected one or more activities and not all the activity line items, please click cancel and only select the activity line items that you wish to accepted/rejected.

6. If you reject the time bill items, it is helpful to enter a reason in the comments field prior to clicking Reject. You may also enter comments per activity by clicking the “C” hyper link next to each activity item, enter comments and click Save.
7. If you do not wish to act on the time bill, click Cancel.
8. To review item details, click the View Details link. This will display the Time In/Out, Lunch Out/In and Description details, if applicable.
9. You can review the history of the time bill (i.e. when and by whom the time bill was submitted, approved, rejected, billed and allocated) by selecting the Status link on the time bill main menu. If you wish to view the activity line item status you may do so by clicking the Status link on the time bill at the item level.

***Note:** Duplicate Time Bills: If duplicate time/expense bills exist, view all potential duplicates by double clicking the duplicate icon next to the time bill.*

Review Time Items by Activity

If a more detailed or Advanced Time Bill is received, Buyer users have the ability to accept or reject individual time items by activity. Once the time bill has been submitted you may wish to approve or reject line items based on each activity submitted. To accept or reject individual time items by activity follow these easy steps:

1. Select the Bills menu.
2. Select the All Time Items sub menu.
3. Enter any required search criteria and click Search.
4. Review the item status by clicking the hyper link below the Status column header.
5. Review the time details from the time items grid. If you wish to see further details select the appropriate period start date.
6. If you wish to accept or reject multiple time items for different time bills you may do so from the All Time Items grid.
7. Check off multiple items from the Select column and click Accept/Reject.
8. A Time Items Review page will be displayed which allows you to remove any last minute time items that you do not wish to Accept/Reject.
9. Check off any time items you do not want to Accept/Reject by checking the check box under the Remove column and click Remove.
10. Click Accept/Reject if you want to Accept/Reject all items.
11. You will be returned to the All Time Items details grid.
12. From here if you wish to Accept/Reject a single Time Item, you may do so by entering any required search criteria and clicking Search.
13. If the Time Item is in a Submitted or Resubmitted status you may Accept/Reject the item.
14. Select the appropriate period start date.
15. Review the details and click Accept/Reject.

Review Expense Bills

Candidates complete expense bills online and submit them to the Buyer for approval. Once expense has been submitted you will receive an email notifying you of the expense bill awaiting your approval in the system. You must accept each expense bill prior to being invoiced by the Subcontractor. This gives you the ability to reject disputed items and prevent them from being billed. To review expense information, follow these steps:

1. Select the Bills menu.
2. Select the Active Expense Bills sub menu.
3. Select the expense bill you wish to review from the list of expenses by clicking on the Period Start Date. Once all expense bill items have been approved or billed, you cannot change its status.
4. From the right side of the page, check off the Activity line items that you wish to Accept or Reject.
5. If the Subcontractor or Candidate entered tax amounts for individual expense items the totals for each day include these tax amounts. The total amount of the tax will also be displayed in the Tax Total column at the far right of the Expense Details grid. Click on a Total Tax amount in order to review a break down of the taxes associated with a particular expense bill entry.
6. Click the Accept/Reject button.

Attention: If you do not check any items prior to clicking Submit the system will automatically submit all items. However, you will be prompted and asked if you wish to continue prior to submission. Please pay close attention to this, once you click Ok all items will be accepted/rejected and this cannot be undone. If you wish to only accepted/rejected one or more activities and not all the activity line items, please click cancel and only select the activity line items that you wish to accepted/rejected.

7. If you reject the expenses, it is helpful to enter a reason in the comments field prior to clicking Reject. You may also enter comments per activity by clicking the "C" hyper link next to each activity item, enter comments and click Save.

8. You can review the history of the expense bill (I.E. When and by whom the expense bill was submitted, approved, rejected, billed and allocated) by selecting the Status link on the expense bill main menu. If you wish to view the activity line item status you may do so by clicking the Status link on the expense bill at the item level.

   Note: *Subcontractors are permitted to create duplicate time or expense bills for candidates for the same period. If more than one time bill or expense bill, with the same period start date, exists a red 'D' will be displayed following the Status column.*

   Note: *If you reject a candidate's time bill, an email notification will be sent to the Candidate, with a copy to their Supervisor, only if the Candidate has the authority to receive the notification. Otherwise, the notification will be sent to the Supervisor only.*

Review Expense Items by Activity

Buyer users have the ability to accept or reject individual expense items by activity. Once the expense bill has been submitted you may wish to approve or reject line items based on each activity submitted. To accept or reject individual expense items by activity follow these easy steps:

1. Select the Bills menu.
2. Select the All Expense Items sub menu.
3. Enter any required search criteria and click Search.
4. Review the item status by clicking the hyper link below the Status column header.
5. Review the expense details from the expense items grid. If you wish to see further details select the appropriate period start date.
6. If you wish to accept or reject multiple expense items for different expense bills you may do so from the All Expense Items grid.
7. Check off multiple items from the Select column and click Accept/Reject.
8. An Expense Items Review page will be displayed which allows you to remove any last minute expense items that you do not wish to Accept/Reject.
9. Check off any expense items you do not want to Accept/Reject by checking the check box under the Remove column and click Remove.
10. Click Accept/Reject if you want to Accept/Reject all items.
11. You will be returned to the All Expense Items details grid.
12. From here if you wish to Accept/Reject a single Expense Item, you may do so by entering any required search criteria and clicking Search.
13. If the Expense Item is in a Submitted or Resubmitted status you may Accept/Reject the item.
14. Select the appropriate period start date.
15. Review the details and click Accept/Reject.

Deactivate a Candidate from a Contract

To deactivate a Candidate from a contract, follow these steps:

1. Select the Contracts menu.
2. Click on the Requisition ID & Name for the appropriate Candidate.
3. Enter the candidate's termination date in the actual end date field.
4. If the Candidate has previously submitted hours/dollars on a time bill or expense bill for a date past the entered termination date a warning message will be displayed and you must reenter an accurate termination date.
5. UN-check the "Active" Check box.
6. Select a reason for termination from the drop down list.
7. Click Save.

Evaluate a Candidate

Once a Candidate has completed the assignment for which he or she was engaged, you will have the opportunity to complete an evaluation on the Candidate. This evaluation will be sent to the Subcontractor for review. To complete the Candidate Evaluation, follow these steps:

1. Select the Contract menu.
2. Select the Evaluations sub menu.
3. Select the Candidate and requisition you wish to evaluate. Only Candidates or requisitions that have ended an assignment are on the list for an evaluation.
4. Select the appropriate ratings from the drop down box. (Click the Rating Scale link for a detailed explanation of each rating.)
5. Check the box if you would consider hiring this Candidate for another requisition.
6. Click Save and then click Return.

Create or Edit an Evaluation

Evaluations are created at the Classification level in the company profile. The questions on the evaluations reviewed above can be created per classification and further specified per requisition. Please follow these steps below to create or edit an evaluation:

1. Select the Setup menu.
2. Select the Classification menu.
3. If you are adding a new classification to the company click "Add new Classification".
4. Select the new classification from the list and click Save.
5. Next the classification will appear in the list of existing classifications.
6. Select the blue link for "Req Types".
7. Click on the top link "Add New Requisition Type".
8. The Add Classification / Requisition Type page will display.
9. Select the required requisition information (these options are reviewed in detail in the Add Classification section).
10. Clicking Save will automatically bring you to the Create an Evaluation page.
11. Enter evaluation questions pertinent to the classification and req type for which you are adding.
12. Click Save.

If you wish to edit the evaluation questions of a particular classification/req type please follow these steps:

1. Select the classification from the list of existing classifications at the company profile level.
2. Select the blue link "Req Types".
3. This will display the current req types that exist for the selected classification.
4. Select the desired req type for which you wish to edit the evaluation questions.
5. Scroll to the bottom of the Req Type page and select the blue link "Edit Evaluation questions".
6. Make desired changes and click Save.
7. Select the Candidate and requisition you wish to evaluate. Only Candidates or requisitions that have ended an assignment are on the list for an evaluation.
8. Select the appropriate ratings from the drop down box. (Click the Rating Scale link for a detailed explanation of each rating.)
9. Check the box if you would consider hiring this Candidate for another requisition.
10. Click Save and then click Return.

Allocate a Milestone to a Charge to Cost Center

Once a Subcontractor has completed a Milestone the Buyer is able to allocate the Milestone to the available Charge to Cost Centers. To complete the Milestone Allocation, follow these steps:

1. Select the Bills menu.
2. Select the Active Milestones menu.

3. Select the Completed Milestone you wish to allocate.
4. Click Insert at the bottom of the Milestone Detail page.
5. A drop down list of available Charge to Cost Centers will appear.
6. Select the Charge to Cost Center you want to allocate the Milestone to.
7. In the Allocation Amount field enter in the correct amount and continue to enter Charge to Cost Centers and Allocation Amounts until the Milestone amount is completely allocated.
8. Notice the Milestone Actual Cost Amount and Total Amount Allocated. The Total Amount Allocated number represents what you just entered in the amount field. Once these two numbers are equal you may complete the allocation.
9. Click the Complete Alloc button only if the full Milestone Amount has been allocated.

View Invoices

1. Select the Invoices menu.
2. A list of all Subcontractor-billed invoices will be displayed.
3. Select the invoice date for which you would like to see the details.
4. You will now see the selected invoice details.
5. The top portion of the Invoice Details page will display the tax break down of the invoice by: Total State Sales Tax/GST Amount, Total County Sales Tax/PST Amount, Total Local Sales Tax/QST Amount and Total Other/Manual Amount
6. The Taxes column next to the Expenses column will contain the tax amounts associated with individual expense items if the Subcontractor or Candidate entered tax amounts.
7. From the Invoice Details screen you have four options:
    - Invoice Detail Report - A Report on Time Bill Items
    - Print Invoice
    - Return
    - Allocate
8. Click on the Invoice Detail Report.
9. A Crystal Report Viewer window will pop up and display the report. This report displays information at the time bill item level. Buyer Admins and Engagement Managers have the option to export the Invoice Detail Report.
10. Close the Crystal Reports Viewer window and you will be returned to the Invoice Details screen.
11. To Print the Invoice Detail, select the Print Invoice button and select Print from the file menu.
12. Close the Crystal Reports Viewer window and you will be returned to the Invoice Details screen.
13. Select Return to return to the Invoice list.

Allocate Invoices

Invoice allocation allows you to allocate certain dollar amounts to GL or charge codes for further analysis or back end data feeds. To allocate an invoice, follow these steps:

1. Select the Invoices menu.
2. Select the invoice date for which you would like allocate.
3. To allocate the invoice click Allocate.
4. This page allows you to allocate the invoice amount to Allocation accounts.
5. Select Insert.
6. Click the icon to select an Allocation account. The Allocation Account selection page is displayed. In order to view a full listing of Allocation Accounts click the 'Search' link located in the search box. These accounts were previously entered at the Setup. To view a select listing, enter the appropriate search criteria and then click 'Search'.
7. Select the Allocation account you want to allocate the invoice net amount to.
8. In the Amount field enter in the correct amount and continue to enter Allocation accounts and Allocation Amounts until the invoice amount is completely allocated.
9. Notice the Invoice Amount and Total Amount Allocated. The Total Amount Allocated number represents what you just entered in the amount field. Once these two numbers are equal you may complete the allocation.
10. You may click Save to save your changes.

11. If finished, you may click Return to save your changes and return to the Invoice Details page.
12. Click the Complete Alloc button only if the full Invoice Amount has been allocated.

Review Reports

Management Reporting is available to certain Buyer user roles. The reports are designed to summarize and report on key information contained within the application. Data for the reports is refreshed each time that you run the report. Reports may be exported to other applications such as Excel and Word for further analysis. To access reports, select the Reports menu. To execute any of these reports, click the name of the report and the report will be displayed in a new browser window. To exit the report, click the "X" in the upper right corner of the Reports screen.