knowledge services

Getting Started

Client Guide – Time Approver

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Activate your Account

To activate your account, your company Administrator must first create it Once created an activation email is sent with a link to activate the account

1. Click the secure **link** provided in the email
2. **Complete the form** entirely and click **Activate**
3. A success message appears. Click **OK**
4. **Login** utilizing the newly created credentials

For assistance, contact the Support Team at Knowledge Services

Retrieve Username

1. From the login screen, click the **Forgot Username?** hyperlink
2. Enter your **email address**
3. Select **Submit**. A message for review appears, click **OK**. Upon clicking ok, an automated email request is sent
4. Locate email with provided username and **click the link** to login
5. Type in provided username and your password
    a. *If password is unknown, follow the **Reset Password** steps*

For assistance, contact the Support Team at Knowledge Services

Unlock Account

1. From the login screen, click the **Unlock Account?** Hyperlink
2. Enter your Username
3. Select an unlock option:
    a. **Unlock via Email**: An email is sent with a code
    *If **Unlock via Email** is selected, then you will click **Send me an email***
    b. **Unlock via Phone**: An SMS code will be sent to the number on file
    *If **Unlock via Phone** is selected, then you will click **Receive a code via SMS***
    ***Note**: If you have not setup SMS verification, no code will be sent*
4. Enter the provided code into the box and select **Verify**
5. Answer your **Security Question**
6. Enter your **Password**
7. Click **Verify**

For assistance, contact the Support Team at Knowledge Services

Reset Password

1. From the login screen, enter your **Username**
2. Click **Next**
3. Press the **Forgot Password?** Hyperlink 4. Select a reset option:
    a. **Reset via Email**: An email is sent with a code
    *If **Reset via Email** is selected, then you will click **Send me an email***
    b. **Reset via Phone**: An SMS code will be sent to the number on file
    *If **Reset via Phone** is selected, then you will click **Receive a code via SMS***

***Note**: If you have not setup SMS verification then this option will not appear*

5. Enter the provided code into the box and select **Verify**
6. Answer your **Security Question**
7. Enter your **New Password** and then **Re-enter** it
8. Click **Reset Password**

For assistance, contact the Support Team at Knowledge Services

Preview A Resume

1. Click **Postings** in the navigation tool in the upper left-hand corner
2. Select **View Postings**.
3. **Locate** the Posting of interest. *Set the date range if needed.*
4. **Double-click** to open the Posting.
5. Click the **Bids** tab.
6. All bids for that Posting appear. Click the **Comments** box *(if applicable)* to review any comments left by the Vendor regarding the candidate.
7. Click the **Attachment Icon** to review the attachments. The Document Previewer will appear.
    - **Preview** each document by clicking on it in the document library on the left.
    - **Download** a document by clicking the download icon.
    - **Print** a document by clicking the print icon.
    - **Search** the document for key words such as job requirements, skills, experience by typing words in the binocular field.

Review and Process Bid Submissions

Review Candidates

1. Click **Postings** in the navigation tool in the upper left-hand corner
2. Select **View Postings**
3. **Locate** the Posting of interest. *Set the date range if needed.*
4. **Double-click** to open the Posting
5. Click the **Bids** tab
6. All bids for that Posting appear. Click the **Comments** box *(if applicable)* to review any comments left by the Vendor regarding the candidate.
7. Click the **Attachment Icon** to review the attachments. The Document Previewer will appear.
    - **Preview** each document by clicking on it in the document library on the left.
    - **Download** a document by clicking the download icon.
    - **Print** a document by clicking the print icon.
    - **Search** the document for key words such as job requirements, skills, experience by typing words in the binocular field.

Reject Uninterested Candidates

1. Click **Postings** in the navigation tool on the left
2. Select **View Postings**
3. **Locate** the Posting of interest. *Set the date range if needed*
4. **Double-click** to open the Posting
5. Click the **Bids** tab
6. **Check the box** for any candidate that is of no interest

7. Click the red **Reject button above**
8. Provide a **reason** and any **comments** for the rejection
9. Click **Reject**. *Upon clicking, an automated email is sent to the Vendor and the status of the bid updates to "Rejected by Client"*

Interviewing

Initiate the Interview

1. Click **Postings** in the navigation tool on the left
2. Select **View Postings**
3. **Locate** the Posting of interest. *Set the date range if needed*
4. **Double click** to open the Posting
5. Click the **Bids** tab
6. Locate the **candidate(s)** with whom you wish to initiate an interview and **click the box(es)** associated with the line item(s)
7. Click the **Interview** button
8. If desired, toggle the buttons for phone number and email to enable them as required
    a. *Phone Number: If toggled on (orange), the vendor will be required to enter the candidate phone number*
    b. *Email Address: If toggled on (orange), the vendor will be required to enter the candidate email address*
    c. *Attachment: If toggled on (orange), the vendor will be required to add an attachment*
9. A candidate(s) may be removed mid process from scheduling an interview by selecting the black minus sign next to the name
10. Complete the **Interview Details**

*Include any required information for the interview along with any important meeting instructions such as location, virtual meeting links or a direct phone number to share with the candidate If desired, you can leave the meeting instructions blank initially. If moving forward with blank meeting instructions, the interview will be considered to have missing details. Those with missing details will be signified by an orange caution symbol found in the second column of the **View Interviews** page. Interviews missing details can be filtered on the **View Interviews** page by selecting the filter option **Missing Details.** If electing to proceed with this option, it will be important to return and add in those details later*

- If desired, include additional **interview confirmation recipient(s)** from the drop- down selection

11. Select the interview length, time zone, and time(s)/date(s)

Note: If more than one candidate is selected for interviewing, the times given will be available to all candidates on a first come first served basis.

- **Client Attachments**: Click the **Browse** button to add attachments to the interview request
- **Interview Length**: Select the **Interview Length** drop down to select the overall length of time for the interview(s)
- **Time Zone**: Choose the appropriate **Time Zone** the interview will take place to prepare the interviewee(s)
- **Date Picker**: Click the desired **date** from the calendar box.
  If the desired month is not shown; select the orange arrow to advance to the next month
- **Time Picker**: Once the desired day is selected, click the **Start Time** box and auto populated time will appear for selection. Depending on the interview length, the End Time will be set automatically

For as many candidates you select, you must have an equal amount of times/dates for candidates to select, i.e. if you have five candidates selected, you must have five times/dates selected. *Upon confirmation of an interview, the selected date/time will no longer be available*

12. Click the **Schedule** button.
    Upon clicking Schedule, an automated email request is sent to the Vendor(s) and the status of the bid(s) updates to "Interviewing"

Check the Status of Interviews

1. Select **Postings** from the navigation tool
2. Click on **View Interviews**
3. Use the filter to locate the **Posting** of interest

The Vendor will coordinate the interview with the candidate and act upon the request. An email is sent indicating what action is taken and the status of the bid updates to one of the following:

- **Interview Requested** = The request has been sent, but no action has been taken
- **Interview Confirmed** = The interview has been confirmed. ***Double click*** *to see confirmed date and time of the interview along with the resource phone number if applicable*
- **Interview Declined** = The interview has been declined
- **Interview Reschedule Requested** = The candidate is requesting to reschedule at a different date/time. ***Double click*** *to confirm or decline the requested date/time*

If an interview has missing details, it will be signified by an orange caution symbol found in the second column of the page. Interviews missing details can be filtered on the ***View Interviews*** *page by selecting the filter option* ***Missing Details***

Editing an Interview

This action is intended to be used when details need to be adjusted on the interview such as time zone, meeting URL, meeting instructions, etc.

1. Select **Postings** from the navigation bar
2. Click on **View Interviews**
3. **Double click** on the line item of interview requiring adjustment
4. Click **Edit**
5. **Update** field(s) requiring adjustment
6. Once complete, select **Submit**
7. A message appears asking if you wish to proceed. Click **Yes**

Upon clicking yes, an automated email is sent to the Vendor with the update information. If an interview with a status of Interview Confirmed is edited, an updated calendar invite is sent out

Cancelling an Interview Request

This action is intended to be used when a reason is not needed to be included from the specified drop down

1. Select **Postings** from the navigation bar
2. Click on **View Interviews**
3. **Double click** on the requested interview

4. Click **Cancel Interview**
5. A message appears asking if you wish to proceed. Click **Yes.**

Upon clicking Yes, an email is sent to the vendor informing them the interview has been cancelled

- If necessary, the bid of the resource can now be **rejected** by navigating to View Bids and following the **Rejecting Bids and Closing the Posting** steps

Propose New Time for the Interview

1. Select **Postings** from the navigation bar
2. Click on **View Interviews**
3. **Double click** on the requested interview or the confirmed interview to review request details
    - Pay attention to time zone, location, and instructions such as providing the candidate's phone number or virtual meeting links and information provided
4. Click **Propose New Time**
5. Use the **calendar** and **clock** icons to indicate a date and time of availability
    a. You must submit at least **one** date and time to reschedule an interview
6. Type an **explanation** for requesting to reschedule
7. Click **Propose New Time**
8. A message appears asking if you wish to proceed. Click **Yes**

Upon clicking Yes, an email is sent to the vendor requesting the interview be rescheduled and asking that action be taken to confirm/decline the request

Declining an Interview Request

This action is intended to be used when a reason must be selected when removing an interview request

1. Select **Postings** from the navigation bar
2. Click on **View Interviews**
3. **Double click** on the requested interview
4. Click **Decline Interview**
5. **Select** the decline reason. **Click** Save

    Upon clicking Save, an email is sent to the vendor informing them the interview has been declined with the specified reason selected

    - If necessary, the bid of the resource can now be **rejected** by navigating to View Bids and following the **Rejecting Bids and Closing the Posting** steps

Complete Interview Actions

1. **Double Click** to open the interview details
2. Complete any available actions by clicking the **associated** button

    Before confirming a request to re-schedule, confirm the time by selecting one of the available interview date and time options

3. Once confirmed, open the confirmation email, and **download** the attached calendar invite to your calendar
4. When an interview is completed, mark it complete by placing a **check in the box** associated with your candidate and select the **Mark Complete** button in the top right-hand corner

Schedule Follow Up Interviews

Once an initial interview has been completed, follow up interviews can be scheduled if desired. To proceed with scheduling a follow up interview, the following steps should be taken from View Interviews (Follow up interviews are not able to be scheduled from View Postings or View Bids):

1. Select **Postings** in the navigation tool on the left
2. Click on **View Interviews**
3. Locate the **candidate(s)** with whom you wish to initiate a follow up interview and **click the box(es)** associated with the line item(s)

*Please ensure that you are selecting the most recent interview number associated with your candidate and posting ID. You will **not** be able to schedule a follow up interview if you do not select the most recent interview number. Also, the bid must be in an interviewing status, and the interview selected must be in an interview completed status*

4. Click on **Schedule Follow-Up** 5. Complete the **Interview Details**

Be sure to include any required information for the interview along with any important meeting instructions such as location, virtual meeting links or a direct phone number to share with the candidate.

*For further instruction on completing this form, please refer to steps 8-11 in the **Initiating an Interview** section*

*If desired, you can leave the meeting instructions blank initially. If moving forward with blank meeting instructions, the interview will be considered to have missing details. Those with missing details will be signified by an orange caution symbol found in the second column of the **View Interviews** page. Interviews missing details can be filtered on the **View Interviews** page by selecting the filter option **Missing Details.** If electing to proceed with this option, it will be important to return and add in those details later*

6. Click the **Schedule** button

Upon clicking Schedule, an automated email request is sent to the Vendor and the status of the bid updates to "Interviewing"

7. Repeat the steps for **Check the Status of Interviews** and **Complete Interview Actions**
8. Repeat the steps for **Schedule Follow Up Interviews** as necessary

Any changes required outside of dotStaff will be handled by the MSP as needed

Bid History

1. Click **Postings** in the navigation tool on the left
2. Select **View Postings**
3. **Locate** the Posting of interest. *Set the date range if needed*
4. **Double-click** to open the Posting
5. Click the **Bids** tab
6. Locate the **candidate** for whom you wish to review the Bid History and **double**-**click** the candidate's line item
7. Select **View Bid History** to populate information regarding the status change break down
   - The information provided is organized from bottom to top with the most recent status found on the top line

Bid Rejection Reason

1. Click **Postings** in the navigation tool on the left
2. Select **View Postings**
3. **Locate** the Posting of interest. *Set the date range if needed*

4. **Double-click** to open the Posting
5. Click the **Bids** tab
6. By default, bids will be set to filter out those bids in a status of Rejected by MSP. To display those hidden bids, select **Show Rejected** button.
7. Locate the **candidate** for whom you wish to review the Bid Rejection Reason and **double**-**click** the candidate's line item

*The **Bid Rejection reason** can be found under the Vendor's Bid Information section*

Candidate Status

Bid Statuses

By default, bids will be set to filter out those bids in a status of Rejected by MSP. To display those hidden bids, select Show Rejected button.

Pending MSP Review:

When the Vendor submits a candidate to a posting, the bid status will automatically read Pending MSP Review

Pending Client Review:

When the MSP Team pushes the candidate submission to the Manager's view, the bid status **will change to Pending Client Review**

Engagement Request:

Once the bid is accepted *(candidate selected)*, the bid status will change to **Engagement Request.** The Vendor must login to dotStaff and **Accept** or **Reject** the engagement request

Onboarding:

After a candidate has accepted the position, and the Vendor has accepted the engagement request, onboarding compliance will begin. The candidate's status will be **Onboarding** until all onboarding compliance is complete.

Cleared:

The MSP Team will verify all onboarding requirements have been completed. At that time, the status will change to **Cleared**. The MSP will let the Manager know and coordinate start date details

Started:

The Resource has entered time and started working on assignment

Rejected:

The candidate has been rejected and will not be moving forward

Interview Statuses

Interview Requested:

An Interview has been requested by the Client

Interview Confirmed:

An Interview has been confirmed and is scheduled

Interview Reschedule Requested:

An Interview has been requested by the Vendor to be rescheduled by the Client

Interview Declined:

An Interview has been declined by the Vendor

Interview Canceled:

An Interview has been canceled and is no longer scheduled

Interview Complete:

An Interview has been completed

Interview Completed – Round #:

A Follow up Interview has been completed, and the round number indicates the number of interviews completed

Time and Expense Approval

The Client is responsible for approving time and expense entries. The Client will be sent an invoice for the approved entries.

Client Users can only view, approve, or deny entries for their relevant contractors or Projects. Client Administrators can view, approve, or deny all entries.

Time Approval

A Timesheet in Draft status is not visible to the Client Manager. The timesheet must be submitted for approval in order for the Client Manager to see the entry to approve it.

1. Select **Time/Projects** 2. Click **Approve Time**

   *Only timesheets in **Awaiting Approval** status will appear.*
3. Carefully **review** the time entries before choosing to approve or deny:
   a. Click the **Arrow** be provided with an expanded view of the week, showing individual entries
   b. For even greater detail, **double click** on the weekly entry to view the Time Summary, Status History, and Approval History
4. **Check the box** associated with the Time Entry to approve or deny
5. If desired, you may **leave a performance rating** for that specified time entry for MSP review
   a. **Star ratings**: You can leave ratings in increments of full or half star ratings by **selecting the star** on the left side for a half rating or the right side for a full rating
   b. **Feedback box**: This is an additional option to leave further feedback in addition to the star rating (*you must leave a star rating to enable this function*). You can do so by **selecting the comment box** and then typing in your comment
6. Click the **Approve** or **Deny** Button
   a. **Approve**: Confirm the action by clicking **Yes** in response to the question "Are you sure you want to approve?"
   b. **Deny**: Select the reason from the dropdown menu. Type any comments (if applicable). Click **Save** to complete the action

The timesheet will drop off the list after being approved or denied

Expense Approval

Expenses approved by the Client are not subject to the dotStaff Fee. Expenses are reimbursed 100% to the Vendor.

1. Select **Time/Projects**
2. Click **Approve Expenses**

   *Only Expenses in **Awaiting Approval** status will appear*
3. Carefully **review** the expense entries before choosing to approve or deny:
   - **Double Click** to see further details of the expense and download attachments
4. **Check the box** associated with the Expenses to approve or deny
5. Click the **Approve** or **Deny** button
   a. **Approve**: Confirm the action by clicking **Yes** in response to the question "Are you sure you want to approve?"
   b. **Deny**: Select the reason from the dropdown menu. Type any comments (if applicable). Click **Save** to complete the action

The Expense will drop off the list after being approved or denied

Approve or Deny Milestones

The Client is responsible for approving time and expense entries. The Client will be sent an invoice for the approved entries.

1. Navigate to **Time\Project > Approve Milestones**.
2. Carefully review the entries with a status of Awaiting Approval.
   a. Click the **"Arrow"** button to expand an entry to view the Date, Resource, Vendor, Milestone, and the Amount.
   b. Access greater detail by **double clicking** on the expanded line entry.
   c. Make certain to note those which should not be approved as action must be taken on these entries as well.
3. **Select the check box** associated with the entry to approve or deny.
4. Click the **"Approve"** or **"Deny"** button on the action bar.
   a. If **Approving,** *the Milestone will drop off the list after being approved.*
   b. If **Denying**, select the reason from the Reason dropdown menu. If none of the reasons apply, select "Other" and type the reason in the Comments box. Click the **Save** button to complete the action. *The Milestone will drop off the list after being denied.*

Resource Contract Renewal

You may have access to the Resource Contract Renewal page. This page is intended to enable data collection for PO updates nearing their end dates in addition to other details as needed to comply with necessary information to continue a candidate's employment. The manager will receive an email notifying of upcoming expiring contracts in advance asking for action

Completing a Renewal Form

1. Select **Records Management**
2. Click **Resource Contract Renewal**
3. Locate the **candidate** of interest and select the **Renewal Form button**

   Candidates are displayed in a list starting with those set to expire soonest (renewal date) and then by last name alphabetical order. To further filter results, click on the search button in the upper right-hand corner, if desired

4. You will be **redirected** to the dotStaff forms website. Complete the **fields** for the form 5. Once finished, hit **Submit**

Upon clicking submit, a confirmation page will display to show you were successful. In addition to this, an automated email is sent to the manager.

You are now able to return to the Resource Contract Renewal page to complete additional forms, if desired.

The candidate's line item will not fall off the default list (not complete) until an MSP has reviewed and marked it from their end as complete