

State of Ohio

IT Staff Augmentation Services Contract



Agency Peoplefluent Training Guide

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LOGIN INFORMATION

This training guide details the web-based requisitioning system known as Peoplefluent and how it's used to procure and manage IT staff augmentation resources under the Ohio IT Staff Augmentation Services Contract. This guide covers various stages of the requisitioning process, including:

- Tool navigation
- Requisition creation and approval
- Candidate/response review and selection
- Timesheet and expense approval
- Engagement evaluation

Please feel free to use this page to record your personalized login information.

Peoplefluent Login Information

URL:	https://vms.peopleclick.com
User Name:	_____
Password:	_____
Org ID:	i4245

NAVIGATING THROUGH THE SYSTEM

This section provides you with a high-level overview of Peoplefluent.

Login

- Open internet browser
- Enter appropriate URL
- Enter login Information

Please note: When you enter the site for the first time, you will need to sign-off on a Software Service Agreement. After your initial log-in, you won't need to do this again.

The image shows a screenshot of the Peoplefluent login interface. The page has a light blue background with a cloud pattern. The Peoplefluent logo is in the top left. The main content area contains a login form with the following fields: Username (containing 'hiring1'), Password (masked with dots), and Organization Key (masked with dots). Below the fields is a 'Login' button with a green arrow icon. A 'Forgot password?' link is located to the right of the password field. Three callout boxes with arrows point to the Username, Password, and Organization Key fields, containing the text: 'Enter your login info here and click on the "Login" button. When you login to the system the first time, you will need to change your password.' A fourth callout box with an arrow pointing to the 'Forgot password?' link contains the text: 'If you can't remember your password, click here to have Peoplefluent send you a new password via email. Be sure to check your Spam filter, as the new password email may end up there.'

Below the login form, there is a dark grey footer area with the text: 'Peoplefluent solutions help you achieve sustainable business results through a consistent, integrated talent management process.'

At the bottom of the page, there are three callout boxes with arrows pointing to links in the footer:

- Click [here](#) for login assistance and for a list of people to contact if you have any questions.
- Click [here](#) to view the Peoplefluent Service Agreement you will need to sign-off on when you login to the system for the first time.
- Click [here](#) to go to Peoplefluent's website.

The footer also contains the text: 'Help | Service Agreement | Peoplefluent | About VMS © Copyright Peoplefluent, Inc. All Rights Reserved.' and 'ABOUT SSL CERTIFICATES'.

Accessing Key Sections of the System

The following section highlights five main areas of the Peoplefluent system:

- Home Page
- Requisitions (Requirements)
- Candidates
- Timesheets
- Expenses

Home Page

This is the main page of the system, and it's the first you'll see after logging into the system. Also known as the dashboard, you can initiate the following tasks from the Home Page:

- View or edit your user information
- Enter a new requisition
- Access your active reqs.
- Review reqs. that may need your approval
- View candidates that have been submitted to your reqs.
- Search for reqs., candidates, and timesheets.
- View reports

The screenshot shows the Peoplefluent Home Page dashboard with several callouts explaining navigation options:

- Home Page:** Click here to return to the Home Page from any other part of the application.
- Create:** Click here to create a new requisition.
- View:** Click here to view reqs., candidates, engagements, timesheets, and expenses.
- Reports:** Click here to view standard reports.
- Quick Find:** Use the quick search functionality to search for reqs., candidates, engagements, and timesheets.
- My Account:** Click here to view and edit your personal information (e.g. reset your password).
- Help:** Click here to access help directory.
- Configure Dashboard:** Click here to customize the layout and content of your dashboard. Please refer to the Help directory for more info.
- Requisitions to Approve:** Click here to view and approve requisitions.
- Timesheets to Approve:** Click here to view and approve timesheets.
- Expenses to Approve:** Click here to view and approve expenses.

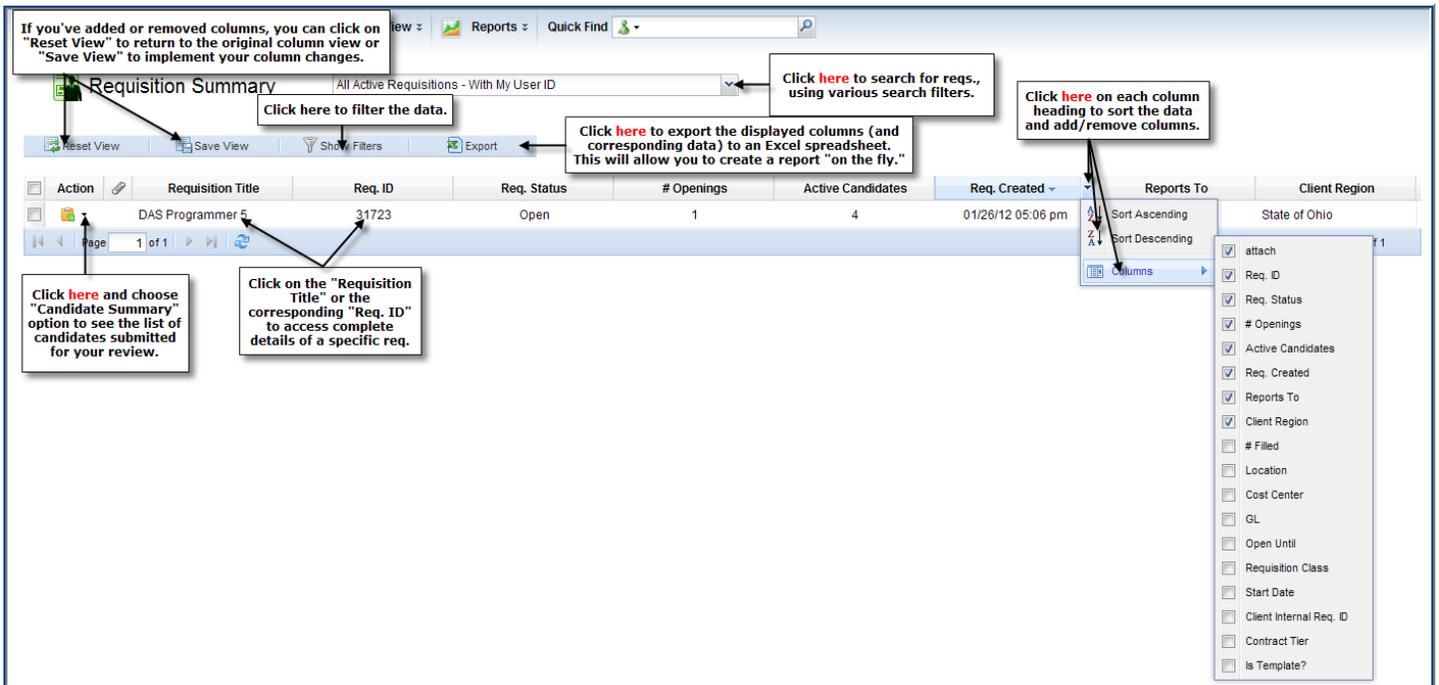
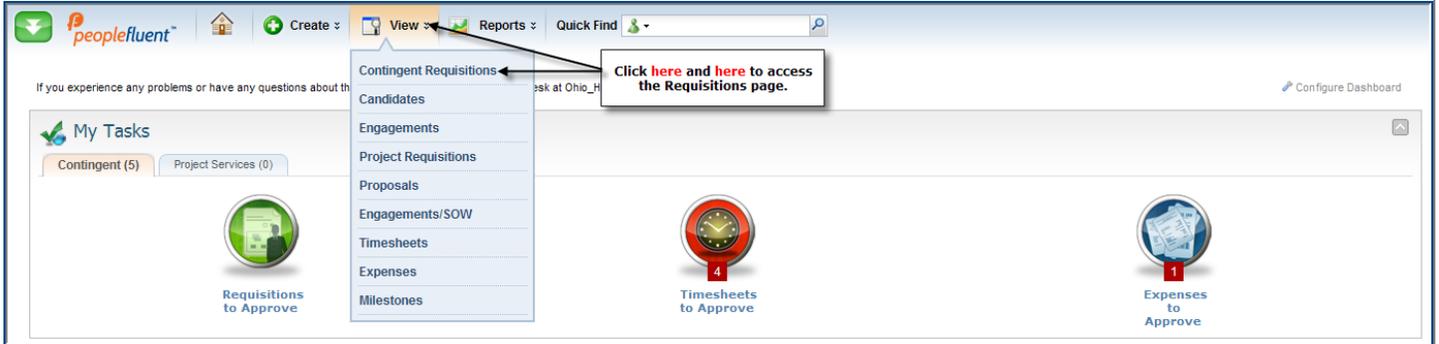
The dashboard also features a 'Current Activity' section with the following items:

- Project Services won't be used for Staff Aug. positions.
- Contingent (12) | Project Services (0)
- Draft Requisitions: Click to view the reqs. that you've created but haven't submitted. (3)
- Pending Requisitions: Click to view reqs. that need approval. (4)
- Active Requisitions: Click to view your open reqs. (1)
- New Candidates: YOU WON'T BE USING THIS LINK. (0)
- Active Candidates: Click to view candidates forwarded by CAI AM for your review. (3)
- Engagements: Click to view candidates currently engaged against your reqs. (1)

The 'Alerts' section shows a calendar view for February 2012, with a callout: "The Alerts Calendar will highlight key points of the requisition process (e.g. interviews, engagements set to start, and engagements set to end)."

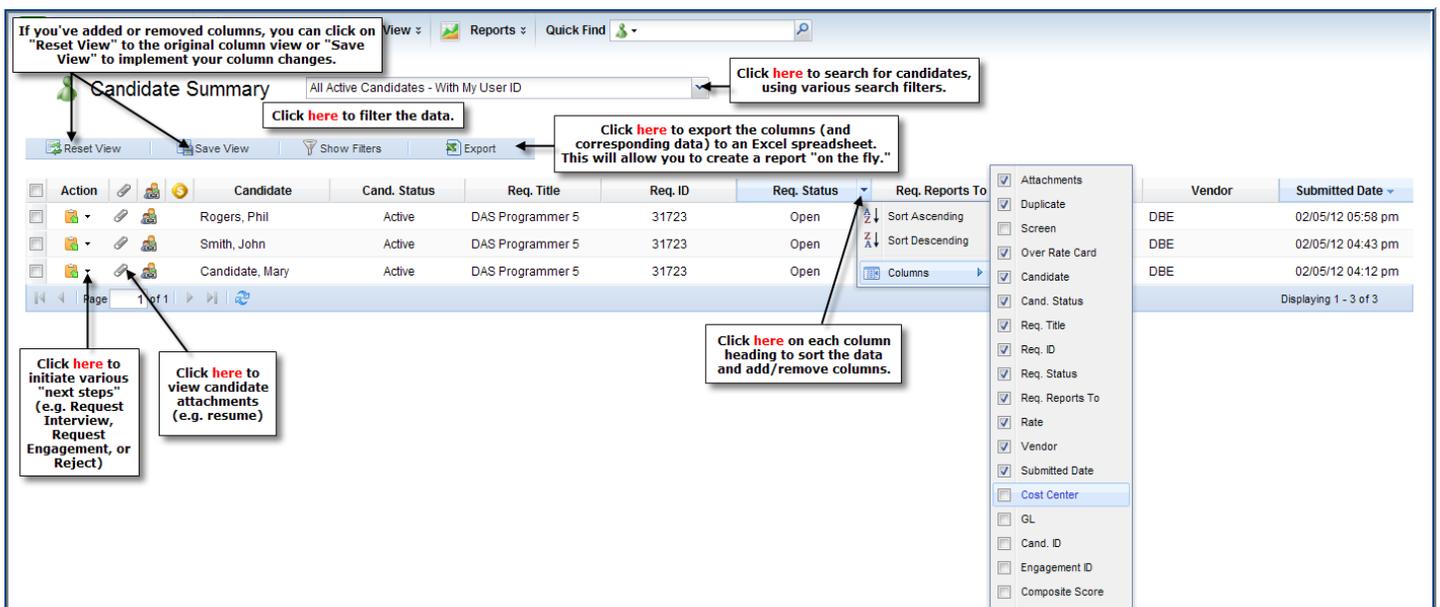
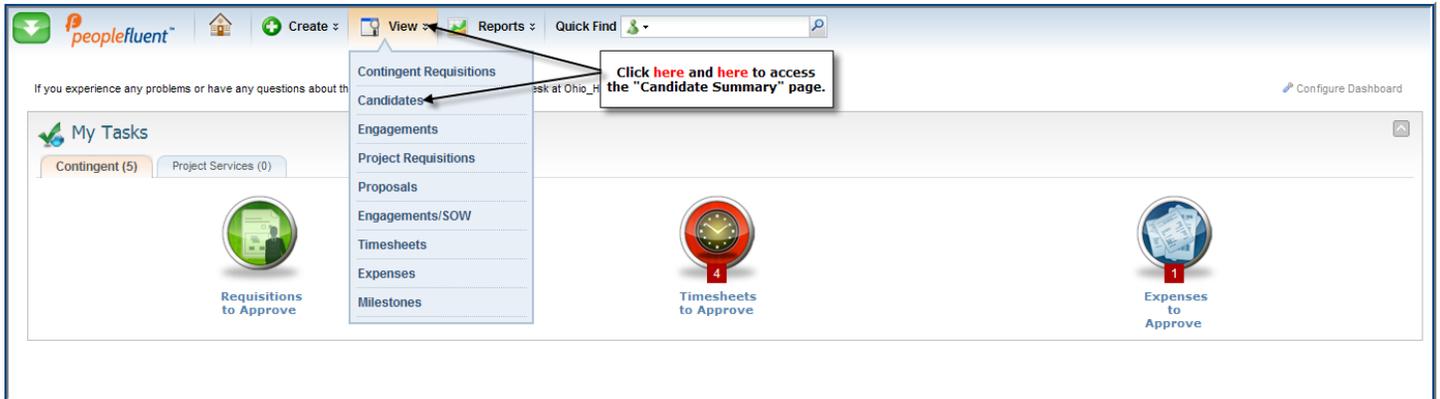
Requisition Summary Page

The following screen shots illustrate how to access the **Requisition Summary Page** and summarize the main points of the page.



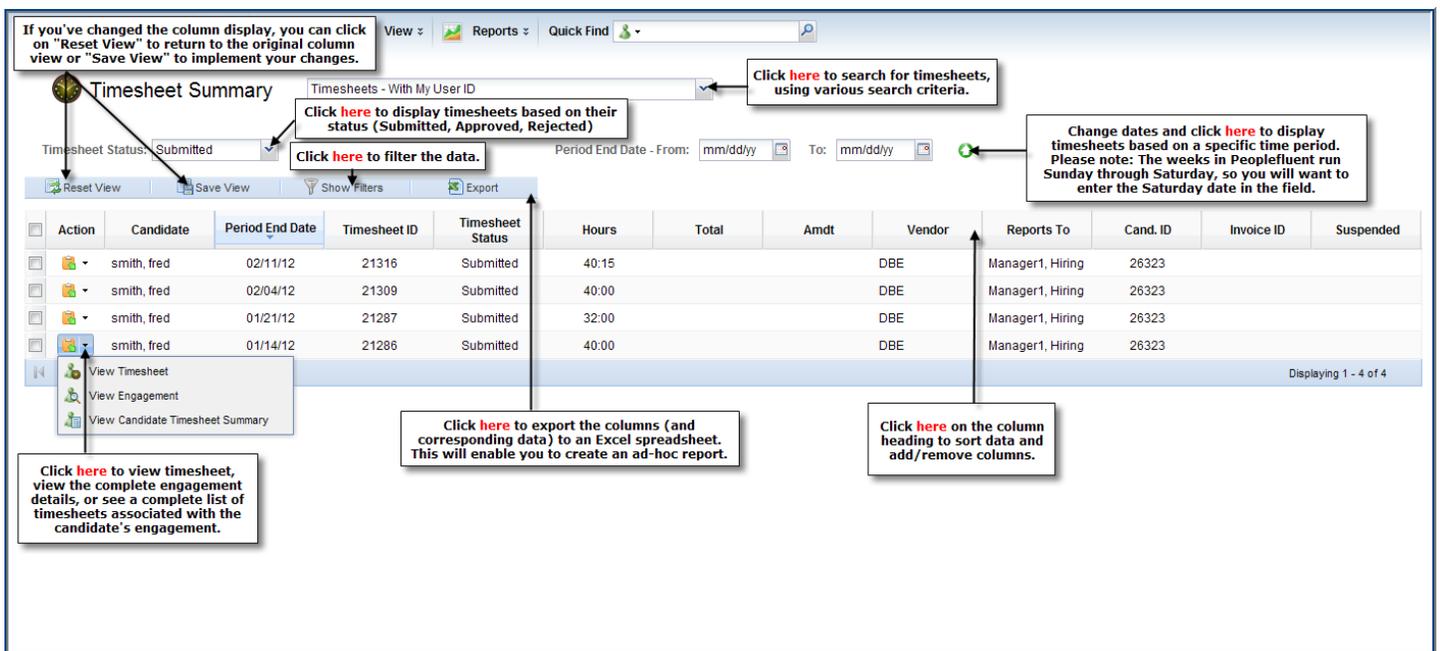
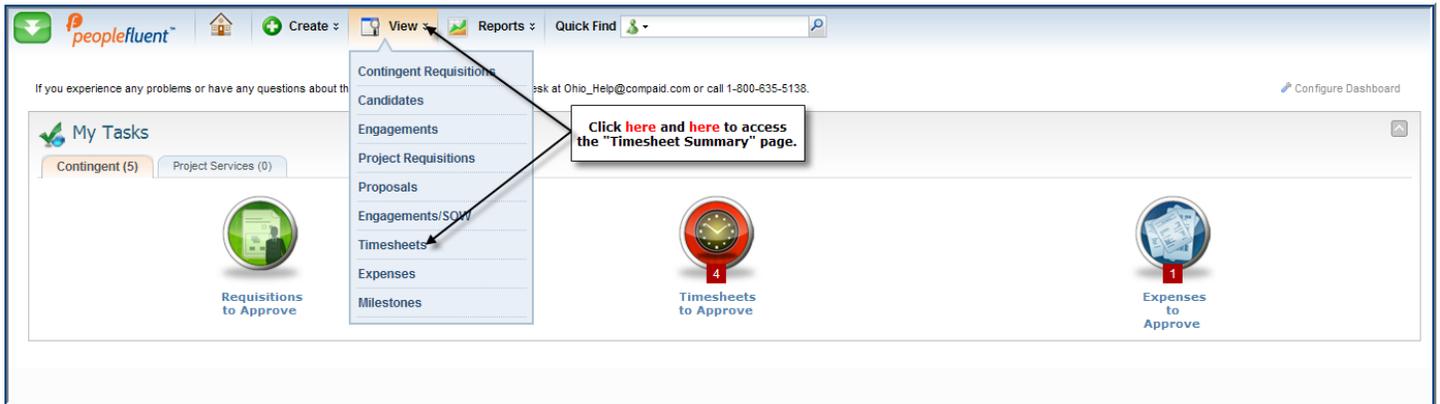
Candidate Summary Page

The following screen shots illustrate how to access the **Candidate Summary Page** and summarize the main points of the page.



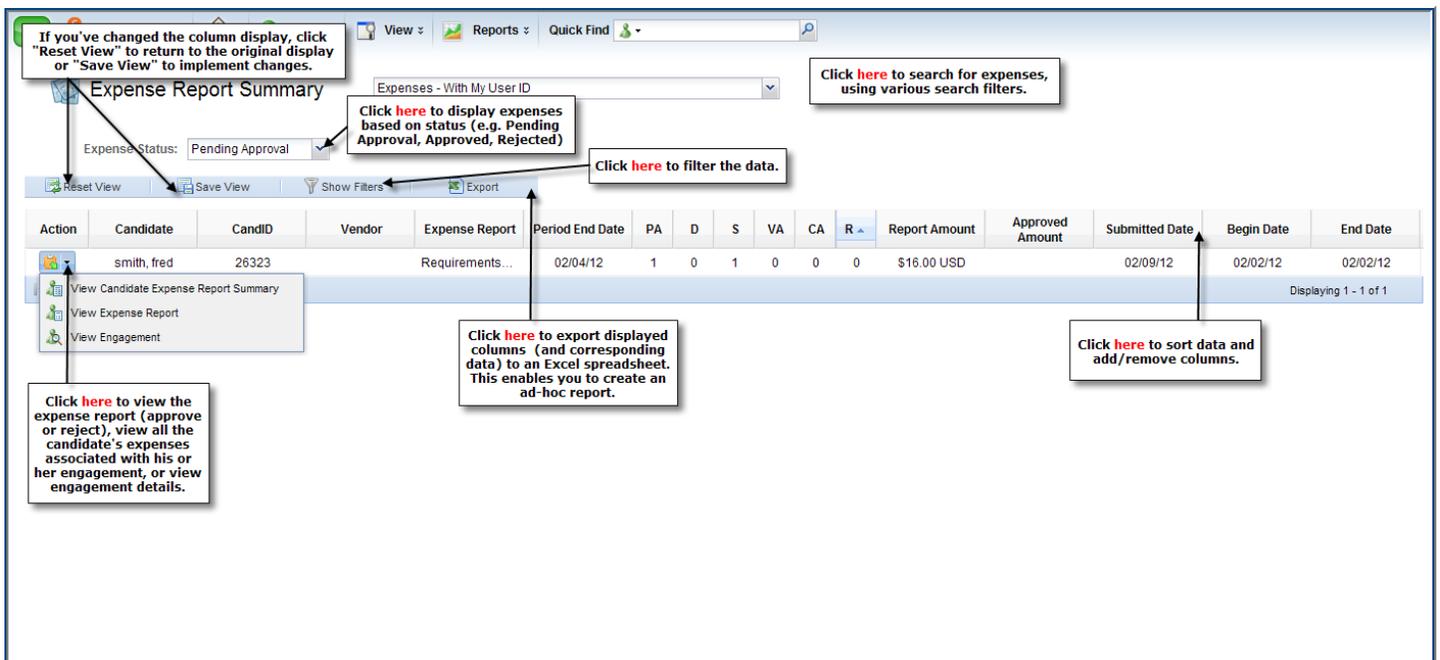
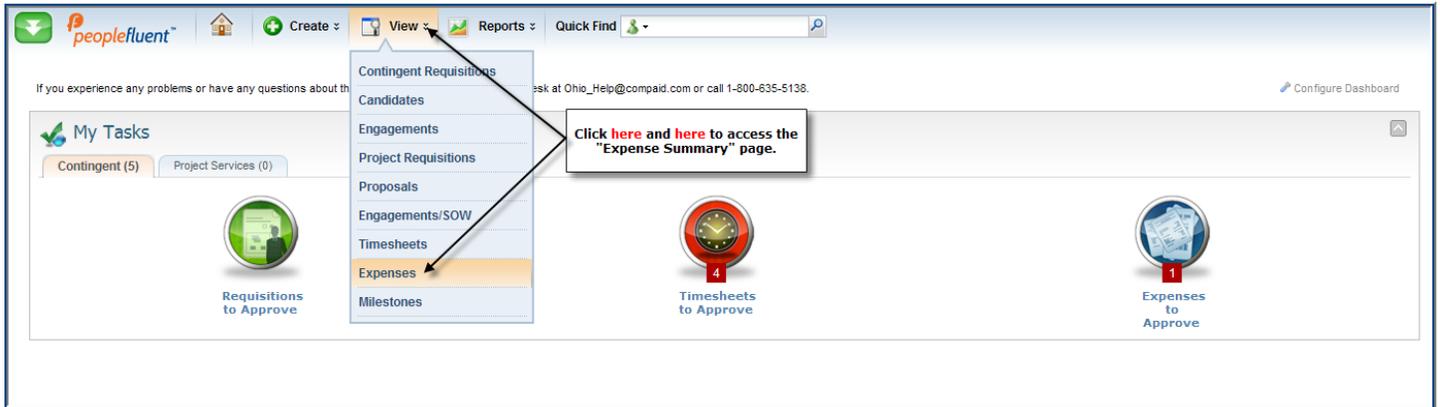
Timesheet Summary Page

The following screen shots illustrate how to access the **Timesheet Summary Page** and summarize the main points of the page. This page enables you to view and approve timesheets for the engaged candidates' timesheets for whom you have approval authority.



Expense Report Summary Page

The following screen shots illustrate how to access the **Expense Report Summary Page** and summarize the main points of the page. This page enables you to view and approve expenses incurred by engaged candidates. **Please note:** Expenses will be reimbursed only if they are pre-approved by the hiring manager and if they are within State guidelines.

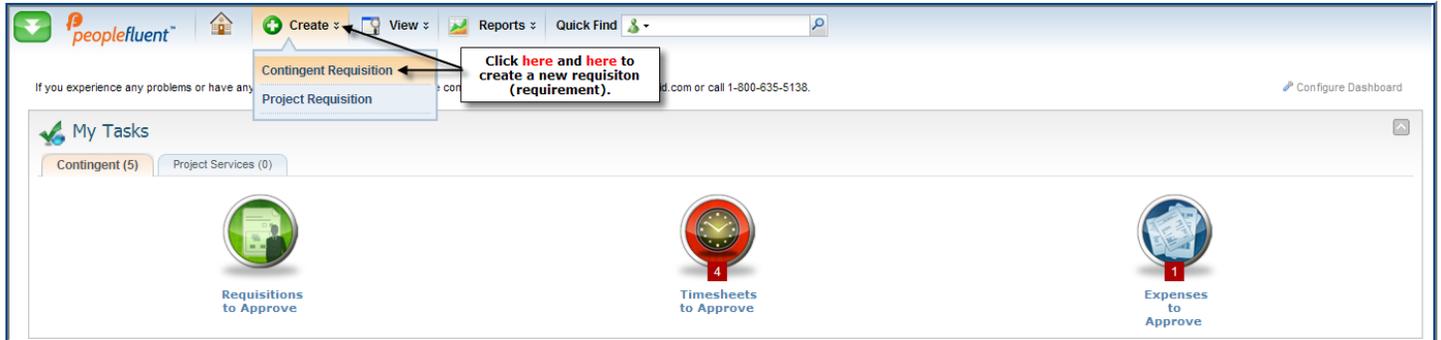


ENTERING A REQUISITION

The following pages detail the workflow Hiring Managers must follow in order to fulfill a staff augmentation requirement (requisition) under this contract.

Initiate a New Requisition

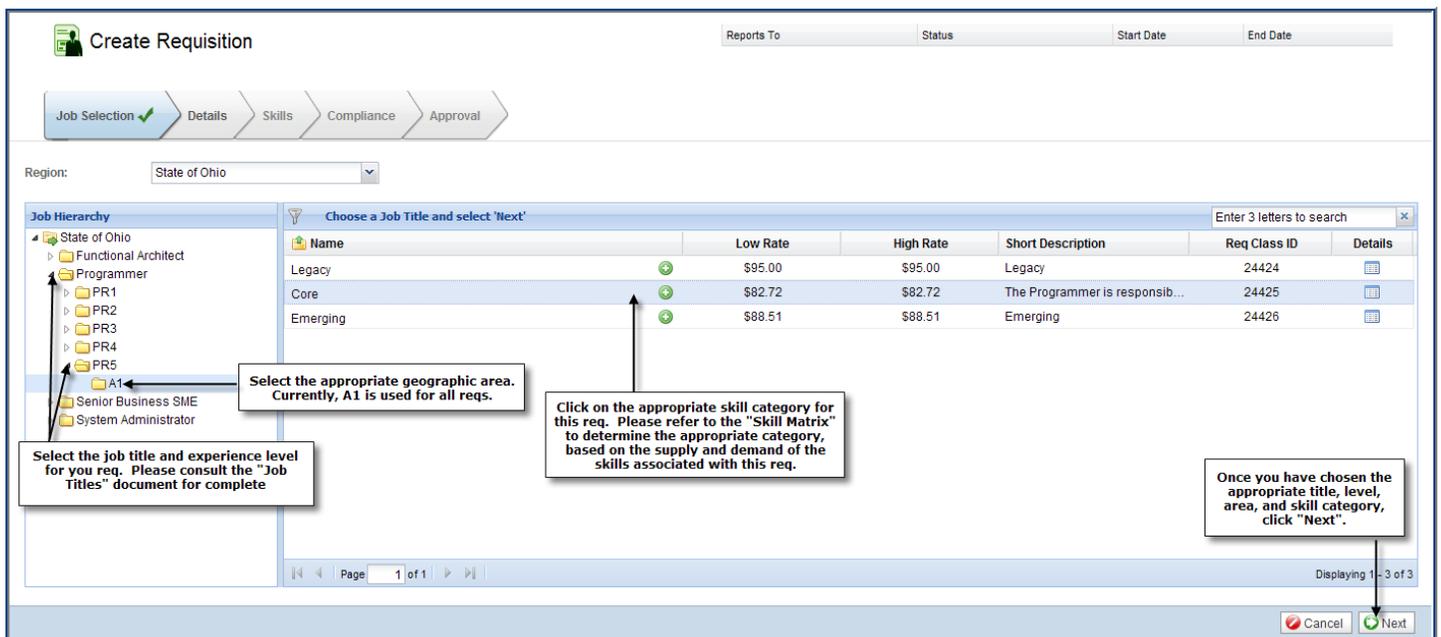
After discussing the need with the CAI Account Manager and all appropriate internal users, you will need to enter your requisition into Peoplefluent.



Select the Job Title and Skill Category

There are five levels to a req. class that must be selected when creating your requisition:

- Job Position (Refer to **Job Titles and Descriptions** document for more details)
- Job Category
- Experience Level
- Economic Area (This will be denoted as **A1**, regardless of title)
- Skill Category (Legacy, Core, or Emerging; refer to contract **Skill Matrix** for details)



Enter the Details

After you select the req. class, you can now begin creating your need. Some information is pre-populated depending on the requisition.

peoplefluent™ Create View Reports Quick Find

Reports To Status Start Date End Date

Create Requisition

Job Selection ✓ Details Skills Compliance Approval

The Progress Bar tells you where you currently are in the req. creation process. If a section is checked, that means it's complete. If it's highlighted, that's the section you're currently completing. If it's gray with no check mark, that's a section that still needs completed.

Entry Instructions
Please review all information prior to submittal. Any changes after submittal must be handled by your designated CAI representative.

PLEASE COMPLETE ALL FIELDS WITH A RED DOT.

Requisition Details

The default requisition class values have been copied to this requisition.

Requisition Class: PROG : PR5 : A1 : Core
Use default values from req class template:

Title/Role: DAS Programmer 5

No. of Openings: 1
Start Date: 04/01/12
No New Submittals After: mm/dd/yy
Market Solicitation: Entire Network
Selected Vendor/Resource:
Worksite Address: 4200 Surface Road, Columbus, OH
Agency Interview Type: In Person Only
Expenses Allowed: No
Account Manager: Lori Hubbard
SLA Exempt: No1
Priority: Normal
Release and Permit Nbr (if available):

No. Filled: 0
End Date: 12/31/12

This should always be "1".

This displays the title, level, and skill category you selected. If this is incorrect, please click on the "Job Selection" tab above to

Enter your title for this req. Please be sure to keep the job title and add your agency name/acronym to the beginning.

Choose the anticipated start date for the assignment.

Choose the anticipated end date for the assignment.

Click here to denote if the req. should go to MBEs Only, MBEs and EDGE Only, the Entire Network, or if it's a direct request for one

If it's a direct request, please denote the vendor/candidate name here.

Enter the physical address for the primary work location.

Choose the interview type (e.g. In Person Only, Both Phone and In Person, Webcam, etc.)

Denote if expenses will be reimbursed. Select "yes" or "no".

Don't change these three fields. These will be changed by the CAI Account Manager, as needed.

Enter the Release and Permit number, if known. Note: It's not required in order to submit.

Job Selection ✓ Details Skills Compliance Approval

Rate Information

Bill Range:

Bill Rate Low: \$ 82.72 USD Per Hour
Bill Rate High: \$ 82.72 USD Per Hour
Not To Exceed Bill Rate: \$ 82.72 USD Per Hour
Do Not Allow Submission Above Maximum Bill Rate: Yes

Hourly High Bill Rate: \$ 82.72 USD Calculate

Current Budget

Click here, and when the pop-up box appears, key in the bill rate already listed, enter the hours per day, days per week, and click on the Save button at the bottom of the box.

Once you have done the Calculation, the estimated budget will automatically populate. If you need to change the budget, do so by changing the number of hours or by adjusting the Estimate Budget field itself.

Rate	# of Openings	Work Hours/Units per Week	Duration (Weeks)	Estimated Budget	Estimated Hours
\$82.72 USD	x 1	x 40	x 39.2857	= \$129988.52 USD	1571.43
Total:				\$129988.52 USD	1571.43

Job Selection Details Skills Compliance Approval

Requisition Description

Engagement Type: Contract **Keep this box checked.**

Short Description: The Programmer is responsible for analysis, design, coding, component and assembly testing of all application code owned by the Application Team. **Delete the pre-filled info that first appears when creating a req. for the first time and enter a high-level overview of your opportunity.**

Complete Description: The Programmer is responsible for analysis, design, coding, component and assembly testing of all application code owned by the Application Team. Programmers typically are involved in maintenance (including production support), enhancement and development work. Programmers have a range of skills and knowledge of the technologies used and applications supported by the Application Team. The Programmer works with the Functional Architect and Technical Architecture Specialist on an as needed basis to ensure that design and code meets customer requirements. **Please note the character limit.**

PR5 **Delete the pre-filled info and enter specific assignment details. This should describe a "day in the life" of the person who will be working in this position.**

Contact Information

Client Contact: Manager1, Hiring **This section will automatically default to the User who is logged in and entering the req.**

Req. Owner: Manager1, Hiring **Please do not change this field.**

Reports To: Manager1, Hiring **This field will automatically default to the agency to which you're associated. If you need to change, click here to choose another agency from the drop-down box, or use the Advanced Search option.**

Client Information

Work Location: State of Ohio **This field should always say State of Ohio. To choose, click on the Magnifying Glass, and when the pop-up window appears, click on the line with the State of Ohio, and click on Select Location at the bottom of the screen.**

Cost Center: Administrative Services **Enter project name, as you wish.**

Project: iOS Mobile Computing **Click "Next" if you have completed everything in its entirety or "Save as Draft". DO NOT HIT "SUBMIT NOW" UNTIL YOU'VE COMPLETED EVERY STEP OF THE PROCESS.**

Save as Draft Submit Now Next

Enter Skills and Ask Questions

Use this section to list all the required/desired skills for the requisition and create any questions you would like the vendor/candidate to answer.

Job Selection Details Skills Compliance Approval

Required / Desired Skills

The default requisition class values have been copied to this requisition.

Click here to add more rows.

Remove	Skill	Required / Desired	Amount	of Experience
<input type="checkbox"/>	Full SDLC experience	Required	10	Years
<input type="checkbox"/>	Experience with Object oriented development	Required	5	Years
<input type="checkbox"/>	Experience with HTML development	Required	5	Years
<input type="checkbox"/>	Experience with relational database development	Required	3	Years
<input type="checkbox"/>	Experience with IOS SDK development	Desired	1	Years
<input type="checkbox"/>	Strong oral communication skills	Required		

List all the skills you would like the candidate to possess.

If you'd like to remove a skill, click on the check box associated with the skill, and when you go on to next step, it will be removed.

Note if each skill is "Required", "Desired", or "Nice to Have", and then note the amount of experience required for each skill, if applicable.

Click here to add more rows.

Question 1 Are you willing to work weekends?

If you'd like to remove a question, click on the check box associated with the question, and when you go on to next step, it will be removed.

Click here to save and complete at a later date.

DO NOT CLICK HERE.

Click here to continue on to the next step.

Click here to go back to the previous step in the process.

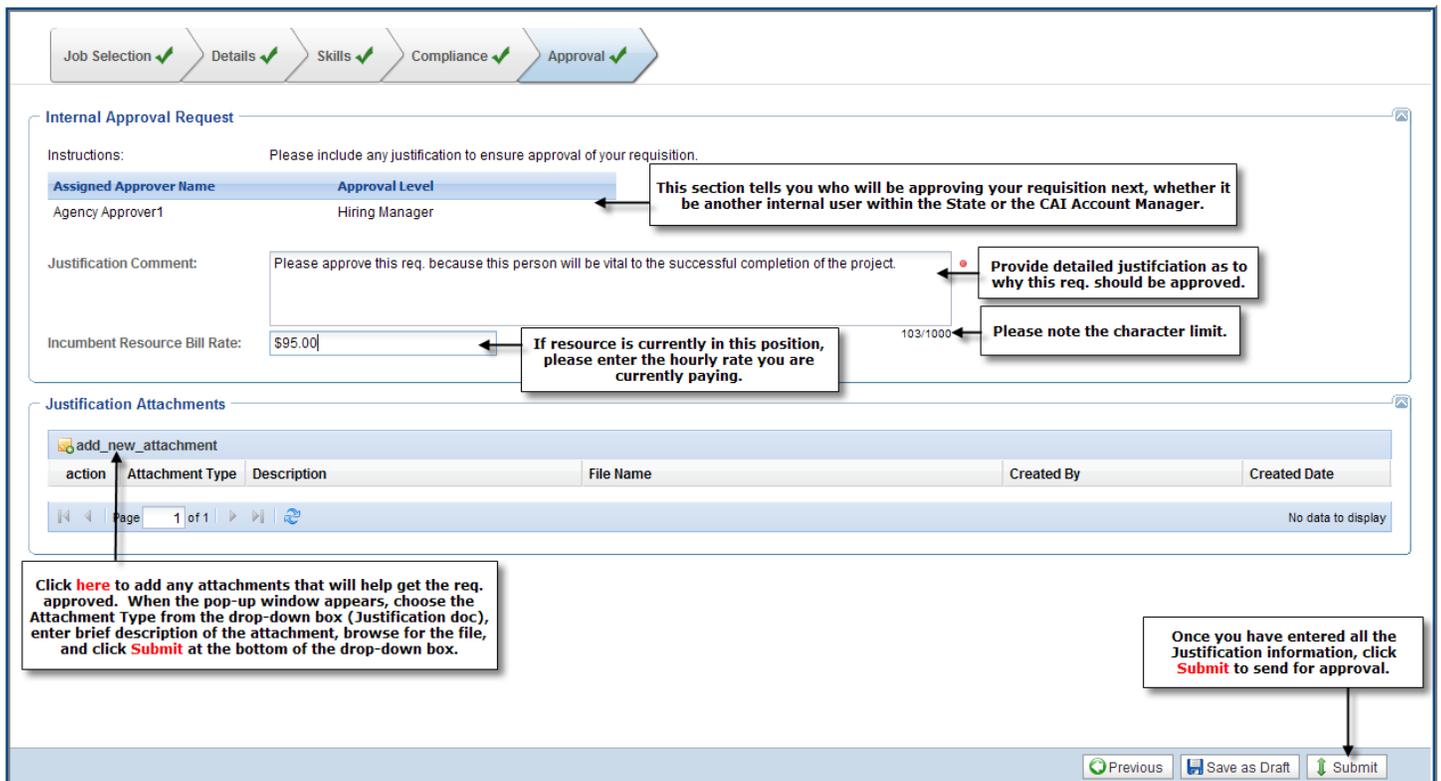
Previous Save as Draft Submit Now Next

Skip the Compliance Section

This section isn't being used at this time, so you can skip to the final step, Justification for Approval.

Enter Justification and Submit for Approval

Once you have entered the necessary justification for entering this requisition and click the Submit button, the requisition will go to the approver for sign-off.



Job Selection ✓ Details ✓ Skills ✓ Compliance ✓ Approval ✓

Internal Approval Request

Instructions: Please include any justification to ensure approval of your requisition.

Assigned Approver Name	Approval Level
Agency Approver1	Hiring Manager

Justification Comment: Please approve this req. because this person will be vital to the successful completion of the project.

Incumbent Resource Bill Rate: \$95.00

103/1000

Justification Attachments

action	Attachment Type	Description	File Name	Created By	Created Date
No data to display					

Page 1 of 1

Previous Save as Draft Submit

Callouts:

- This section tells you who will be approving your requisition next, whether it be another internal user within the State or the CAI Account Manager.
- Provide detailed justification as to why this req. should be approved.
- Please note the character limit.
- If resource is currently in this position, please enter the hourly rate you are currently paying.
- Click **here** to add any attachments that will help get the req. approved. When the pop-up window appears, choose the Attachment Type from the drop-down box (Justification doc), enter brief description of the attachment, browse for the file, and click **Submit** at the bottom of the drop-down box.
- Once you have entered all the Justification information, click **Submit** to send for approval.

APPROVING A REQUISITION

If you're designated as an approver responsible for reviewing and signing-off on the requisition before it's released to the CAI Account Manager, you'll receive a Peoplefluent email notification informing you that a requisition is awaiting your approval. Within the email, you can click on the link that will take you directly to the requisition that requires your approval.

You can also access the Peoplefluent requisition by logging in and navigating the system in the following manner.

The screenshot shows the Peoplefluent dashboard. At the top, there are navigation tabs: 'Create', 'View', 'Reports', and 'Quick Find'. Below the navigation is a message: "If you experience any problems or have any questions about this website, please contact the help desk at Ohio_Help@compaid.com or call 1-800-635-5138." The main content area is titled "My Tasks" and includes two sub-sections: "Contingent (3)" and "Project Services (0)". A callout box points to a "Requisitions to Approve" icon with a red '3' badge, stating "Click here to view the requisition(s) that need your approval." To the right is a "Timesheets to Approve" icon. Below "My Tasks" is the "Current Activity" section, which lists various activity types with counts: Draft Requisitions (0), Pending Requisitions (0), Active Requisitions (0), New Candidates (0), Active Candidates (0), and Engagements (0). To the right of "Current Activity" is an "Alerts" calendar view for February 2012, with the 14th highlighted.

The screenshot shows the "Requisition Summary" page in Peoplefluent. At the top, there are navigation tabs: 'Create', 'View', 'Reports', and 'Quick Find'. Below the navigation is a dropdown menu set to "All Requisitions Pend. My Approval". The main content area includes a table with columns: Action, Requisition Title, Req. ID, Req. Status, # Openings, Active Candidates, Req. Created, Reports To, and Client Region. The table contains three rows of data for "DAS Programmer 5" requisitions. A callout box points to the "Requisition Title" column, stating "Click on the 'Requisition Title' of the req. that needs your approval." The page footer indicates "Page 1 of 1" and "Displaying 1 - 3 of 3".

Action	Requisition Title	Req. ID	Req. Status	# Openings	Active Candidates	Req. Created	Reports To	Client Region
	DAS Programmer 5	32109	Pending approval	1	0	03/14/12 12:52 pm	Manager1, Hiring	State of Ohio
	DAS Programmer 5	31839	Pending approval	1	0	02/15/12 02:46 pm	Manager1, Hiring	State of Ohio
	DAS Programmer 5	31802	Pending approval	1	0	02/10/12 02:24 pm	Manager1, Hiring	State of Ohio

Requisition
DAS Programmer 5 (32109)

Reports To	Status	Start Date	End Date
Hiring Manager1	Pending approval	04/01/12	12/31/12

Job Selection | **Details** | Skills | Compliance | Candidates | Distribution | Reference | Approval/History

Requisition Details

Requisition Class:	PROG : PR5 : A1 : Core	Region Description:	State of Ohio
Title/Role:	DAS Programmer 5		
Req. Status:	Pending approval		
No. of Openings:	1	No. Filled:	0
Start Date:	04/01/12	End Date:	12/31/12
No New Submittals After:			
Market Solicitation:	Entire Network		
Selected Vendor/Resource:			
Worksite Address:	4200 Surface Road, Columbus, OH		
Agency Interview Type:	In Person Only		
Expenses Allowed:	No		
Account Manager:	Lori Hubbard		
SLA Exempt:	No1		
Priority:	Normal		
Release and Permit Nbr (if available):			

Review the Details tab for complete information on the requisition, including:
Assignment logistics
Start and end date
Rate and budget information
Complete assignment description
Contact information

Rate Information

Bill Range:			
Bill Rate Low:	\$ 82.72	USD	Per Hour
Bill Rate High:	\$ 82.72	USD	Per Hour
Not To Exceed Bill Rate:	\$ 82.72	USD	Per Hour

Requisition
DAS Programmer 5 (32109)

Reports To	Status	Start Date	End Date
Hiring Manager1	Pending approval	04/01/12	12/31/12

Job Selection | Details | **Skills** | Compliance | Candidates | Distribution | Reference | Approval/History

Required / Desired Skills

Skill	Required / Desired	Amount	of Experience
Full SDLC experience	Required	10	Years
Experience with Object oriented development	Required	5	Years
Experience with HTML development	Required	5	Years
Experience with relational database development	Required	3	Years
Strong oral communication skills	Required		

Review the Skills tab and make sure the Required/Desired Skills are in line with the chosen title/level/skill category

Questions

Description
Are you willing to work weekends?
Question 1

If there are questions, check to make sure they are complete and appropriate to the position.

Once you have reviewed the information, go to the **Approval/History** tab, as illustrated below.

The screenshot shows the Peoplefluent interface for a Requisition. The top navigation bar includes 'Create', 'View', 'Reports', and 'Quick Find'. The main header shows 'Requisition' for 'DAS Programmer 5 (32109)'. A table at the top right displays: Reports To: Hiring Manager1, Status: Pending approval, Start Date: 04/01/12, End Date: 12/31/12. Below this are tabs for Job Selection, Details, Skills, Compliance, Candidates, Distribution, Reference, and Approval/History. A callout box points to the 'Approval/History' tab with the text: 'Once you have reviewed the "Details" and "Skills" tabs, click here to approve or reject the requisition.' The 'Submit Approval' section contains instructions, justification, and a form with 'Approve' and 'Do not approve' radio buttons, and a 'Submit' button. A callout box points to the 'Submit' button: 'Click "Approve" or "Do not approve" and click "Submit". If you're not approving the requisition, please be sure to include detailed comments as to why the requisition cannot be approved. This will allow the person that submitted the req. to know what to correct when submitting it for approval the next time.' Below this is the 'Approval Summary' table:

Date	Name	Level	Status	Comments
03/14/12 5:40 PM	Hiring Manager1	Hiring Manager	Submitted - Client Approval	Please approve this req. because this person will be vital to the successf...
	Agency Approver1	Hiring Manager	Next Approver	

A callout box points to the 'Next Approver' row: 'Check the "Approval Summary" section to see who submitted the req. and if anyone approved it prior to you receiving it.' Below the summary is the 'Justification Attachments' section with a table for attachments. A callout box points to this section: 'Review any "Justification Attachments" that may have been added by the person submitting the req. for your approval.' The bottom of the page shows 'Page 1 of 1' and 'No data to display'.

If the Requisition is **rejected** at any point in the approval chain, the Hiring Manager will be sent an email indicating the rejection. The Hiring Manager can then make corrections to the requisition and resubmit for approvals.

If the Requisition is **approved**, it will go onto the next approver in the approval chain.

Ultimately, all requisitions will be reviewed and approved by the designated CAI Account Manager who will do a final review of the requisition to ensure it is clear and complete before sending it to the vendor network for competition.

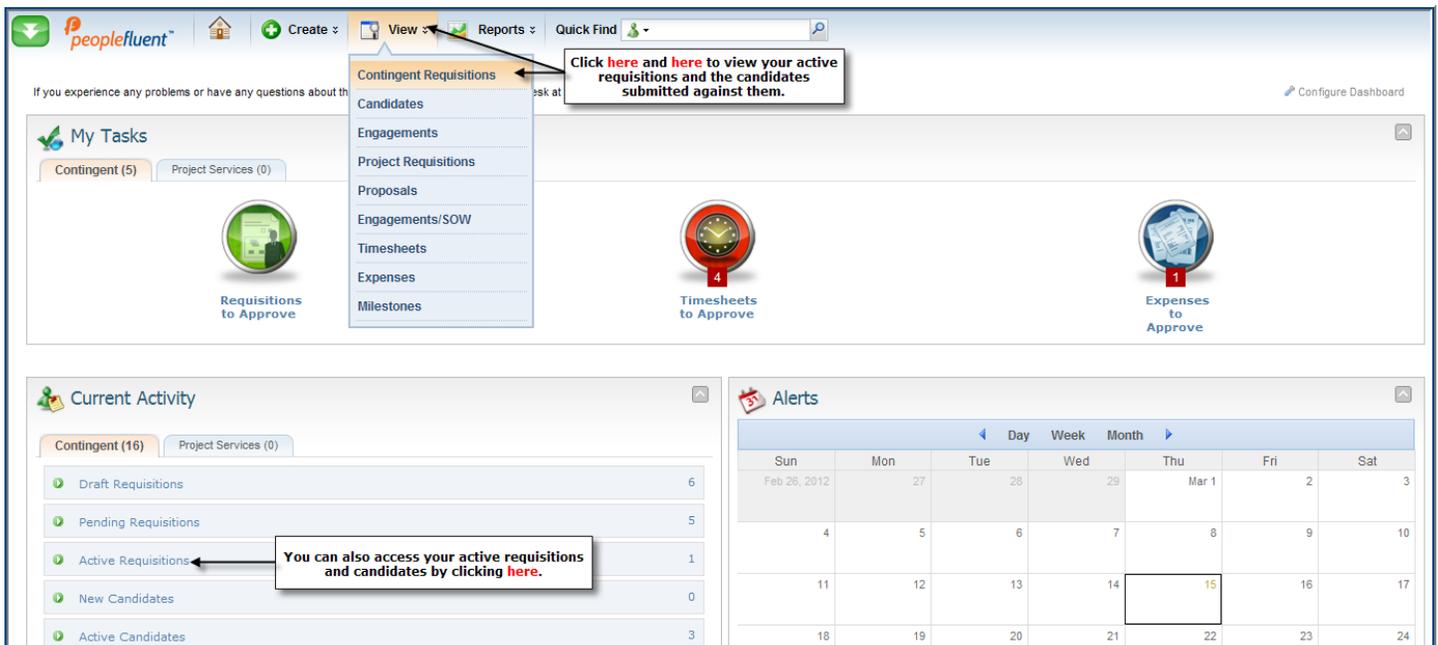
SELECTING YOUR CANDIDATE

Once the requisition is released to the Vendor network and candidates are submitted, the CAI Account Manager (AM) is responsible for screening the vendor network’s candidates that are submitted against your requisition. The CAI AM examines the information provided for each candidate and reviews the score that has been calculated by the candidate responses in the **Required/Desired** section of Peoplefluent. In addition, the CAI AM compares the responses against the resume to make sure they match.

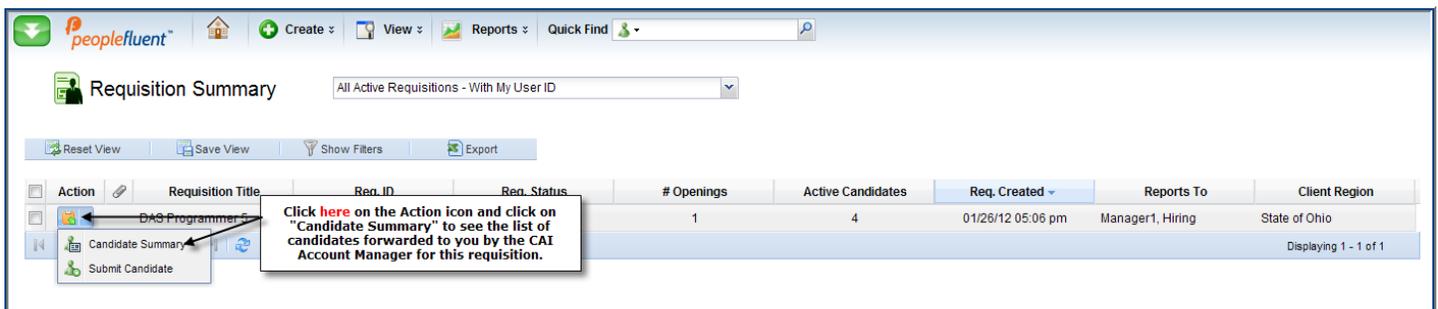
If the CAI AM feels the candidate has the necessary skills, he or she will call the candidate to do an initial screening of the candidate’s qualifications. If the CAI AM still feels the candidate is a match for the position, the candidate will be forwarded to you via Peoplefluent.

Access the Candidates

When a candidate is forwarded for your review, you’ll receive an automatic email notification from Peoplefluent. Within the email, you can click on a link that will take you directly to the candidate’s detail page. You can also access all candidates forwarded against your requisition by navigating through Peoplefluent in the following manner.



The screenshot shows the Peoplefluent dashboard. A dropdown menu is open under the 'View' button, listing options: Contingent Requisitions, Candidates, Engagements, Project Requisitions, Proposals, Engagements/SOW, Timesheets, Expenses, and Milestones. A callout box points to 'Contingent Requisitions' and 'Candidates' with the text: "Click here and here to view your active requisitions and the candidates submitted against them." Below the menu are three circular gauges: 'Requisitions to Approve' (5), 'Timesheets to Approve' (4), and 'Expenses to Approve' (1). The 'Current Activity' section shows a list of activities: Draft Requisitions (6), Pending Requisitions (5), Active Requisitions (1), New Candidates (0), and Active Candidates (3). A callout box points to 'Active Requisitions' with the text: "You can also access your active requisitions and candidates by clicking here." To the right is an 'Alerts' calendar for March 2012.



The screenshot shows the 'Requisition Summary' page. A dropdown menu is open under the 'Action' column for the first row. The menu options are: Candidate Summary, Submit Candidate, and another 'Candidate Summary' option. A callout box points to the first 'Candidate Summary' option with the text: "Click here on the Action icon and click on 'Candidate Summary' to see the list of candidates forwarded to you by the CAI Account Manager for this requisition." The table below has the following data:

Action	Requisition Title	Req. ID	Req. Status	# Openings	Active Candidates	Req. Created	Reports To	Client Region
	DAS Programmer			1	4	01/26/12 05:06 pm	Manager1, Hiring	State of Ohio

At the bottom right of the table, it says "Displaying 1 - 1 of 1".

Compare the Candidates

Once you've accessed the list of candidates submitted against your requisition, you can choose to compare the candidates' skills and experience, as illustrated in the following screen shot.

Requisition
DAS Programmer 5 (31723)

Reports To: Hiring Manager1 | Status: Open | Start Date: 04/01/12 | End Date: 12/31/12

Job Selection | Details | Skills | Compliance | **Candidates** | Distribution | Reference | Approval/History

Reset View | Save View | Show Filters | Export

Action	Candidate	Cand. Status	Req. Title	Req. ID	Req. Status	Req. Reports To	Rate	Vendor	Submitted Date
<input checked="" type="checkbox"/>	Rogers, Phil	Active	DAS Programmer 5	31723	Open	Manager1 Hiring		DBE	02/05/12 05:58 pm
<input checked="" type="checkbox"/>	Smith, John	Active	DAS Programmer 5	31723	Open	Manager1 Hiring		DBE	02/05/12 04:43 pm
<input checked="" type="checkbox"/>	Candidate, Mary	Active	DAS Programmer 5	31723	Open	Manager1 Hiring		DBE	02/05/12 04:12 pm

Page 1 of 1 | Displaying 1 - 3 of 3

Requisition Summary List | Bulk Actions | **Compare Candidates**

Click the check boxes next to each of the candidates you would like to compare.

Once you've selected the candidates you would like to compare, click here.

After clicking on the "Compare Candidates" link, you'll be directed to a page that matches the candidates side-by-side, based on various criteria including:

- Composite Score (System-assigned score based on responses to Required/Desired Skills)
- Each required/desired skill listed on the requisition and the candidate response
- Previous employment (Did the candidate work for the State before)

The following screen shot highlights the various parts of the Candidate Compare page.

Candidate Compare
DAS Programmer 5 (31723)

3 of 3 selected Candidates satisfy criteria.
0 Candidates in pool also satisfy criteria.

Selection Criteria: Composite Score, Deployable Rating, Employed Previously, My Star Rating

Click here to go back to the Candidate Summary or view the requisition.

This screen represents a typical Candidate Compare screen.

Click here to add (or remove) selection criteria to the "Candidate Compare". You can also rearrange the order of the criteria. Please note: Once you add or remove criteria, your changes will carry over to the next time you access the "Candidate Compare" section for this requisition.

You can reduce the candidate pool by adjusting each of these bars.

Candidate	Composite Score	Deployable Rating	Employed Previously
26472 Rogers, Phil	118.644	10	No
26432 Candidate, Mary	105.085	10	Yes
26452 Smith, John	100	10	No

You can sort (rank) the candidates by Name (Alphabetical Order) or Criteria (It will rank the candidates based on their response to the first criteria listed).

Composite Score is the system-assigned score given to the candidate, based on responses to the Required/Desired skills listed on the requisition.

The candidate ranking goes left to right, with the top candidate on the left.

The following screen shot illustrates how you can change the selection criteria used for the candidate comparison. **Please note:** Once you alter the selection criteria, your changes will carry over to the next time you are doing a candidate comparison for this particular requisition.

The screenshot shows the 'Candidate Compare' interface for requisition 'DAS Programmer 5 (31723)'. It features a 'Selection Criteria' sidebar on the left, a 'Requisition Criteria' list in the center, and a 'Selected Criteria' list on the right. Callouts provide instructions: 'Click here to bring up the complete list of Selection Criteria.' points to a plus icon in the sidebar; 'These criteria are unique to the requisition. These are the Required/Desired Skills.' points to the 'Requisition Specific Criteria' section; 'These criteria are standard for every requisition.' points to the 'Quick Compare Criteria' section; 'Double-click to add criteria to the Candidate Compare.' points to a double-click action on a criterion; 'Click here to remove criteria from the Candidate Compare.' points to a minus icon in the 'Selected Criteria' list; 'The candidates are ranked by the first criteria listed. So, if you'd like the candidates to be ranked based on their Composite Score, you can move it to the top by clicking on the row and sliding it up to the first position.' points to a drag handle in the 'Selected Criteria' list; 'Click here to cancel any changes you made and return to the previous Candidate Compare.' points to the 'Cancel' button; and 'Click here to save your changes and update the Candidate Compare.' points to the 'Save' button.

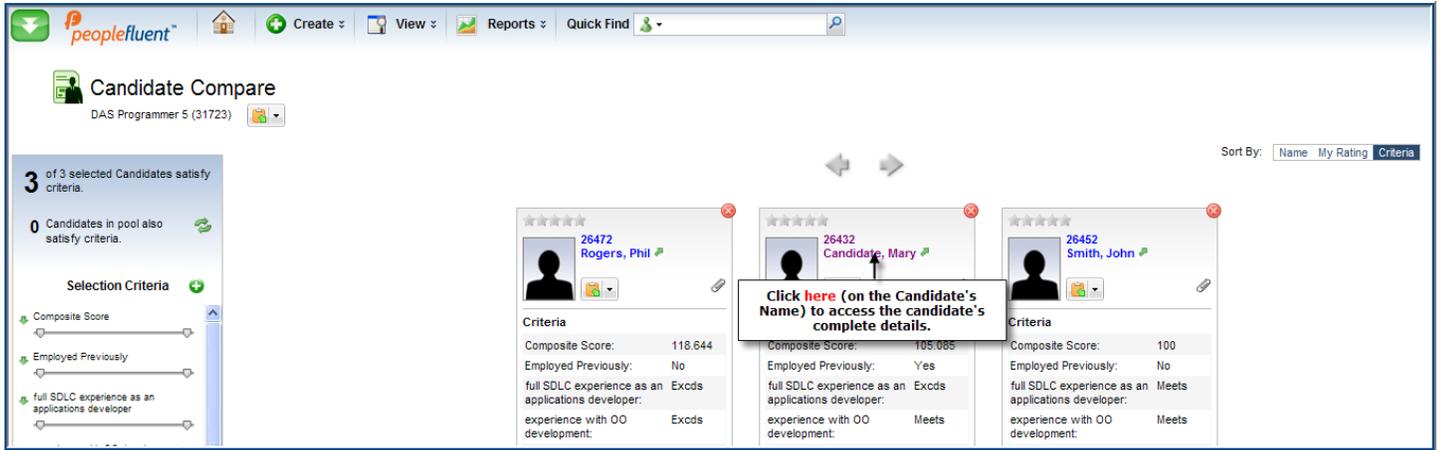
The following screen shot depicts what your Candidate Compare screen may look like if you make changes to the Selection Criteria.

The screenshot shows the 'Candidate Compare' interface with three candidate profiles displayed. The 'Selection Criteria' sidebar on the left is updated with new criteria. The candidate profiles are as follows:

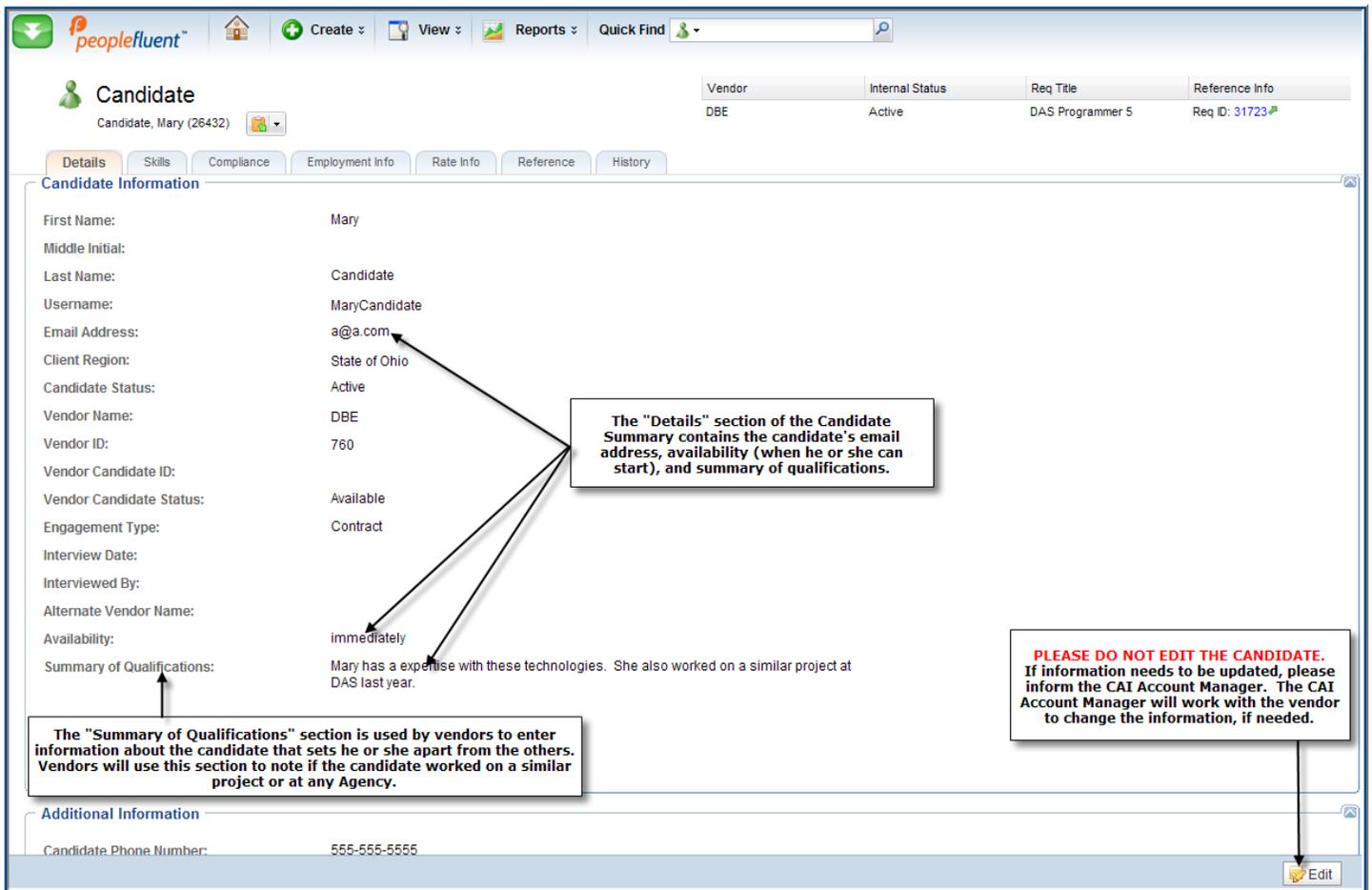
Candidate Name	Composite Score	Employed Previously	full SDLC experience as an applications developer:	experience with OO development:	experience with HTML development:	experience with relational database development:	experience with iOS SDK developm:	Strong oral communication skills:	Experience in architecting & developing mobile web applications:	Experience developing applications on multiple mobile computing platforms :	Experience w/synchronization of data captured on a mobile device :	Experience w/integration of
Rogers, Phil	118,644	No	Excds	Excds	Excds	Excds	Excds	Excds	Excds	Excds	Excds	Excds
Candidate, Mary	105,085	Yes	Excds	Meets	Meets	Excds	Meets	Meets	Meets	Meets	Meets	Meets
Smith, John	100	No	Meets	Meets	Meets	Meets	Meets	Meets	Meets	Meets	Meets	Meets

Review a Specific Candidate in Greater Detail

If you've done your candidate comparison and would like to look at an individual candidate's complete details, you can do so right from the Candidate Compare page, as illustrated in the screen shot below.



The **Candidate Summary** provides key information, including availability, summary of qualifications, skills, previous work experience, and resume. The following screen shots highlight these areas.



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Candidate: Mary (26432)

Internal Status: Active | Req Title: DAS Programmer 5 | Reference Info: Req ID: 31723

Skills | Compliance | Employment Info

Requisition Details And Candidate Match

Skill	Required / Desired	Amount	of Experience	Response	Amount	of Candidate's Experience
full SDLC experience as an applications developer	Required	10	Years	Exceeds	15	Years
experience with OO development	Required	5	Years	Meets	5	Years
experience with HTML development	Required	5	Years	Meets	5	Years
Strong oral communication skills	Required	2	Years	Meets	2	Years
Experience in architecting & developing mobile web applications	Desired			Meets		
Experience developing applications on multiple mobile computing platforms	Desired			Meets		
Experience w/synchronization of data captured on a mobile device	Desired			Meets		
Experience w/integration of data captured on a mobile device	Desired			Meets		

Questions For Requisition

Question	Response
Absences greater than two weeks MUST be approved by CAI management in advance, and contact information must be provided to CAI so that the resource can be reached during his or her	Yes

The "Skills" section lists the Required/Desired skills from your requisition, as well as the candidate's response to each. This section also includes any questions you asked, along with the candidate response.

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Candidate: Mary (26432)

Vendor: DBE | Internal Status: Active | Req Title: DAS Programmer 5 | Reference Info: Req ID: 31723

Details | Skills | Compliance | **Employment Info** | Rate Info | Reference | History

Candidate Employment Status

Is Candidate currently employed by Vendor: Yes

Is/will be Paid-Employee/W2 to Vendor: Yes

If not, list candidate employer if subcontracted to vendor:

Independent Contractor: No

If yes, incorporated, 1099/Self-Employed Or N/A:

Was Candidate ever contracted/employed by client: Yes

If yes, specify what type: Temporary

If yes, when did the last employment end?: 09/30/11

If yes, why did the employment end?: Engagement Fulfilled

If yes, detail previous contract/employment at client: Similar DAS Project

Candidate Vendor Contact Information

Vendor Contact: Linda Leiby

Vendor Email:

Vendor Contact Phone:

Vendor Client Status:

Vendor Rep.: Linda Leiby

The "Employment" section details the candidate's employment relationship with the submitting vendor, as well as any previous Agency experience. This section also contains Vendor contact information. Please remember not to contact the vendor directly. If you need any information from the vendor/candidate, let the CAI Account Manager know. He or she will get that information for you.

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Create View Reports Quick Find

Candidate
Candidate, Mary (26432)

Vendor: DBE Internal Status: Active Req Title: DAS Programmer 5 Reference Info: Req ID: 31723

Details Skills Compliance Employment Info Rate Info **Reference** History

Candidate Comments

User Name	Org. Short Name	Date/Time	Comment	Sys. ID
There are currently no comments				

Internal Comments

User Name	Org. Short Name	Date/Time	Comment	Sys. ID
There are currently no comments				

Attachments

Attachment Type	Description	File Name	Created By	Created Date
Resume/CV	Mary Candidate Resume	Mary Candidate Resume.doc	Linda Leiby	02/05/12 9:13 PM

Page 1 of 1

Displaying 1 - 1 of 1

The "Reference" section lists any comments that may have been added by the Vendor, the Agency, or CAI. Please note that these comments are specific to this particular submittal. It is also worth noting that the Candidate Comments are viewable by the Vendor, and the Internal Comments are only viewable by you and the CAI Account Manager.

The "Reference" section also contains the candidate resume, as well as any additional attachments that the vendor may have submitted. To view the file, simply click on the File Name.

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Create View Reports Quick Find

Candidate
Candidate, Mary (26432)

Vendor: DBE Internal Status: Active Req Title: DAS Programmer 5 Reference Info: Req ID: 31723

Details Skills Compliance Employment Info Rate Info Reference **History**

Candidate History

First Name: Mary
Middle Initial:
Last Name: Candidate
User ID: 14942

The "History" section enables you to see if the candidate has been submitted against any other requisitions within the Peoplefluent system.

Job Title	Submitted To	Date	By	Candidate ID
Database Administrator	Commonwealth of Pennsylvania	12/14/2004	Jackie Boas	7809
DCNR - Database Administrator	Commonwealth of Pennsylvania	01/17/2005	Linda Leiby	8037
DCNR - Database Administrator	Commonwealth of Pennsylvania	01/17/2005	Linda Leiby	8040
DCNR - Database Administrator	Commonwealth of Pennsylvania	01/17/2005	Linda Leiby	8043
DCNR - Database Administrator	Commonwealth of Pennsylvania	01/17/2005	Linda Leiby	8046
DCNR - Database Administrator	Commonwealth of Pennsylvania	01/17/2005	Linda Leiby	8049
DCNR - Database Administrator	Commonwealth of Pennsylvania	01/17/2005	Linda Leiby	8052
DCNR - Database Administrator	Commonwealth of Pennsylvania	01/17/2005	Linda Leiby	8055
DCNR - Database Administrator	Commonwealth of Pennsylvania	01/17/2005	Linda Leiby	8058
DCNR - Database Administrator	Commonwealth of Pennsylvania	01/17/2005	Linda Leiby	8061

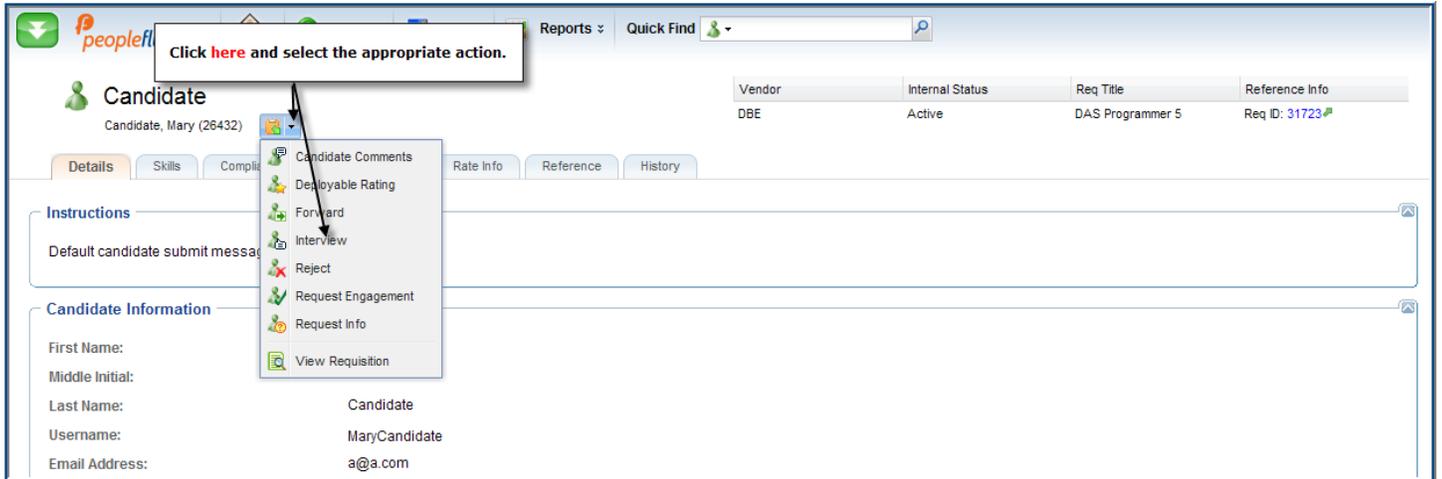
Page 1 of 5

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From any part of the **Candidate Summary** page, the Hiring Manager can do the following:

- Request additional information about the candidate
- Forward the candidate to another person for review
- Request an interview with the candidate
- Reject the candidate
- Request that the candidate be engaged

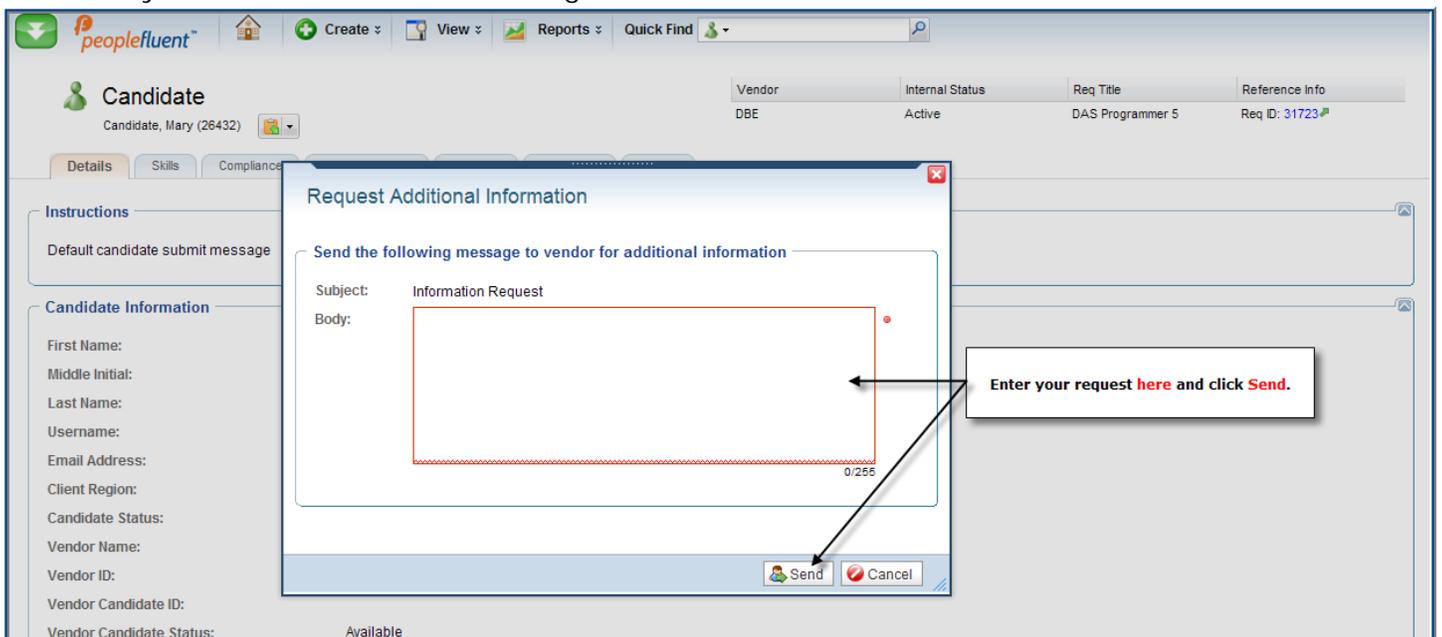
These action items, highlighted in the screen shot below, are sometimes referred to as “email generators”, as they initiate emails to CAI, requesting that action be taken.



The following sections describe these “email generators” in greater detail.

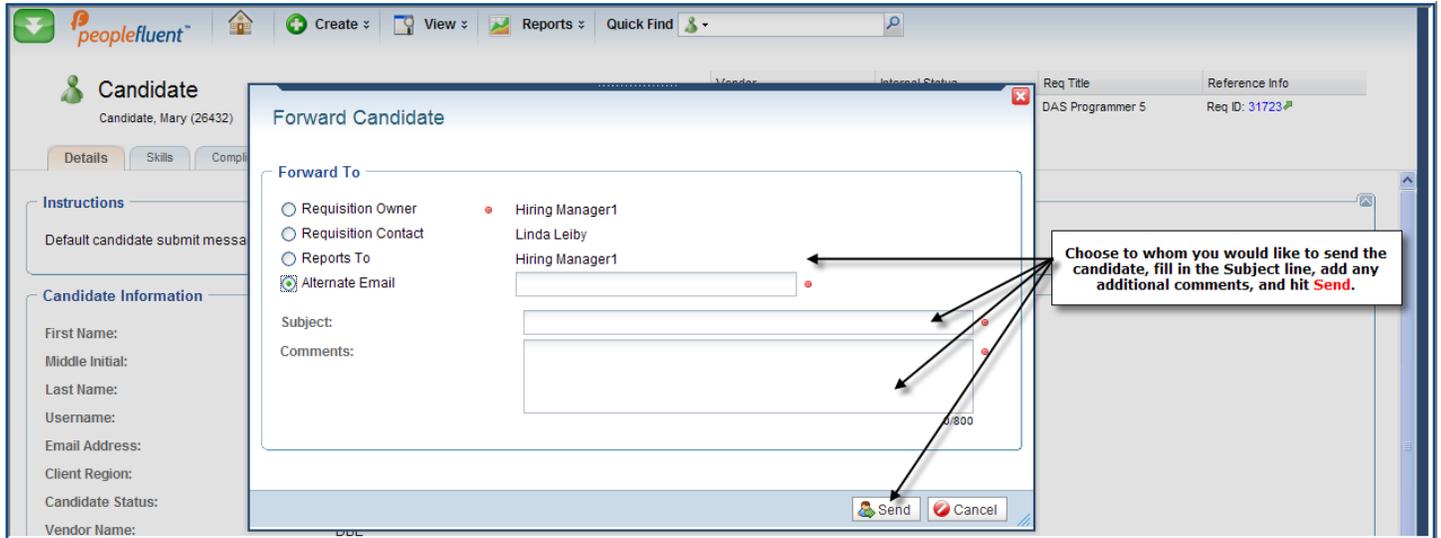
Request Information

The **Request Information** action item enables you to request additional information about the candidate. Note the additional information needed in Peoplefluent, and the CAI AM will work directly with the vendor/candidate to get this information.



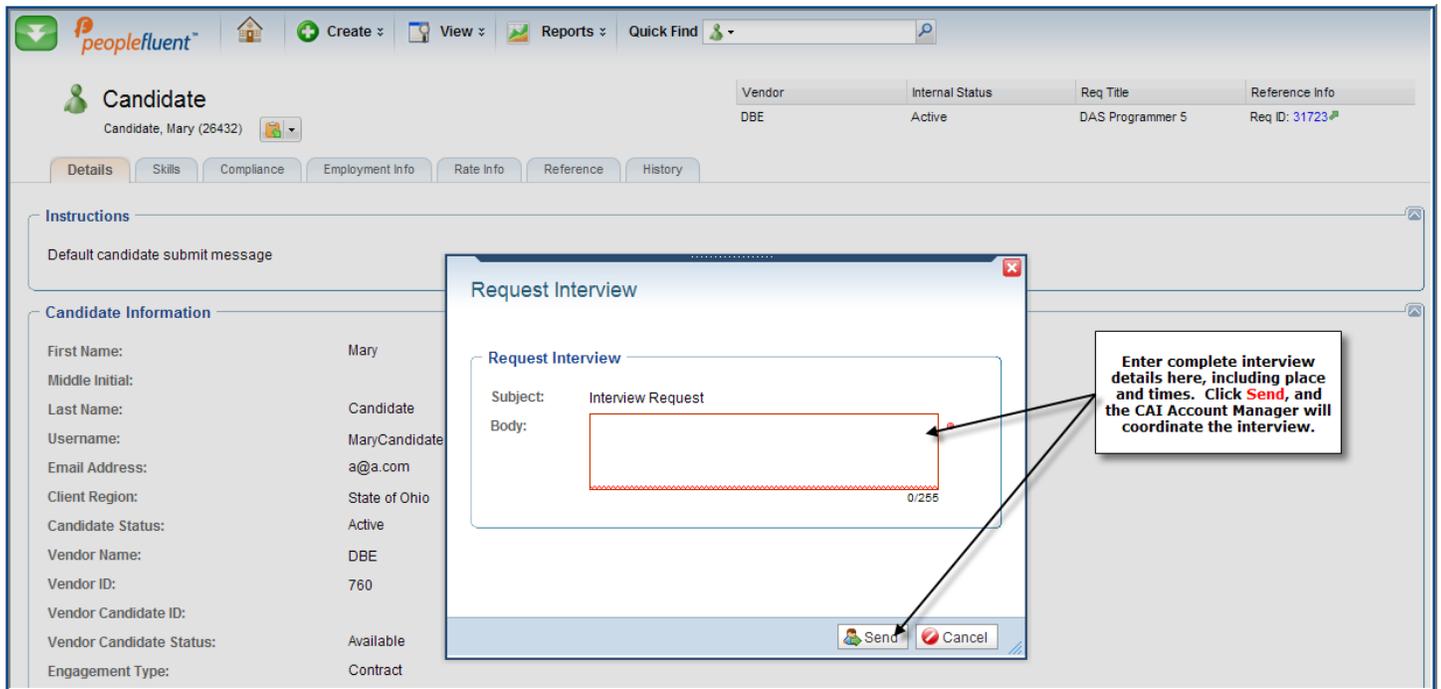
Forward Candidate

The **Forward Candidate** action item allows you to send an email to another person, asking them to review the candidate. **Please note:** In order for the other person to review the candidate's information, he or she must have access to the Peoplefluent system.



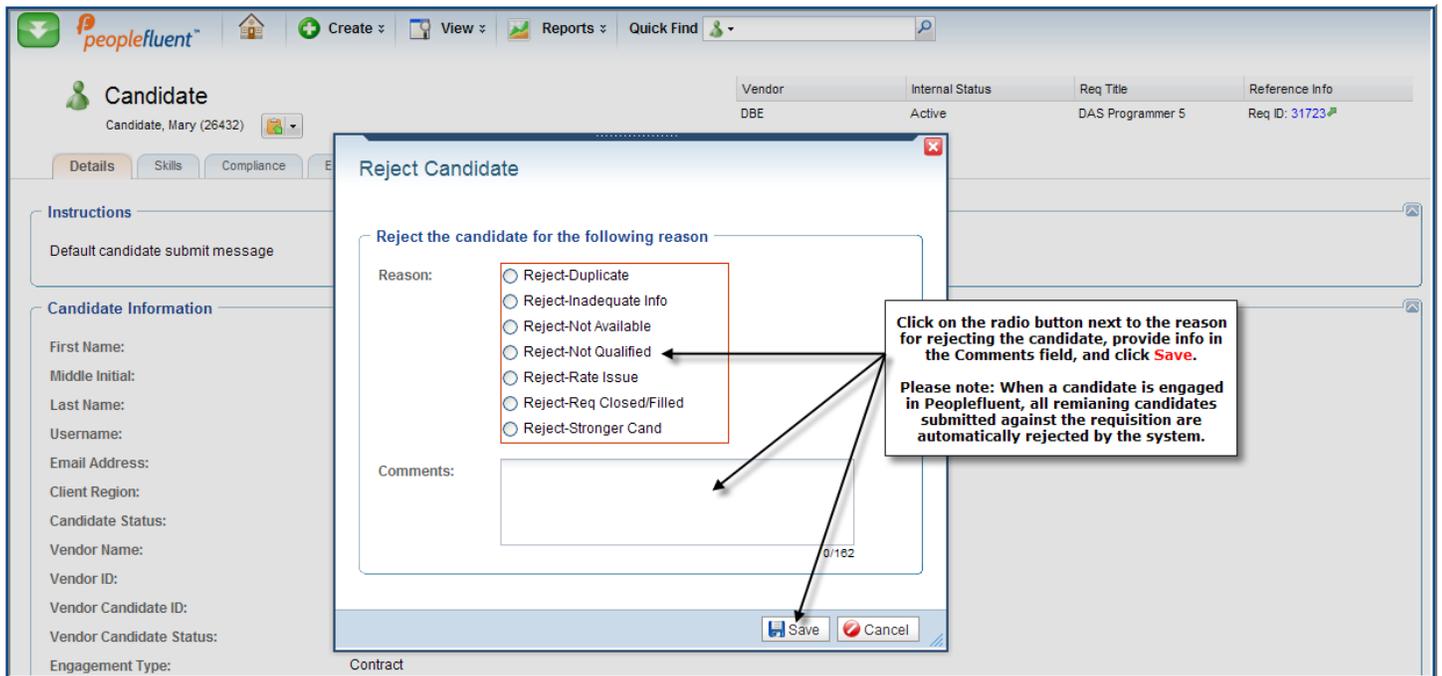
Request Interview

The **Request Interview** action item should be used to request an interview. Enter the complete details, and the CAI AM will coordinate scheduling with the vendor/candidate.



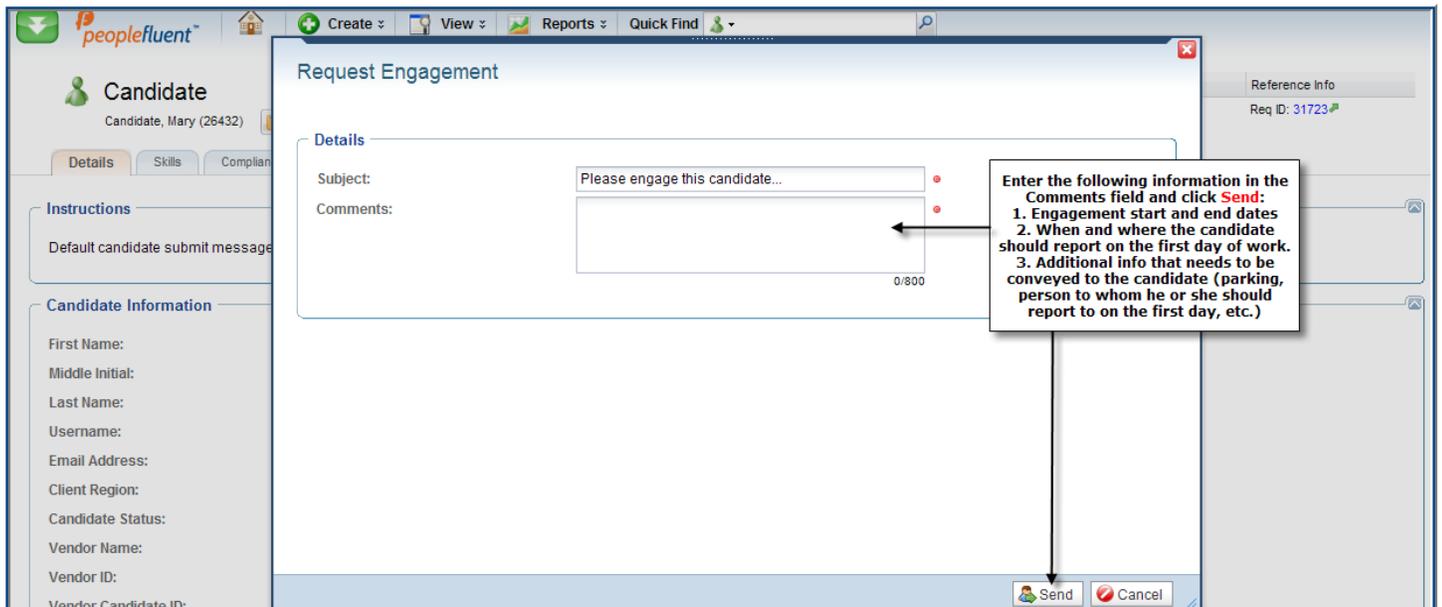
Reject Candidate

The **Reject Candidate** action item allows you to remove a candidate from consideration.



Request Engagement

The **Request Engagement** action item is used when you've selected a candidate. When the CAI AM receives the notification, CAI will begin the engagement process.



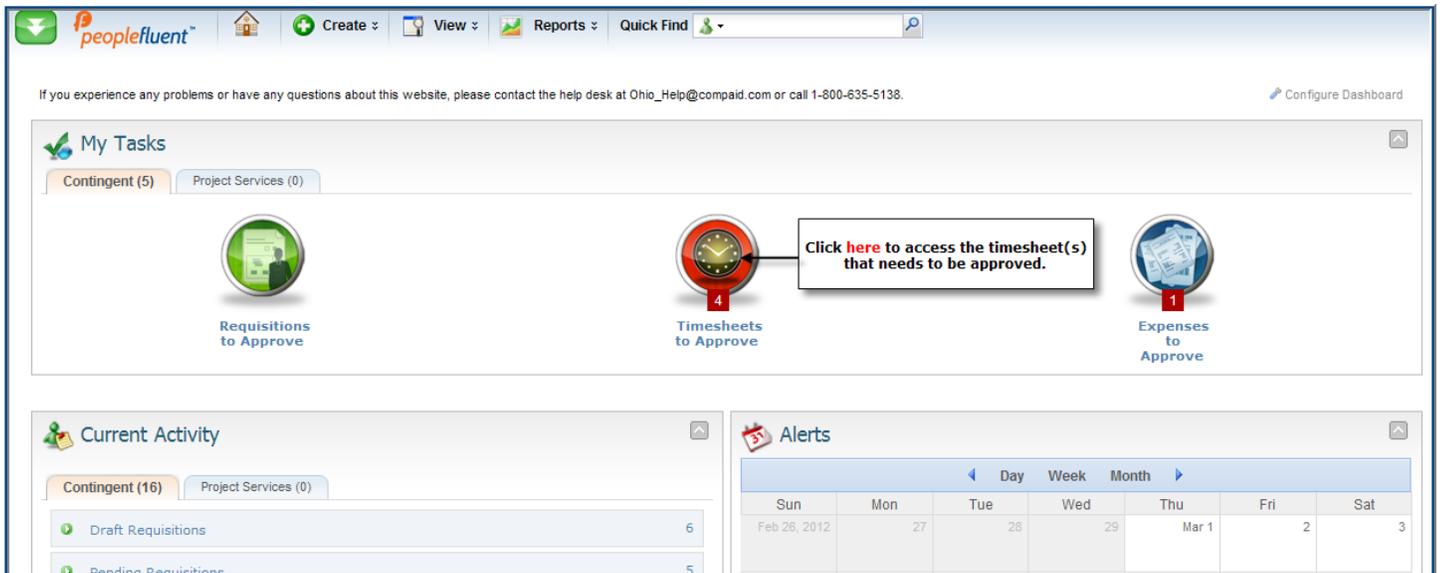
APPROVING A TIMESHEET

Each engaged candidate will be required to enter a weekly timesheet by noon on Monday into Peoplefluent. If you're designated as the candidate's time approver, you will be required to approve the timesheet by **the close of business on Tuesday of each week**. Approval indicates the hiring manager has accepted the time entered as being valid and approved for invoicing.

Once the timesheet is submitted, you'll receive an email from Peoplefluent. Within the email, you can click on a link that will take you directly to the timesheet that is pending your approval. You can also access all Peoplefluent timesheets pending your approval in the following manner.

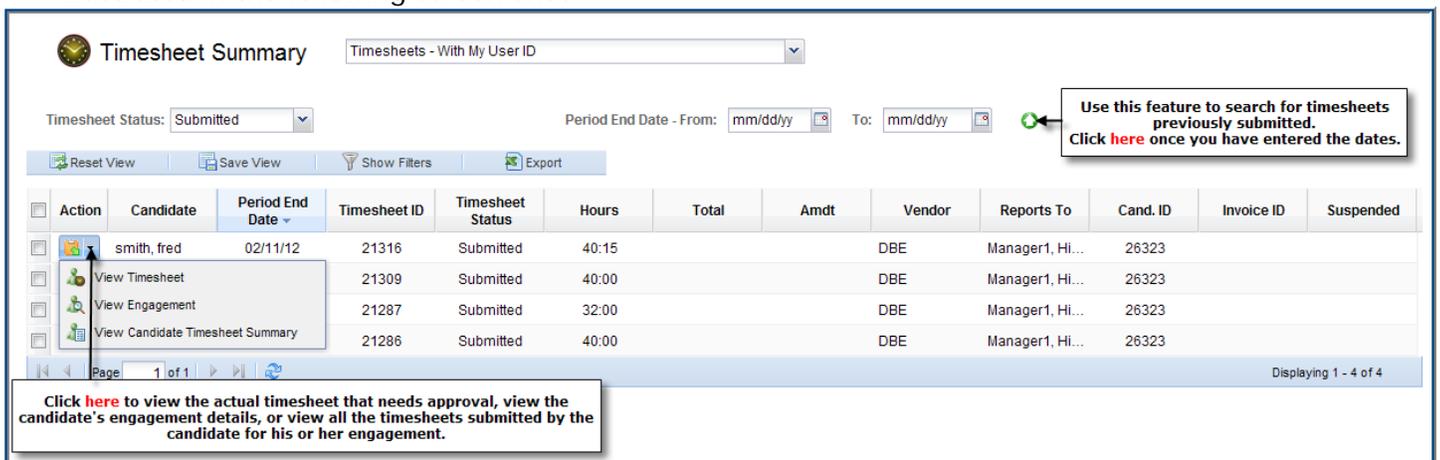
Go to the Timesheet Summary Page

You can access this screen via the **Home Page**, as illustrated in the following screen shot.



Access the Timesheet

Once you've accessed the **Timesheet Summary Page**, you can pull up the timesheet, as illustrated in the following screen shot.



Approve the Timesheet

The approval (or rejection) of a timesheet is highlighted in the following screen shot.

Timesheet
smith, fred (26323)

Reports To: Manager1, Hiring | Requisition Title: DAS Programmer 5 | Vendor: DBE | Reference Info: CC: , GL: , PO:

Period (Begin - End): Sunday, January 15, 2012 - Saturday, January 21, 2012

Timesheet
Timesheet ID: 21287 Submitted by: Linda Leiby Status: Submitted (Linda Leiby) 2/5/2012 6:14:15 PM

	15 Sun	16 Mon	17 Tue	18 Wed	19 Thu	20 Fri	21 Sat	Total
DAS - 01/01/2012 - Project Name / PO 12345 / PROG~L00001		08:00	08:00	08:00	08:00			32:00
Straight Time								32:00
Total Billable Hours (Day)		08:00	08:00	08:00	08:00			32:00

Rate Summary
Comment: 0/255

Please provide comments in regards to approval or rejection of the timesheet. If rejecting the timesheet, please use this field to let the candidate know what needs to be done to fix it.

Comment History

Comment	User	Date
1/20 - out sick; no hours worked	Linda Leiby	02/05/12 06:14 PM

Review any comments the candidate may have entered.

Click here to print the timesheet. [View Printable Version](#)

Click here to approve or reject the timesheet. [Approve](#) [Reject](#)

If you reject the timesheet, the candidate will be notified via another Peoplefluent email and will have the opportunity to resubmit a corrected timesheet for approval. This process will continue until the timesheet is approved.

If it is determined that a timesheet was submitted in error after it was approved, an amendment can be done to the timesheet. However, only the CAI Administrator can create an amendment.

Please note: You will need to approve the amendment just as you would the regular timesheet.

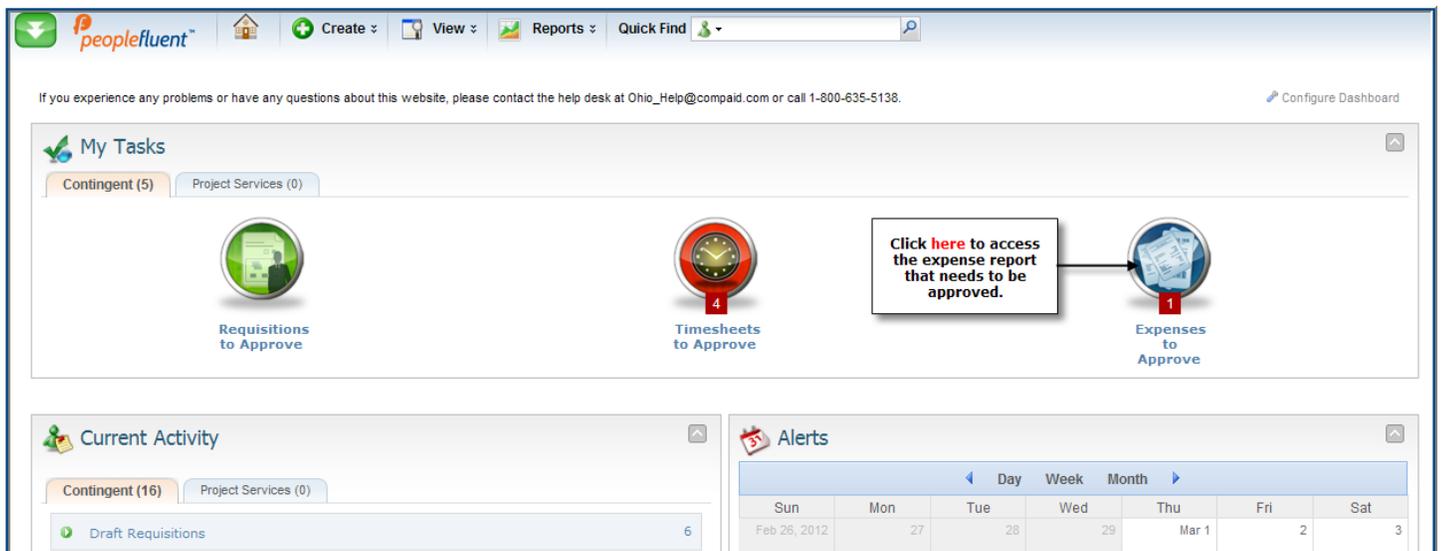
APPROVING AN EXPENSE REPORT

Like timesheets, any engagement-related expenses that the State has agreed to reimburse must be approved by the Agency Hiring Manager through Peoplefluent. **Please note:** Expenses should only be approved if the candidate's PO includes a line item specifically for such reimbursements.

If you an expense report has been submitted for your approval, you'll receive email notification from Peoplefluent. Within the email, you may click a link that will take you directly to the expense report that is pending your approval. You may also access all expense reports that require your approval by navigating through Peoplefluent in the following manner.

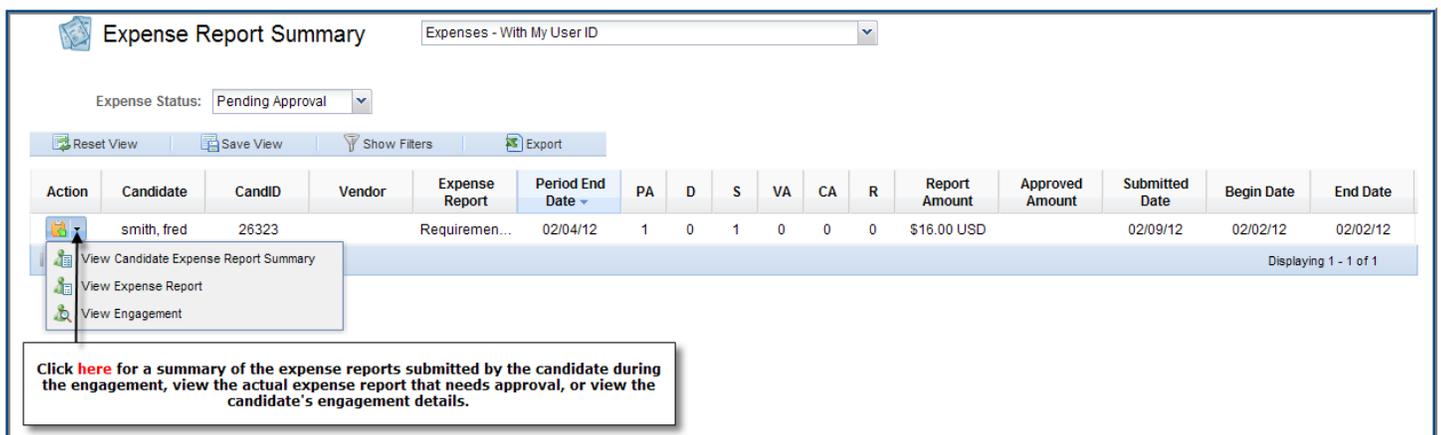
Go to the Expense Report Summary Page

You can access this screen via the **Home Page**, as illustrated in the following screen shot.



Access the Expense Report

Once you've accessed the **Expense Report Summary Page**, you can pull up the expense report, as illustrated in the following screen shot.



Approve the Expense Report

The approval (or rejection) of an expense report is highlighted in the following screen shot.

The screenshot shows the Peoplefluent Expense Report interface. At the top, there is a navigation bar with 'peoplefluent' logo and options like 'Create', 'View', 'Reports', and 'Quick Find'. Below this, the report details are shown: 'Expense Report' for 'smith, fred (26323)', 'Reports To', 'Requisition Title', 'Vendor' (DBE), and 'Reference Info' (Engt ID: 13718). A callout box points to the 'Reports To' field with the text: 'Click here to Approve All or Reject All expense lines associated with this report.'

The main section is 'Expense Report Line Item Summary'. It contains a table of 'Line Items' and a 'Line Item Detail' section. The 'Line Items' table has columns for 'Approve', 'Reject', 'Status', 'Date', 'Description', 'Type', and 'Amount'. A callout box points to the 'Approve' and 'Reject' columns with the text: 'Click Approve or Reject for each line. Please note: When you check "Approve" or "Reject", the "Comment" box in the "Line Item Detail" section will appear.'

The 'Line Item Detail' section shows information for a specific line item: Date: 02/02/12, Amount: \$ 16.00 USD, Status: Submitted, Type: Mileage, Project: PROG-L00001, Reason: Mileage reimbursement for requirements gathering trip to Dublin from Columbus, and Location: . Below this is a 'Comment History' section with two entries: '02/09/12 - Draft by fred smith' and '02/09/12 - Submitted by fred smith'. A callout box points to the 'Comment' field with the text: 'Enter comments here, especially if you are rejecting the expense.'

Below the 'Line Item Detail' is the 'Expense Report Comments' section, which has a table with columns for 'Date', 'User Name', and 'Comment'. A callout box points to this section with the text: 'Additional comments entered by the candidate will be viewable here.'

At the bottom of the interface is the 'Attachments' section, which includes 'Engagement Detail' and 'Expense Approval Summary' buttons. A callout box points to the 'Expense Approval Summary' button with the text: 'Click here to initiate approval/rejection.'

At the very bottom right, there is a button labeled 'Approve/Reject' with a green and red arrow icon.

Expenses should only be approved if they have provided complete information, and have attached receipts for all expenses requiring such documentation. If you are not sure which expenses should include receipts, please feel free to contact your CAI Account Manager.

If you reject the expense report, the candidate will need to resubmit. If you discover an error on the expense report after you have already approved it, please contact the CAI Account Manager or the CAI-managed help desk. The CAI team will then ensure that it is corrected.

EVALUATING A CANDIDATE

For each candidate you have engaged under the contract, you will also receive an email request to complete an engagement evaluation form. Evaluation requests will be made after first thirty (30) days, six (6) months, and one (1) year. The evaluations are not required but highly recommended as they will be available for future reference.

If you receive a Peoplefluent email request, simply click on the link within the notification and fill in the fields as instructed in the last screen shot in this section. Or, if you decide to do an "unscheduled" evaluation, you can access the form by completing the steps detailed in the next four screen shots and then completing it, as instructed in the last screen shot.

The screenshot shows the Peoplefluent dashboard. At the top, there are navigation tabs: 'Create', 'View', 'Reports', and 'Quick Find'. Below the navigation is a help desk contact information: 'If you experience any problems or have any questions about this website, please contact the help desk at Ohio_Help@compaid.com or call 1-800-635-5138.' The main content area is divided into two sections: 'My Tasks' and 'Current Activity'. 'My Tasks' shows three categories: 'Requisitions to Approve' (1), 'Timesheets to Approve' (4), and 'Expenses to Approve' (1). 'Current Activity' shows a list of tasks: 'Draft Requisitions' (6), 'Pending Requisitions' (5), 'Active Requisitions' (1), 'New Candidates' (0), 'Active Candidates' (3), and 'Engagements' (1). A callout box points to the 'Engagements' row with the text 'Click here to view engaged candidates.' To the right of 'Current Activity' is an 'Alerts' calendar view showing dates from Feb 26, 2012, to Mar 31, 2012.

The screenshot shows the 'Engagement Summary' page. At the top, there is a dropdown menu set to 'All Engaged Candidates - With My User ID'. Below the dropdown are buttons for 'Reset View', 'Save View', 'Show Filters', and 'Export'. The main content is a table with the following columns: 'Action', 'Candidate', 'Engt. ID', 'Engt. Status', 'Req. Title', 'Req. ID', 'Engt. Reports To', 'Rate', 'Vendor', and 'Engt. Created Date'. The table contains one row for 'smith, fred' with ID 13718, status 'Engaged', title 'DAS Programmer 5', ID 31647, reports to 'Manager1 Hiring', rate '\$82.72 USD', vendor 'DBE', and created date '02/05/12 01:00 pm'. A callout box points to the 'View Engagement' action in the 'Action' column with the text 'Click here and here to access Engagement Details for the candidate you want to evaluate.'

Action	Candidate	Engt. ID	Engt. Status	Req. Title	Req. ID	Engt. Reports To	Rate	Vendor	Engt. Created Date
View Engagement	smith, fred	13718	Engaged	DAS Programmer 5	31647	Manager1 Hiring	\$82.72 USD	DBE	02/05/12 01:00 pm

Engagement Vendor: DBE Engagement Status: Engaged Req Title: DAS Programmer 5 Reference Info: Req ID: 31647 Cand ID: 28323

fred smith (13718)

Details Compliance Timesheet Settings Financials Rates/Budget Logistics Attachments **Evaluation** Timesheets Expenses History

Candidate Information Click on the Evaluation tab of the Engagement Detail.

Client Name:

Details Compliance Timesheet Settings Financials Rates/Budget Logistics Attachments **Evaluation** Timesheets Expenses History

Evaluation History

No Engagement Evaluations Found.

On the "Evaluation" tab, click [here](#) to bring up the evaluation form.

Engagement Summary List Bulk Actions New Evaluation

Evaluation Criteria

Evaluation Date: 01/31/2012 12:00 (Evaluation 1)

Resource/Client Relationship: Rate the candidate in each area by selecting the appropriate rating from each drop-down box.

Attitude towards work and job, ability to work without direction, effectiveness when working with others, ability to communicate in an effective manner, professional appearance, professional personality. Outstanding Unsatisfactory Poor Satisfactory Above Average Outstanding

Resource's productivity: Ability to finish assigned work on time, ability to work on multiple assignments, ability to plan and maintain workload. Outstanding

Resource's quality of work: Accuracy of work completed, thorough at following, through, effectiveness of work produced, quality of work when completed. Outstanding

Resource's tech capability: Knowledge of requirements and standards, knowledge of required technical disciplines. Outstanding

Resource's overall performance: Overall performance. Outstanding

Total Average: 0 The total average is a numerical value based on the responses above, with 1 being assigned to Unsatisfactory and 5 being assigned to Outstanding.

Final Comments: Add comments here.

Once you've completed the evaluation, click **Save**.

Engagement Summary List Bulk Actions New Evaluation Save Cancel

SEEKING ASSISTANCE

You are now ready to begin using Peoplefluent to fill all your Ohio IT Staff Augmentation Services Contract requisitions. Should you need assistance, please contact CAI's Help Desk at Ohio_Help@compaid.com or 1-800-635-5138.