# Supplier User's Guide

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# Table of Contents

# Chapter 1 Introduction to WAND

## What is WAND?

Workforce Alliance Network Direct (WAND) is a web based contingent workforce management tool designed and developed by PrO Unlimited. WAND drives business processes for the Managed Service Provider (MSP), Client, Worker and Supplier as part of PrO's contingent workforce management solution.

PrO's business model encompasses a full service contingent workforce solution: recruited staffing (supplier sourced workers), referred staffing (client sourced workers), business validation (consultants/firms), YourSource (re-engagement), and competitive bidding (project based work).

WAND Supplier features include:

- A comprehensive requisition process that includes sourcing, interviews, hiring and invoicing
- Online time and expense entry for recruited workers
- Supplier billing and invoicing
- Business validation for consultants/firms
- Competitive bidding environment for project based work
- Home page dashboard with detailed reporting for supplier engagements across clients

## PrO Business Functions

PrO's business functions are divided into three groups:

- **Configuration and Maintenance** functions establish and maintain data that is referenced throughout the WAND system and contain application functions in the following categories:
    - **YourSource**, including resume maintenance, skill assessments and surveys
    - **Supplier** functions, including RFI and contract maintenance, Score-card and National Supplier
- **Support** functions enhance the capabilities of WAND. They include the following functions:
    - Reporting
    - Approval Routing
    - On and Off-Boarding
- **Core** functions are the cornerstone of WAND. They associate a resource with a task, then generate financial information. Core functions use config and support functions to complete the process and include functions in the following categories:
    - **Requisition** functions, including sourcing, business evaluation (Biz Val), interview and pricing
    - **Billing** functions, including invoicing, input, reconciliation, holidays and expenses

# About This Guide

*WAND User's Guide for Suppliers* includes:

- Brief overviews and step-by-step instructions for using WAND features
- Examples of screens that are used to perform tasks

WAND product documentation was created for print usage as well as online viewing.

# Audience and Assumptions

This guide is intended for supplier personnel who use Workforce Alliance Network Direct (WAND), a web-based database application, to provide support for clients, suppliers, and workers.

This guide assumes all users have some experience using web browsers, the internet, sending email, using file formats such as Excel and PDF, and Microsoft Windows operating system.

As you work your way through the concepts and tasks, please familiarize yourself with WAND's user interface, as well as navigating through menus, using a variety of buttons, navigating through pages, and so on.

# How to Use this Guide

The following table is a “road map” to help users locate overviews and step-by-step instructions for some of WAND’s commonly used features.

Table 1-1 **Road Map for Using this Guide**

| To learn about this topic | Go here |
|---|---|
| System Requirements | Chapter 1, Introduction to WAND |
| WAND basics such as:<br>• Logging in and Navigating WAND<br>• Switching Roles or Switching Clients<br>• Roles and Permissions<br>• Commonly Used Buttons and Links | Chapter 2, Getting Started with WAND |
| Requisitions | Chapter 3, Requisitions |
| Billing Items | Chapter 4, Billing Management |
| Invoicing for Suppliers | Chapter 5, Invoicing for Supplier |
| Worker Management for Suppliers | Chapter 6, Worker Management for Suppliers |
| Supplier Administration | Chapter 7, Supplier Administration |
| Chapter 8, Reports Management | Chapter 8, Reports Management |

## Documentation Conventions

The following typographical and style conventions are used in this guide.

Table 1-2 **Typographical Conventions**

| Convention | Description |
|---|---|
| *italics* | Emphasis, or variable values. |
| **bold** | Names of menu items, and fields on various screens. |
| `courier font` | Filenames used in text. |
| < > | Variable values. |
| initial capitals | Buttons, menu items, field names, components and elements. |

The following icons and emphasized notes are provided to aid anyone reading this guide.

**Note:** Provides additional information that can improve your understanding of WAND, or help you perform tasks more efficiently.

**Caution:** Describes implications of an irreversible step in a process that can affect software systems.

## Screen Captures and Illustrations

The screen captures and illustrations in this guide are intended to provide a visual representation of what you may see when using this product. Many of the screen captures have been edited and, in some cases, only partial examples are used. They may vary depending on your platform, how your system is customized, and the product release schedule. It is therefore recommended that you consider these illustrations samples.

# WAND System Requirements

To run WAND efficiently, make sure your computers meet the following system requirements:

## Supported Operating Systems

WAND can be run on the following operating systems:

- Microsoft® Windows®
- MacOS®

## Supported Browsers

Supported browsers include:

- Internet Explorer 6.0 or higher
- Firefox 1.5 or higher
- Safari 3.2 or higher

WAND may not function or display properly in unsupported browsers.

WAND uses 128 bit encryption provided by Thawte's SuperCerts, which are recognized by the recommended browsers.

JavaScript must be turned on.

A consistent Internet connection such as DSL, cable modem, or T1 line is highly recommended.

## Recommended Monitor Settings

Use the 1024x768 display setting with 16-bit color and above color depth when using WAND through a full-screen browser.

# Chapter 2 Getting Started with WAND

This chapter will help you understand how to navigate WAND.

## Logging into WAND

Before you can use WAND, you will need a unique log in and a password to access the product website.

To log into WAND:

1. Open a web browser.
2. Enter `https://prowand.pro-unlimited.com` in the browser's address box.

The WAND log in screen will appear, as shown in Figure 2-1.


Figure 2-1 **WAND Log In**

**3.** Enter your user name.

**Important**: The username and password are case sensitive

**4.** Enter your password.

**5.** Click **Log In**. The **WAND home page** will appear.


Figure 2-2 **Example of WAND Supplier Home Page**

After logging into WAND, the menu bar options that are available to you will appear on the home page.

## Security Timeout

For security reasons, WAND automatically logs you out of the system if you do not perform any tasks for 20 minutes. When you are ready to resume working with WAND, you will need to log in again.

## Menu Bar

The menu bar and the home page, in general, provide easy access to other WAND components (sections) as well as items that may need immediate attention.


Figure 2-3 **Menu Bar**

The home page's dashboard-like view alerts you to tasks that you may need to perform, such as:

- Viewing current action items, such as pending billing, pending interviews, pending approvals, or pending terminations.
- Access to news items and help desk contact information
- Links in **RED** are available throughout WAND.These links provide more information about a specific item.

  After clicking a link, a separate screen or section opens with additional details.

# Navigating WAND's Home Page

WAND's home page includes a menu bar with links to sections to which you have access.


Figure 2-4 **WAND Supplier Home Page (top of page view)**

All users, regardless of role or permissions, can access the following from any screen.

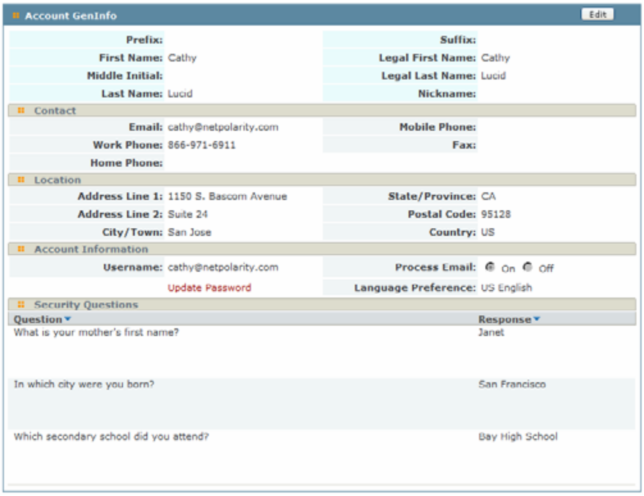
- My Account
- Online Help
- Contact Us
- Log Out of WAND

These links are discussed in the sections that follow.

## My Account

As a WAND user you can view, edit, and maintain account information, update your password, and add a security question to your user profile.

Figure 2-5 **Example of Account GenInfo Page**




The **Account GenInfo** page, shown in Figure 2-5, allows you to view basic information, such as your name and other contact information, email address, and your account security questions.

## Setting the Language Preference

By default, many WAND accounts may be set to display US English. Two other language selections are available: UK English and Japanese.You can change the language setting through My Account.

To change the language preference:

1. Click **My Account**. The **Account GenInfo** page as shown in Figure 2-5 will appear.
2. Click **Edit**.
3. Select the desired **Language Preferenc**e from the drop-down list. Options include US English, UK English, and Japanese.
4. After selecting the language click **Save**.
5. Log Out of WAND, then log back in. The language you selected will be the default.

## Online Help

The **Online Help** link will display WAND's product documentation center where you will find links to WAND User Guides, WAND Quick Reference Guides, and other product documentation.

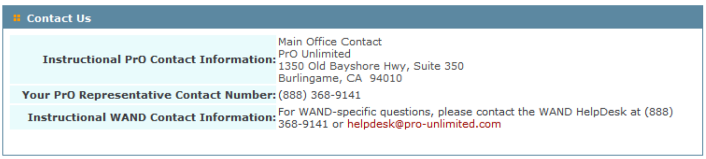
Figure 2-6 **WAND Online Help Center**


Help Center documents are updated regularly. Available documents are subject to change without notice.

## Contact Us

Contact Us gives you at-a-glance access to contact information for PrO Unlimited's corporate office, your PrO representative, and details on contacting WAND's help desk.

Figure 2-7 **Contact Us (ProUnlimited) Information**



## Log Out of WAND

Click the **Log Out** link that appears at the top of all pages, as shown in Figure 2-8, to log out of WAND.


Figure 2-8 **Example of Log Out Link on far right side of bar**

## Switching Roles

One or more of the following roles may be assigned to you: Standard, and/or Admin. Within each role, your user account is assigned a set of *permissions*. Permissions control what you can access, edit, submit, and/or view.

If you have multiple roles you can "switch" roles at any time while logged into WAND. You do not need to log out and then log back into WAND to switch roles.

To switch roles:

1. Click the **Switch Roles** drop-down list. You can do this from any screen.
2. Select a different role.

   After a few seconds the screen changes and gives you access to page and product features that are specific to the new role.

Figure 2-9 **Switch Roles Drop-Down List**

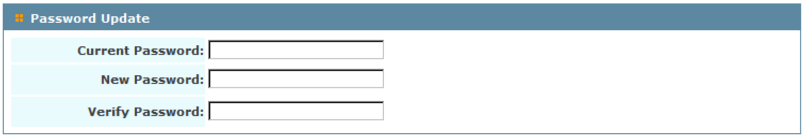
# Managing Passwords

Before you can log into WAND, you must be issued a *password*.

When you log into WAND for the first time you will be prompted to change the password that you were issued.

The **Update (reset) Password** page will appear if your password has expired or has been reset by the system or a system administrator.

Figure 2-10 **Update Password**




## Missing Password

If you do not have, or were not issued, a valid WAND ID or user name contact the Help Desk via email at: helpdesk@pro-unlimited.com. Or call:

1-888-368-9141 (United States)

00-800-7787-7877 (United Kingdom)

001-800-7787-7877 (Hong Kong)

010-800-7787-7877 (Japan)

## Password Guidelines

The following password guidelines are for reference when creating and/or updating passwords.

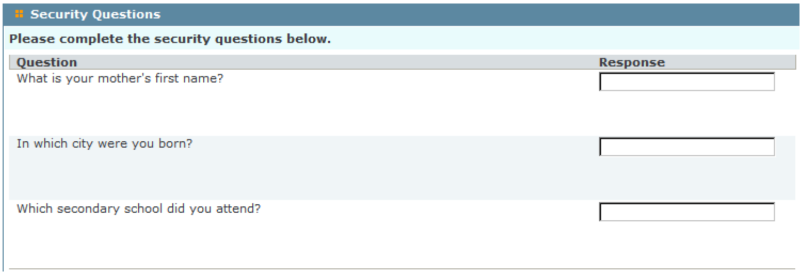
- You cannot use any of the 5 previous passwords. Enter a new password each time you update your password.
- Passwords must be at least eight (8) characters in length.
- Passwords should be easy to remember but difficult for others to guess.

- A strong password contains a combination of uppercase and lowercase letters (remember that your password is case sensitive), numbers, and special characters such as +, $, or *.
- Do not share your password with anyone, or use old passwords.
- You will be prompted by WAND to change your password every 90 days.

## Password Security Questions

You may be prompted to complete the security questions page.

Figure 2-11  **Security Questions**




While optional, completing the security questions is encouraged because it enhances the security of your account information.

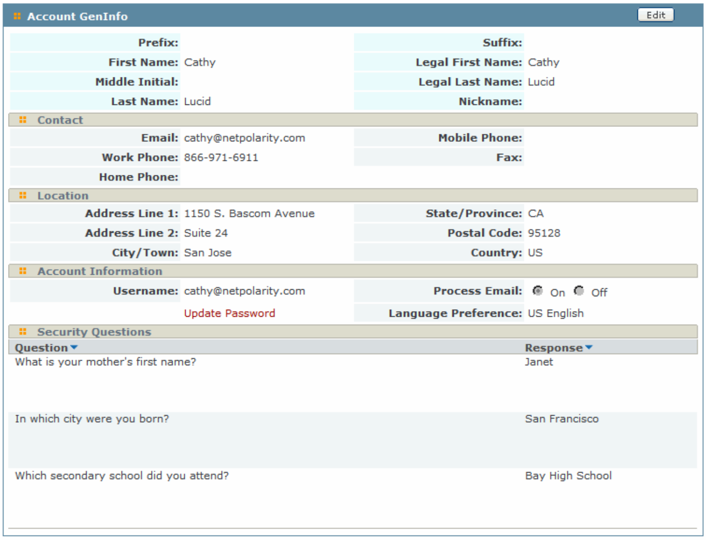
Enter a response for each security question and click **Save**.

## Changing Your Password

To change your password:

1. Log into WAND.
2. Click **My Accounts**.
3. Click the **Change Password** link. The **Account GenInfo** page will appear.

Figure 2-12 **Account GenInfo**




As shown in Figure 2-12, the **Account GenInfo** page displays basic information including the user's first and last names, email address, username (which is entered when logging into WAND), and responses to the Security Questions, if they were completed.

4. Click the **Update Password** link. The **Password Update** page, as shown in Figure 2-10, will appear.

5. Complete the change password entries (Current Password, New Password, Verify Password).

6. Click **Save**. Your password will be updated.

## Forgot Your Password?

If you forget your password, use the following instructions to retrieve a new password.

1. Click **Log In Help** on the **WAND Log In** page. The **Forgot Your Password** page will appear.

   Figure 2-13 **Forgot Your Password**


2. Enter your **Username** or **Email Address**.
3. Complete the other security questions, if required.
   - Your Mother's First Name
   - City You Were Born In
   - Secondary School You Attended
4. Click **Reset Password**. A temporary password will be emailed to you.
5. After retrieving the temporary password, go back to the WAND login page and:
   - Enter your username/email address and the temporary password.
   - Click **Log In**. The **Password Update** page will appear.
6. Complete the **Password Update** page entries:
   - Enter the **Current Password -** This is the temporary password that you received.
   - Enter a **New Password**.

- Re-enter your new password.

7. Click **Save**. Your password will be updated.

# Understanding Supplier Roles and Permissions

The following table describes Supplier-specific role(s) and how they are used.

Table 2-1 **Supplier Roles and Permissions**

| User Type | Role | What you can do... |
|---|---|---|
| Supplier | Standard | The Standard role allows you to update information on the workers that you supply to clients, view requisitions for personnel, and review billing items and invoices.<br>The Standard Role screen with the Home tab selected opens after you first log in to WAND. An overview of pending requisitions, invoices, and billing items are shown on the left side of the screen.<br>The right side of the screen shows action items, news articles, and contact information for the PrO Help Desk. |
| Supplier | Admin | The Admin role allows you to set up and maintain your information.<br>After selecting Admin from the drop-down list, you can view supplier documentation, supplier benefits, and supplier custom fields. |

# Commonly Used Buttons and Links

The following table describes some of WAND's most frequently used buttons and links.

Table 2-2 **Commonly Used Buttons and Links**

| Button or Link | Usage |
|---|---|
| Add or Add New | Add a variety of items, such as users, workers, requisitions, etc. |
| Browse | Locate files that you may need to upload to WAND from your network or your local drive(s). |
| Cancel | Cancel current processes or entries. Note: when you click **Cancel** during a process, your entries will be lost, unless you have already saved them. |
| Clear Search | Clear search results. |
| Done | Allows you to commit entries and/or modifications and then exit once the process completes.<br>In addition, clicking **Done** triggers certain email notifications and ensures that the task that you just performed takes effect. |
| Edit (Modify) | Edit or modify existing attributes or content. |
| Expand All | Click the Expand All link when there are multiple sections on the screen. |
| List All | List all items, such as all requisitions or workers (among others) for browsing, viewing or, selection. |
| Next | Proceed to the next page, or next procedure. |
| Plus (+) Sign | Click the plus (+) sign next to any individual section to expand it and view the details.<br>You can also click the Expand All link when there are multiple sections on the screen. |
| Previous | Return to the previous page or previous procedure. |

Table 2-2 **Commonly Used Buttons and Links**

| Button or Link | Usage |
|---|---|
| Remove | Remove or delete items from a section or page. |
| Save | Save your entries or modifications. |
| Save & Exit | Save your entries or modifications, then exit the page or procedure that you were working on. |
| Save & Next | Save your entries or modifications, then proceed to the next page. |
| Search | Perform an extensive system search based on criteria entered in the search screen. Use Search to locate documents, project-related information, users, clients, and other items. |
| Submit | A two-step process that lets you make multiple changes before clicking Save to commit the edits to WAND. |
| Variance | The Variance flag alerts managers to billing items that:<br>• Fall beyond the threshold set for the client for Overtime worked.<br>• Are beyond the threshold set for average billing. |

# Chapter 3 Requisitions

## What is a Requisition

A requisition (or an *order*) is a request for services.

Suppliers *fulfill* open requisitions by submitting resumes that meet client requirements.

As a supplier, your primary tasks include:

- Adding new workers to WAND
- Creating worker resumes
- Responding to Requisitions
- Scheduling Candidates for Interviews

# Responding to Requisitions

When a client submits a requisition, the supplier will receive an email message that a client has a pending staffing or project requisition.

After receiving the email notification:

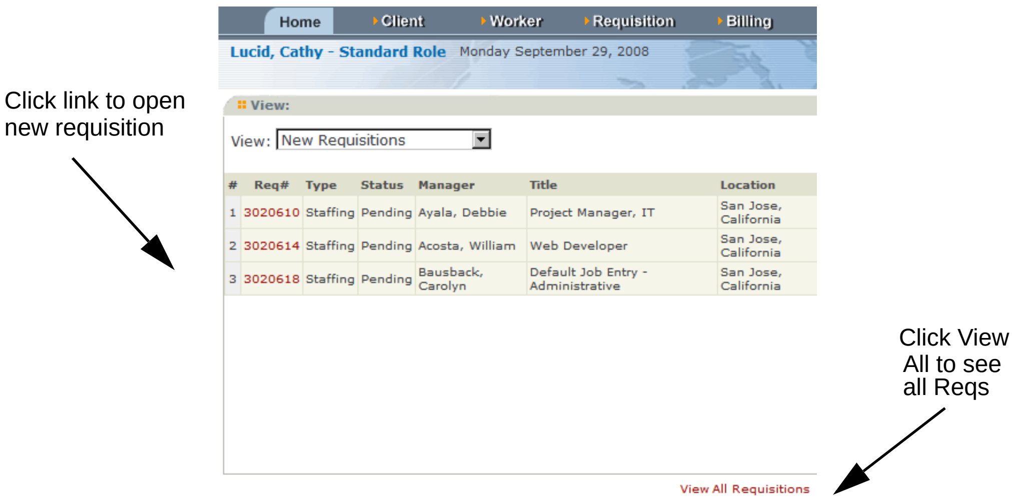
**1.** Log into WAND and do one of the following:

   **a.** Use the **View** drop-down list to see new requisitions, or to check the status of resumes that have been submitted.

   **b.** Click **View All Requisitions** to see a list of all available requisitions as shown in Figure 3-1.

   **c.** Click the **Requisition** tab and either: search for a specific requisition number; or click the **List All** link and locate the desired requisition number from the results.

Figure 3-1 **Supplier Home Page: View Reqs., Check Submittal Status**




You can also click the **Requisition** tab to specifically search for pending staffing or pending project requisitions.

**2.** Review the **Requisition Description** page as shown in Figure 3-2.

Figure 3-2  **Partial Example of Requisition Description Page**


The requisition description page includes important details such as an overview of required skills, start and end dates, rate information, educational and/or work-related experience, among others.

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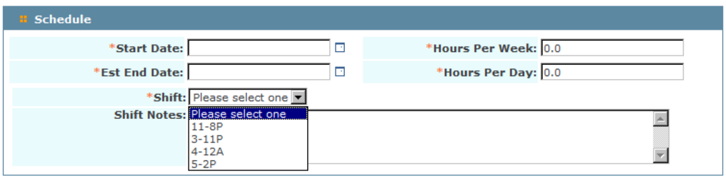
**Note:** If your system has been configured to select a worker's shift and optionally enter notes about the shift, the **Schedule** section of the requisition will display as shown in the following example.

Figure 3-3  **Example of Schedule Section with Shift Options**




Otherwise, this section will only include the Start Date, Est. End Date, Hours Per Week, and Hours Per Day.

---

3. From here you can submit a resume to the requisition.

   Refer to “Submitting a Resume to a Requisition” on page 3-5 for instructions.

# Submitting a Resume to a Requisition

Before you can submit a resume to a requisition, you will need to create a worker record, and create a resume for the worker.

- To add a worker, refer to “Adding a New Worker” on page 6-10.
- To create a resume, refer to “Creating a Worker’s Resume” on page 6-12.

After these tasks are performed, you can proceed with submitting a resume.

To submit a resume to a requisition:

1. Select the **Standard** role > click the **Requisition** tab.
2. Click **List All** to locate the desired *pending* requisition. The search results will appear.

Figure 3-4 **Example of List All Requisitions Search Results**

Home | Client | Worker | Requisition | Billing | Invoicing | Reporting

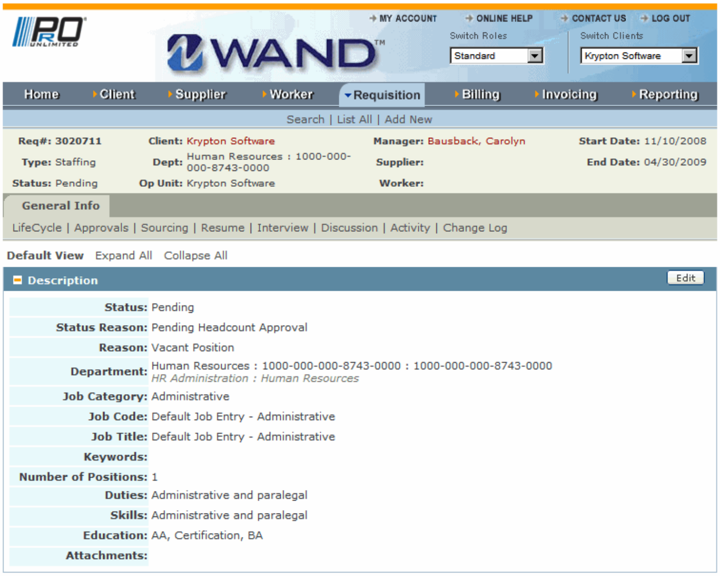
Search | List All | Add New

List All — All fields are sortable . — 1 2 3 4 Next >>

| Req# | Date Start | Type | Status | Client | Resource | Title | Location |
|---|---|---|---|---|---|---|---|
| 3020968 | 12/01/2008 | Staffing | Pending | Krypton Software | | Information Developer | US,CA |
| 3020727 | 11/17/2008 | Staffing | Pending | Krypton Software | | Information Developer | US,CA |
| 3020715 | 11/10/2008 | Staffing | Pending | Krypton Software | | Associate Admin/Paralegal | US,CA |
| 3020700 | 11/03/2008 | Staffing | Incomplete | Krypton Software | | Default Job Entry - Administrative | US,CA |
| 3020689 | 10/27/2008 | Staffing | Pending | Krypton Software | | Engineer, Software | US,CA |
| 3020676 | 10/27/2008 | Staffing | Pending | Krypton Software | | Order Specialist | US,CA |
| 3020672 | 11/03/2008 | Staffing | Pending | Krypton Software | | Default Job Entry - Administrative | US,CA |
| 3020670 | 10/29/2008 | Staffing | Pending | Krypton Software | | Desktop Specialist | US,CA |
| 3020653 | 10/06/2008 | Staffing | Pending | Krypton Software | | Project Manager, IT | US,CA |
| 3020626 | 10/06/2008 | Project | Pending | Krypton Software | | Project A | US,CA |

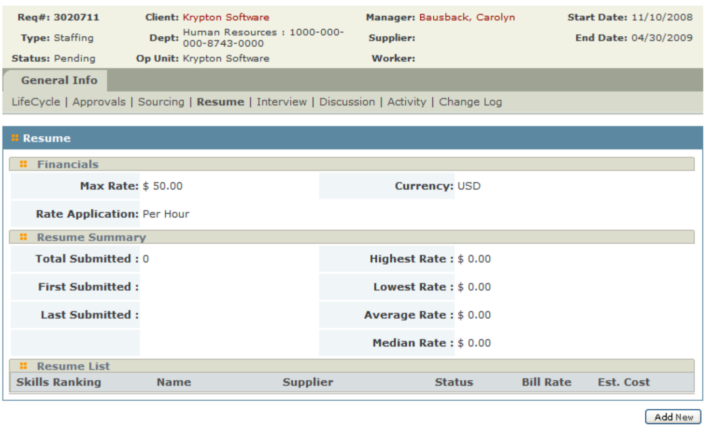
3. From the search results, click the desired **Req#** link to open the record. A page similar to the following will appear.

Figure 3-5 **General Info Page - Requisition Description (partial)**




4. Click **Resume** under the **General Info** tab. The **Resume** page will appear.

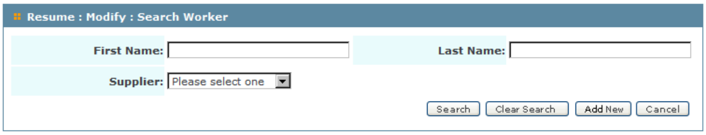
Figure 3-6 **Example of Resume Page with Add New Button**




5. Click **Add New**.

The **Resume: Modify: Search for Worker** page will appear.

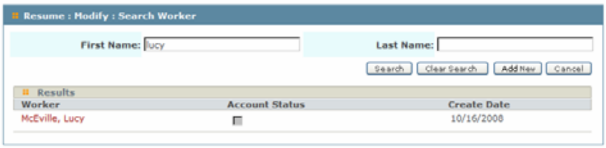
Figure 3-7 **Resume: Modify: Search for Worker**




Since resumes are attached to workers, you must locate and select the worker first. You can either search for an existing worker, or add a new worker.

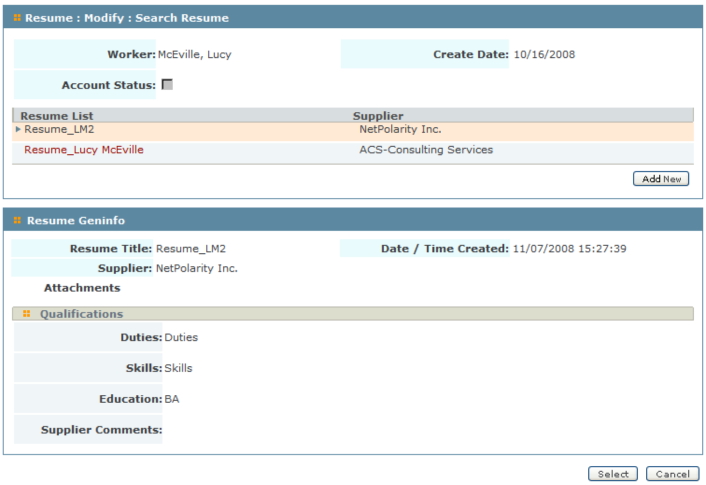
**6.** Enter the worker's full name or partial name and click **Search**. The results will appear.

Figure 3-8 **Example of Worker Search Results**



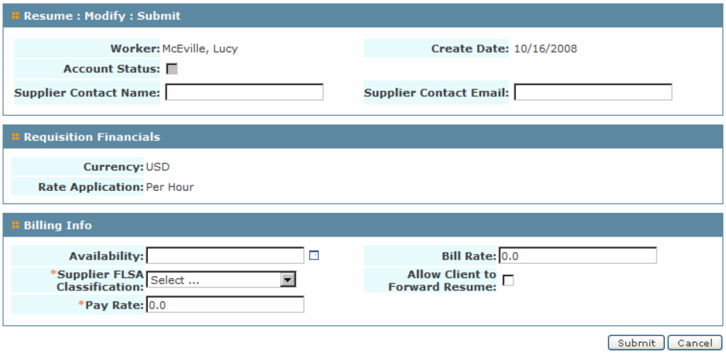

**7.** Click the worker's name to review the worker's resume list. A page similar to the following will appear.

Figure 3-9 **Partial Example of Worker's Resume**



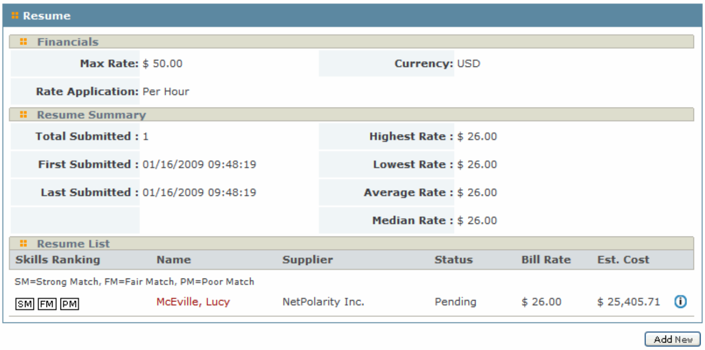

**8.** Click **Select** at the bottom of the page. A page that allows you to submit the resume will appear.

Figure 3-10 **Resume Submit Page**




9. Enter the **Supplier Contact Name** and the **Supplier Contact Email Address** if these fields are not automatically completed.
10. Select the **FLSA (Fair Labor Standards Act)** Classification from the drop-down list.
    - Select **Non-exempt** if the worker will be paid on an hourly basis and is eligible for overtime.
    - Select **Exempt** if the worker is salaried or paid on a “daily” basis, and is not eligible for overtime.
    - Select **Computer Professional** if the worker is paid on an hourly straight basis and is not eligible for overtime.
11. Enter the **Pay Rate**.
12. Click **Submit** to submit the resume to the requisition. The **Resume** page will appear with the worker’s information.

Figure 3-11 **Example of Submitted Resume List**



# Scheduling a Candidate for an Interview

If the client manager is interested in the candidate(s) you've submitted against a requisition, the client manager can either select the candidate based on the resume, or request to schedule an interview with the candidate.

When a manager requests an interview, an email message is generated and sent to the supplier with all interview information and the available times.After receiving the email notification, log into WAND to schedule the interview. Interview requests will be displayed in the **Interview** tab of the requisition.

To schedule a candidate for an interview:

1. Select the **Standard** role > click the **Requisition** tab.
2. Search for or enter the requisition number for which the candidate was submitted.
3. Select the requisition link from the **Search Results** page. The **General Info > Interview** page will appear.

   Figure 3-12 **Example of General Info > Interview Link**


4. Click **Interview**. The **Interview List** page will appear.
5. Click the appropriate link under **Title.**
6. Click schedule to view the manager's open times. Note that the **Candidate List** includes the name of the candidate to be interviewed by the supplier.
7. Locate the interview time that works best for your candidate(s).
8. Click **Accept** next to the desired interview time.
9. Repeat this process, if necessary for additional candidates.
10. When finished, click **Done**.

## Entering an Interview Candidate's Contact Information

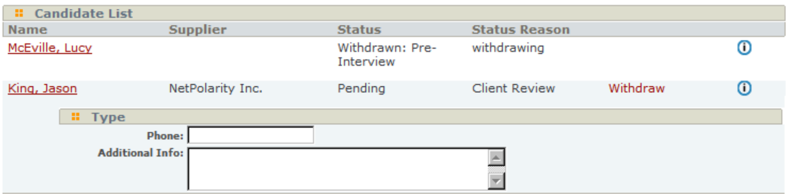
Entering additional information for an interview candidate such as their phone number or other details can be helpful should the interviewer/client need to contact the candidate.

To enter a candidate's contact info:

1. Scroll to the **Candidate List** section of the **Interview** page.
2. Click the **Candidate's** Name.

   A **Type** section appears allowing you to enter the candidate's phone number and additional info.
3. Click **Edit** to open the **Type / Contact Info**.section.

   Figure 3-13 **Interview Candidate List**

   
   
4. Enter the **Phone Number** and **Additional Information** if needed.
5. Click **Save**.

   The info you provided will be visible to the client when reviewing their scheduled interviews

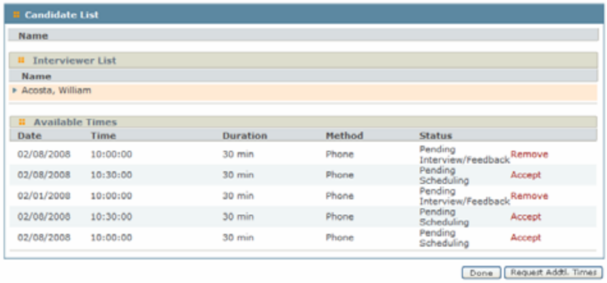
   **Tip**: Clicking the **Done** button ensures that the task that you just performed takes effect. The **Done** button also triggers certain email notifications and ensures that the task that you just performed takes effect.

## Viewing an Interviewer's Schedule

To view an interviewer's schedule:

1. Navigate to the **Interview** page.

Figure 3-14 **Example of Interview Page with Schedule link**



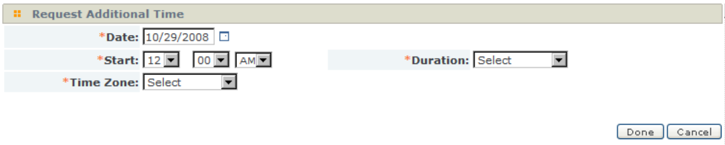

2. Click **Schedule**. The **Candidate List** page appears with the client's available times.

## Requesting Additional Interview Times

To request additional interview times:

1. Click **Request Addti. Times**. The **Request Additional Time** schedule will appear.

Figure 3-15 **Request Additional Time**




2. Select a **Date** for the interview.
3. Select the **Start Time** for the interview.
4. Select the **Time Zone**.
5. Select the **Duration** (length of interview).
6. Click **Done**.

## Accepting Interview Times

To accept a proposed interview time.

1. Navigate to the **Candidate List** page.
2. Review the available times.
3. Click **Accept**. The interview status will change to *scheduled*.
4. Click **Done**.

## Withdrawing an Interview Candidate

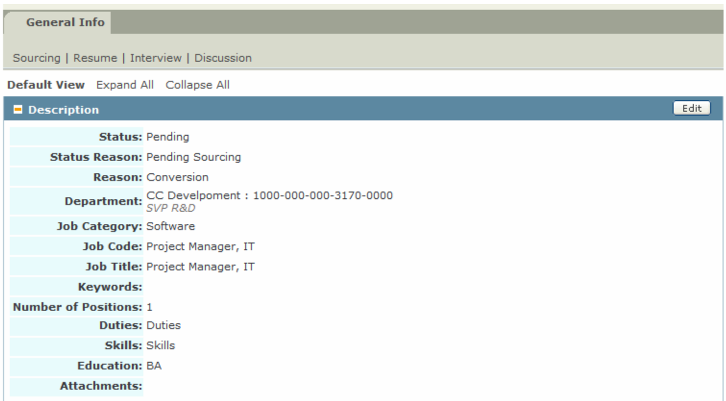
To withdraw an interview candidate:

1. Click the **Requisition** tab.The **Search for Requisition** page will appear.
2. Enter the pending requisition number for the interview/candidate.
3. Click **Search**. The search results page will appear.

Figure 3-16 **Example of Search Results**

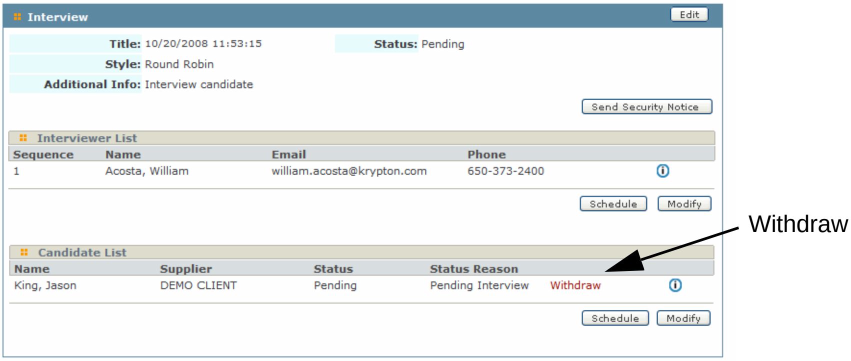

4. Click the **Req#**. The **General Info Page** will appear.

Figure 3-17 **General Info > Interview Link**




5. Click **Interview.** The **Interview List** page will appear.
6. Click the desired interview link/title. The **Interview** page will expand.

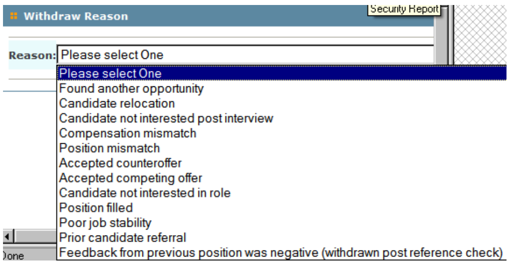
Figure 3-18  **Interview > Withdraw**




**7.** Click **Withdraw.**

**8.** Select a reason for the withdrawal from the **Withdraw Reason** drop-down list.

Figure 3-19  **Withdraw Reason Drop-Down List**




**9.** Click **Save**. The candidate will be withdrawn.

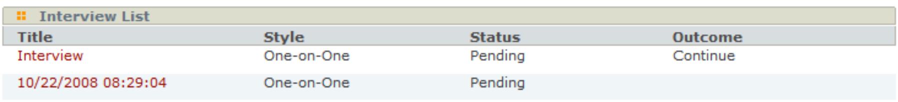
## Viewing Interview Feedback

To view a client’s interview feedback:

1. Click the **Requisition** tab.
2. Enter the **Req#**, the click **Search**. The **Search Results** page will appear.
3. Select the **Req#** from the search results. The **General Info** page will appear.
4. Click **Resume**. The **Resume List** will appear.
5. Click the desired candidate’s resume. The resume will open.
6. Scroll to the **Interview List** section of the resume.
7. Click the link for the desired **Interview**. The **Interview Page** will appear.

   The **Outcome** of the interview is displayed on the right side of the page.

Figure 3-20 **Example of Interview Outcome**



Interview List

| Title | Style | Status | Outcome |
|---|---|---|---|
| Interview | One-on-One | Pending | Continue |
| 10/22/2008 08:29:04 | One-on-One | Pending | |

- Additional information may also be available for viewing, such as the **Status Reason** and, if available, comments that the client entered.
- Check the **Status** field in the **Resume** page.

  If the candidate was rejected, the status of the interview and a reason for the rejection will display in the **Resume** page.

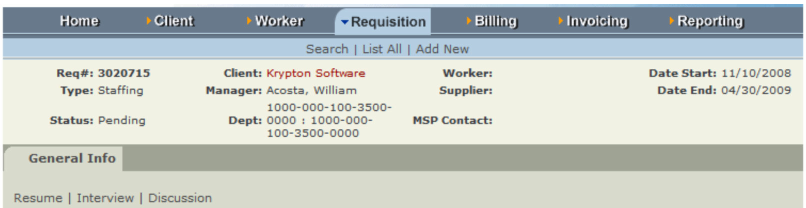
## Using the Discussion Board

The Discussion Board allows you to post and/or view topics (threads) or inquiries related to a requisition. You can also use this board to share information about resumes that you want to submit. Use this board for professional/business purposes only.

To use the Discussion Board:

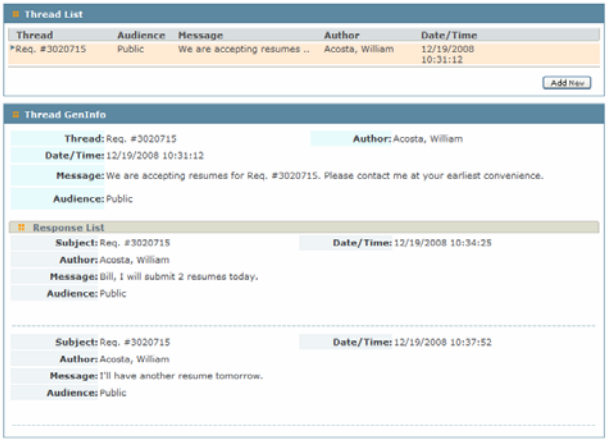
1. Click **Requisition**. The **Requisition** search page will appear.
2. Search for and select a pending staffing or pending project requisition. **The Requisition > General Info** page will appear.

   Figure 3-21 **Requisition > General Info**

3. Click **Discussion**. The **Discussion Thread List** will appear.

Figure 3-22 **Discussion Thread List - Thread GenInfo**




Use the Discussion Thread to view existing messages, if posted, or add new messages.

4. Click **Add New**. The **Thread GenInfo** page will appear.
5. Enter a subject or topic in the **Thread** field.
6. Enter a **Message**.
7. Click **Save**.

The **Thread List** will be populated with the details of the message. It will also be viewable to others with access.

Figure 3-23 **Example of Populated Thread List**

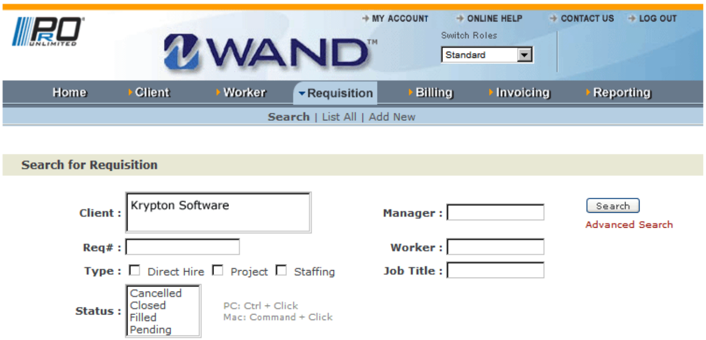
# Submitting a Quote to a Project Requisition

Quotes can be submitted to *project* requisitions by supplier-users with the appropriate permissions.

To submit a quote to a project requisition:

1. Select the **Standard** role > click the **Requisition** tab. The **Search for Requisition** page will appear.

   Figure 3-24 **Search for Requisition**

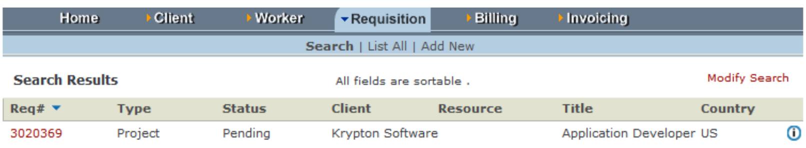
   
   

2. Select the **Project** checkbox, then click **Search** to locate a Project requisition.

   Or click the **List All** link to access a list of requisitions, then browse the list to locate the desired project requisition.

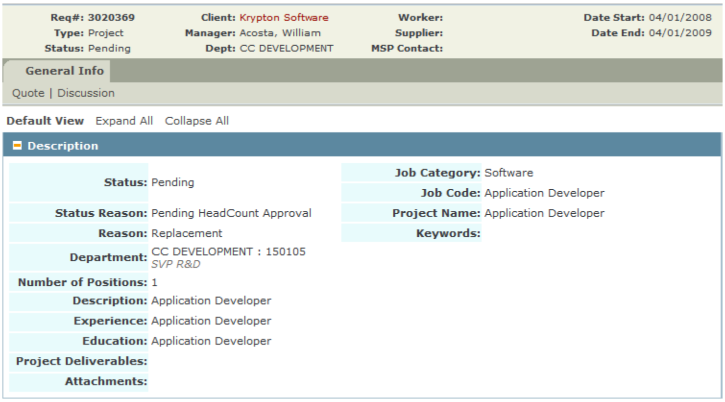
   A **Search Results** page, similar to the following, will appear.

   Figure 3-25 **Example of Project Requisition in Search Results**

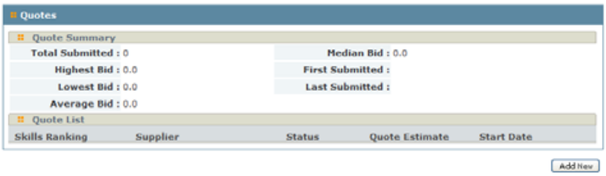
3. From the search results, click the **Req#** link to open the record. The **General Information** page will appear.

Figure 3-26 **General Information with Quote Link**



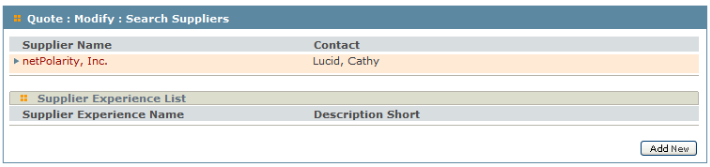

4. Click the **Quote** link. The **Quotes** page will appear.

Figure 3-27 **Quotes Page**



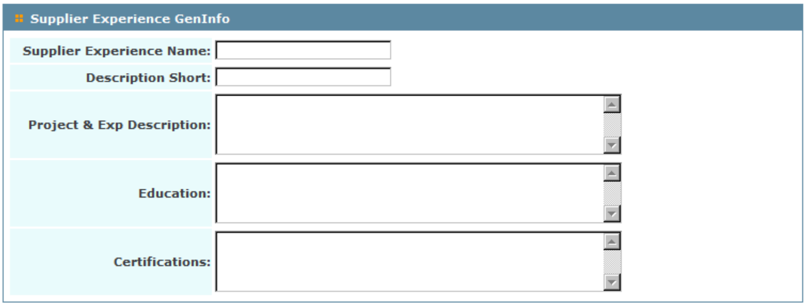

5. Click the **Add New** button. The **Quote-Modify** page will appear.

Figure 3-28 **Quote Modify**




6. Click **Add New** to add supplier experience details.

Figure 3-29 **Supplier Experience GenInfo**



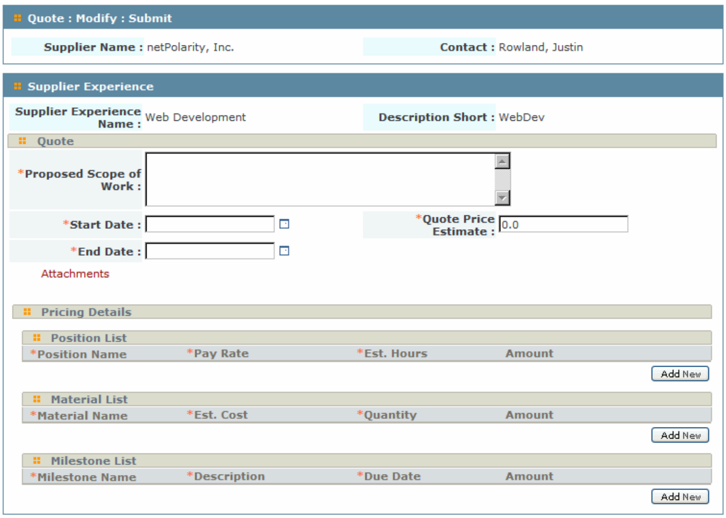

7. Complete the following: Supplier Experience Name, Description, Project and Experience Description

   - Education, Certifications

8. Click **Save**.

9. At the bottom of the screen, click **Select**. The **Quote Submit** section will appear.

Figure 3-30 **Quote submit, Supplier Experience**




10. Complete the following:

    - Proposed Scope of Work

- Select the Start Date, End Date
- Quote Price Estimate

Optionally use the **Attachment** link to attach related documents, such as a resume, if needed.

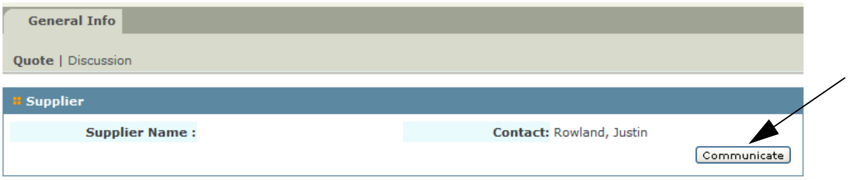
11. Click **Add New** to add Pricing Details, such as the Pay Rate, Estimated Hours, and Amount.
12. Click **Submit**.

## Communicating Quote Details

To communicate with a client about a quote:

1. Search for and select a **Pending Project Requisition**. The **General Info** > **Quote** page will appear.
2. Click **Quote**. The **Quote** page will appear.
3. In the **Quote List** section click the **Supplier Name** (link). A page with the **Communicate** link will appear.

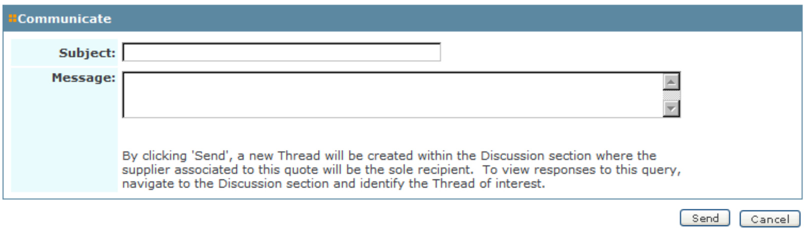
Figure 3-31 **Example of Communicate Link**




4. Click **Communicate**. The **Communicate** page, as shown in Figure 3-32 will appear.

   Use this page to communicate details about the quote with a Client-Manager.

Figure 3-32 **Communicate Page**




5. Enter the **Subject**, such as the requisition number, that you want to discuss with a specific client-manager.
6. Enter a **Message** regarding the quote in the Message box.
7. Click **Send**. The message will be forward to the appropriate recipient.

# Chapter 4 Billing Management

## About WAND Billing Management

To manage billing items, such as time and expenses, you can submit time on behalf of a worker, confirm expenses and export a billing item. WAND's billing functions gather information from various input points and process it to generate debits and credits to clients and suppliers.

WAND is capable of handling many different kinds of data while maintaining a consistent process that can be easily tracked and reproduced. WAND is also able to verify a billing item by tracking the history of any changes made to it.

### Entering Time and Expenses

A worker's time and expenses can be input from various sources. The data is consolidated into a format that is passed on to the client for approval. After the billing items have been approved, the data is consolidated again before it is sent to the client for payment.

Time and expense billing items usually go through a two-stage approval process. The worker submits time and expenses to a manager, who approves the billing item, and then passes it on for final approval.

When a requisition for a contingent worker is created, it is configured to specify whether the worker will be entering time and expense data into WAND or if an external source will provide the data entry.

# Types of Billing Items

WAND billing items are described in the following table.

Table 4-1 **Table of Billing Items**

| **Billing Item** | **Description** |
| --- | --- |
| Time | A worker may be required to enter time as hours, days, or both hours and days. The worker may enter the actual hours worked during the day and specify whether each hour is regular time, overtime, or double time for cost allocation. Hourly time can also be entered by specifying the start and end times for each day's work period. Time entered as hours must conform to the workweek, day, and shift that were defined in the requisition for the position. If the position was defined as by-the-day rather than by-the-hour, the worker need only indicate that he or she worked that day. Some clients require that workers enter both the start and end times and confirm that they worked on a specified day. |
| Project | Independent Contractors/Consultants or firms use the project user interface if their position is defined as project-related.<br>**Note**: For project and milestone based work, expenses may be included in the total amount and not detailed separately. |
| Expenses | Workers can enter work-related expenses in WAND so the supplier can reimburse them. Although client-specific, receipts for expenses are often submitted to the supplier along with detailed information that explains why the expense is work-related. Non-travel related expenses for closed requisitions can be added after the closed date, but only up to the end of the billing period. |
| Holiday Pay | Depending on how the client is setup, the client may reimburse the supplier for holiday pay. |
| Adjustments | Adjustments include billing items that do not fall into other categories. Adjustments can also include minor adjustments for variations that may arise during the course of a billing cycle. Adjustment billing is assigned a classification which identifies the purpose and type of billing adjustment. Examples of adjustments are credits, rebills, process fees, and completion bonuses. |

# Managing Billing Information

The instructions that following will help you manage billing information:

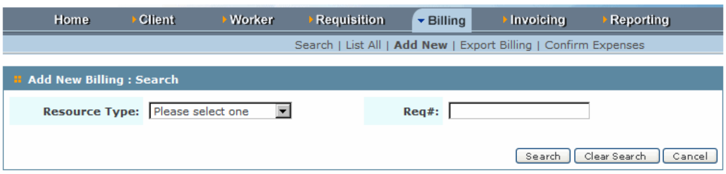
## Submitting Time on Behalf of a Worker

Before completing this procedure, you must have selected a requisition to bill against.

To add and submit time entries:

**1.** Click the **Billing** tab > **Add New**. The **Add New Billing: Search** page will appear.

Figure 4-1 **Add New Billing: Search**



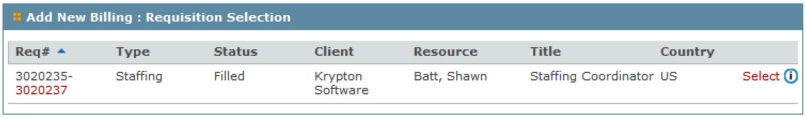

Use this page to select your search criteria. At least one option must be selected.

**2.** Select a **Resource Type**, such as **Worker** or **Supplier**, or enter a **Req#**.

- If you select **Worker**, worker results will appear. Click the worker’s name.
- If you select **Supplier**, supplier results will appear. Click the supplier’s name.

**3.** Click **Search.** The results will appear.

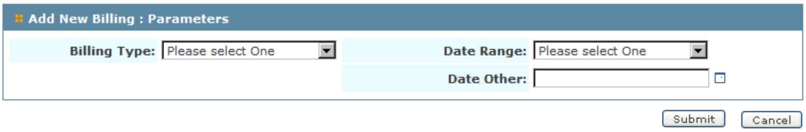
Figure 4-2 **Add New Billing: Requisition Selection**




4. Click **Select** The **Add New Billing: Requisition Selection** page will appear.

5. Click **Select**. The **Add New Billing Parameters** page will appear.

   Figure 4-3 **Add New Billing: Parameters**




6. Select a **Billing Type**, such as Adjustment, Benefit, Expense or Time.

   *In this example,* **Time** *is selected.*

7. Select **Time** from the **Billing Type** drop-down list.

8. Select the **Date Range** from the drop-down list.

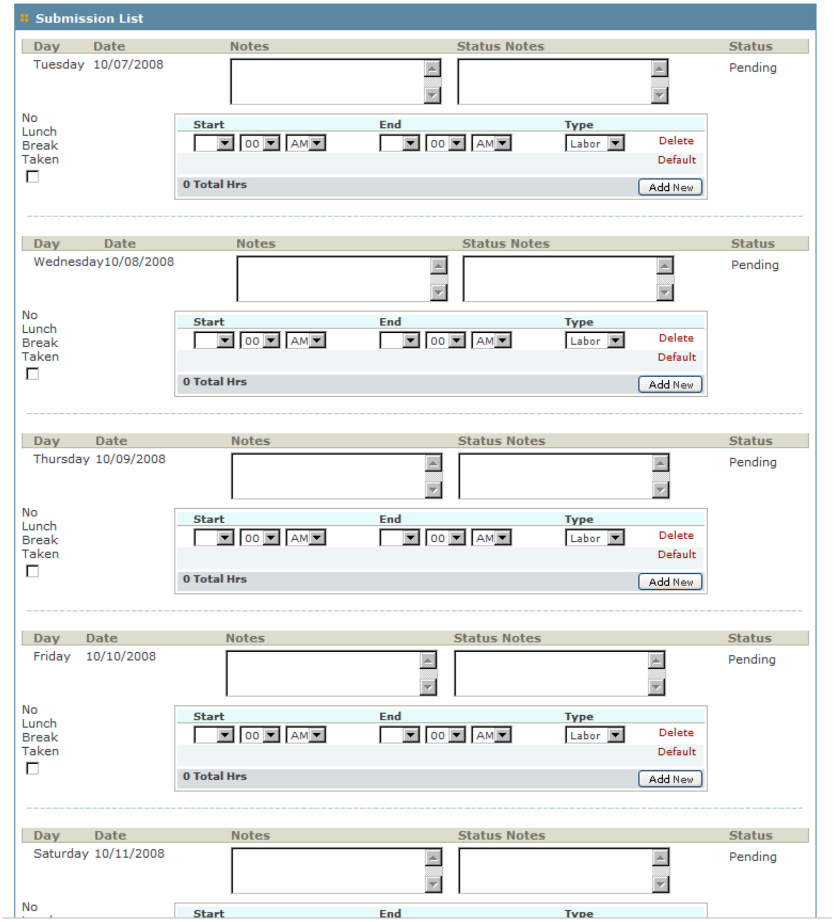
   The **Date Range** drop-down list shows the date ranges of work periods that are associated with the worker and the requisition. Several work periods, including the current work period, may be available.

   If the desired date range is not available, enter a date in the **Date Other** box using the format: **MM/DD/YYYY**.

   Or use the calendar icon to select the date.

9. Click **Submit**. The **Submission List** page will appear

Figure 4-4 **Example of Submission List for Time Entry**




**10.** Complete one of the following:

- **a.** For an hourly timecard, enter the number of hours worked for each day.
- **b.** For a daily timecard, specify each day that was worked.

c. For a mixed time card, specify each day that was worked as well as the start and end times.

11. Click **Save**. The time billing item(s) will be added.
12. Review the submission list.
13. Click **Edit** to make changes.
14. When finished, click **Done** to save your changes.

## Exporting a Billing Item

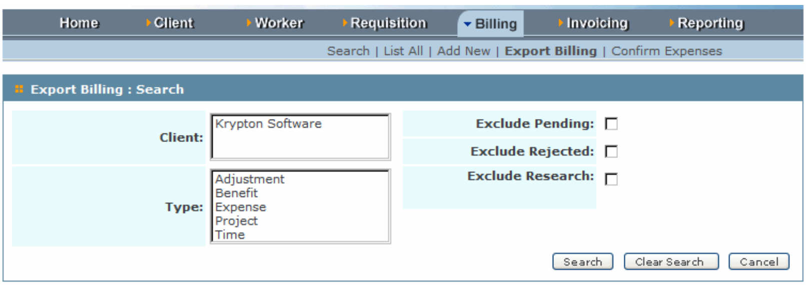
After billing items are processed by WAND and routed for approval, suppliers will need to export billing information so that workers can be paid.

When you export a billing item, the billing record is flagged so you can run reports on these billing items.

To export a billing item:

1. Select the **Standard** role > click the **Billing** tab.
2. Click the **Export Billing** link. The **Export Billing Search** page will appear.

Figure 4-5 **Export Billing Search**




3. Select the search criteria, such as the Client's name and billing types.
4. Optionally, select the checkboxes for **Exclude Pending**, **Exclude Rejected** and/or **Exclude Research**.

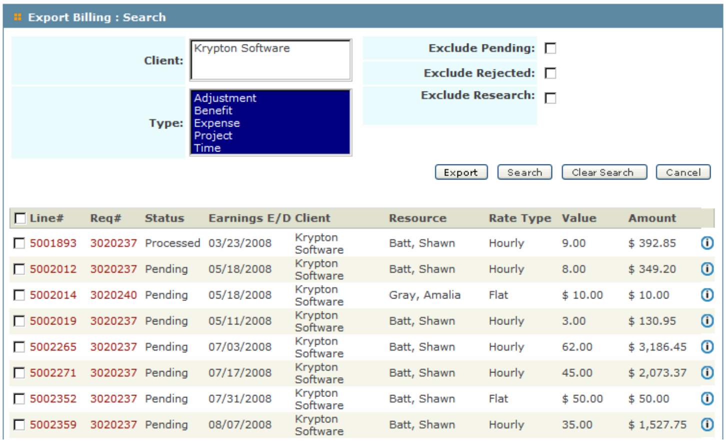
If you have multiple clients, you can select a range of clients by clicking the first name, then select and shift/click the last one in the group.

5. Select the billing type, such as **Time, Project, Expense, Benefit** and/or **Adjustment**.

   To select a range of types, click the first one and shift/click the last one in the group.

6. Click **Search**. The search results will appear as shown in the following example.

Figure 4-6 **Export Billing Search Results Screen**




7. Select the appropriate checkbox(es) for the items that you want to export.

8. Click **Export**. A confirmation message will appear.

Figure 4-7 **Example of Export Confirmation Message**

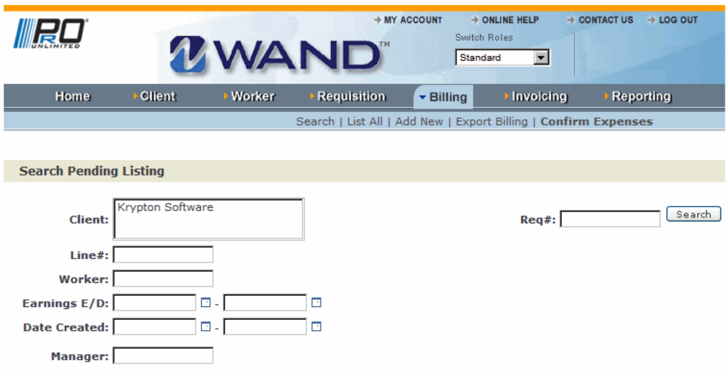

9. Click **Done** to return to the **Billing Search** page.

## Confirming Expenses

To confirm submitted expense items:

1. Select the **Standard** role > click the **Billing** tab.
2. Click **Confirm Expenses**. The **Search Pending Listing** page will appear.

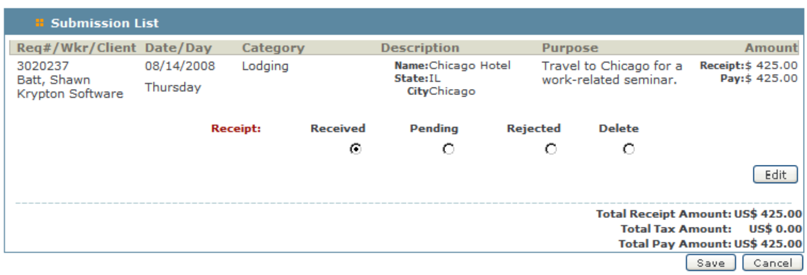
Figure 4-8 **Example of Search Pending Listing page**




3. Enter specific fields to narrow your search results, or click **Search** to view all listings.

   A **Submission List** similar to the following, will appear.

Figure 4-9 **Example of Submission List for Expenses**




4. Review the expense entries on the submission list.

If you need to revise details in the **Submission List**, click **Edit**, make your changes, then click **Save** to proceed.

**5.** Select one of the following:

- Click **Received** if you have the receipt
- Click **Pending** if the receipt is pending. You can change this status after you receive the receipt.
- Click **Rejected** if you cannot approve the receipt, then enter a **Reason** for the rejection.

  The worker will be notified that the receipt was rejected. The worker can modify and re-submit the revised expense.
- Click **Delete** to remove the receipt

**6.** Click **Save**. A **Confirmation** page will appear.

Figure 4-10 **Example of Confirmation Page for Expenses**


- Click **Print Expense Report** and, if needed, save a copy for your records.
- Click **Done** when finished.

# Chapter 5 Invoicing for Suppliers

## What is an Invoice

An invoice is an itemized bill for goods sold, or services provided, to a company, client, or consumer that contains individual prices or expenses, the total amount due, and the terms.

You can use this section to track the payments that you have received, as well as view billing items that may be associated with a particular invoice.

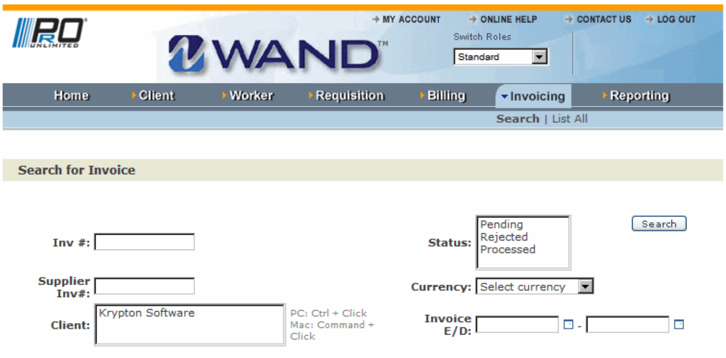
# Searching for Invoices

To search for invoices.

**1.** Select the **Standard** role from the **Switch Roles** drop-down list.

**2.** Click the **Invoicing** tab. The **Search for Invoice** page will appear.

Figure 5-1 **Search for Invoice**




**3.** Use this page to search by any of the following:

- Invoice Number (**Inv#**)
- Supplier Inv#
- Client
- Status (Pending, Rejected, Processed)
- Currency
- Invoice E/D

You can also click **List All** to see all available invoices without selecting search criteria.

**4.** After selecting your criteria click **Search**.

Following is an example of search results of all processed invoices for the client (Krypton), with the currency of USD.

Figure 5-2  **Example of Search Results for Processed Invoices**

**Search Results** All fields are sortable. Modify Search

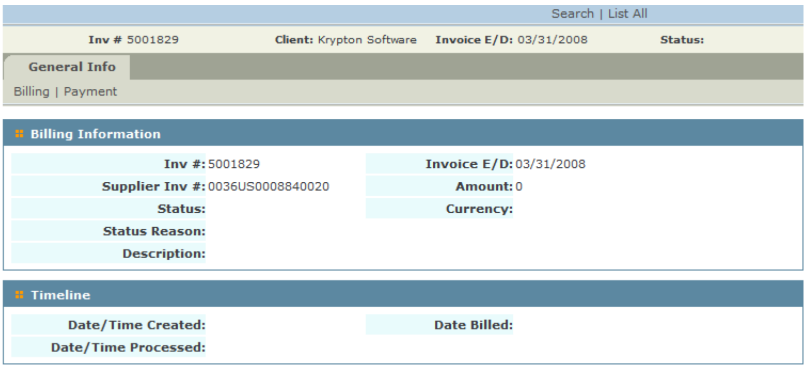
| Inv # | Supplier Inv# | Client | Invoice E/D | Status | Status Reason |
|---|---|---|---|---|---|
| 18990 | 0036US0008840019 | Krypton Software | 05/07/2006 | Processed | |
| 18839 | 0036US0008840018 | Krypton Software | 04/30/2006 | Processed | |
| 18691 | 0036US0008840017 | Krypton Software | 04/23/2006 | Processed | |
| 18526 | 0036US0008840016 | Krypton Software | 04/16/2006 | Processed | |
| 18399 | 0036US0008840015 | Krypton Software | 04/09/2006 | Processed | |
| 18251 | 0036US0008840014 | Krypton Software | 04/02/2006 | Processed | |
| 18145 | 0036US0008840013 | Krypton Software | 03/26/2006 | Processed | |
| 18061 | 0036US0008840012 | Krypton Software | 03/19/2006 | Processed | |
| 17843 | 0036US0008840011 | Krypton Software | 03/12/2006 | Processed | |
| 17772 | 0036US0008840010 | Krypton Software | 03/05/2006 | Processed | |
| 17628 | 0036US0008840009 | Krypton Software | 02/26/2006 | Processed | |

5. Click **Modify Search** to revise the search criteria, or perform another search.

## Viewing Invoices

To view an invoice, you can either enter a specific **Inv#** and click **Search** as shown in Figure 5-3. Or, select an **Inv#** from a list of search results.

Figure 5-3  **Example of Viewing an Invoice**




This page includes the **Inv#** and the invoices **E/D**.

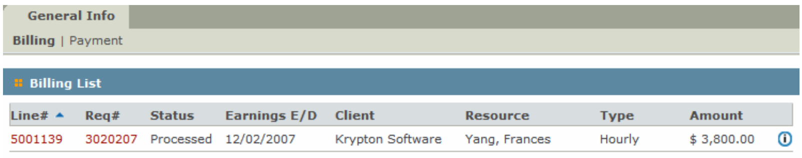
## Using the Billing List

Two additional links under **General Info** can be clicked to see more details: Billing and Payment.

To view billing details:

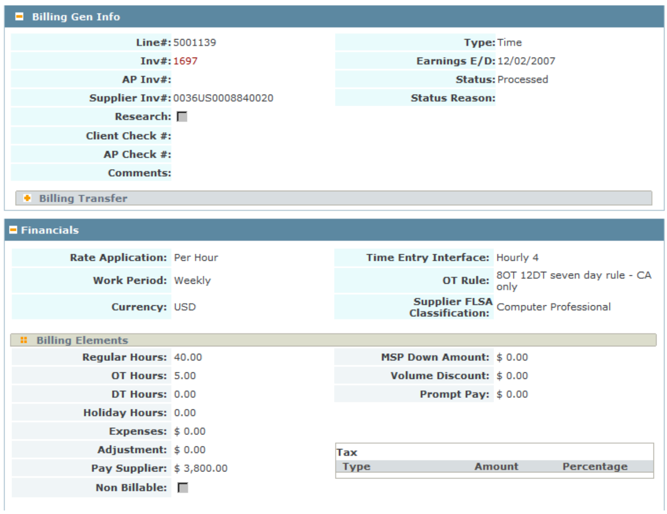
1. Click **Billing**. The **Billing List** will appear.

Figure 5-4 **Example of General Info > Billing List**




2. Click **Line Number** to see more details as shown in the following example.

Figure 5-5 **Partial Example of Expanded Gen Info Page**




3. Scroll up and down the page to view the various sections.

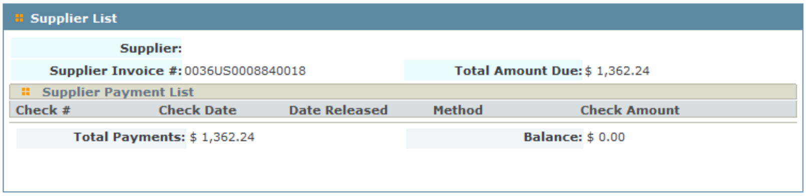
   Use the **Expand All** or **Collapse All** links to open or close sections as needed.

## Viewing Payment Info

To view payment info:

1. Click the **Payment** link as shown in Figure 5-4. The **Supplier List** will appear.

Figure 5-6 **Example of Payment Info - Supplier List**




2. Supplier details include, if available, the supplier invoice number, total amount due, total payments, and balance.

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# Chapter 6 Worker Management for Suppliers

## What is Worker Management

A worker is your W2 employee who performs temporary assignment based work at a client’s site.

You can use the Standard role **Worker** tab to view information about your workers who are currently on assignment at a client’s site, or workers you have used in the past.

You can also add new workers into WAND and edit information about your existing workers.

# Managing Workers

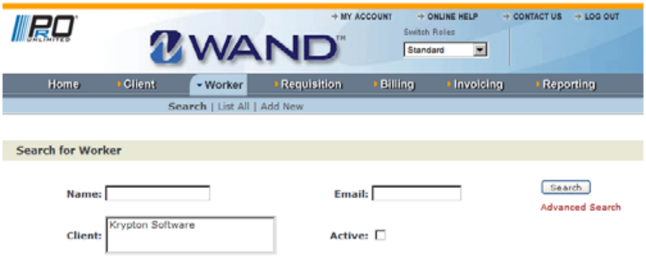
The instructions that follow will help you manage worker information.

## Modifying Worker Information

To view or edit worker information:

1. Click the **Worker** tab. The **Search for Worker** page will appear.

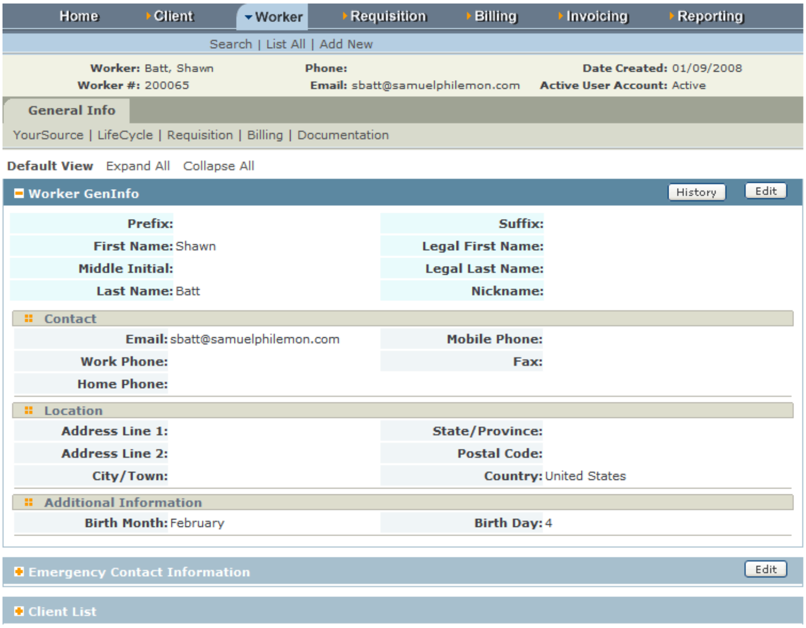
Figure 6-1 **Search for Worker**




2. Perform a search or click the **List All** link to access a list of workers.
3. After locating the desired worker, click the worker's name.

   The worker record displayed on the **Worker General Information** screen, as shown in Figure 6-2, opens.

Figure 6-2  **Worker General Information Screen**




If the **Add New** button is available at the bottom of a section, you can add information about the user.

The **Add New** button is only visible when the section is expanded.

The **Edit button** is visible on the section's colored header.

The links below the **General Info** tab provide access to several other categories of information about the worker (YourSource, LifeCycle, Requisition, Billing, and Documentation).

**4.** Complete one of the following:

   **a.** Click the **Add New** button, if available, at the bottom of an expanded section to add new information.

   **b.** Click the **Edit** button on the section header to modify the record.

**5.** After you have added or edited information to your satisfaction, click the **Save** button.

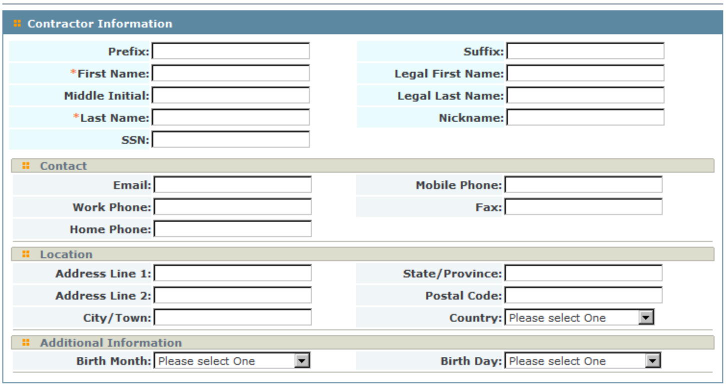
## Adding a New Worker

To add a new worker:

1. Click the **Worker** tab > click **Add New**. The **Search for Worker** page will appear.
2. Perform a search to ensure that the desired worker does not already exist.
3. Click the **Add New** button at the bottom of the **Search Results** page.

   The **Contractor Information** page, as shown in Figure 6-3, will appear.

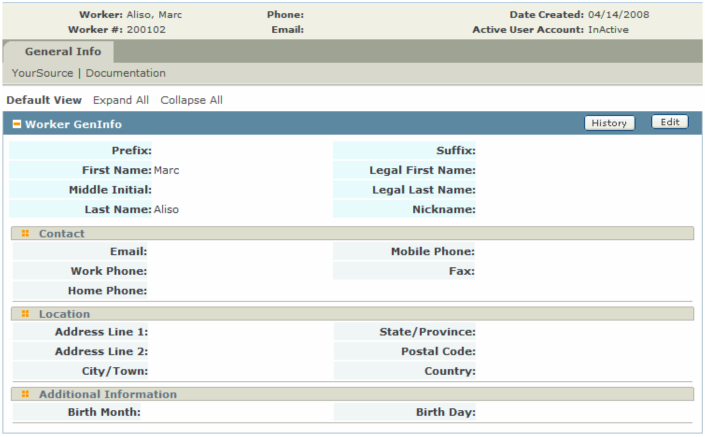
   Figure 6-3 **Contractor Information**




4. Complete the required fields (*) and any optional fields, as needed, for the new worker.
5. Click **Save**.

   The new worker's record will appear in the **Worker General Information** page, as shown in Figure 6-4.

Figure 6-4  **General Info page for newly added worker**




6. From the **General Information** page, you can:

- Click **History** to view history associated with this entry.
- Click **Edit** to modify the Contractor Information page.
- Click **Edit** to add emergency contact information.
- View the **Client List** section.

## Creating a Worker's Resume

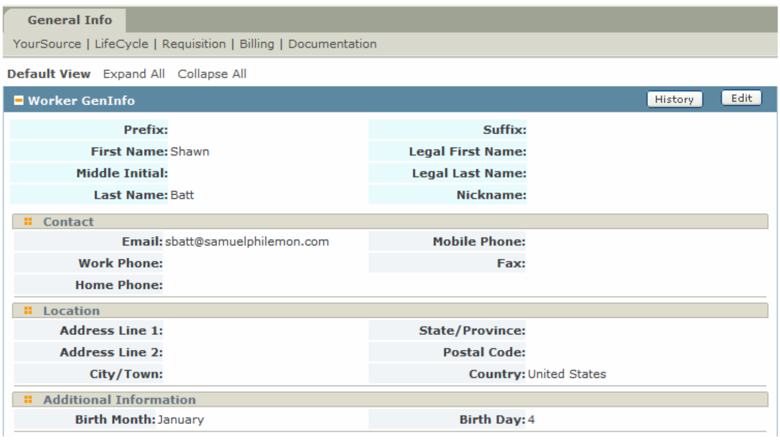
You can add one or more resumes to a worker's record. In addition, you can attach a supporting file to the resume record such as cover letter, or skills assessment list.

To add a resume to a worker's record:

1. Select the **Standard** role > click the **Worker** tab.
2. Click **Search** to search for a worker, or click **List All** to access a list of workers.

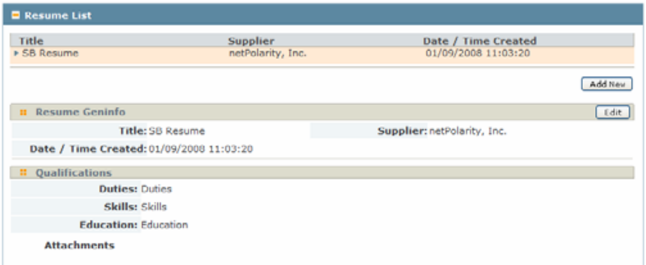
   Refer to Modifying Worker Information for more information.
3. Click a worker's name. The **Worker General Information** page will appear.

   Figure 6-5  **Worker General Information**




4. Click the **YourSource** link under the **General Information** tab. The **Resume List** page will appear.

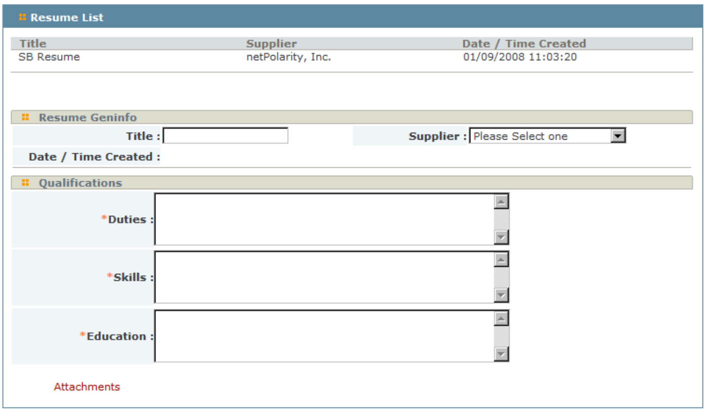
Figure 6-6  **Resume List page for a specific worker**




If a resume already exists, click the link that appears under **Title**.

5. Click **Add New**. The **Resume List** page will appear.

Figure 6-7  **Resume List**




6. Enter a **Title** such as *Resume_John Smith*.
7. Select the **Supplier** from the drop-down list.
8. Enter **Qualifications** such as Duties, Skills, and Education.
    - Optionally, use the **Attachments** link to attach a resume if desired.
        - Click the **Attachments** link and click **Browse** to locate the resume stored on your desktop. Attachments cannot exceed 10 MB (megabytes).
        - Click **Attach**. The resume will be uploaded to WAND and the attachment will be added to the Attachment list.

- To remove a resume from the list, click the checkbox next to the resume, and click **Remove From List**.

**9.** Click **Save**. The new resume will display in the **Resume List** section.

# Chapter 7 Admin for Suppliers

## About Supplier Administration

You can view details about supplier benefits, RFIs, and supplier documentation.

Using the Admin role, you can establish and maintain information associated with your supplier profile.

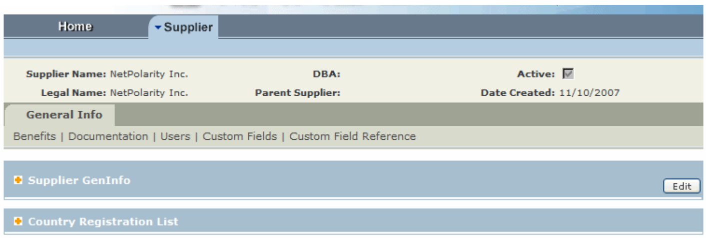
The instructions that follow will help you manage and administer supplier information.

## Modifying Supplier Information

To edit supplier information:

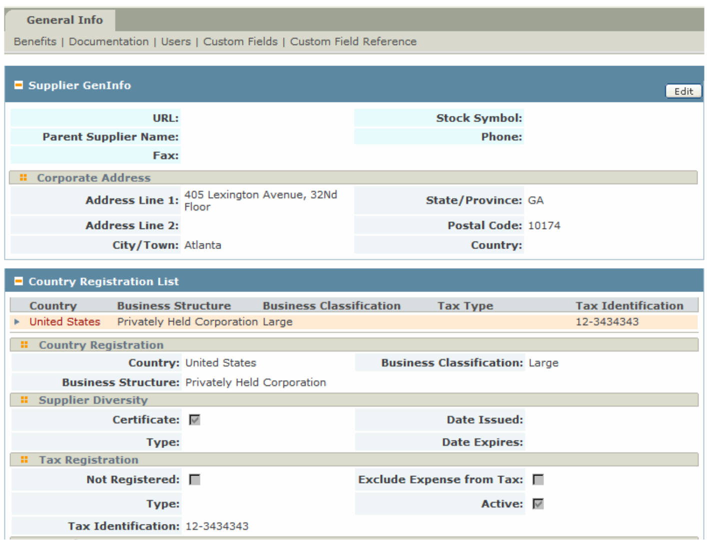
1. Select the **Admin** role.
2. Click the **Supplier** tab. The **Supplier General Information** page will appear.

Figure 7-1 **Example of Supplier General Information Page**



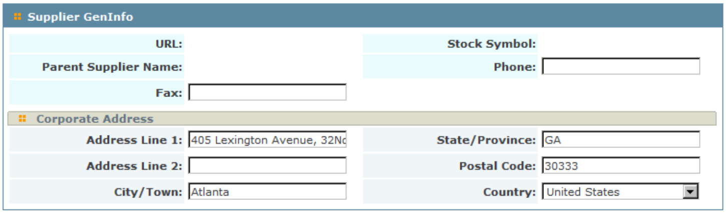

3. Click the + buttons on the far left side to expand the page.

Figure 7-2 **Expanded View of Supplier General Information Page**




4. In the **Supplier GenInfo** section click **Edit**. The **Supplier GenInfo** page will appear.

Figure 7-3 **Supplier GenInfo Page for Editing**




**5.** Complete the entries on this page as needed.

- Use the top part of this page to optionally enter a **FAX** and/or **Phone** Number.
- Use the bottom part of this page to enter the **Corporate Address**.

**6.** When finished click **Save**.

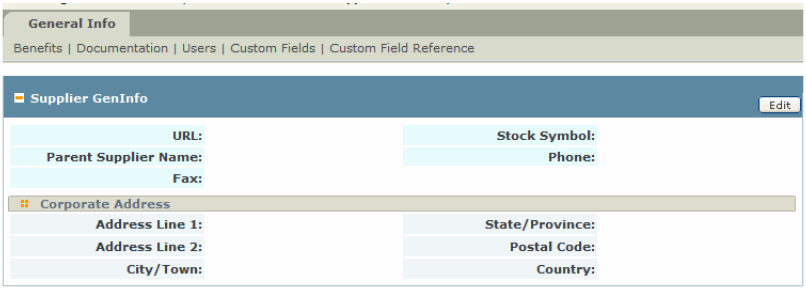
## Adding Custom Fields

Custom fields can be created and then added to your worker record. Only users with Admin permissions can perform this task.

To add a custom field:

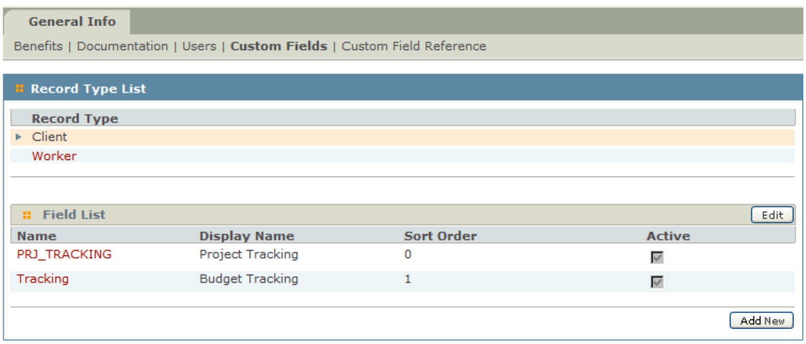
1. Select the **Admin** role > click the **Supplier** tab. The **General Info** page will appear.

Figure 7-4 **Example of Supplier General Info Page (expanded)**



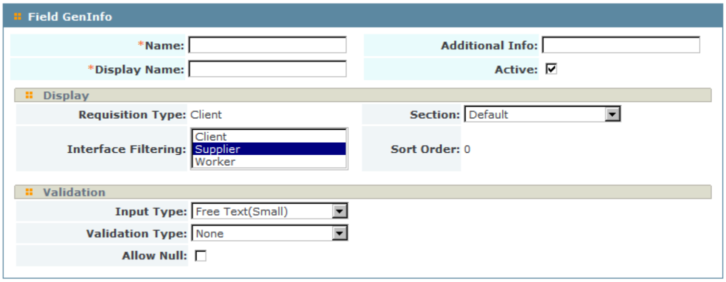

2. Click **Custom Fields**. The **Record Type List** page will appear.

Figure 7-5 **Record Type List**




3. Click **Add New**. The **Field GenInfo** page will appear.

Figure 7-6 **Example of Field General Information Page**




4. Enter a **Name** for the field.

5. Enter the **Display Name** for the field. This is the name that will appear on the user interface.

6. Make sure **Active** is checked.

7. Select an option for **Interface Filtering**, such as **Client**, **Supplier**, or **Worker**

8. Select the desired input type, such as Free Text (small or large), Pull Down, Pull Down Long, or Radio Button.

9. Complete any related entries that are associated with the **Input Type** that was selected.

10. Click **Save**.

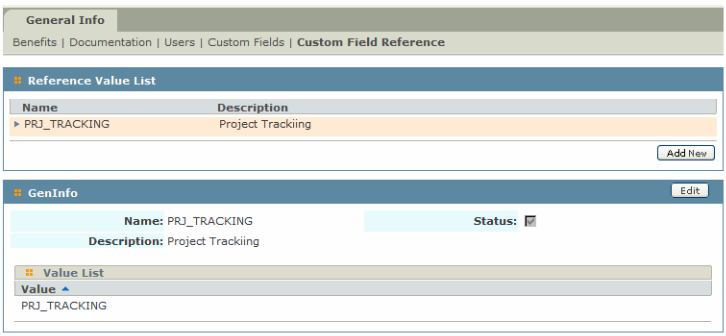
## Adding a Custom Field Reference Value

The Custom Field Reference section allows you to configure values that will be displayed within a particular custom field's drop-down menu.

To create a custom field reference value:

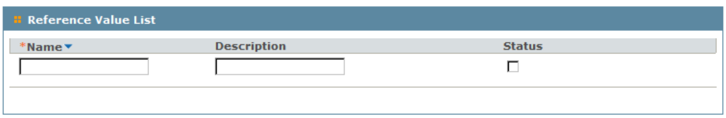
1. Select the **Admin** role > click the **Supplier** tab. The **General Info** page will appear.
2. Click **Custom Field Reference**. The **Reference Value List** page will appear.

Figure 7-7 **Example of Reference Value List Page**




3. Click **Add New**. The **Reference Value List** will appear.

Figure 7-8 **Reference Value List**



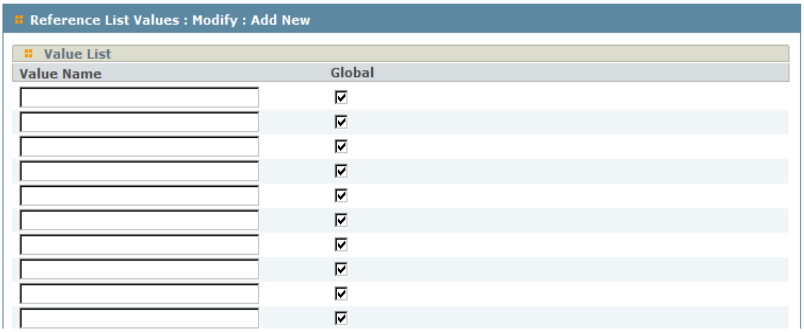

4. Enter the **Name** for the reference value. This name will be associated with the designated custom field(s) to which this value is assigned.
5. Enter a **Description** for the reference value.
6. Select the **Status** checkbox.
7. Click **Save**.

## Modifying the Reference List Values

To modify Reference List Values:

1. Navigate to the **Reference List Values: Modify** page.
2. Click **Add New**. The **Reference List Values: Modify: Add New** page will appear.

Figure 7-9 **Reference**




3. Enter a **Value Name**. Repeat this process as needed.
4. By default the **Global** checkbox(es) are selected.

   If a value name is configured as *global*, Billing custom fields (also referred to as project code values) that are associated to a reference list with global values will always contain that value when they are used in WAND, such as during time entry.

   - To apply global values leave the global checkbox(es) next to the value name you entered selected
   - If you do not want global values applied *unselect* the global checkbox(es) where needed.

5. When finished, click **Add To List**
6. Click **Save**.

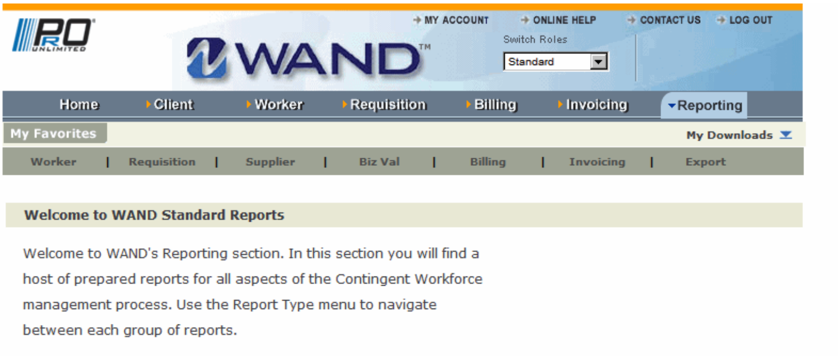
# Chapter 8 Using WAND Reports

WAND reports provides detailed information that will help you manage the business activities for your group or corporation. Search criteria details are retrieved from a database and then displayed in one of three formats: web pages, PDF or Excel. Reports are maintained and accessed from a menu bar that is similar to the menu bars available throughout WAND.

## Navigating the Reports Home Page

WAND reports are stored and accessed from a reports menu bar, similar to the menu bars discussed in Chapter 2.

Figure 8-1 **Reports Home Page**



The Reports home page appears after the Reporting tab is clicked. It lists the report *categories*: each category represents a grouping of similar reports.

Figure 8-2 **Example of Reports Category During Mouse-Over**


When you mouse-over a category, a menu lists the available reports within the category. You can select a report from this list, or access another page that describes the reports.

# Types of Reports

WAND standard reports provide immediate, out-of-the-box reporting solutions that help WAND users analyze and manage day-to-day business needs. Reports are available based on user role(s) and permissions.

# Standard Reports

Standard reports for each category are described in the sections that follow.

## Worker Reports

- The **Worker** report lists contractors that are or were on filled requisitions. The report lists the contractor's name, along with all requisitions associated to the contractor.
- The **Worker Employment Status** report is an overview of PrO workers Employment Status in comparison to their average weekly time.

## Requisition Reports

- The **Interview Information** report provides a detailed listing of scheduled interviews. Use this report to follow up with appropriate individuals, or to obtain interview feedback.
- The **Requisition** report is used to view the status of a requisition throughout its lifecycle, along with detailed information on the sourcing process.
- The **Requisition Activity** report provides an overview of requisition activity by Supplier, Location and Category. It can be used to view requisition details throughout its lifecycle, or used for the QBR.
- The **Resume Overview** report provides detailed resume information throughout the lifecycle of the resume sent to the supplier.

## Supplier Reports

- The **Engagement Ratio** details the percentage of resume submissions that made it to the interview stage, and the percentage of hired candidates.

## Billing Reports

- The **Billing** report is a comprehensive overview of billing information related to invoiced timecards. It includes invoice, worker, department, location, manager, and timecard information for all Billing types.
- The **Billing Line Item** report provides an overview of a billing line item from its creation through invoicing.
- The **Duration Audit** report provides information on both lapses in working billing activity and durations of labor, lunch and break times.
- The **Funds Depletion** report provides you with funds depletion information on active orders by either the P.O. amount or Budgeted amount.
- The **Overtime Billing** report provides the overtime hours and overtime dollar amounts invoiced for the date range specified. Use this report to monitor the client's spend on overtime billing.
- The **Pending Expense** report is used to identify expenses that have been entered in WAND that are awaiting either Supplier approval of receipts or final Client approval.
- The **Rejected Billing** report shows all time entries that have been rejected by the manager.
- The **Supplier Payment History** report provides historical information on payments made to suppliers.

## Invoicing Reports

- The **Self Billed VAT Invoice** is a hardcopy invoice that is sent to both the Client and Supplier.

- The **Supplier Payment Invoice** report provides all information the supplier will need to apply payment from PrO. This report is provided to suppliers along with their check to assist with their payment application.

## Export Reports

- The **Requisition Data Export** report is an overview of all requisition related information.
- The **Supplier Billing Export** report is a listing of workers reported billing item entries.
- The **Worker Data Export** report is an overview of all worker-related information.

# Understanding WAND Reports

The type of information retrieved from a report depends on the report that is selected, and the options (search criteria) specified on the **Report Search** page.

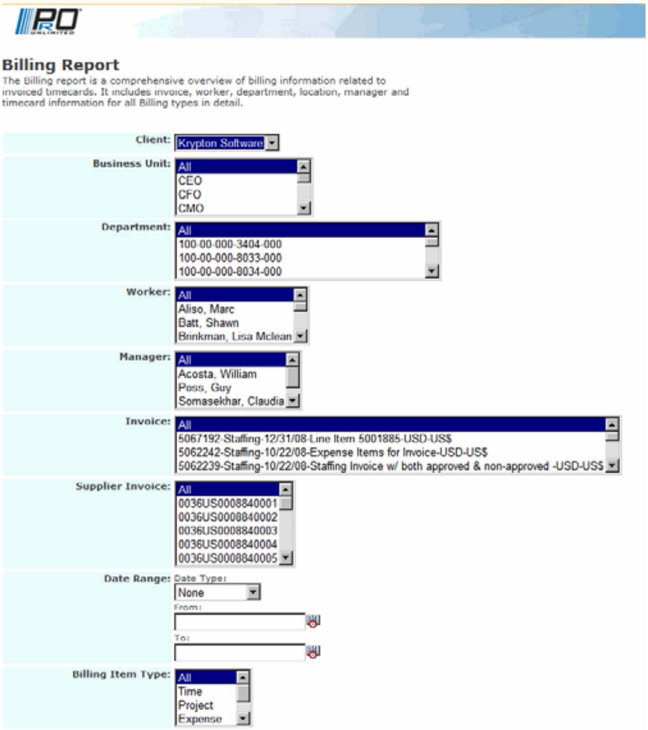
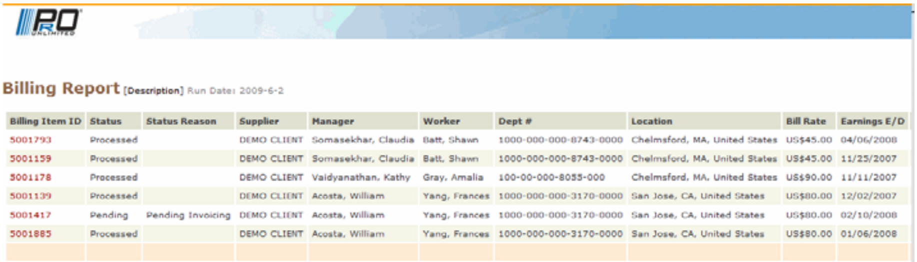



Figure 8-3 **Example of Report Search page**

The Report Search page contains a number of controls for you to configure the report output. Use the controls to create rows and/or columns that will format how the results will display when the report is run.

When you run report, information is retrieved from the database and then formatted into a table of rows and columns as shown in the example that follows.



Billing Report [Description] Run Date: 2009-6-2

| Billing Item ID | Status | Status Reason | Supplier | Manager | Worker | Dept # | Location | Bill Rate | Earnings E/D |
|---|---|---|---|---|---|---|---|---|---|
| 5001793 | Processed | | DEMO CLIENT | Somasekhar, Claudia | Batt, Shawn | 1000-000-000-8743-0000 | Chelmsford, MA, United States | US$45.00 | 04/06/2008 |
| 5001159 | Processed | | DEMO CLIENT | Somasekhar, Claudia | Batt, Shawn | 1000-000-000-8743-0000 | Chelmsford, MA, United States | US$45.00 | 11/25/2007 |
| 5001178 | Processed | | DEMO CLIENT | Vaidyanathan, Kathy | Gray, Amalia | 100-00-000-8055-000 | Chelmsford, MA, United States | US$90.00 | 11/11/2007 |
| 5001139 | Processed | | DEMO CLIENT | Acosta, William | Yang, Frances | 1000-000-000-3170-0000 | San Jose, CA, United States | US$80.00 | 12/02/2007 |
| 5001417 | Pending | Pending Invoicing | DEMO CLIENT | Acosta, William | Yang, Frances | 1000-000-000-3170-0000 | San Jose, CA, United States | US$80.00 | 02/10/2008 |
| 5001885 | Processed | | DEMO CLIENT | Acosta, William | Yang, Frances | 1000-000-000-3170-0000 | San Jose, CA, United States | US$80.00 | 01/06/2008 |

Figure 8-4 **Example of sample results in Tables of Rows and Columns**

The results (i.e. report) are displayed in table format in a results page. You can revise the results by clicking the **Back to Search** button.

Modify your selections and run the report again.

The reports available to you and the options on the Report Search page depend on your user role and the permissions to which you were assigned.

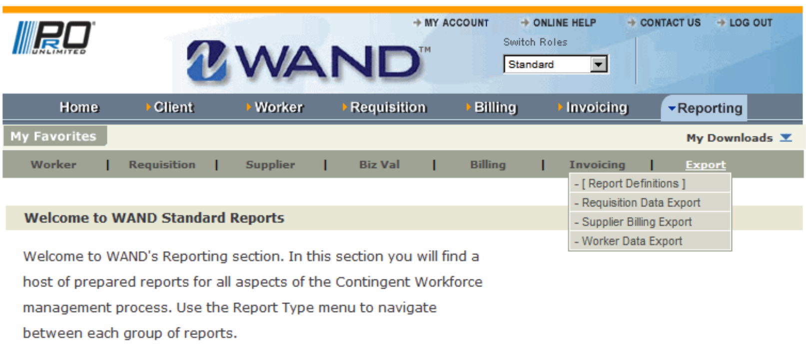



Figure 8-5 **Example of Reports Category (drop-down)**

The instructions that follow will help you get familiar with the basics of using WAND reports.

## Selecting a Report

To select a report:

1. Click the **Reporting** tab.
2. On the **Report Home** page, review the categories of reports.
3. Mouse-over a report category to access a drop-down menu that lists the associated reports.
4. Select a report from the drop-down menu.

   If you are unsure about the report, click the related **Report Definitions** link get more information about the reports in that category.

   The **Report Search** page is setup to give you a sample of report results when you click the **Run Report** button without changing any of the options.

## Creating a Report

To create a report:

1. Click the **Reporting** tab.
2. On the **Report Home** page, select the report you want to run.
3. On the **Report Search** page, set the options to define the data required on the report.
4. Click the **Run Report** button and review the **Report Output** page.

   If you are unfamiliar with the options and the data on the report output, you can create the report by trial and error.

   - First, set the options on the **Report Search** page.
   - Then, output the report to a **Web Page** and view the results.

If you want to modify the data, click the **Back** button on the Browser, until the **Report Search** page displays again (even if you get the Expired Page message).

Make changes to the options and run the report again until you are satisfied with the results.

**Note:** When you click the **Back** button on the Browser, all specified options except for **Date Range (From and To Dates)**, **Save search to Favorites**, and **Email Report** are preserved.

If you have previously set these options, you will need to specify them again.

## Setting the Date Range

The **Date Range** option allows you to filter and narrow the data on the report output page producing a report output with fewer rows. When a **Date Range** is set, you will only retrieve data that fits within a specific date or date range.

To set the Date Range:

1. Locate the **Date Range** field.
2. Select the **Date Type** from the drop-down list.
3. Set the **Date Range**.

   **Important**: When setting the **Date Range** make sure that the **From** and the **To** date fields are entered. Otherwise, you may not receive the correct results.

   - Enter the **From** date or use the calendar icon to select the desired date.
   - Enter the **To** date or use the calendar icon to select the desired date.
4. Complete other search criteria as needed.

## Creating and Editing a My Favorites Report Template

If you are frequently running the same reports, you can set options to create a template so you can run the report with a click of the mouse.

The report template is saved as a link in **My Favorites** on the **Report Home** page. **My Favorites** can contain any number of links.

To create a report template:

1. Open the **Report Search** page for any report and set the options.
2. Under the **Save Search** option, select the **Save this Search to Favorites** checkbox**.**
3. Edit the name for the report template link, if desired.

   You can change the name of the link to anything you want. Keep in mind that the names are sorted in alphabetical order on the **Report Home** page.
4. Click **Run Report**.

   The report template (link) is created under **My Favorites** on the **Report Home** page.

To edit the report template:

1. Click the **Edit** link next to a report template under **My Favorites** on the **Report Home** page.
2. On the **Edit Favorites** section, you can change the **Name** of the report link, the **Email** specification, the **Format**, and **Comments**.

   By default, the **Comments** box displays the report template’s time of creation.

   You can enter your own comments (or a tip) about this template. For example, you could specify how often you need to run the report.

   After you click **Save**, the comment is displayed as a tip when you place your cursor over the link.

## Emailing a Report

To email a report:

1. On the **Report Search** page set the format to Excel or PDF.
2. On the Email Report option, select the **Send a copy of the report** checkbox.
3. Enter one or more recipients to receive the email in the **Email address** box.

   Separate multiple addresses with a comma (,).
4. Enter a title for the email in the **Email subject** box.
5. Click the **Send Email** button.

   The email is sent directly to the recipients as an email attachment without an opportunity to review its contents.

   You may want to format the report first as a **Web Page** to verify the contents before emailing it out.

   If you click the **Send Email** button by mistake, you can quickly close the Browser window before it finishes to stop the report and email processing.

   After the email has been sent, a page opens and reports that the email has been sent <to recipients>.

# Running WAND Reports

The sections that follow detail how to run WAND's standard reports.

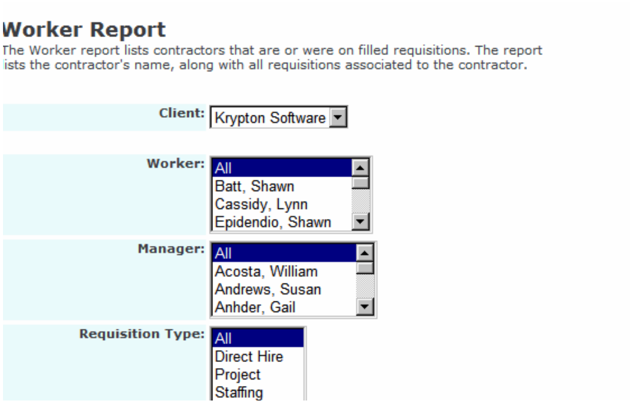
## Running the Worker Report

The Worker report lists contractors that are or were on filled requisitions.

To run the Worker report:

1. Click the **Reporting** tab. The **Standard Reports** page will appear.
2. Mouse-over the **Worker** category, then select **Worker**.
3. Select the **Client** to which the report is associated. The report will appear.

Figure 8-6 **Example of Worker Report**




4. Select and/or modify any combination of the search criteria or accept the default setting(s).
5. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
6. Click **Save Search** to save the search criteria to **My Favorites** for future use.
7. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
8. Modify and re-run the report if needed.

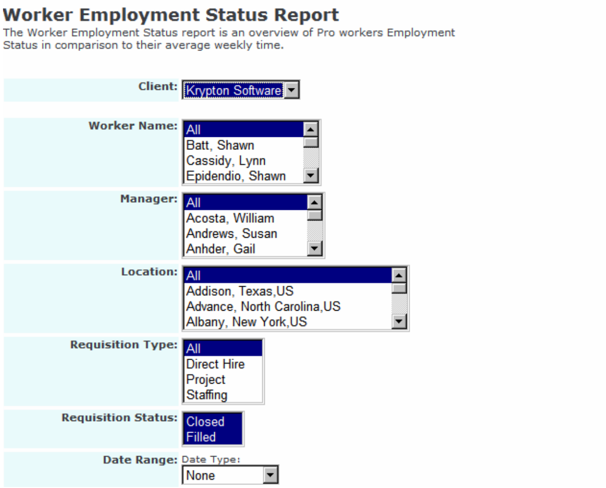
## Running the Worker Employment Status Report

The Worker Employment Status report is an overview of PrO workers employment status in comparison to their average weekly time.

To run the Worker Employment Status report:

1. Click the **Reporting** tab. The **Standard Reports** page will appear.
2. Mouse-over the **Worker** category, then select **Worker Employment Status**.
3. Select the **Client** to which the report is associated. The report will appear

Figure 8-7 **Example of Worker Employment Status Report**




4. Select and/or modify any combination of the search criteria or accept the default setting(s).
5. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
6. Click **Save Search** to save the search criteria to **My Favorites** for future use.
7. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
8. Modify and re-run the report if needed.

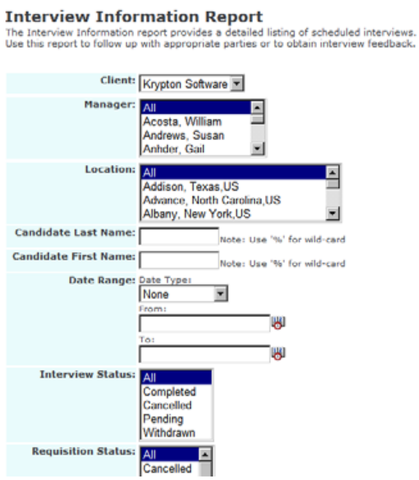
## Running the Interview Information Report

The Interview Information report provides a detailed listing of scheduled interviews. Use this report to follow-up with appropriate parties, or to obtain interview feedback.

To run the Interview Information report:

1. Click the **Reporting** tab. The **Standard Reports** page will appear.
2. Mouse-over the **Requisition** category, then select **Interview Information**.
3. Select the **Client** to which the report is associated. The report will appear.

   Figure 8-8 **Example of Interview Information Report**

4. Select and/or modify any combination of the search criteria or accept the default setting(s).
5. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
6. Click **Save Search** to save the search criteria to **My Favorites** for future use.
7. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
8. Modify and re-run the report if needed.

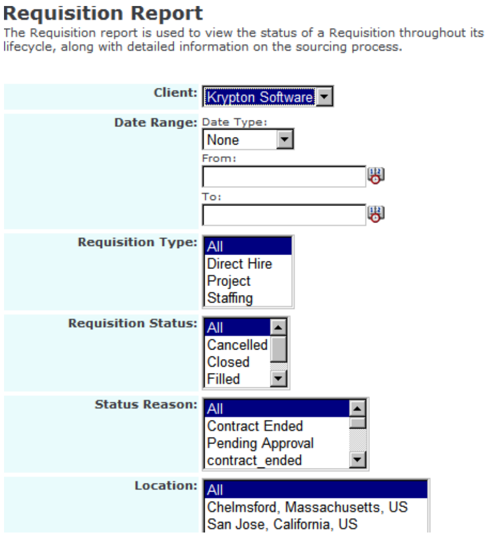
## Running the Requisition Report

The Requisition report is used to view the status of a Requisition throughout its lifecycle, along with detailed information on the sourcing process.

To run the Requisition report:

1. Click the **Reporting** tab. The **Standard Reports** page will appear.
2. Mouse-over the **Requisition** category, then select **Requisition**.
3. Select the **Client** to which the report is associated. The report will appear.

Figure 8-9 **Example of Requisition Report**




4. Select and/or modify any combination of the search criteria or accept the default setting(s).
5. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
6. Click **Save Search** to save the search criteria to **My Favorites** for future use.
7. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
8. Modify and re-run the report if needed.

## Running the Requisition Activity Report

The Requisition Activity report provides an overview of the requisitions activity by Supplier, Location and Category. It can be used to view requisition details throughout its lifecycle. Use this report for the QBR.

To run the Requisition Activity report:

1. Click the **Reporting** tab. The **Standard Reports** page will appear.
2. Mouse-over the **Requisition** category, then select **Requisition Activity**. The **Requisition Activity Report** page will appear.

Figure 8-10 **Example of Requisition Activity Report**


Two types of requisition activity reports are available:

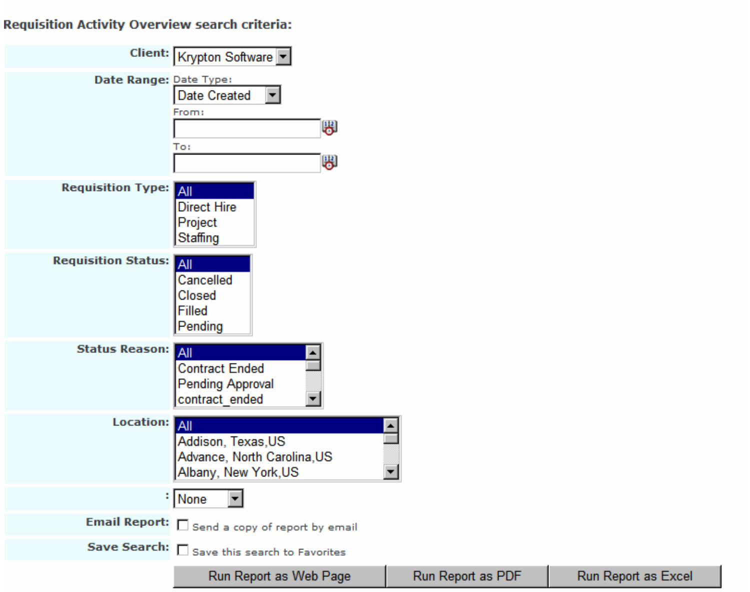
- **Overview** which provides an overview of the requisitions activity by Supplier, Location and Category.
- **By Week** which provides a weekly view of the requisitions activity by Supplier, Location and Category.

## Running the Requisition Activity Overview Report

To run the Requisition Activity Overview report:

1. From the **Requisition Activity** report page, click **Overview**.
2. Select the **Client** to which the report is associated. The report will appear.

Figure 8-11 **Example of Requisition Activity - Overview**




3. Select and/or modify any combination of the search criteria or accept the default setting(s).
4. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
5. Click **Save Search** to save the search criteria to **My Favorites** for future use.
6. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
7. Modify and re-run the report if needed.

## Running the Requisition Activity By Week Report

To run the Requisition Activity By Week report:

1. From the **Requisition Activity** report page, click **By Week**.
2. Select the **Client** to which the report is associated. The report will appear.

   Figure 8-12 **Example of Requisition Activity - Overview**

3. Select and/or modify any combination of the search criteria or accept the default setting(s).
4. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
5. Click **Save Search** to save the search criteria to **My Favorites** for future use.
6. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
7. Modify and re-run the report if needed.

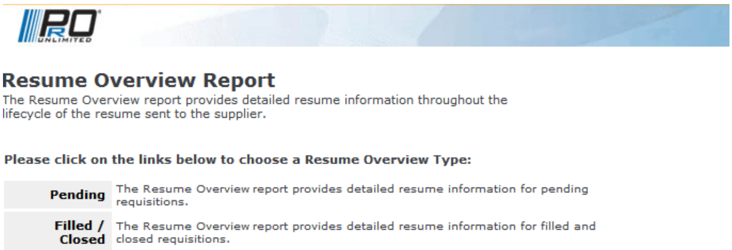
## Running the Resume Overview Report

The Resume Overview report provides detailed resume information throughout the lifecycle of the resume sent to the supplier.

To run the Resume Overview report:

1. Click the **Reporting** tab. The **Standard Reports** page will appear.
2. Mouse-over the **Requisition** category, then select **Resume Overview**. The **Resume Overview** report page will appear.

Figure 8-13 **Example of Resume Overview Report Page**




Two types of requisition activity reports are available:

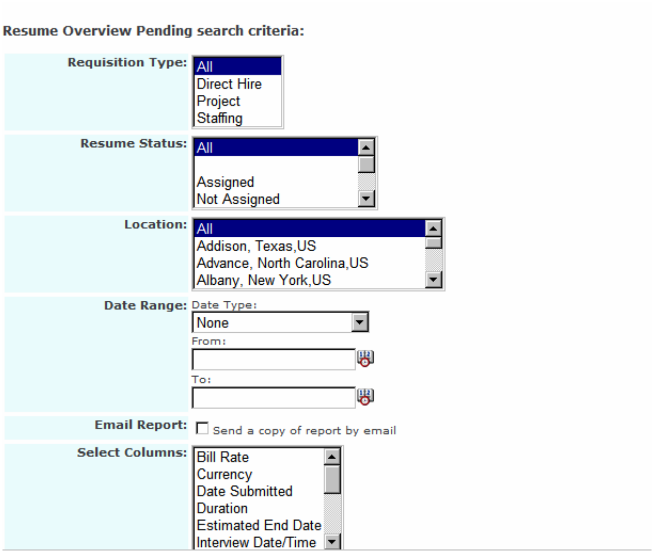
- **Pending** which provides detailed resume information for pending requisitions.
- **Filled/Closed** which provides detailed resume information for filled and closed requisitions.

## .Running the Pending Resume Report

To run the Pending Resume Overview report:

1. From the **Resume Overview** report page, click **Pending**.
2. Select the **Client** to which the report is associated. The report will appear.

Figure 8-14 **Example of Resume Overview - Pending**



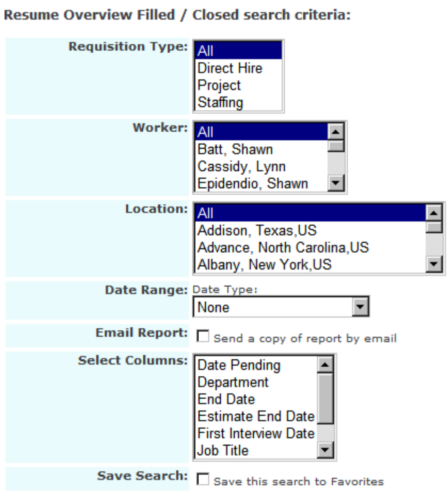

3. Select and/or modify any combination of the search criteria or accept the default setting(s).
4. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
5. Click **Save Search** to save the search criteria to **My Favorites** for future use.
6. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
7. Modify and re-run the report if needed.

## Running the Resume Filled / Closed Report

To run the Resume Filled / Closed report:

1. From the **Resume Overview** report page, click **Filled / Closed**.
2. Select the **Client** to which the report is associated. The report will appear.

Figure 8-15 **Example of Resume Overview - Filled/Closed**




3. Select and/or modify any combination of the search criteria or accept the default setting(s).
4. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
5. Click **Save Search** to save the search criteria to **My Favorites** for future use.
6. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
7. Modify and re-run the report if needed.

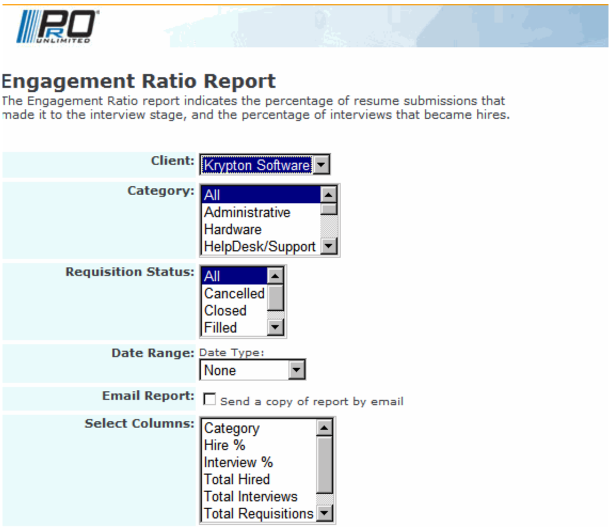
## Running the Engagement Ratio Report

The Engagement Ratio report includes the percentage of resume submissions that made it to the interview stage, and the percentage of hired candidates.

To run the Engagement Ratio report:

1. Click the **Reporting** tab. The **Standard Reports** page will appear.
2. Mouse-over the **Supplier** category, then select **Engagement Ratio**.
3. Select the **Client** to which the report is associated.The report will appear.

Figure 8-16 **Example of Engagement Ratio Report**




4. Select and/or modify any combination of the search criteria or accept the default setting(s).
5. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
6. Click **Save Search** to save the search criteria to **My Favorites** for future use.
7. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
8. Modify and re-run the report if needed.

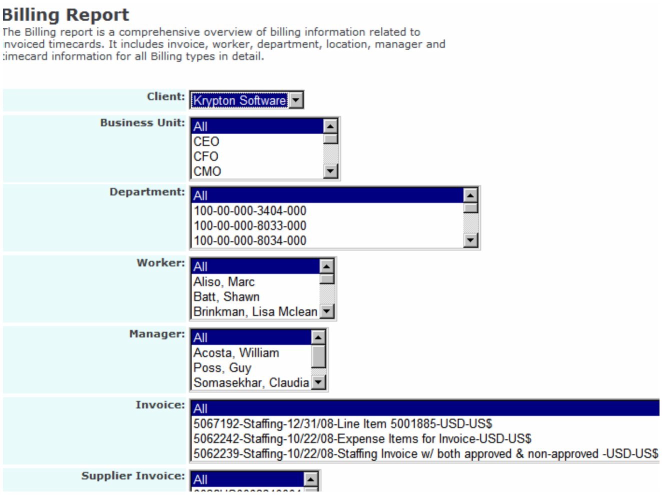
## Running the Billing Report

The Billing report is a comprehensive overview of billing information related to invoiced timecards. It includes invoice, worker, department, location, manager and timecard information for all Billing types in detail.

To run the Billing report:

1. Click the **Reporting** tab. The **Standard Reports** page will appear.
2. Mouse-over the **Billing** category, then select **Billing**.
3. Select the **Client** to which the report is associated. The report will appear.

Figure 8-17 **Example of Billing Report**




4. Select and/or modify any combination of the search criteria or accept the default setting(s).
5. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
6. Click **Save Search** to save the search criteria to **My Favorites** for future use.
7. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
8. Modify and re-run the report if needed.

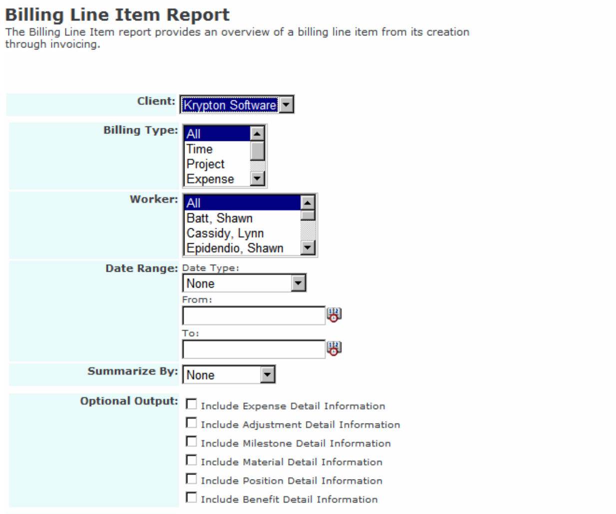
## Running the Billing Line Item Report

The Billing Line Item report provides an overview of a billing line item from its creation through invoicing.

To run the Billing Line Item report:

1. Click the **Reporting** tab. The **Standard Reports** page will appear.
2. Mouse-over the **Billing** category, then select **Billing Line Item**.
3. Select the **Client** to which the report is associated. The report will appear.

Figure 8-18 **Example of Billing Line Item Report**




4. Select and/or modify any combination of the search criteria or accept the default setting(s).
5. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
6. Click **Save Search** to save the search criteria to **My Favorites** for future use.
7. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
8. Modify and re-run the report if needed.

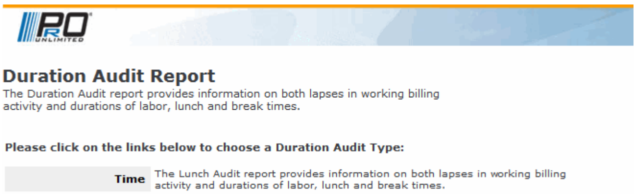
## Running the Duration Audit Report

The Duration Audit report provides information on both lapses in working billing activity and durations of labor, lunch and break times.

To run the Duration Audit report:

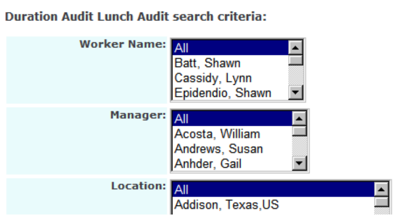
1. Click the **Reporting** tab. The **Standard Reports** page will appear.
2. Mouse-over the **Billing** category, then select **Duration Audit**. The **Duration Audit** report page will appear.

   Figure 8-19 **Example of Duration Audit Report Page**

3. Click **Time**.
4. Select the **Client** to which the report is associated. The report will appear.

   Figure 8-20 **Example of Duration Time Audit Lunch Search Criteria**

5. Select and/or modify any combination of the search criteria or accept the default setting(s).
6. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
7. Click **Save Search** to save the search criteria to **My Favorites** for future use.
8. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
9. Modify and re-run the report if needed.

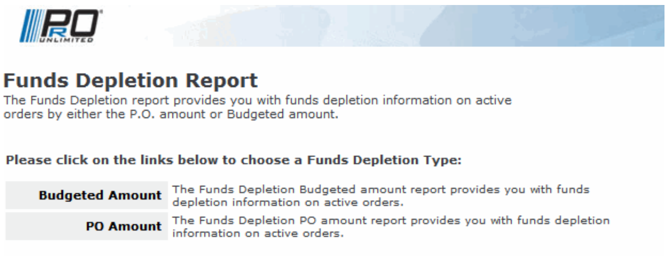
## Running the Funds Depletion Report

The Funds Depletion report provides you with funds depletion information on active orders by either the P.O. amount or Budgeted amount.

To run the Funds Depletion report:

1. Click the **Reporting** tab. The **Standard Reports** page will appear.
2. Mouse-over the **Billing** category, then select **Funds Depletion**. The **Funds Depletion** report page will appear.

Figure 8-21 **Example of Funds Depletion Main Page**




Two types of funds depletion reports are available:

- **Budgeted Amount** which provides funds depletion information on active orders.
- **PO Amount** which provides you with funds depletion information on active orders.

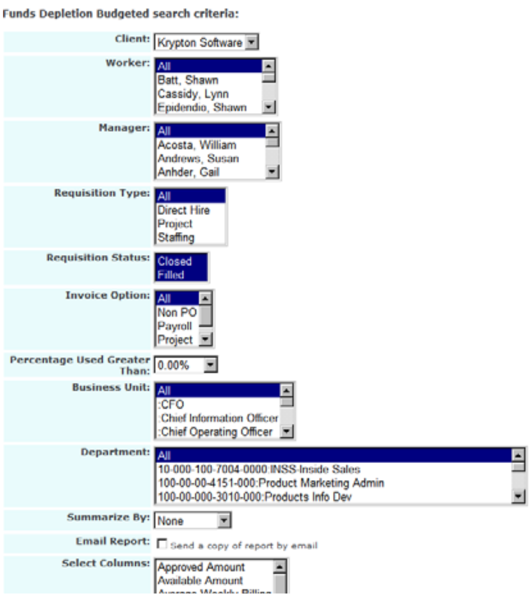
## Running the Funds Depletion - Budgeted Amount Report

The Funds Depletion Budgeted amount report provides you with funds depletion information on active orders.

To run the Budgeted Amount report:

1. From the **Funds Depletion** report page, click **Budgeted Amount**.
2. Select the **Client** to which the report is associated. The report will appear.

Figure 8-22 **Example of Funds Depletion - Budgeted Amount**




3. Select and/or modify any combination of the search criteria or accept the default setting(s).
4. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
5. Click **Save Search** to save the search criteria to **My Favorites** for future use.
6. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
7. Modify and re-run the report if needed.

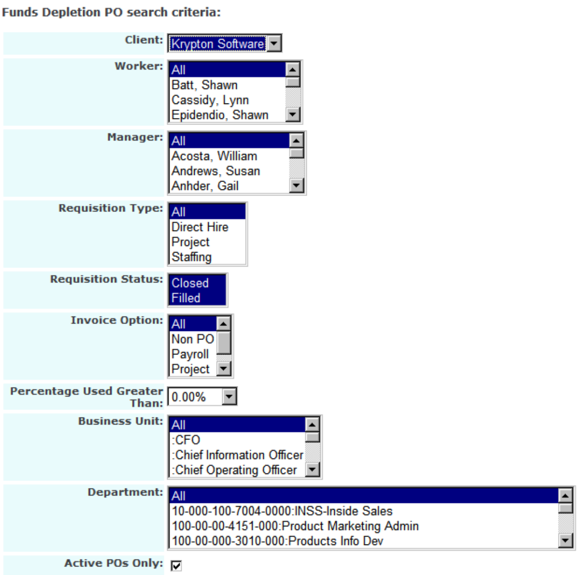
### Running the Funds Depletion - PO Amount Report

The Funds Depletion PO amount report provides you with funds depletion information on active orders.

To run the PO report:

1. From the **Funds Depletion** report page, click **PO Amount**.
2. Select the **Client** to which the report is associated. The report will appear.

Figure 8-23 **Example of Funds Depletion PO Search**




3. Select and/or modify any combination of the search criteria or accept the default setting(s).
4. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
5. Click **Save Search** to save the search criteria to **My Favorites** for future use.
6. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
7. Modify and re-run the report if needed.

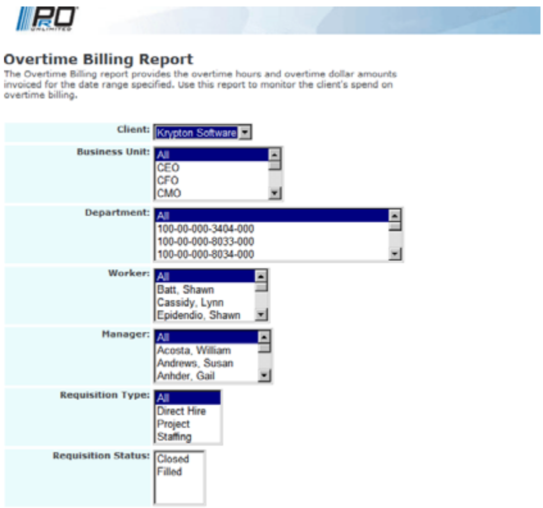
## Running the Overtime Billing Report

The Overtime Billing report provides the overtime hours and overtime dollar amounts invoiced for the date range specified.

To run the Overtime Billing report:

1. Click the **Reporting** tab. The **Standard Reports** page will appear.
2. Mouse-over the **Billing** category, then select **Overtime Billing**.
3. Select the **Client** to which the report is associated. The report will appear.

Figure 8-24 **Example of Overtime Billing Report**




4. Select and/or modify any combination of the search criteria or accept the default setting(s).
5. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
6. Click **Save Search** to save the search criteria to **My Favorites** for future use.
7. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
8. Modify and re-run the report if needed.

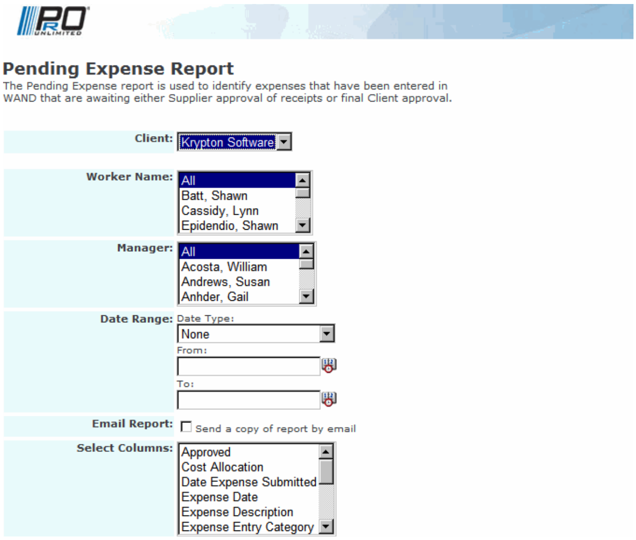
## Running the Pending Expense Report

The Pending Expense report helps you identify expenses that were entered in WAND and awaiting supplier approval of receipts, or final client approval.

To run the Pending Expense report:

1. Click the **Reporting** tab. The **Standard Reports** page will appear.
2. Mouse-over the **Billing** category, then select **Pending Expense**.
3. Select the **Client** to which the report is associated. The report will appear.

Figure 8-25 **Example of Pending Expense Report**




4. Select and/or modify any combination of the search criteria or accept the default setting(s).
5. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
6. Click **Save Search** to save the search criteria to **My Favorites** for future use.
7. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
8. Modify and re-run the report if needed.

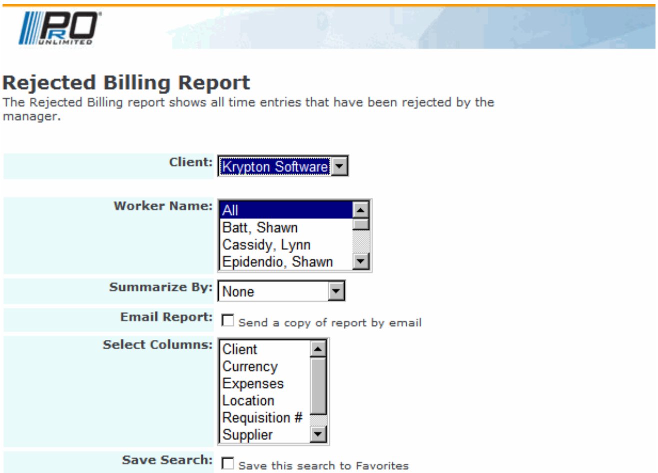
## Running the Rejected Billing Report

The Rejected Billing report includes all time entries that were rejected by the manager.

To run the Rejected Billing report:

1. Click the **Reporting** tab. The **Standard Reports** page will appear.
2. Mouse-over the **Billing** category, then select **Rejected Billing**.
3. Select the **Client** to which the report is associated. The report will appear.

Figure 8-26 **Example of Rejected Billing Report**




4. Select and/or modify any combination of the search criteria or accept the default setting(s).
5. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
6. Click **Save Search** to save the search criteria to **My Favorites** for future use.
7. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
8. Modify and re-run the report if needed.

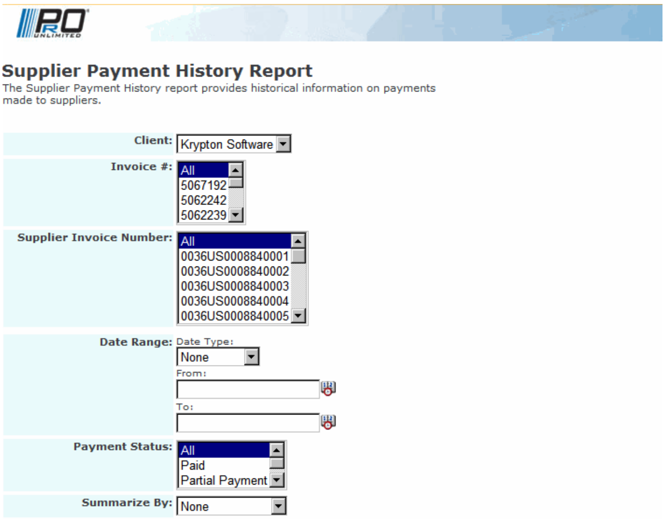
## Running the Supplier Payment History Report

The Supplier Payment History report provides historical information on payments made to suppliers.

To run the Supplier Payment History report:

1. Click the **Reporting** tab. The **Standard Reports** page will appear.
2. Mouse-over the **Billing** category, then select **Supplier Payment History**.
3. Select the **Client** to which the report is associated. The report will appear.

Figure 8-27 **Example of Supplier Payment History Report**




4. Select and/or modify any combination of the search criteria or accept the default setting(s).
5. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
6. Click **Save Search** to save the search criteria to **My Favorites** for future use.
7. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
8. Modify and re-run the report if needed.

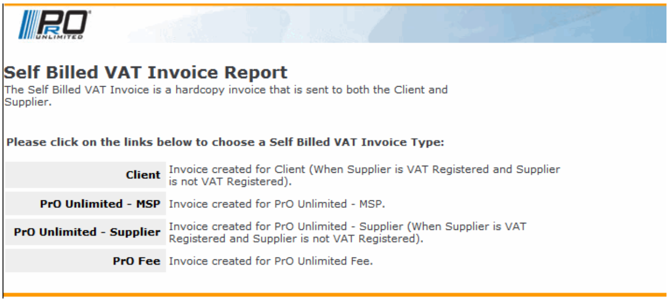
## Running the Self Billed VAT Invoice Report

The Self Billed VAT Invoice is a hardcopy invoice that is sent to the Client and the Supplier.

To run the Self-Billing VAT Invoice Report report:

1. Click the **Reporting** tab. The **Standard Reports** page will appear.
2. Mouse-over the **Invoicing** category, then select **Self Billed VAT Invoice**. The **Self Billed VAT Invoice** page will appear.

Figure 8-28 **Example of Self-Billed VAT Invoice Report Page**




Four types of self-billed VAT invoice types are available:

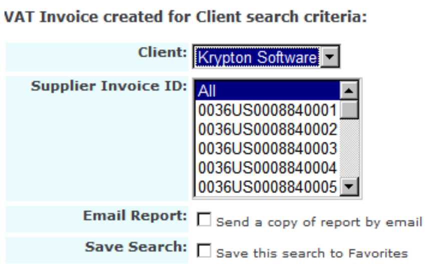
- **Client -** This invoice is created for Clients and is used when a Supplier is VAT Registered or the Supplier is not VAT Registered.
- **PrO Unlimited-MSP -** This invoice is created for PrO Unlimited - MSP.
- **PrO Unlimited-Supplier -** This invoice is created for PrO Unlimited - Supplier, and is used when a supplier is VAT Registered or when a Supplier is not VAT Registered.
- **PrO Fee -** This invoice is created for PrO Unlimited Fee.

## Running the Client Invoice Report

To run the Client Invoice report:

1. From the **Self Billed VAT Invoice** report page, click **Client**.
2. Select the **Client** to which the report is associated. The report will appear.

Figure 8-29 **Example of VAT Invoice for Client**



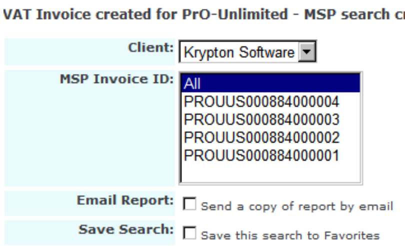

3. Select and/or modify any combination of the search criteria or accept the default setting(s).
4. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
5. Click **Save Search** to save the search criteria to **My Favorites** for future use.
6. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
7. Modify and re-run the report if needed.

### Running the PrO Unlimited - MSP Report

To run the PrO Unlimited - MSP Invoice report:

1. From the **Self Billed VAT Invoice** report page, click **PrO Unlimited - MSP**.
2. Select the **Client** to which the report is associated. The report will appear.

   Figure 8-30 **Example of VAT Invoice for Client**

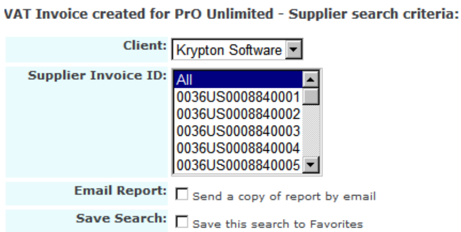
3. Select and/or modify any combination of the search criteria or accept the default setting(s).
4. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
5. Click **Save Search** to save the search criteria to **My Favorites** for future use.
6. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
7. Modify and re-run the report if needed.

### Running the PrO Unlimited - Supplier Invoice Report

To run the PrO Unlimited - Supplier Invoice report:

1. From the **Self Billed VAT Invoice** report page, click **PrO Unlimited - Supplier**.
2. Select the **Client** to which the report is associated. The report will appear.

   Figure 8-31 **Example of PrO Unlimited - Supplier VAT Invoice**



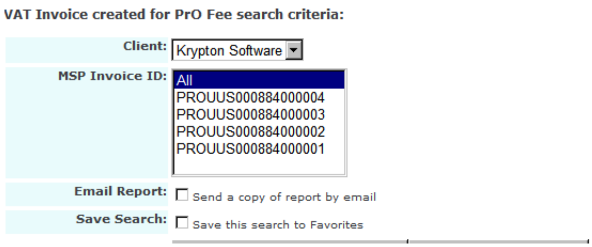

3. Select and/or modify any combination of the search criteria or accept the default setting(s).
4. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
5. Click **Save Search** to save the search criteria to **My Favorites** for future use.
6. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
7. Modify and re-run the report if needed.

### Running the PrO Invoice - Fee Report

To run the PrO Fee report:

1. From the **Self Billed VAT Invoice** report page, click **PrO Fee**.
2. Select the **Client** to which the report is associated. The report will appear.

Figure 8-32 **Example of PrO Fee Invoice**




3. Select and/or modify any combination of the search criteria or accept the default setting(s).
4. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
5. Click **Save Search** to save the search criteria to **My Favorites** for future use.
6. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
7. Modify and re-run the report if needed.

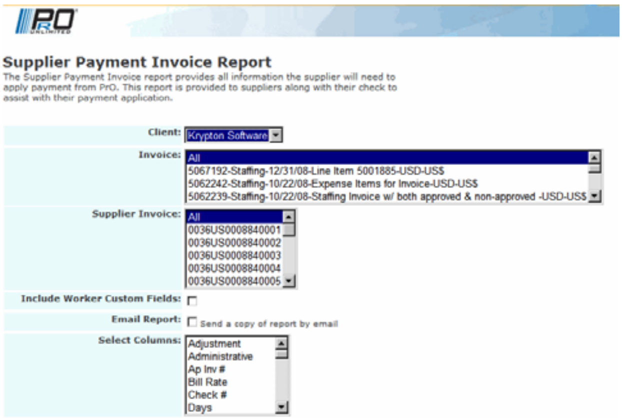
## Running the Supplier Payment Invoice Report

The Supplier Payment Invoice report provides all information the supplier will need to apply payment from PrO. This report is provided to suppliers along with their check to assist with their payment application.

To run the Supplier Payment Invoice report:

1. Click the **Reporting** tab. The **Standard Reports** page will appear.
2. Mouse-over the **Billing** category, then select **Supplier Payment Invoice**.
3. Select the **Client** to which the report is associated. The report will appear.

Figure 8-33 **Example of Supplier Payment Invoice Report**



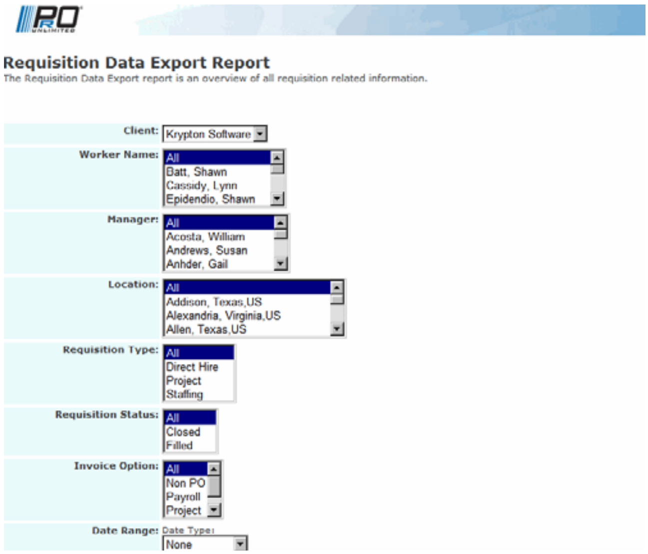

4. Select and/or modify any combination of the search criteria or accept the default setting(s).
5. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
6. Click **Save Search** to save the search criteria to **My Favorites** for future use.
7. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
8. Modify and re-run the report if needed.

## Running the Requisition Data Export Report

The Requisition Data Export report is an overview of all requisition related information.

1. Click the **Reporting** tab. The **Standard Reports** page will appear.
2. Mouse-over the **Export** category, then select **Requisition Data Export**.
3. Select the **Client** to which the report is associated. The report will appear.

Figure 8-34 **Example of Requisition Data Export Report**



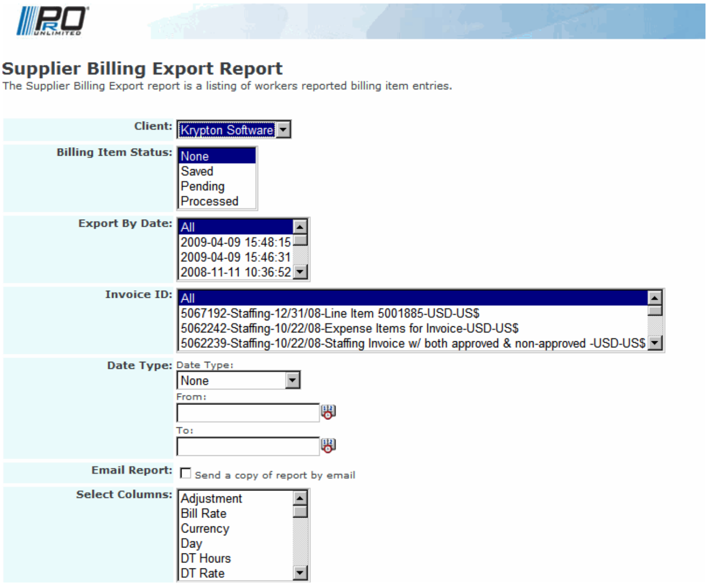

4. Select and/or modify any combination of the search criteria or accept the default setting(s).
5. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
6. Click **Save Search** to save the search criteria to **My Favorites** for future use.
7. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
8. Modify and re-run the report if needed.

## Running the Supplier Billing Export Report

To run the requisition data export report:

1. Click the **Reporting** tab. The **Standard Reports** page will appear.
2. Mouse-over the **Export** category, then select **Requisition Data Export**.
3. Select the **Client** to which the report is associated. The report will appear.

Figure 8-35 **Example of Requisition Data Export Report**




4. Select and/or modify any combination of the search criteria or accept the default setting(s).
5. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
6. Click **Save Search** to save the search criteria to **My Favorites** for future use.
7. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
8. Modify and re-run the report if needed.

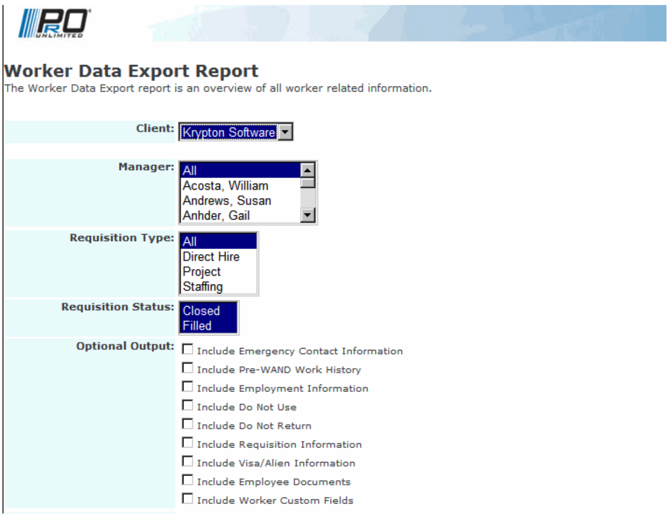
## Running the Worker Data Export Report

The Worker Data Export report is an overview of worker related information.

To run the worker data export report:

1. Click the **Reporting** tab. The **Standard Reports** page will appear.
2. Mouse-over the **Export** category, then select **Worker Data Export**.
3. Select the **Client** to which the report is associated. The report will appear.

Figure 8-36 **Example of Worker Data Export Report**




4. Select and/or modify any combination of the search criteria or accept the default setting(s).
5. Select the **Email Report** checkbox if you wish to send a copy of the report by email.
6. Click **Save Search** to save the search criteria to **My Favorites** for future use.
7. Click the appropriate **Run Report** button to view the results in a web page, PDF, or Excel spreadsheet.
8. Modify and re-run the report if needed.

# *Appendix A* Supplemental Information

This appendix includes supplemental information for WAND suppliers.

## Creating a Staffing Recruited Requisition

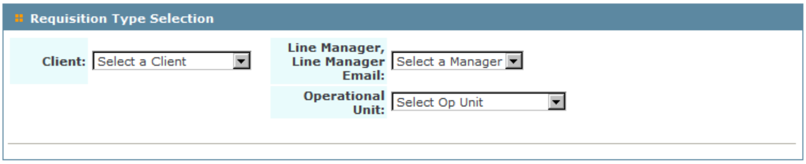
You can also create new requisitions if you have the appropriate permissions.

To create a staffing recruited requisition:

1. Click the **Requisition** tab > click **Add New**.

   The **Requisition Type Selection** screen will appear.

   Figure A-1  **Requisition Type Selection**

2. Select a **Client**, a **Line Manager/Line Manager Email,** and an **Operational Unit**.

   The **Use Template** link will appear after a **Line Manager** is selected.

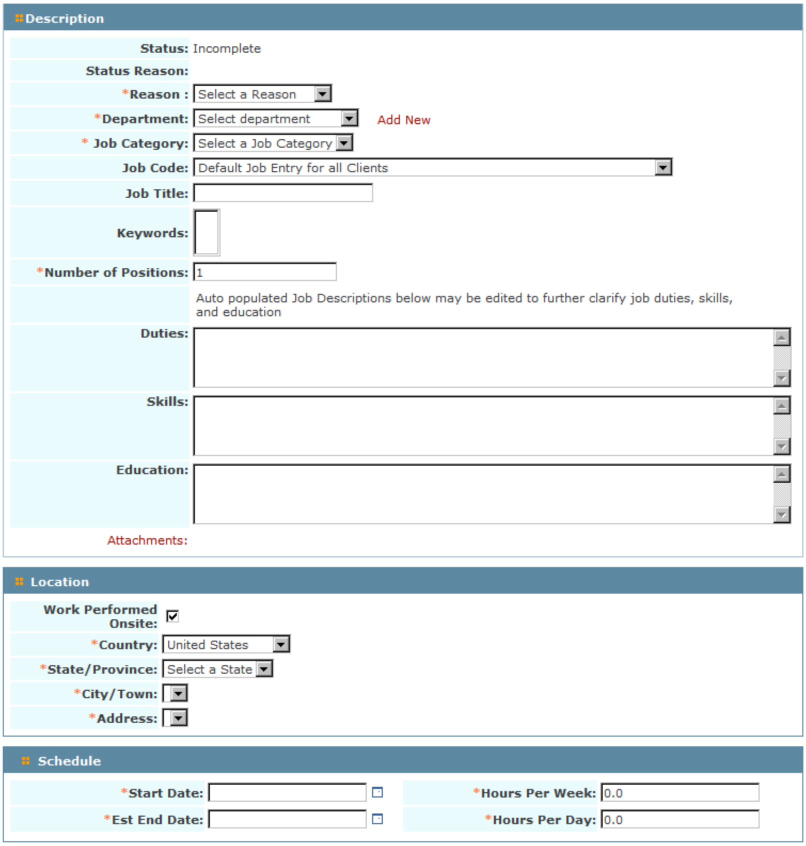
**3.** Click the radio button:

- **I need to find a temporary worker/contractor**

**4.** Click **Next**. The **Description** page will appear, as shown in Figure A-2 in the "Example of Requisition Description (partial)" on page A-2

Use the **Description** page to enter specifics about the requisition such as the reason for the requisition, the number of positions that you need to fill, workplace location and schedule, among others.

Figure A-2 **Example of Requisition Description (partial)**



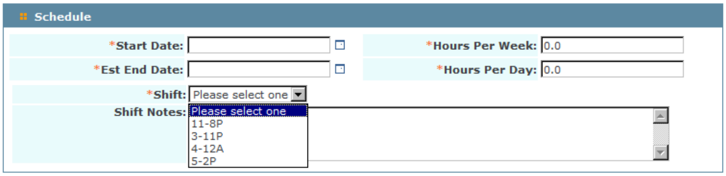
Depending on WAND's configuration, some Description page fields, such as job title, duties, skills, or education, may provide pre-populated details. You can either accept the default description(s), or modify them as needed.

5. Complete all required fields (*) on the page and any optional fields, as needed for the requisition.

---

**Note:** If your system has been configured to select a worker's shift and optionally enter notes about the shift, the **Schedule** section of the requisition will display as shown in the following example.

Figure A-3 **Example of Schedule Section with Shift Options**




Otherwise, this section will only include the Start Date, Est. End Date, Hours Per Week, and Hours Per Day.

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6. Click **Save and Next** when finished.

Depending on WAND's configuration, the **Approvers Modify** screen or the **Sourcing: Modify** screen will appear.

The Approvers page will appear if WAND is configured for approval routing and is required before proceeding to the next page.

7. Add an approver, if required, then click **Save and Next** to proceed to the **Sourcing Modify** page.
8. Enter the referred worker's first name, last name, phone number, and email address.
9. Click **Add to List**. The **Sourcing Modify** page will appear.
10. Select the **Workers** name, then select your sourcing option(s).
11. Click **Save and Next**. The **Confirmation** page will appear.
12. Review the **Confirmation** page.

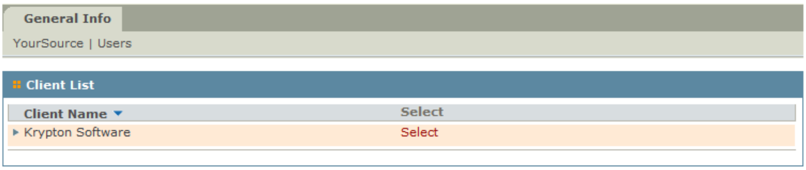
    Note the requisition number so that you can refer to it if you need to modify the requisition, or select sourcing options in the future.
13. Click **Edit** to make changes.
14. Click **Done** when finished. The **GenInfo** page will appear.

# Viewing the Client List and Locations

To view a client list and the client's associated locations:

1. Select the **Standard** role.
2. Click the **Client** tab. The **General Info Page** will appear.

Figure A-4 **General Info Page with Client List**




3. Locate the client that you need in the **Client List**.
   - If there are multiple clients, scroll to the end of the page to view the Locations section.
   - If there is only one client, the **Client List** and **Locations** section are on the same page.
4. Browse the list of clients to locate and click the desired **Client Name** (hyperlink).

   The Locations section will appear.

Figure A-5 **Locations Section for a Client**


The **Locations** section will includes the Address, Country, State, and ZIP, if available for the client.

# Requisition Screen Field Definitions

The following table describes the requisition fields and their usage.

Table A-1 **Table of Requisition Fields**

| **Section** | **Fields, Drop-Down Checkbox** | **Required, Optional, System, N/A** | **Description, Usage** |
|---|---|---|---|
| Description | Status | NA, System Generated | The status of the requisition, such as incomplete, pending, closed, filled, or cancelled. Note that a requisition's status is dynamic and therefore changes during the phases of its development.<br>Status(es) are:<br>• **Incomplete -** This status usually displays during requisition creation.<br>• **Pending** – The requisition has been submitted and is awaiting further action.<br>• **Closed** – The requisition has been completed and is no longer active.<br>• **Filled** – The requisition has been associated with a worker and/or an agency and is active.<br>• **Cancelled** – The requisition was cancelled before any associated requisitions were filled. Cancellation reasons include: failed headcount approval or lack of funds. |
| Description | Status Reason | NA, System Generated | A system-generated explanation about the requisition's status. |
| Description | Reason | Required | The reason or purpose of the assignment. Reasons may vary depending on WAND's configuration. If not configured, the default settings include: Conversion, Peak Period, Replacement, Special Project, Staff Vacation PTO, Unique Expertise, Vacant Position. |
| Description | Department | Required | The department in which the requisition or assignment is needed, such as Financial Services. |

Table A-1 **Table of Requisition Fields**

| **Section** | **Fields, Drop-Down Checkbox** | **Required, Optional, System, N/A** | **Description, Usage** |
|---|---|---|---|
| Description | Number of Positions | Required | Enter the number of positions that you need to fill.<br>**Note**: If you need to fill multiple positions for the same job category/job title, enter the number of job/candidate openings that you have. Example: if you need 3 software developers for the same department and the same job code, etc. enter 3. This allows you to attach several candidates to the same requisition, thus eliminating the need to create, copy, or duplicate multiple requisitions. |
| Description | Job Category | Required | The category in which the requisition resides. Select the appropriate category from the drop-down list.<br>Options may include Accounting/Finance, Administrative, Hardware, Human Resources. If the department that you need is not in the drop-down list, contact the Help Desk. |
| Description | Job Code | Required | The job code that is associated with the requisition. Select the appropriate job code from the drop-down list, such as: Administrative Associate, Legal Assistant, Application Developer, Data Entry Clerk, Helpdesk Analysis, or Quality Assurance Engineer, among others.<br>**Note**: Depending on WAND's configuration, some Description page fields may provide pre-populated details based on the job code selection. You can either accept the default description(s), or modify them as needed. |
| Description | Job Title | Required | The name or title of the position, such as *Administrative Assistant*. Enter the job title. |

Table A-1 **Table of Requisition Fields**

| **Section** | **Fields, Drop-Down Checkbox** | **Required, Optional, System, N/A** | **Description, Usage** |
|---|---|---|---|
| Description | Keywords | NA | Keywords that are associated the assignment and/or job description that may assist with locating the appropriate candidate. If available, you can select appropriate keywords from the drop-down list. |
| Description | Duties | Optional | Description, job tasks, and/or project requirements that the candidate will perform/fulfill. |
| Description | Skills | Optional | Work/assignment-related skills that the candidate must possess. |
| Description | Education | Optional | Education and/or training needed for the assignment, if applicable. |
| Description | Attachments | Optional | Click the Attachment link to attach a description of the positions that you need to fill or other related documents. Attachments cannot exceed 10MB. |
| Location | Country | Required | Select the Country, such as United States, UK, Japan, etc. for the assignment. |
| Location | Location | Required | The City and State in which the assignment will be based, such as Palo Alto, California. Select the location from the drop-down list. |
| Location | Address | Required | The company/job site address or office such as: 1220 Oak Park Road. |
| Location | Work Performed Onsite | Optional; associated fields are Required | The Work Performed Onsite checkbox is already selected by default. Unselect if the candidate is not required to work onsite. Complete all required fields. |
| Schedule | Start Date | Required | The assignment's start date. Enter the Start Date or click the calendar icon, then use the calendar to select the start date. |

Table A-1 **Table of Requisition Fields**

| **Section** | **Fields, Drop-Down Checkbox** | **Required, Optional, System, N/A** | **Description, Usage** |
|---|---|---|---|
| Schedule | Est. End Date | Required | The assignment's estimated end or completion date. Enter the Est. End Date or click the calendar icon, then use the calendar to select the est. end date. |
| Schedule | Hours Per Week | Required | The number of hours needed per week/the number of hours that the candidate will need to work. |
| Schedule | Hours Per Day | Required | The number of hours per day that the candidate will need to work. |
| Schedule | Schedule Shift | Required | A drop-down list that, depending on configuration, may include one or several shifts, such as 6a-3pm, 11a-8pm, etc. to which the worker can commit. |
| Schedule | Shift Notes | Optional | A free-text field that allows you enter details about the shift and/or the associated worker. |
| Financials | Max Rate | Required | Enter the maximum bill rate allowed for the assignment. Max Rate is used when creating temporary staffing requisitions. |
| Financials | Rate Application | Required | The rate application/how the rate is applied: Per Hour or Per Day. Select the rate application from the drop-down list. |
| Financials | Pay Rate | Required | Pay Rate allowed for the position. Pay Rate is used when creating a *referred* worker requisition. |
| Financials | Currency | Required | The currency in which the candidate will be paid, such as Euro, USD, etc. Select the currency from the drop-down list. |
| Contact Information | Manager | Required | The manager or individual(s) that the candidate will report to as well as the manager(s) for the assignment. Select the manager's name from the drop-down list. |

Table A-1 **Table of Requisition Fields**

| **Section** | **Fields, Drop-Down Checkbox** | **Required, Optional, System, N/A** | **Description, Usage** |
|---|---|---|---|
| Contact Information | MSP Contact | Optional | The name of the primary PrO contact or assignment contact. Enter the PrO contact name, if needed. |
| Contact Information | MSP Phone | Optional | The phone number of the primary MSP contact or assignment contact. Enter the MSP phone number, if needed. |
| Contact Information | HR Contact | Optional | Human Resource (HR) contact information. Enter the HR contact's name, if needed. |
| Contact Information | Additional Contact | Optional | The name of a secondary or additional contact for the assignment. Enter the contact's name, if needed. |
| Contact Information | Additional Phone | Optional | The phone number for the secondary or additional contact for the assignment. Enter the contact phone number, if needed. |
| Contact Information | Additional Email | Optional | The email address for the secondary or additional contact for the assignment. Enter the contact's email address, if needed. |
| Custom Fields | Depends on WAND's configuration . | Required if available; NA if not available. | If a custom field is available, complete the entry or select the available options.<br>Custom fields are **always** required and must be completed if they display on a screen or page. |
| Sourcing Options | Want Interviews | Optional | By default this checkbox is selected. Uncheck if you do not want interviews. |
| Sourcing Options | Receive Calls | Optional | Select this checkbox if you want to receive calls from suppliers. |
| Sourcing Options | Filter Resumes | Optional | Select this checkbox if you want resumes filtered in advance. |