

knowledge services

Getting Started Client Manager Guide

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Activate your Account

To activate your account, your company Administrator must first create it

Once created, you should receive an email containing your activation code. Your unique activation code is **required** to activate your account

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

For additional assistance, contact the Support Team at Knowledge Services

Reset Password

1. From the login screen, click the **Need help signing in?** hyperlink
2. Select the **Forgot Password?** hyperlink
3. Enter your **Username**
4. Select a reset option:
 - a. **Reset via SMS:** A text will be sent to the SMS phone number on file
 - b. **Reset via Email:** An email is sent with a link
5. **Click the link** in the email or SMS text received
6. **Answer** your security question
7. Click **Reset Password**
8. Type a **New Password**
9. Type/**Repeat password**
10. Click **Reset Password**

For further assistance, contact the Support Team at Knowledge Services.

Preview A Resume

1. Click **Postings** in the navigation tool in the upper left-hand corner
2. Select **View Postings**.
3. **Locate** the Posting of interest. *Set the date range if needed.*
4. **Double-click** to open the Posting.
5. Click the **Bids** tab.
6. All bids for that Posting appear. Click the **Comments** box (*if applicable*) to review any comments left by the Vendor regarding the candidate.

7. Click the **Attachment Icon** to review the attachments. The Document Previewer will appear.
 - **Preview** each document by clicking on it in the document library on the left.
 - **Download** a document by clicking the download icon.
 - **Print** a document by clicking the print icon.
 - **Search** the document for key words such as job requirements, skills, experience by typing words in the binocular field.

Review and Process Bid Submissions

Reject Uninterested Candidates

1. Click **Postings** in the navigation tool on the left
2. Select **View Postings**
3. **Locate** the Posting of interest. *Set the date range if needed*
4. **Double-click** to open the Posting
5. Click the **Bids** tab
6. **Check the box** for any candidate that is of no interest
7. Click the red **Reject button above**
8. Provide a **reason** and any **comments** for the rejection
9. Click **Reject**. *Upon clicking, an automated email is sent to the Vendor and the status of the bid updates to "Rejected by Client"*

Request Interviews

Initiate the Interview

1. Click **Postings** in the navigation tool on the left.
2. Select **View Postings**.
3. **Locate** the Posting of interest. *Set the date range if needed.*
4. **Double-click** to open the Posting.
5. Click the **Bids** tab.
6. Locate the **candidate(s)** to whom you wish to initiate an interview and **click the box(es)** associated with their line item.

Up to 3 candidates can be selected at a time. If 2 or 3 interviews are requested, there will only be 3 dates and times to select. Upon confirmation of an interview, the selected date/time will no longer be available.

7. Click the **Interview** button.
8. Complete the **Interview Request Form**.

Be sure to include the Time Zone and location for the interview, along with any important details to share with the candidate.

9. Click the **Request Interview** button.
10. A success message appears, click **OK**. *Upon clicking ok, an automated email request is sent to the Vendor and the status of the bid updates to "Interview Requested".*

Check the Status of Interviews

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

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

- **Interview Requested** = The request has been sent but no action has been taken.
- **Interview Confirmed** = The interview has been confirmed. **Double click** to see the confirmed date and time of the interview. *If there is a need to reschedule after an interview is confirmed, click Edit, provide new dates/times, and click Submit.*
- **Interview Declined** = The interview has been declined.
- **Reschedule Requested** = The candidate is requesting to reschedule at a different date/time. **Double click** to confirm or decline the requested date/time.

Complete Interview Actions

1. **Double Click** on the Interview
2. Complete any available actions by clicking the **associated** button

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

3. Once confirmed, open the confirmation email and **download** the attached calendar invite to your calendar.

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

Bid Statuses

Pending MSP Review

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

Pending Client Review

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

Interview Statuses

Interview Requested

An interview has been requested with the candidate by the client

Interview Confirmed

An interview has been confirmed and is scheduled

Interview Reschedule Requested

An interview has been requested by the vendor to be rescheduled by the client

Interview Declined

An interview has been declined by the vendor

Interview Cancelled

An interview has been cancelled and is no longer scheduled

Engagement Request

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

Onboarding

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

Cleared

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

Time and Expense Approval

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

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

Time Approval

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

1. Select **Time/Projects**
2. Click **Approve Time**
*Only timesheets in **Awaiting Approval** status will appear.*
3. Carefully **review** the time entries before choosing to approve or deny:
 - a. Click the **Arrow** be provided with an expanded view of the week, showing individual entries
 - b. For even greater detail, **double click** on the weekly entry to view the Time Summary, Status History, and Approval History
4. **Check the box** associated with the Time Entry to approve or deny
5. Click the **Approve** or **Deny** Button
 - a. **Approve:** Confirm the action by clicking **Yes** in response to the question “Are you sure you want to approve?”
 - b. **Deny:** Select the reason from the dropdown menu. Type any comments (if applicable). Click **Save** to complete the action

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

Expense Approval

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

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

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

Approve or Deny Milestones

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

1. Navigate to **Time\Project > Approve Milestones.**

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