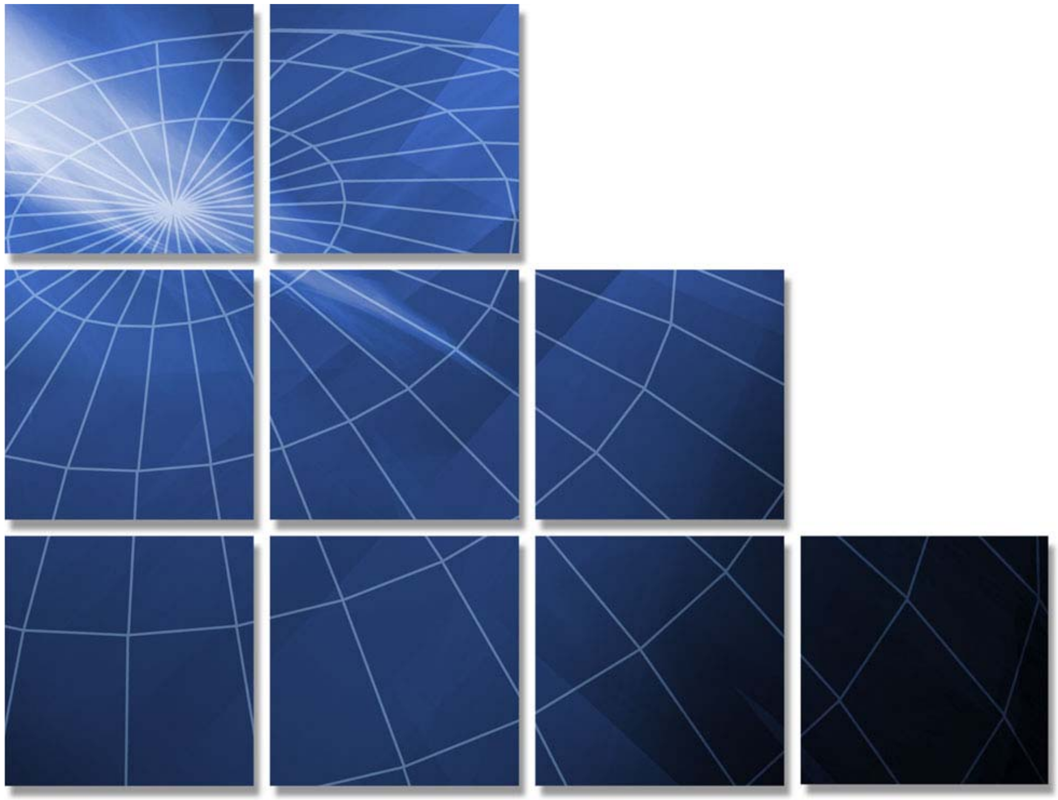


State of Ohio

IT Staff Augmentation Services Contract

OH IT Staff Augmentation MSP
Managed by CAI

Agency Peoplefluent Training Guide

Table of Contents

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

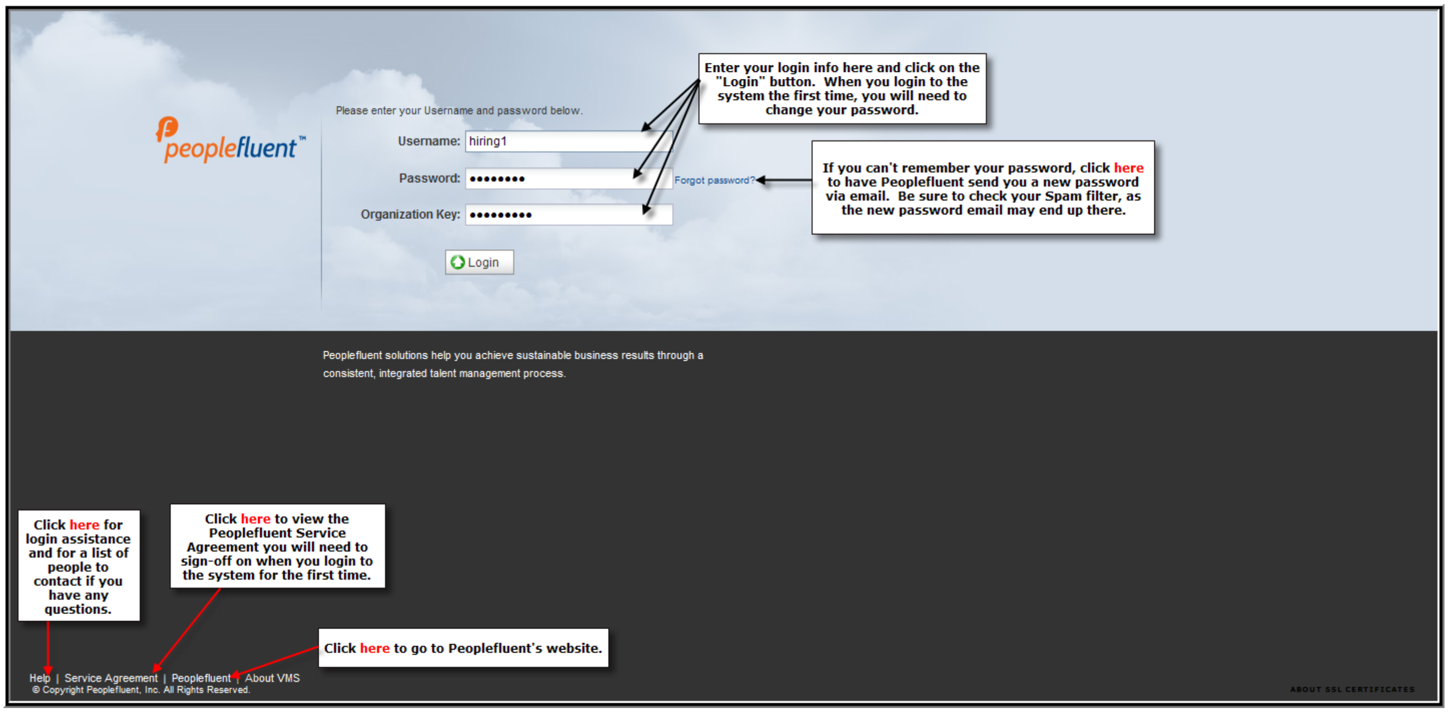
NAVIGATING THROUGH THE SYSTEM

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.



Accessing Key Sections of the System

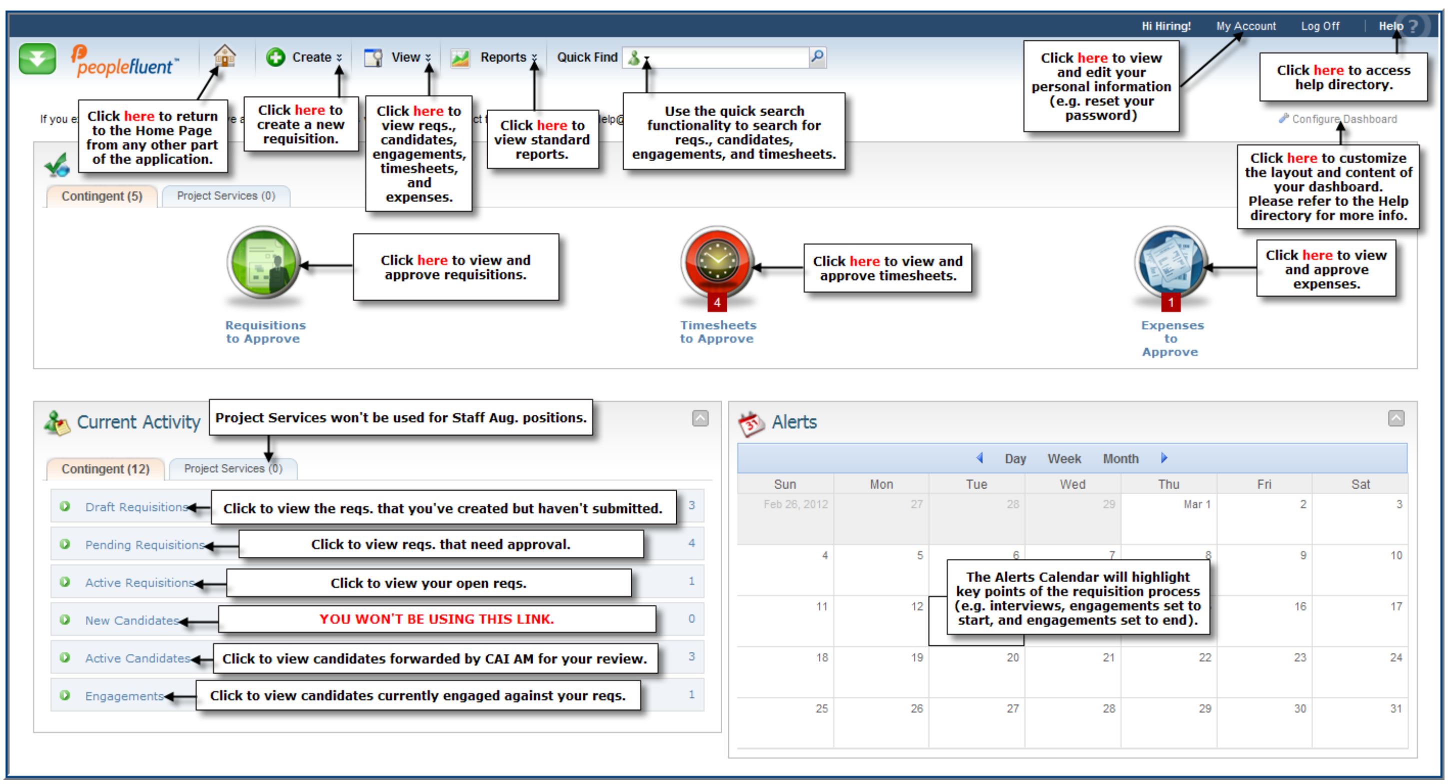
The following section highlights five main areas of the Peoplefluent system:

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

Home Page

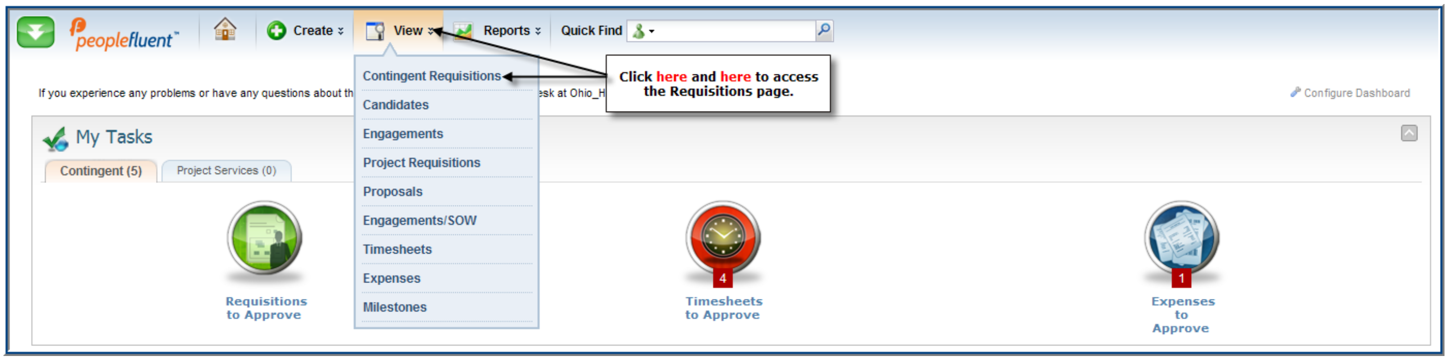
This is the main page of the system, and it's the first you'll see after logging into the system. Also known as the dashboard, you can initiate the following tasks from the Home Page:

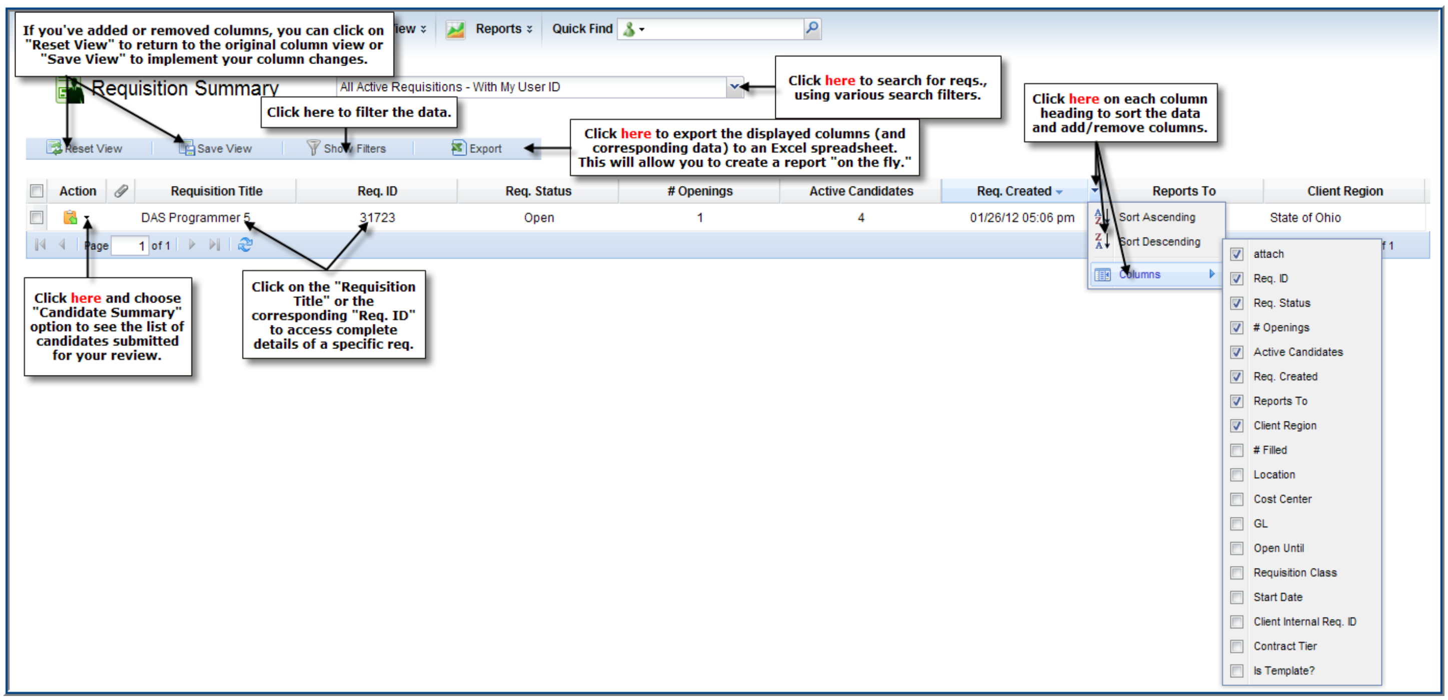
- View or edit your user information
- Enter a new requisition
- Access your active reqs.
- Review reqs. that may need your approval
- View candidates that have been submitted to your reqs.
- Search for reqs., candidates, and timesheets.
- View reports



Requisition Summary Page

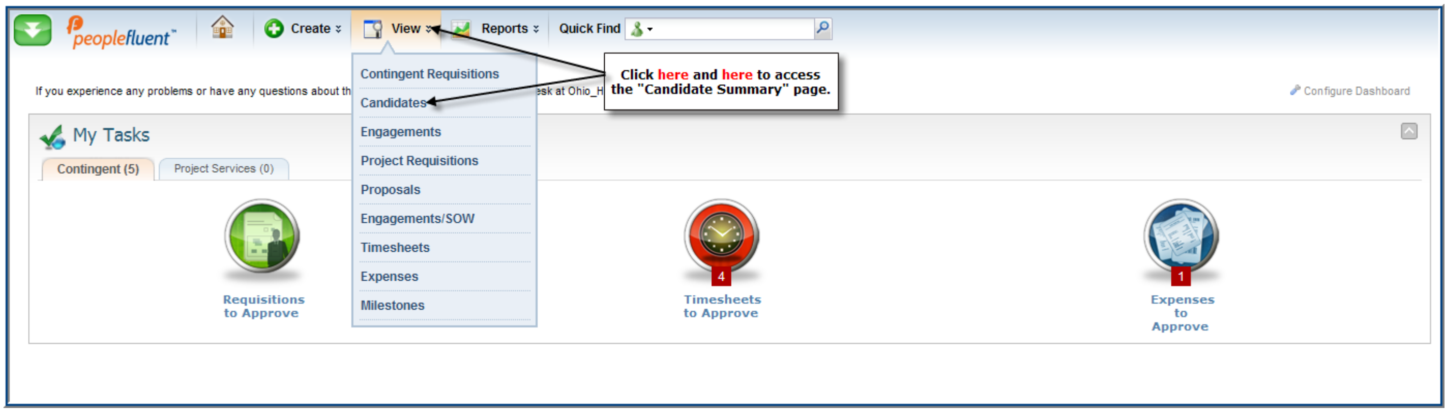
The following screen shots illustrate how to access the **Requisition Summary Page** and summarize the main points of the page.

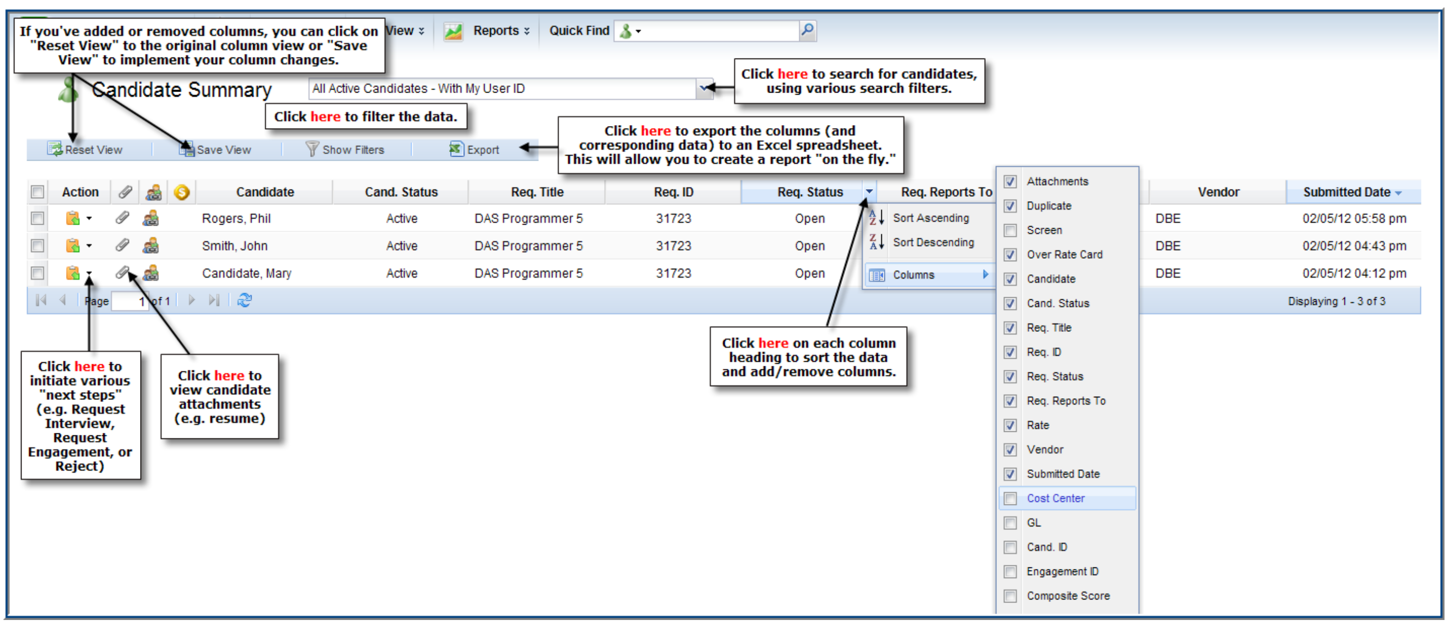




Candidate Summary Page

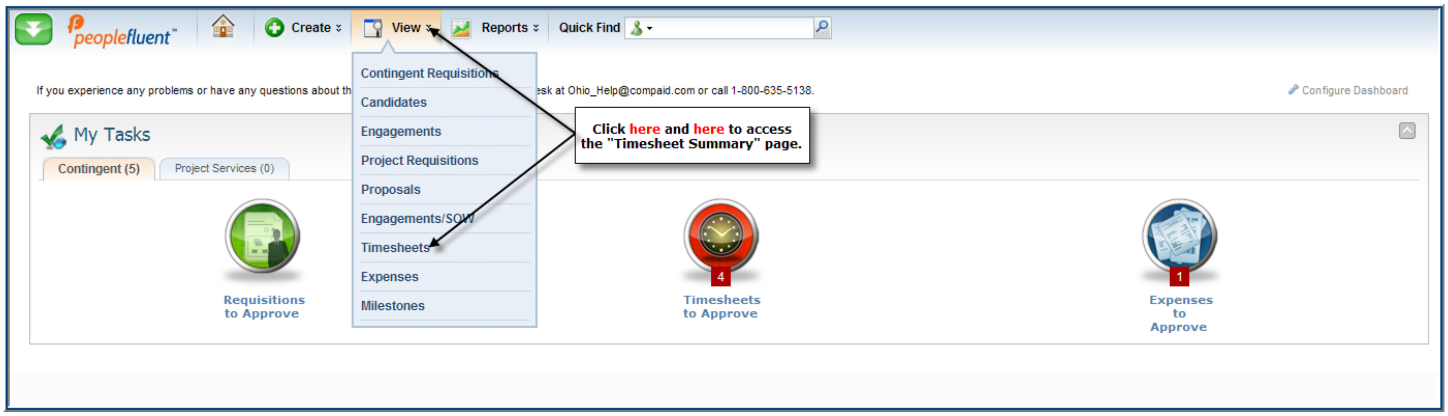
The following screen shots illustrate how to access the **Candidate Summary Page** and summarize the main points of the page.

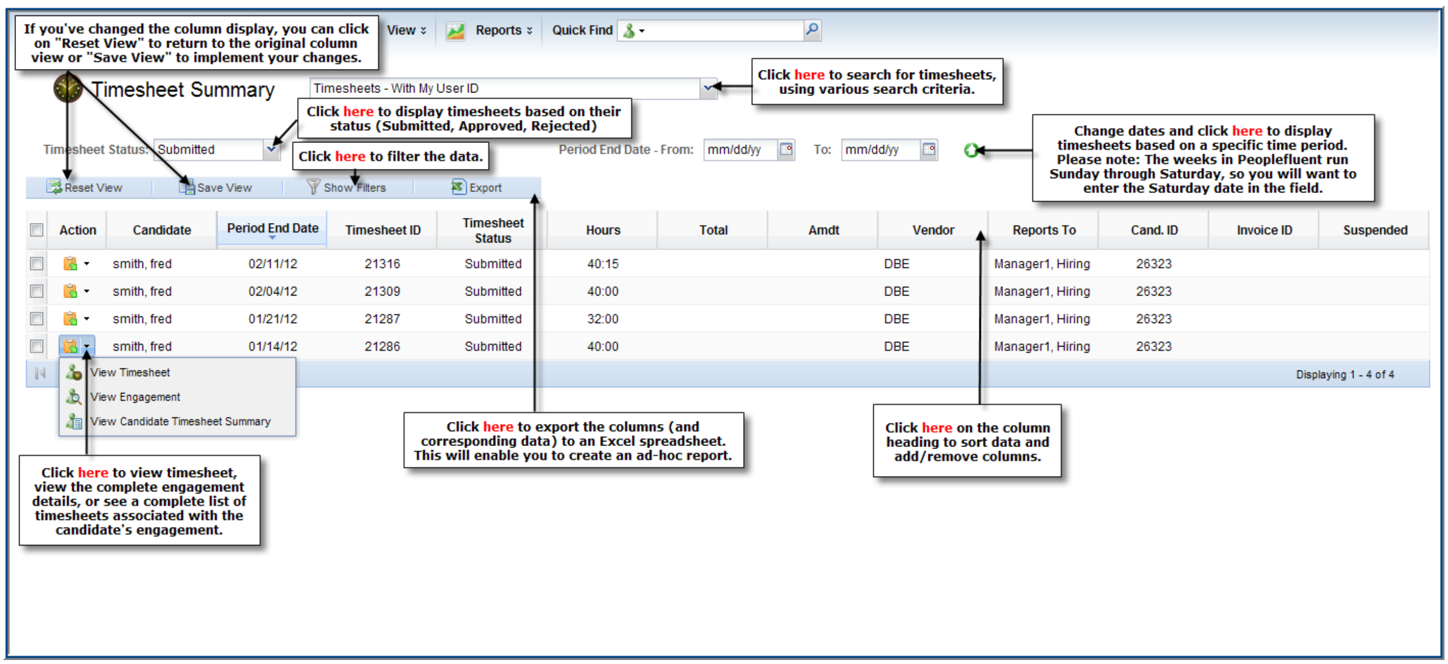




Timesheet Summary Page

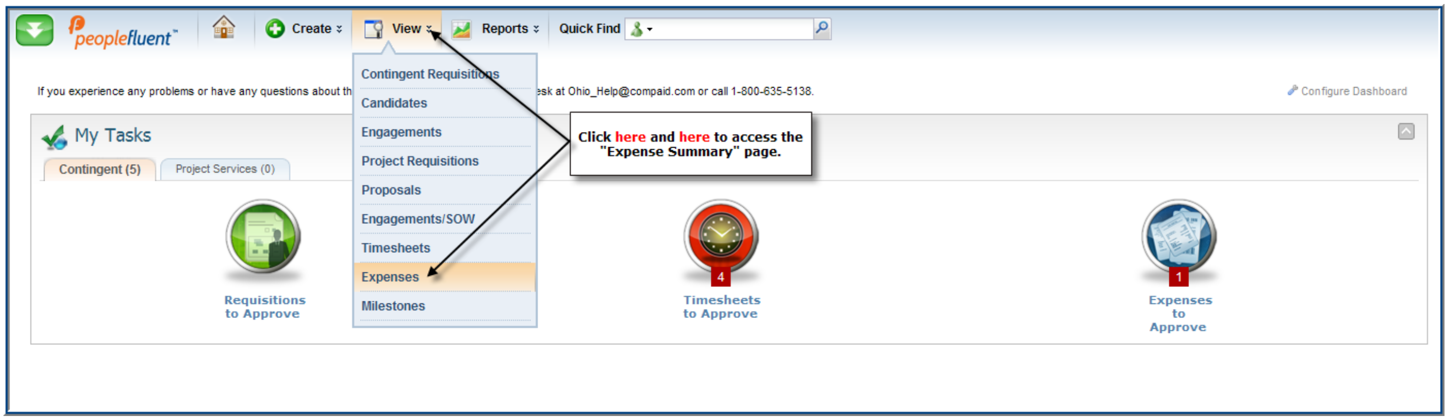
The following screen shots illustrate how to access the **Timesheet Summary Page** and summarize the main points of the page. This page enables you to view and approve timesheets for the engaged candidates' timesheets for whom you have approval authority.

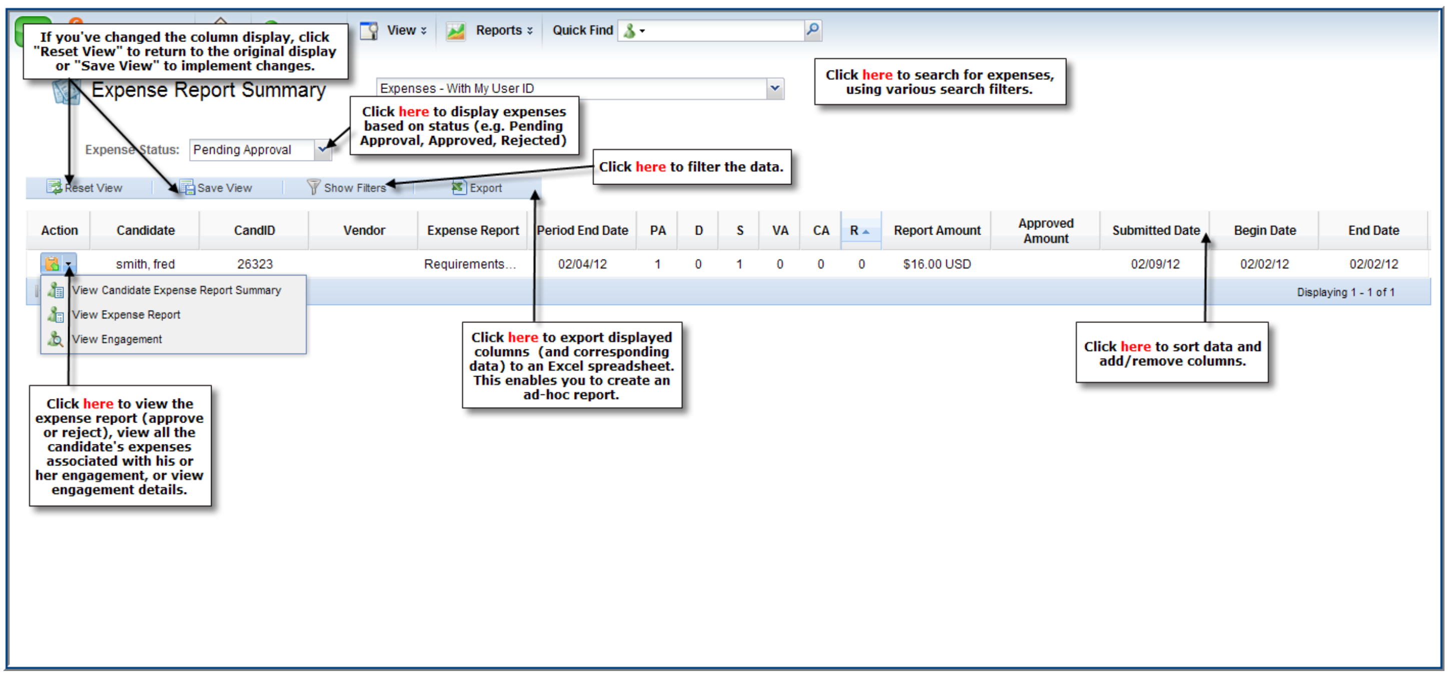




Expense Report Summary Page

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.



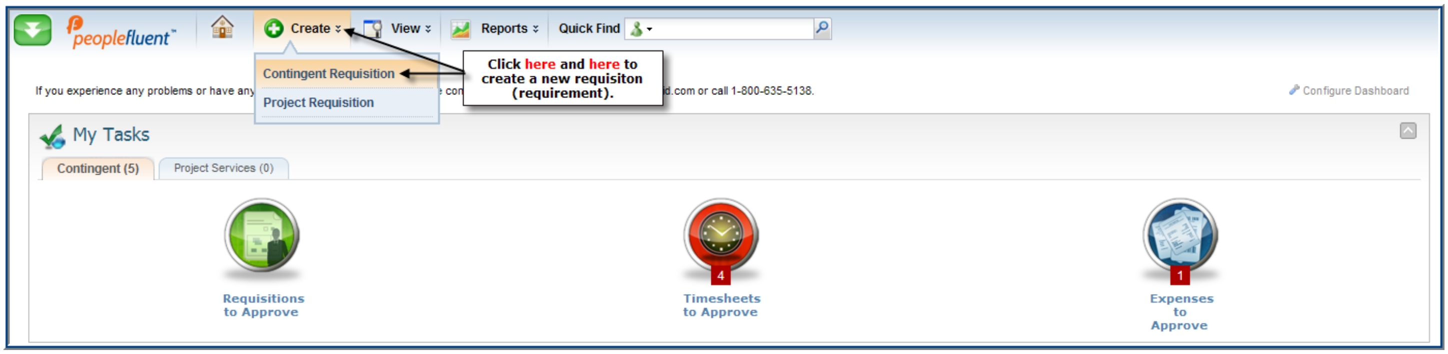


ENTERING A REQUISITION

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

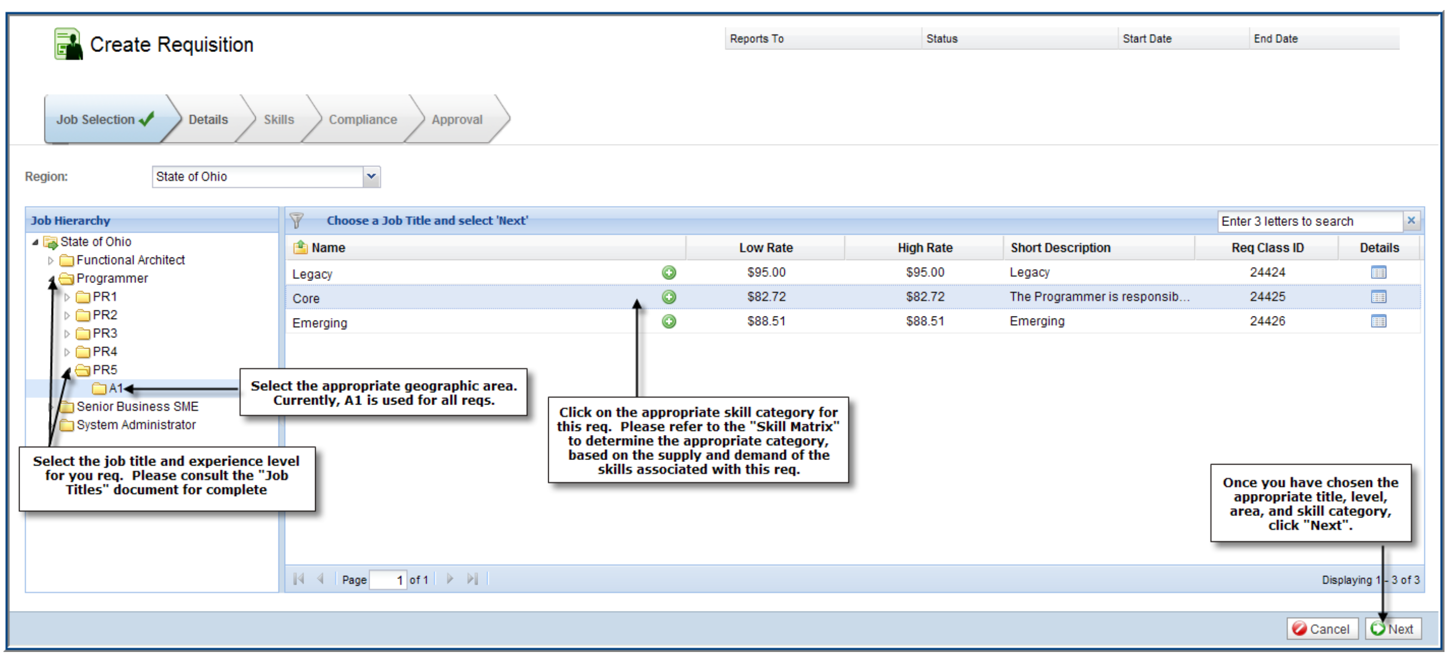
After discussing the need with the CAI Account Manager and all appropriate internal users, you will need to enter your requisition into Peoplefluent.



Select the Job Title and Skill Category

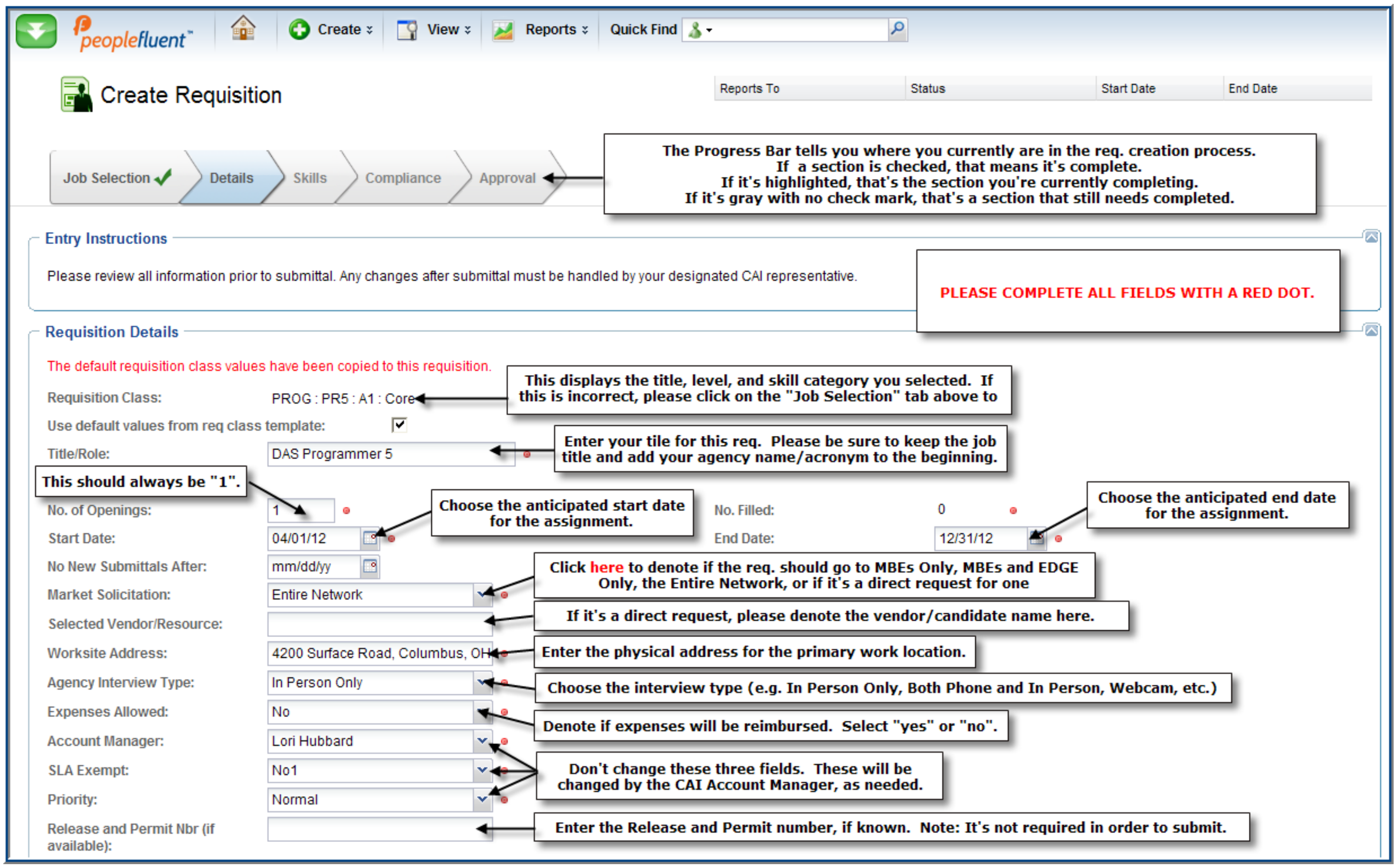
There are five levels to a req. class that must be selected when creating your requisition:

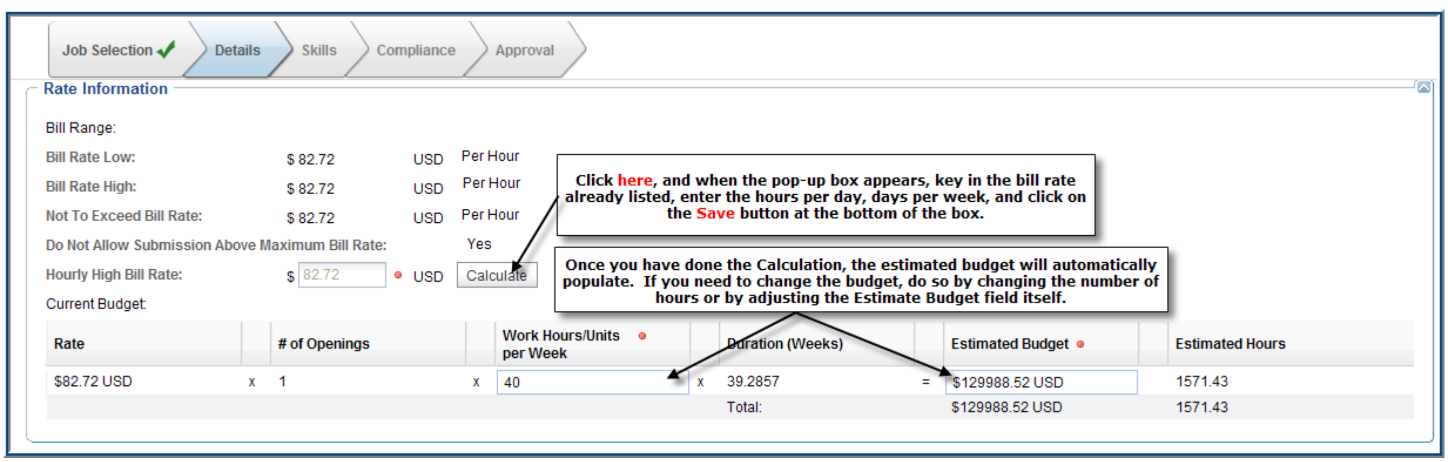
- Job Position (Refer to **Job Titles and Descriptions** document for more details)
- Job Category
- Experience Level
- Economic Area (This will be denoted as **A1**, regardless of title)
- Skill Category (Legacy, Core, or Emerging; refer to contract **Skill Matrix** for details)

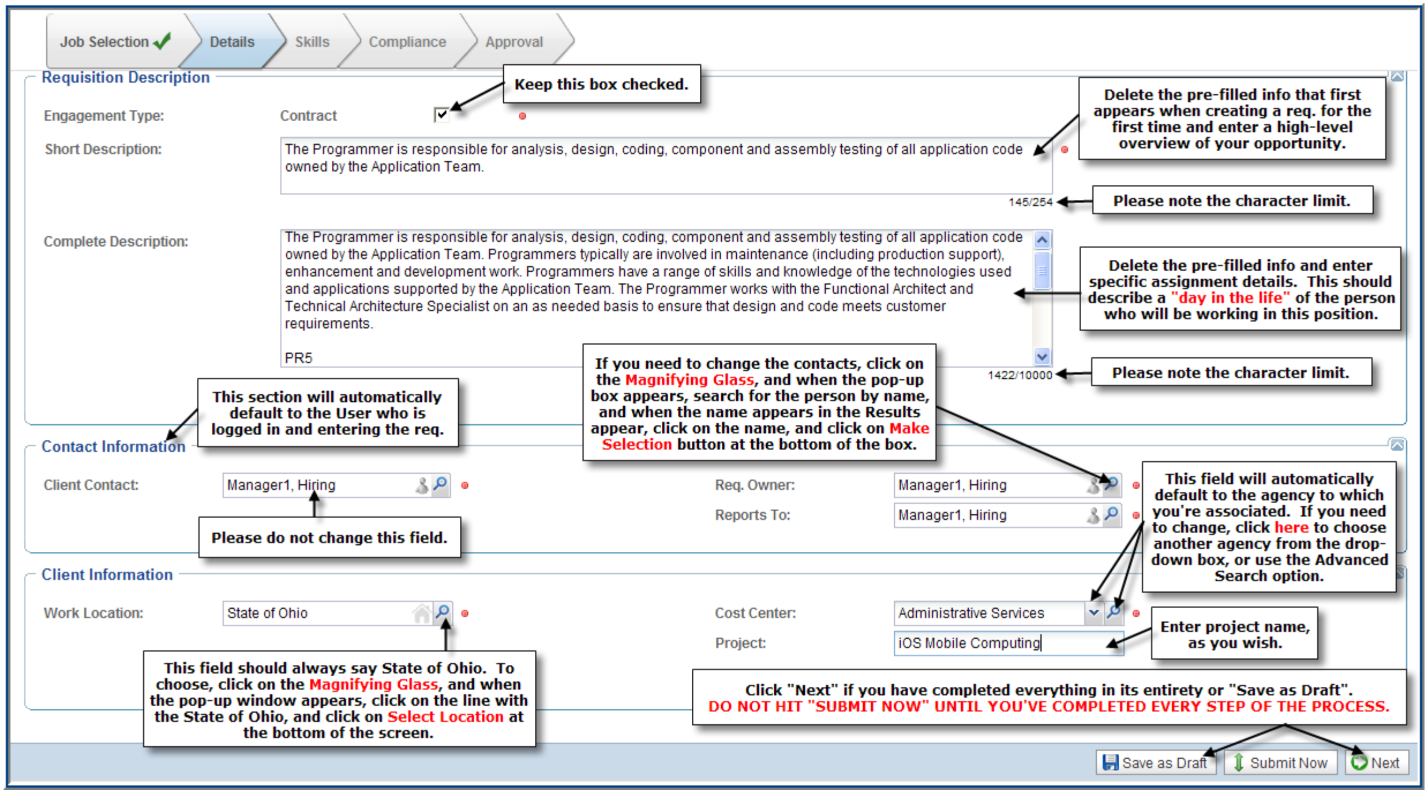


Enter the Details

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

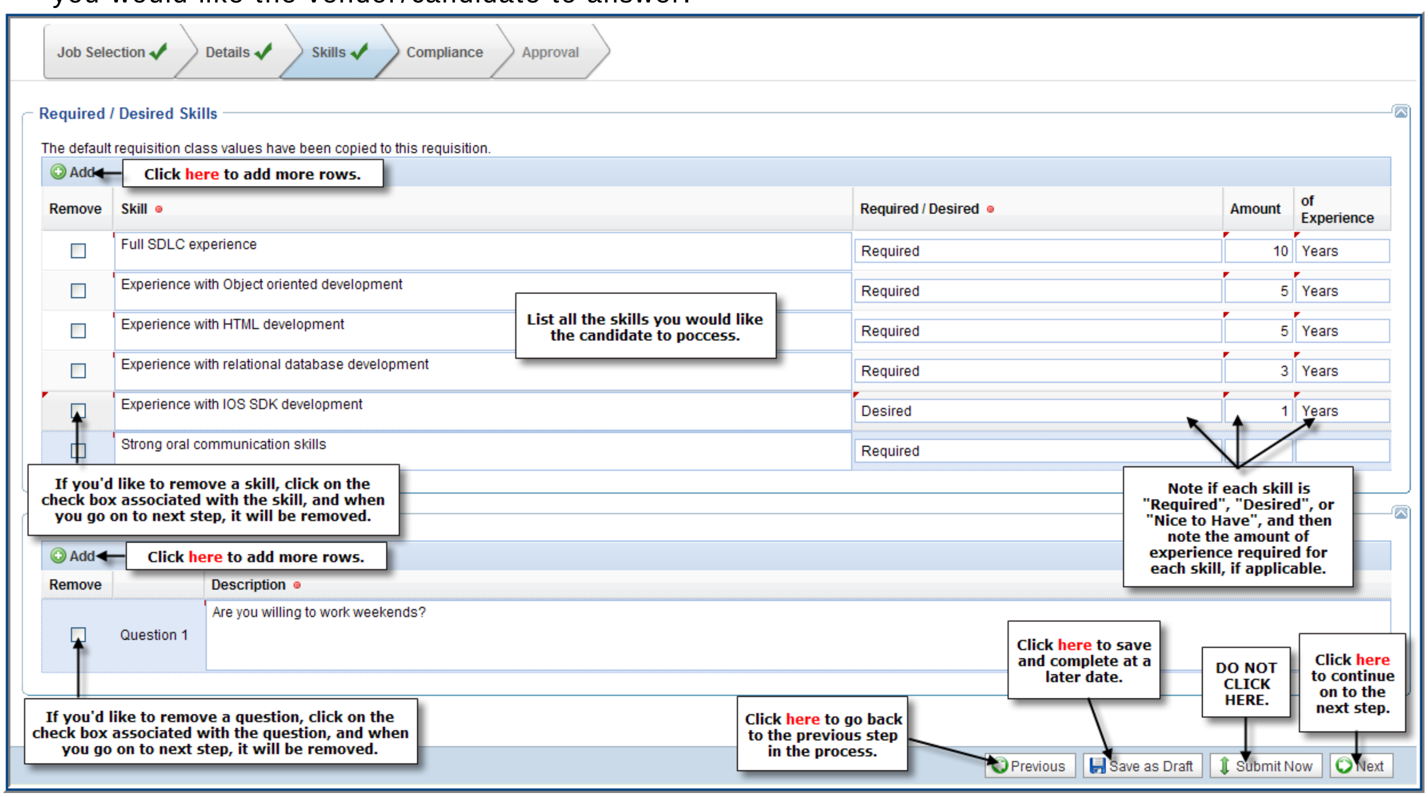






Enter Skills and Ask Questions

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.

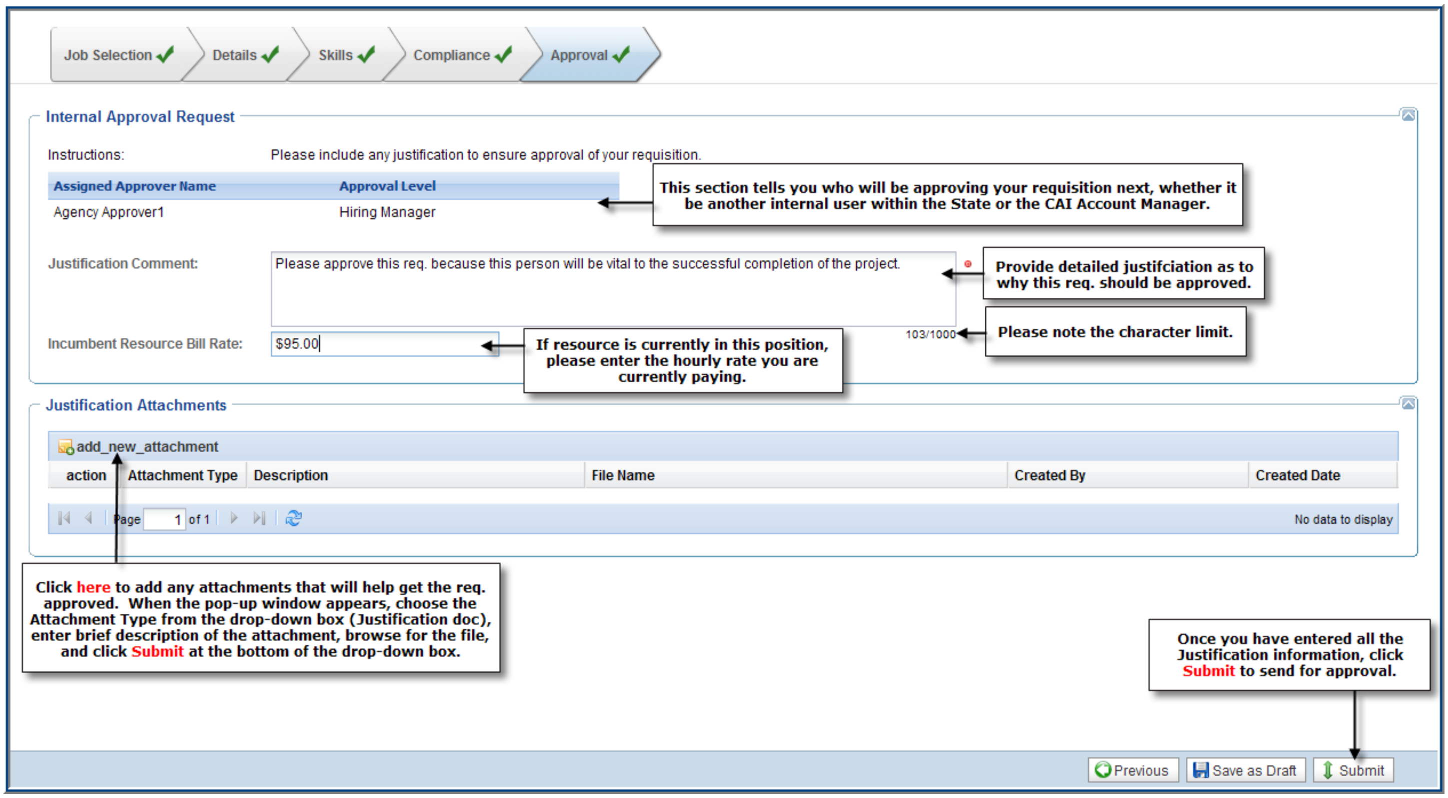


Skip the Compliance Section

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

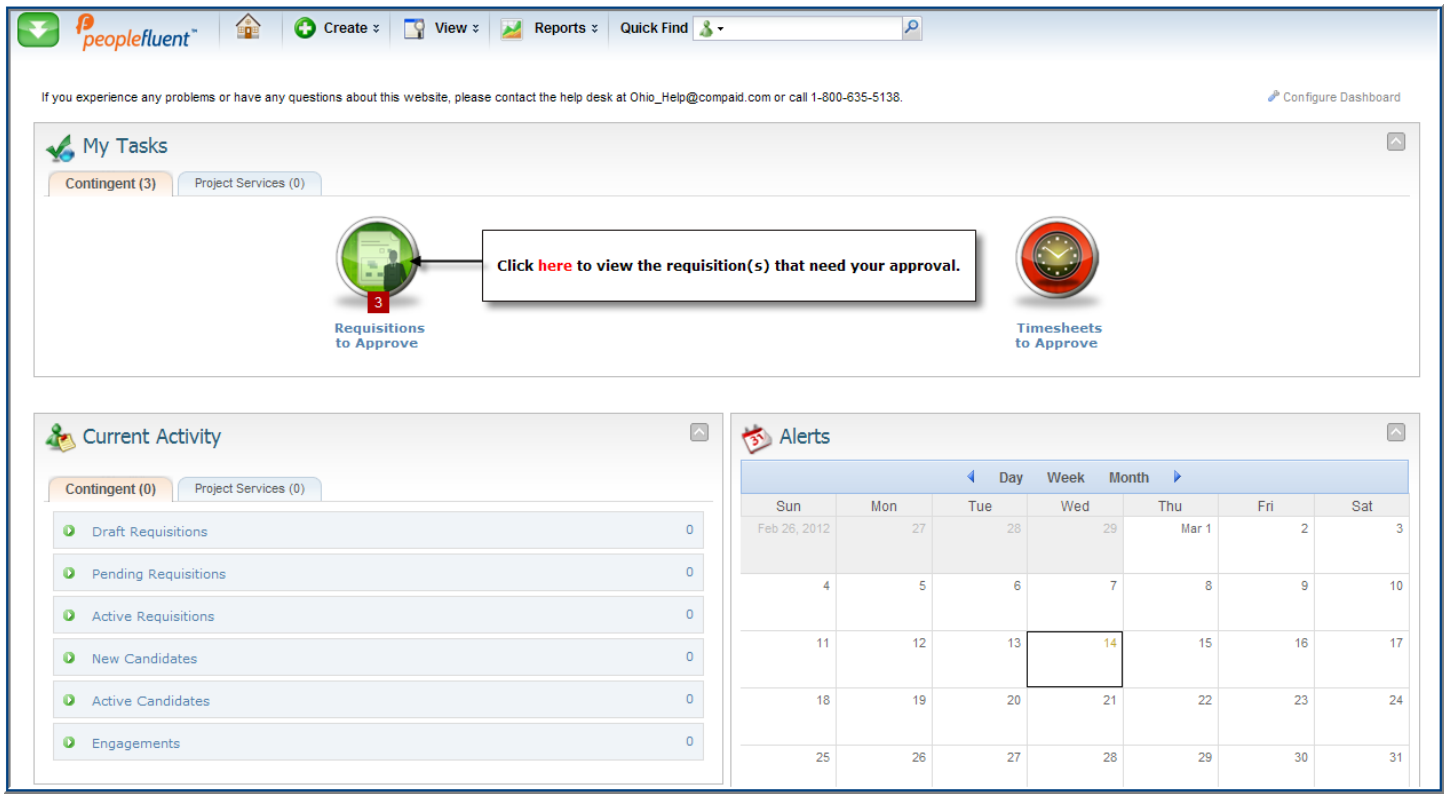
Once you have entered the necessary justification for entering this requisition and click the Submit button, the requisition will go to the approver for sign-off.

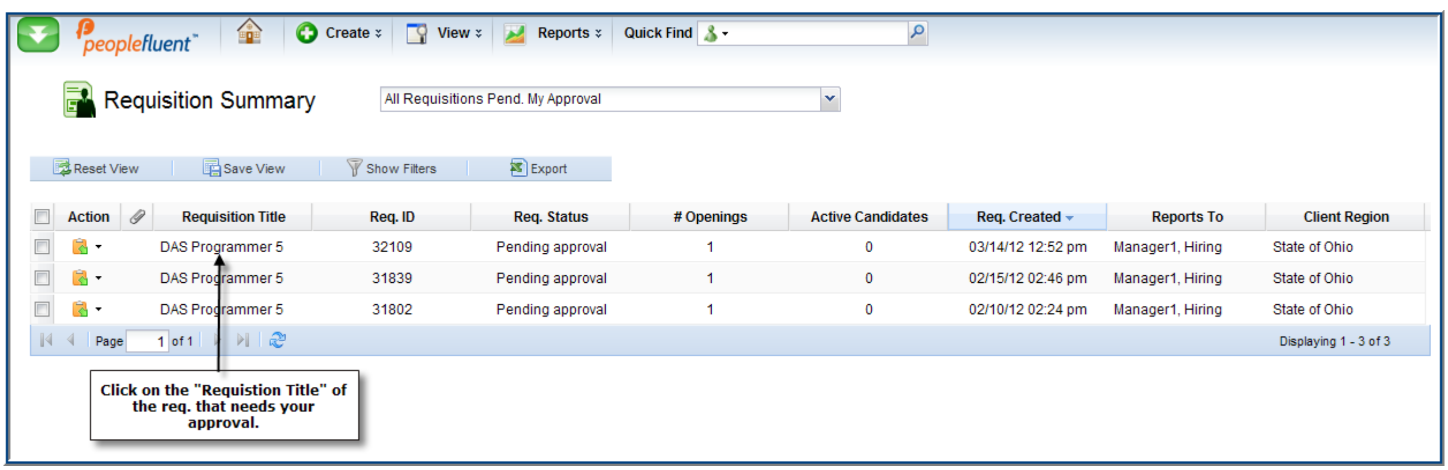


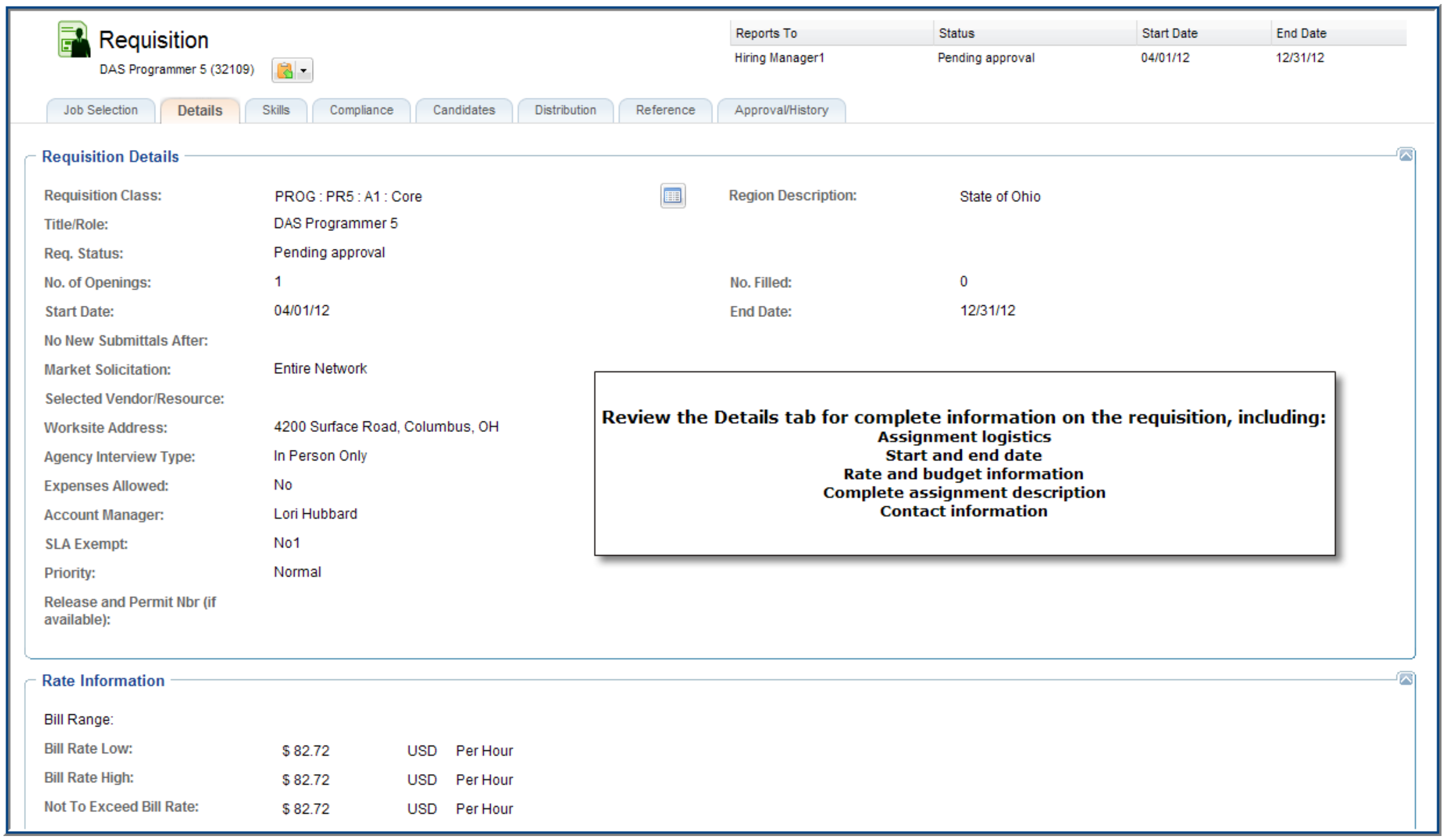
APPROVING A REQUISITION

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.







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

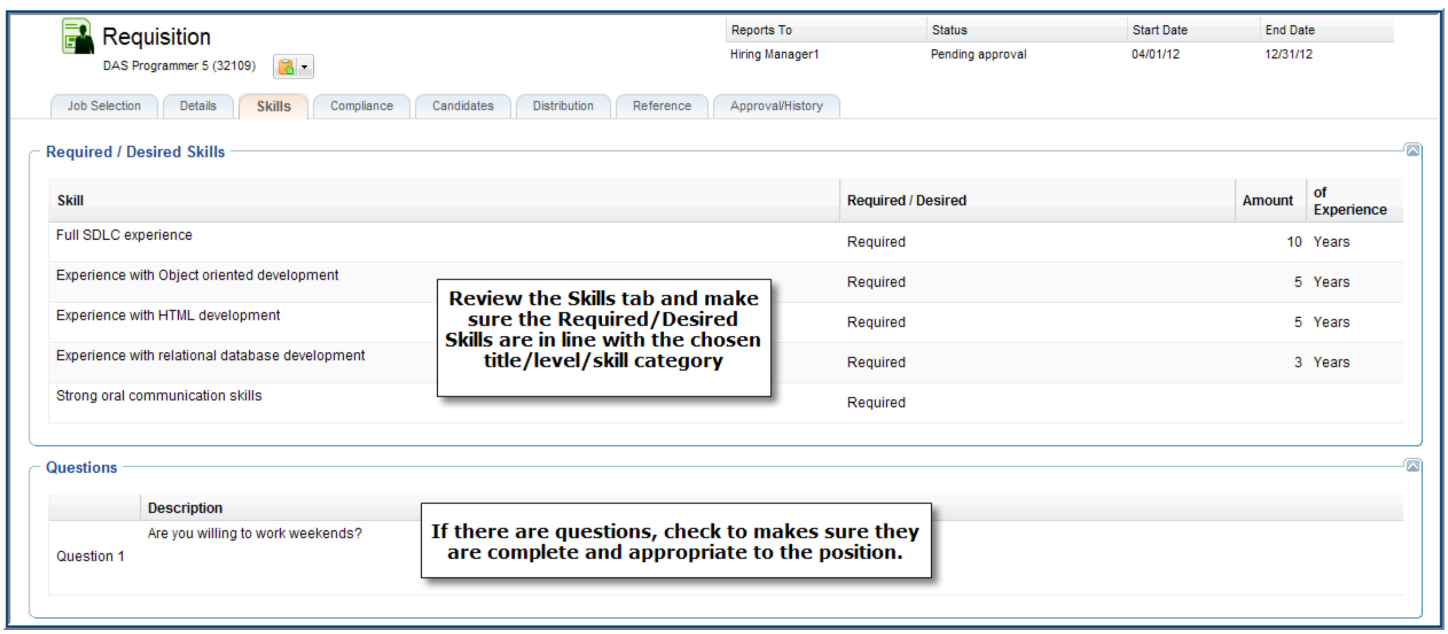
Requisition Class:	PROG : PR5 : A1 : Core	Region Description:	State of Ohio
Title/Role:	DAS Programmer 5		
Req. Status:	Pending approval		
No. of Openings:	1	No. Filled:	0
Start Date:	04/01/12	End Date:	12/31/12
No New Submittals After:			
Market Solicitation:	Entire Network		
Selected Vendor/Resource:			
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		

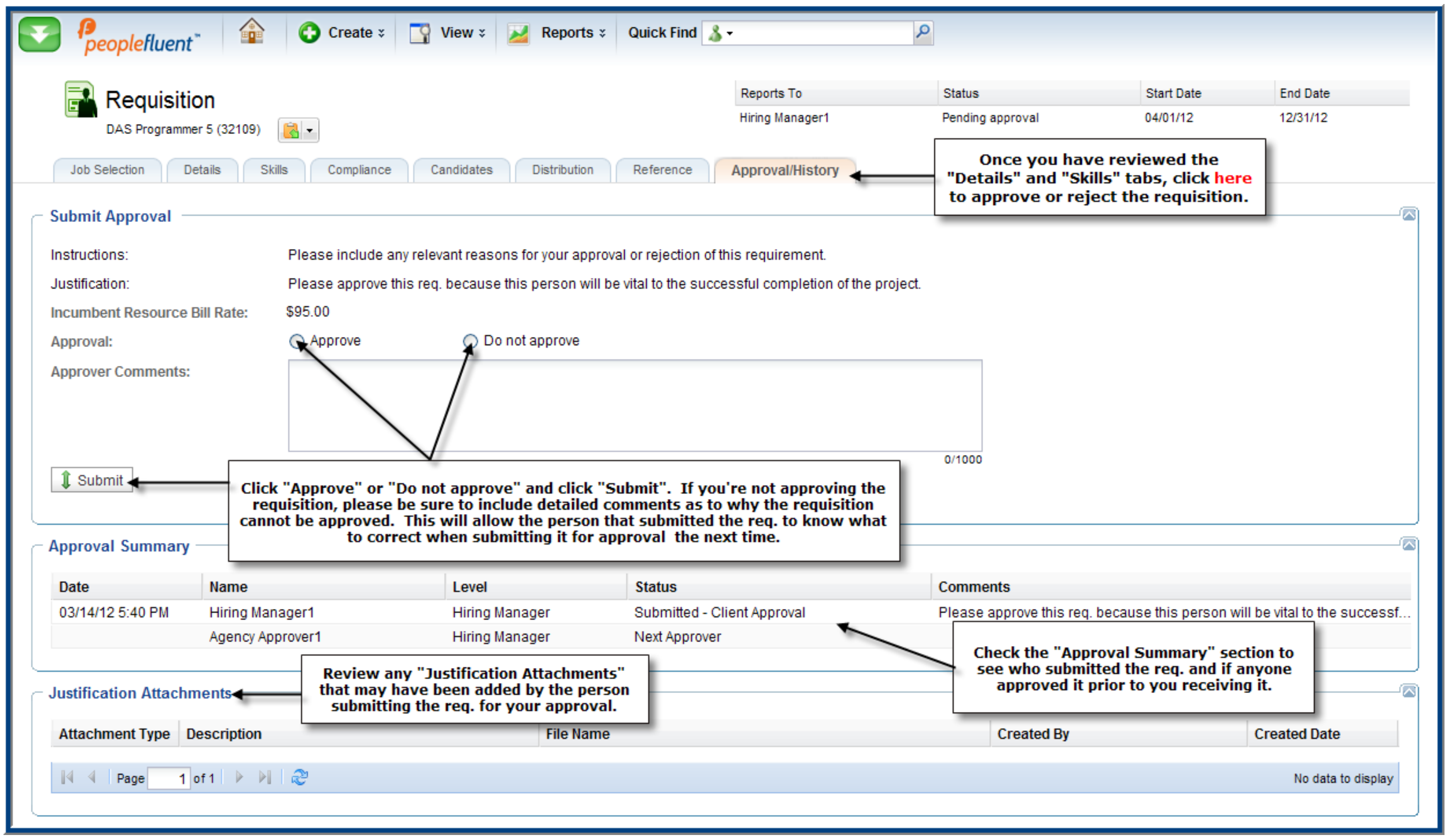
Review the Skills tab and make sure the Required/Desired Skills are in line with the chosen title/level/skill category

Questions

	Description
Question 1	Are you willing to work weekends?

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

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



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.

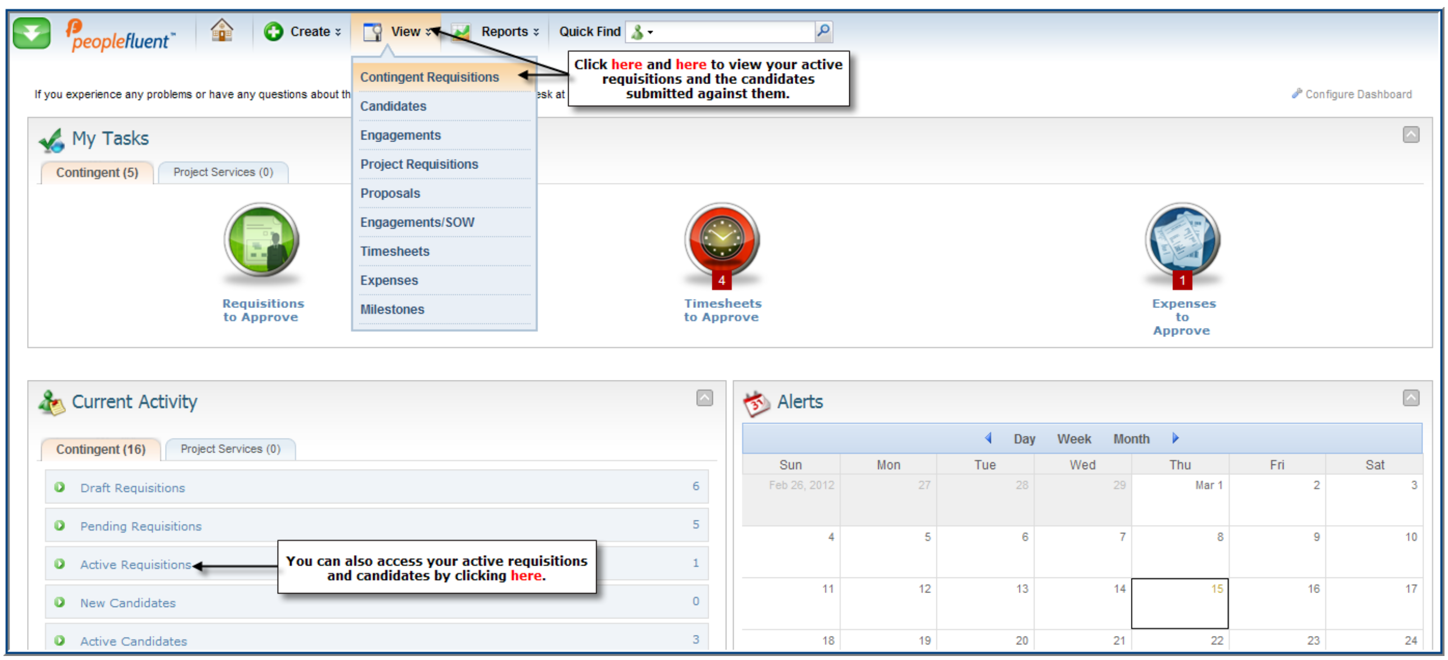
SELECTING YOUR CANDIDATE

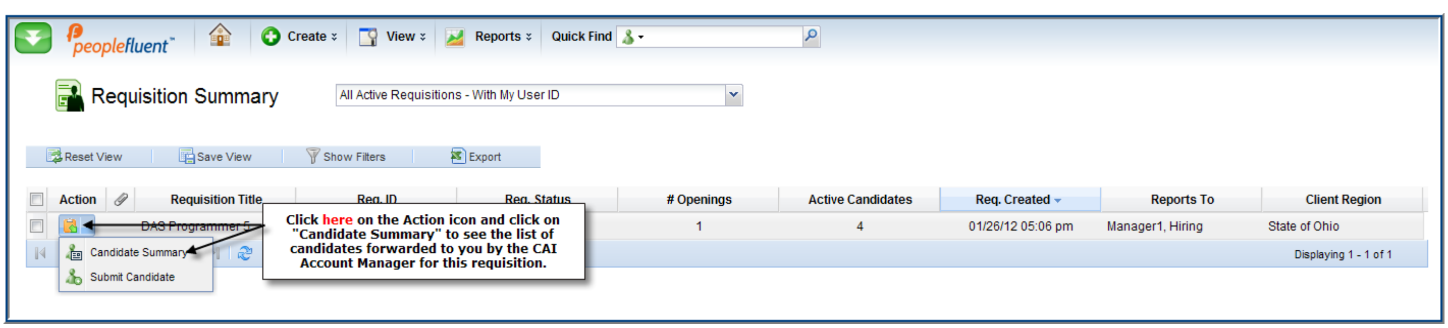
Once the requisition is released to the Vendor network and candidates are submitted, the CAI Account Manager (AM) is responsible for screening the vendor network's candidates that are submitted against your requisition. The CAI AM examines the information provided for each candidate and reviews the score 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

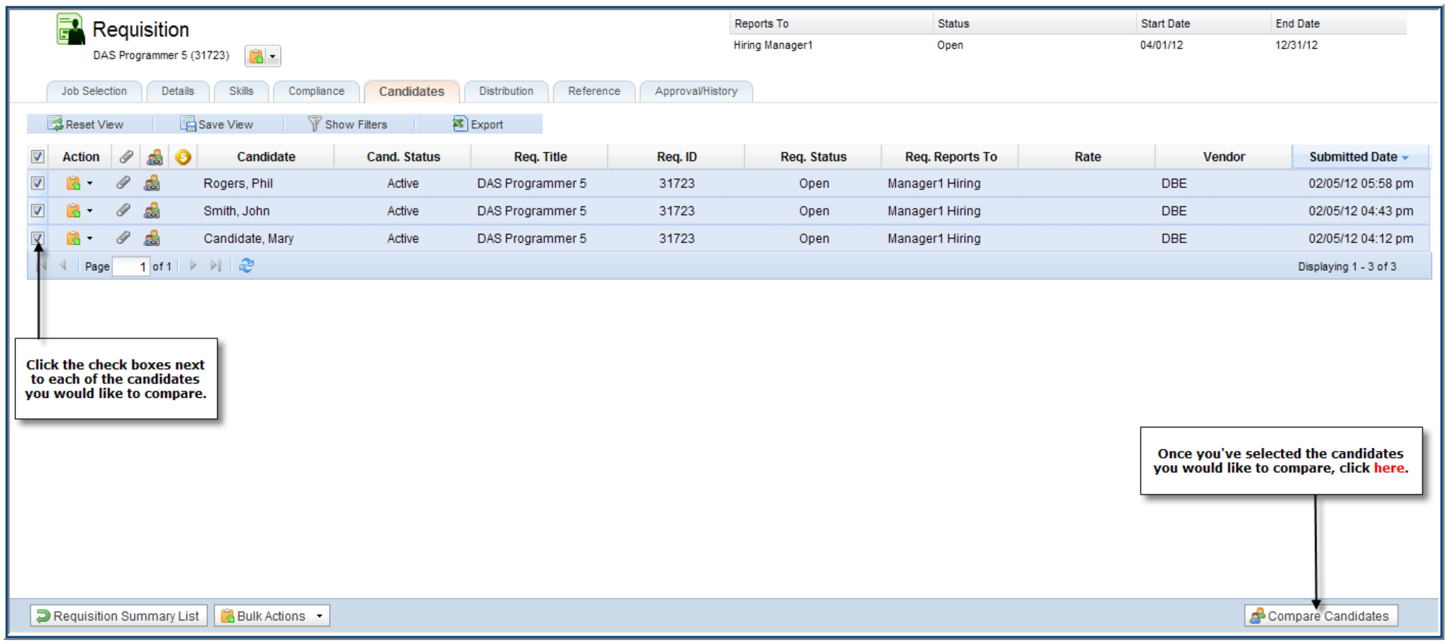
When a candidate is forwarded for your review, you'll receive an automatic email notification from Peoplefluent. Within the email, you can click on a link that will take you directly to the candidate's detail page. You can also access all candidates forwarded against your requisition by navigating through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





Compare the Candidates

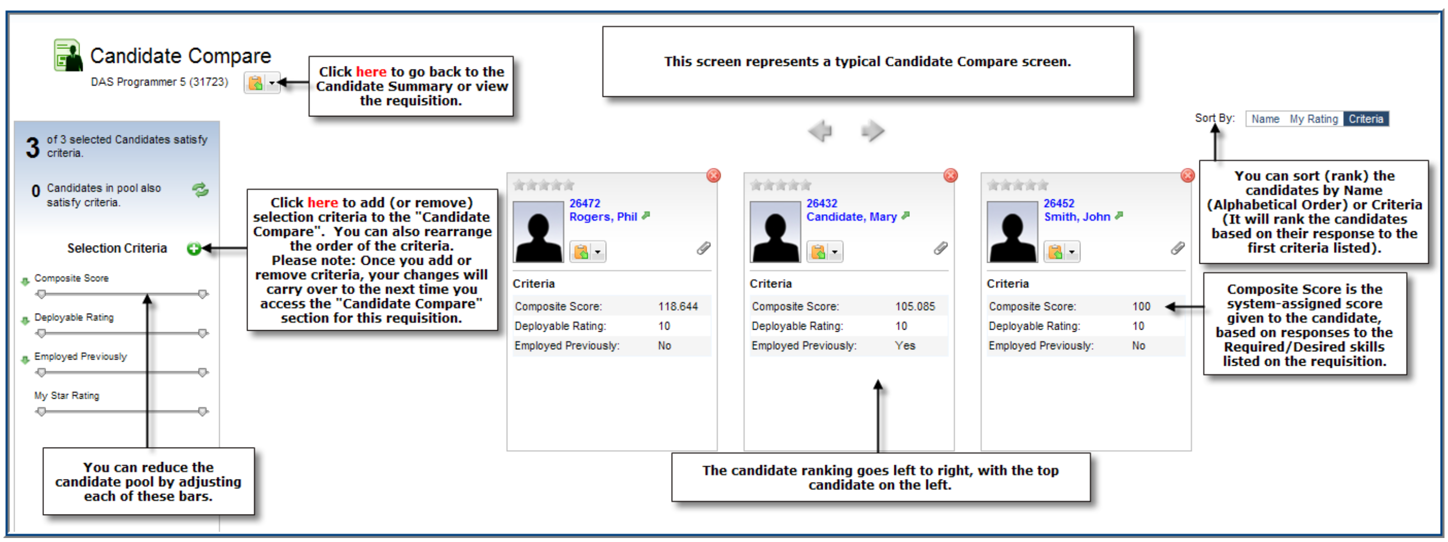
Once you've accessed the list of candidates submitted against your requisition, you can choose to compare the candidates' skills and experience, as illustrated in the following screen shot.



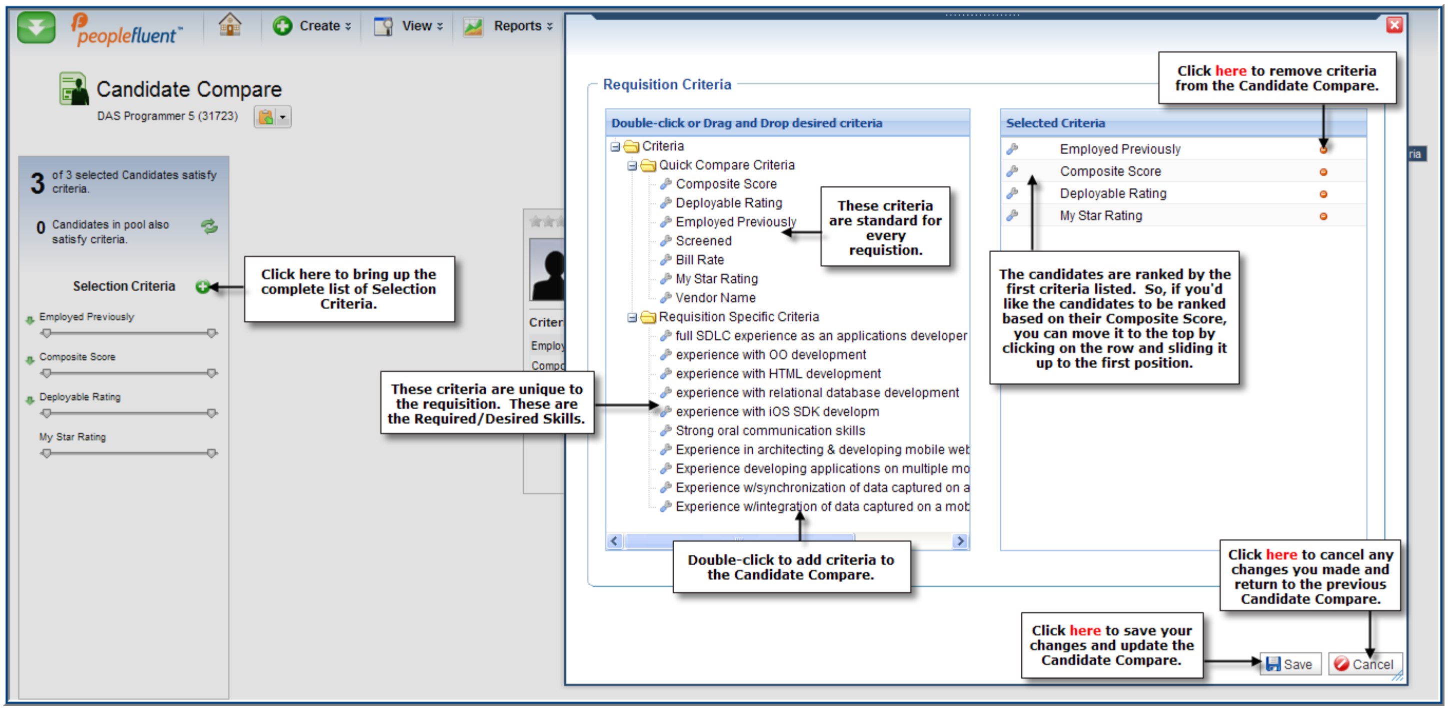
After clicking on the "Compare Candidates" link, you'll be directed to a page that matches the candidates side-by-side, based on various criteria including:

- 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)

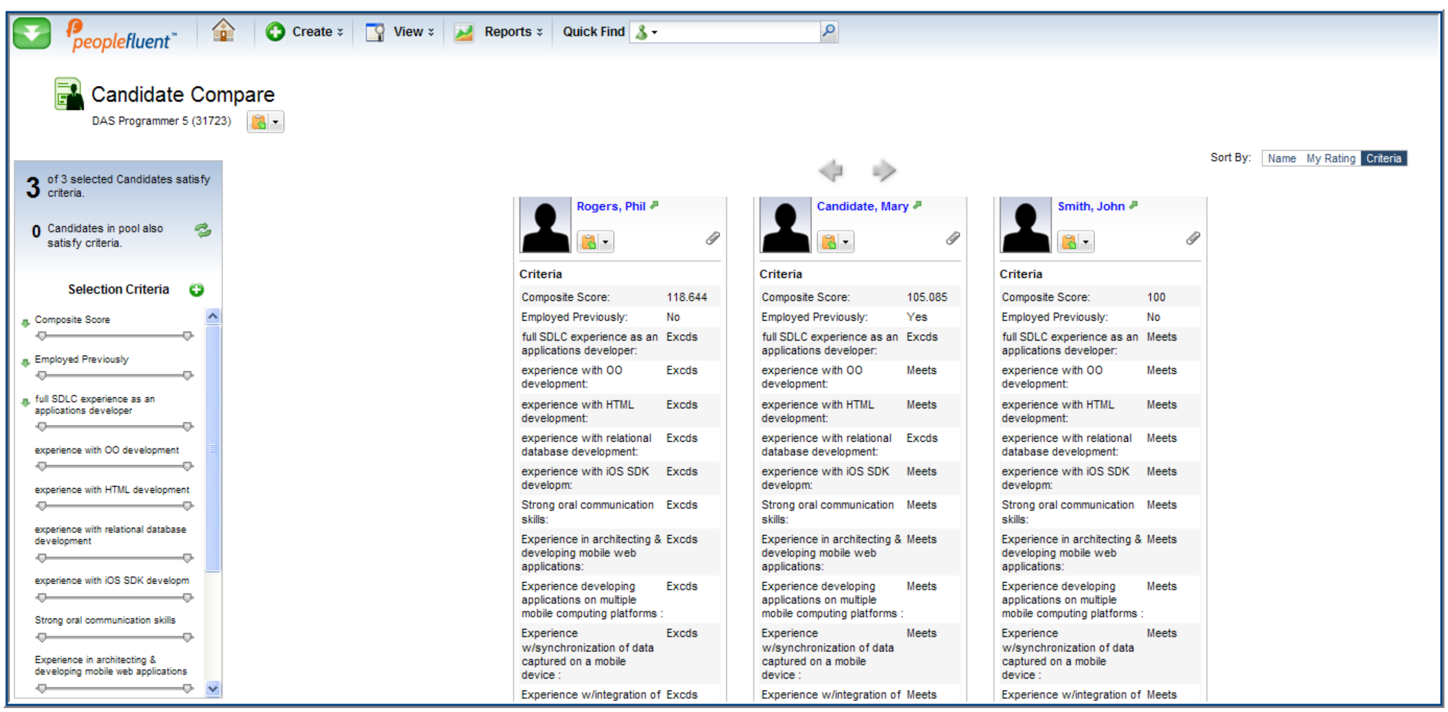
The following screen shot highlights the various parts of the Candidate Compare page.



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.

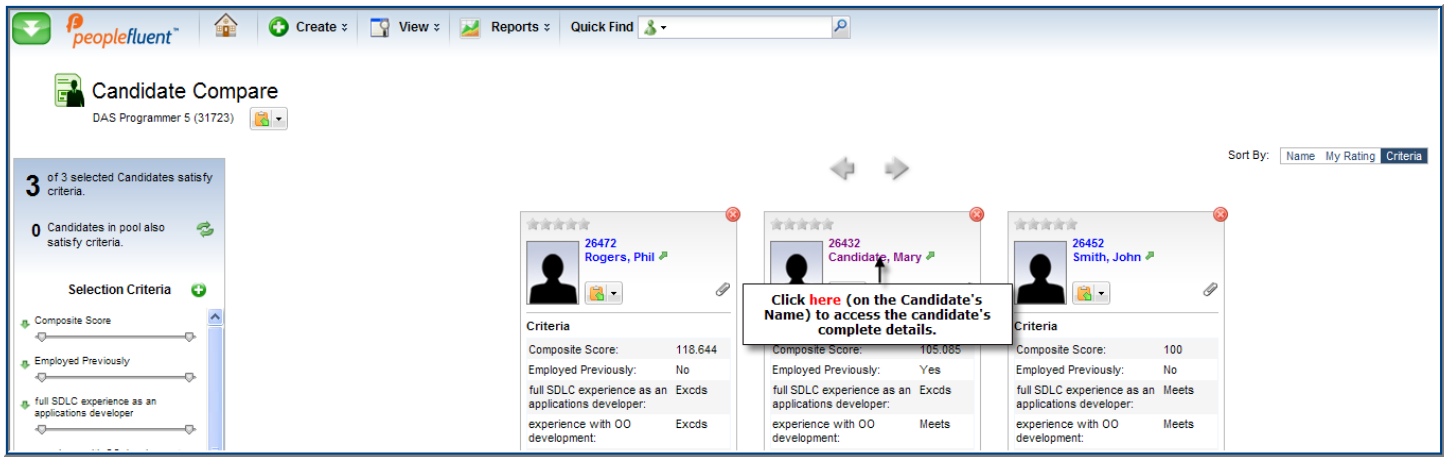


The following screen shot depicts what your Candidate Compare screen may look like if you make changes to the Selection Criteria.

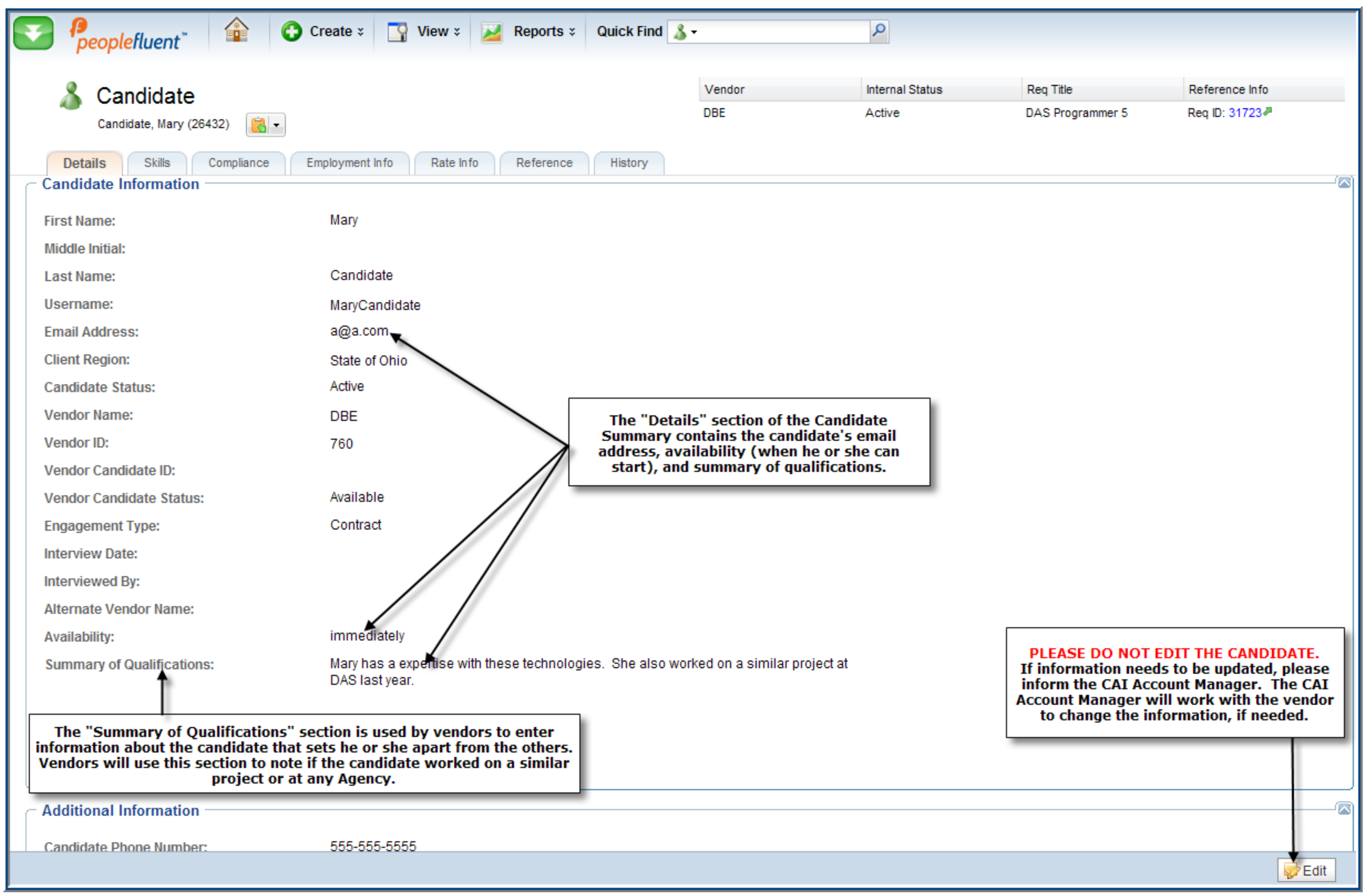


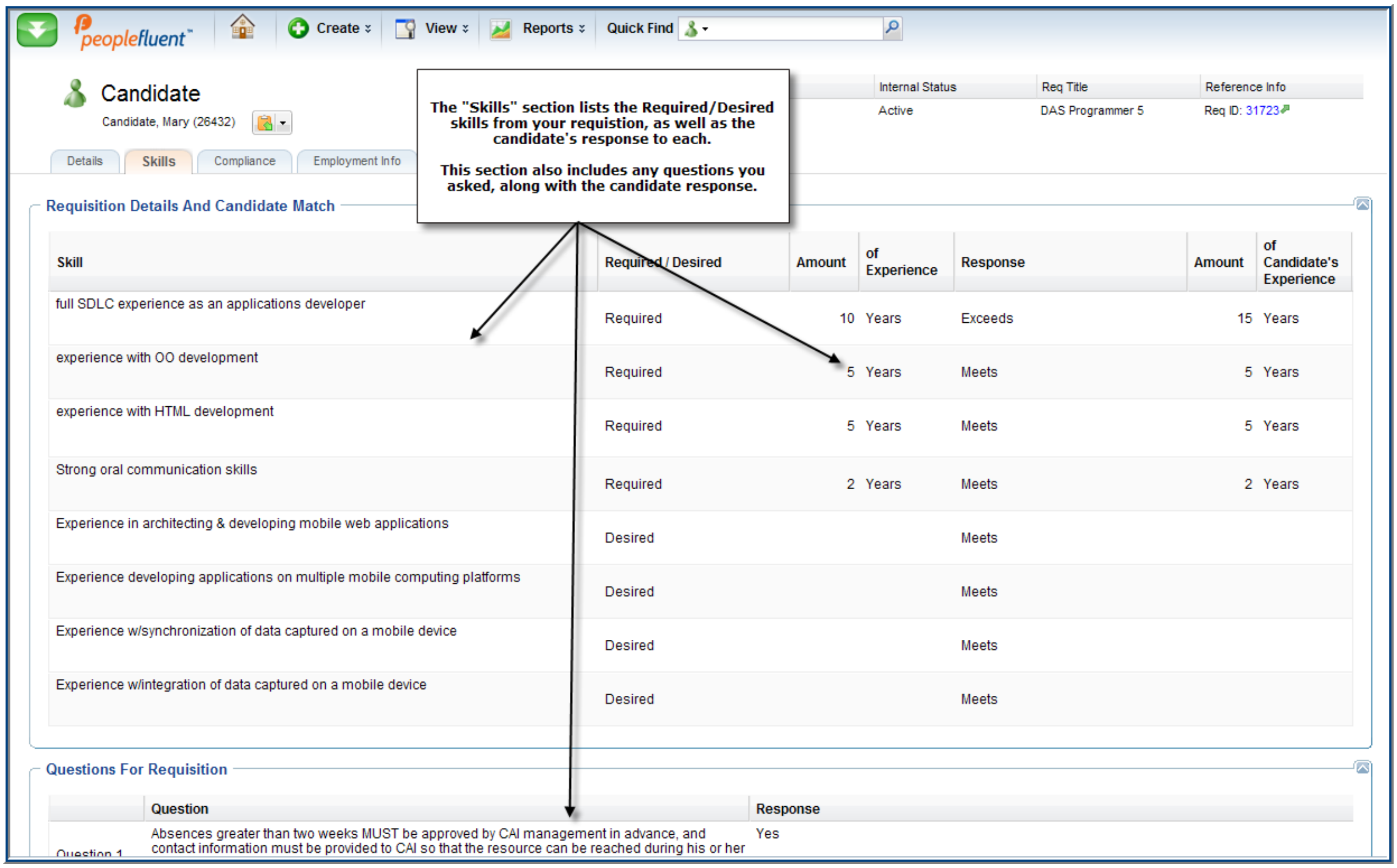
Review a Specific Candidate in Greater Detail

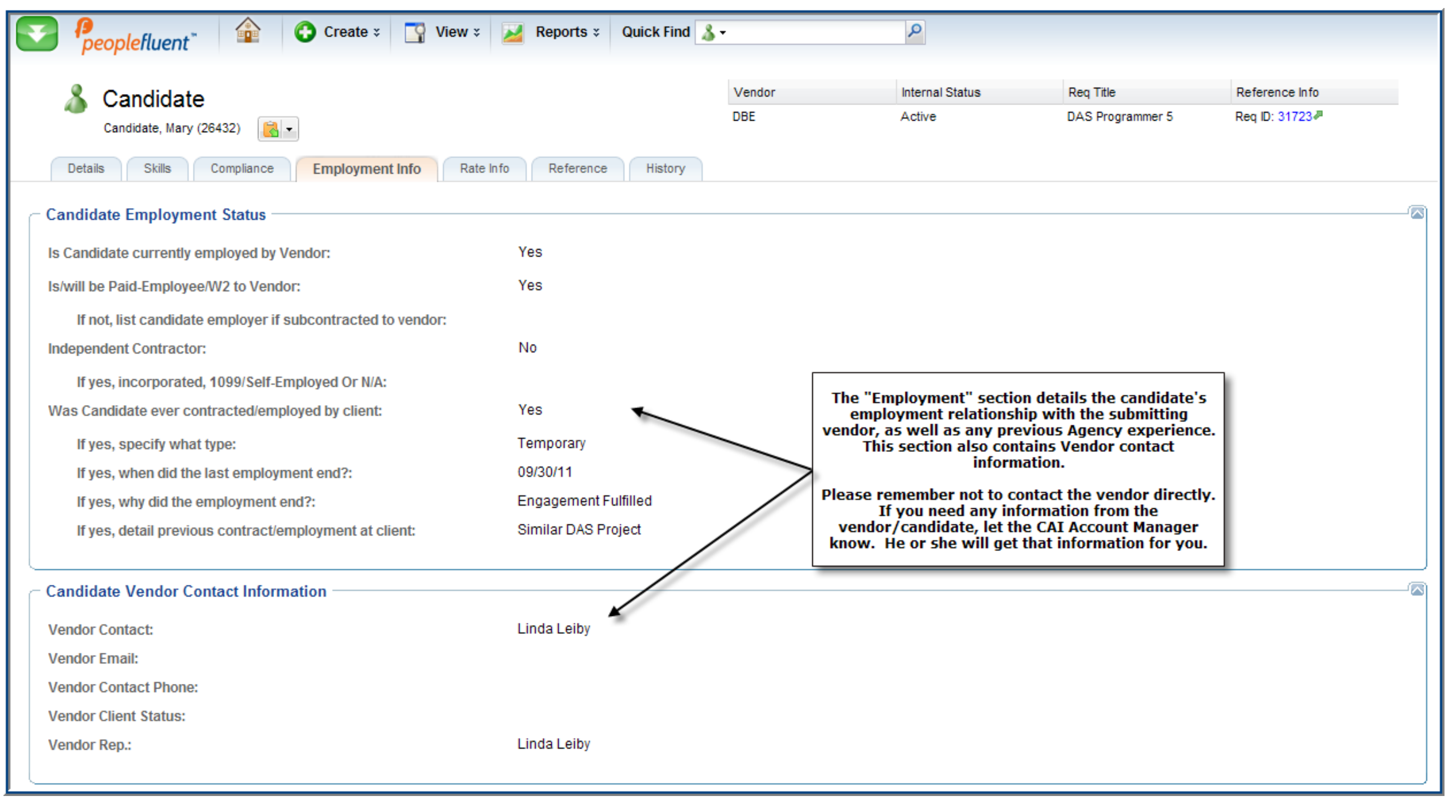
If you've done your candidate comparison and would like to look at an individual candidate's complete details, you can do so right from the Candidate Compare page, as illustrated in the screen shot below.

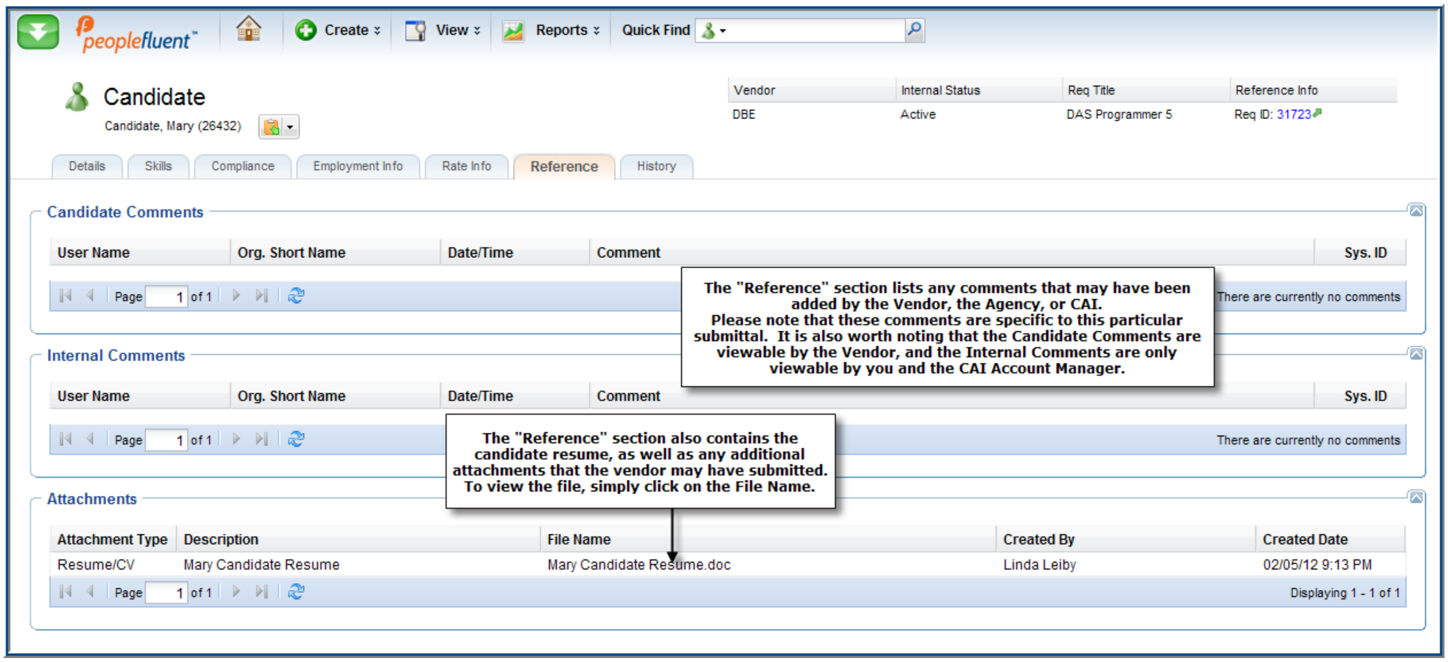


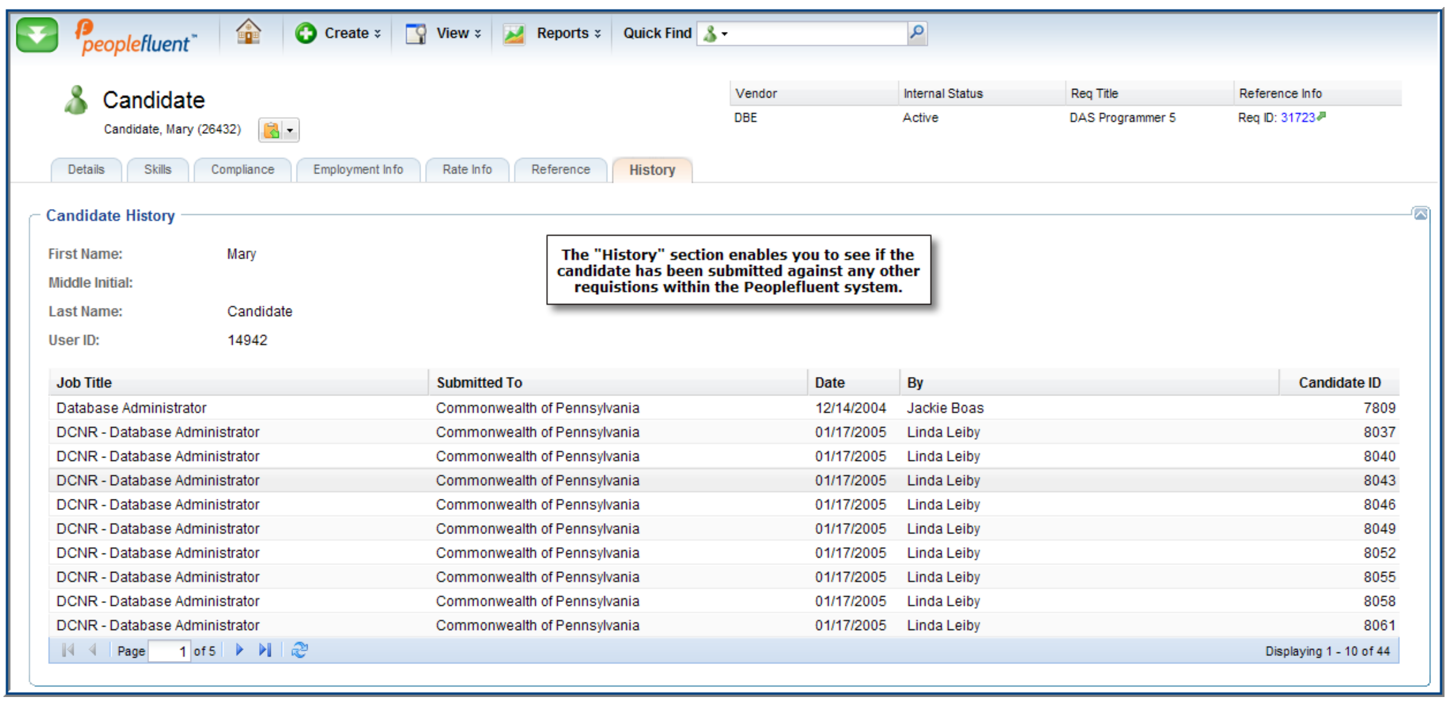
The **Candidate Summary** provides key information, including availability, summary of qualifications, skills, previous work experience, and resume. The following screen shots highlight these areas.




peoplefluent
Create
View
Reports
Quick Find
Candidate
Candidate, Mary (26432)
Internal Status
Active
Req Title
DAS Programmer 5
Reference Info
Req ID: 31723
Details
Skills
Compliance
Employment Info
The "Skills" section lists the Required/Desired skills from your requistion, as well as the candidate's response to each.
This section also includes any questions you asked, along with the candidate response.
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


peoplefluent
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 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
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.
Candidate Vendor Contact Information
Vendor Contact: Linda Leiby
Vendor Email:
Vendor Contact Phone:
Vendor Client Status:
Vendor Rep.: Linda Leiby

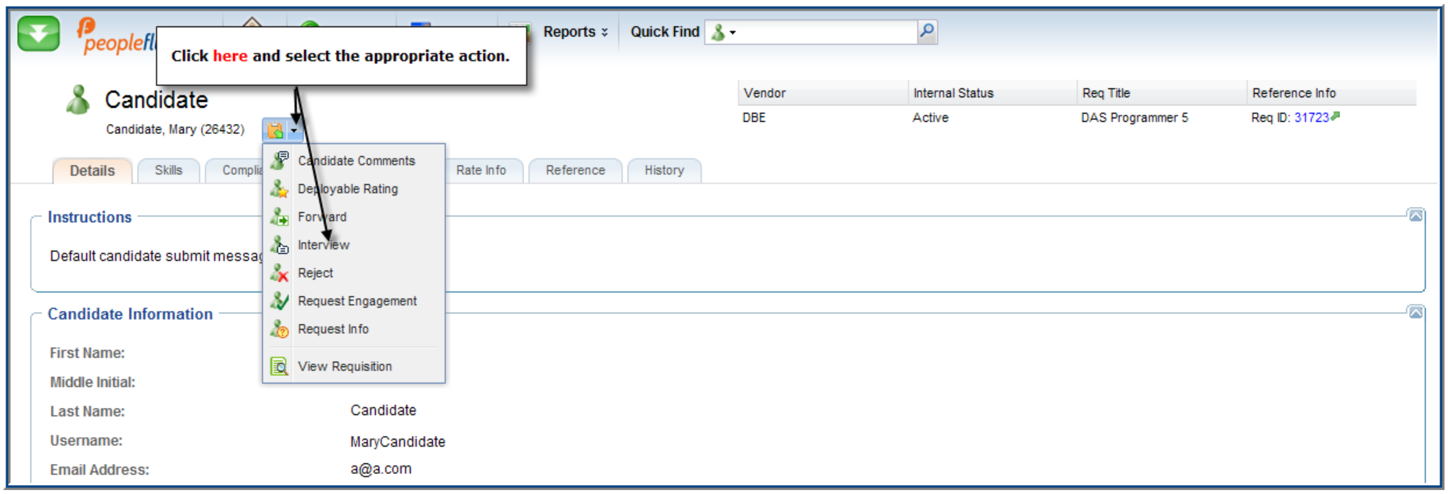

peoplefluent
Create
View
Reports
Quick Find
Candidate
Candidate, Mary (26432)
Vendor
DBE
Internal Status
Active
Req Title
DAS Programmer 5
Reference Info
Req ID: 31723
Details
Skills
Compliance
Employment Info
Rate Info
Reference
History
Candidate Comments
User Name
Org. Short Name
Date/Time
Comment
Sys. ID
Page 1 of 1
There are currently no comments
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.
Internal Comments
User Name
Org. Short Name
Date/Time
Comment
Sys. ID
Page 1 of 1
There are currently no comments
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.
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


peoplefluent
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 requistions 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
Displaying 1 - 10 of 44

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

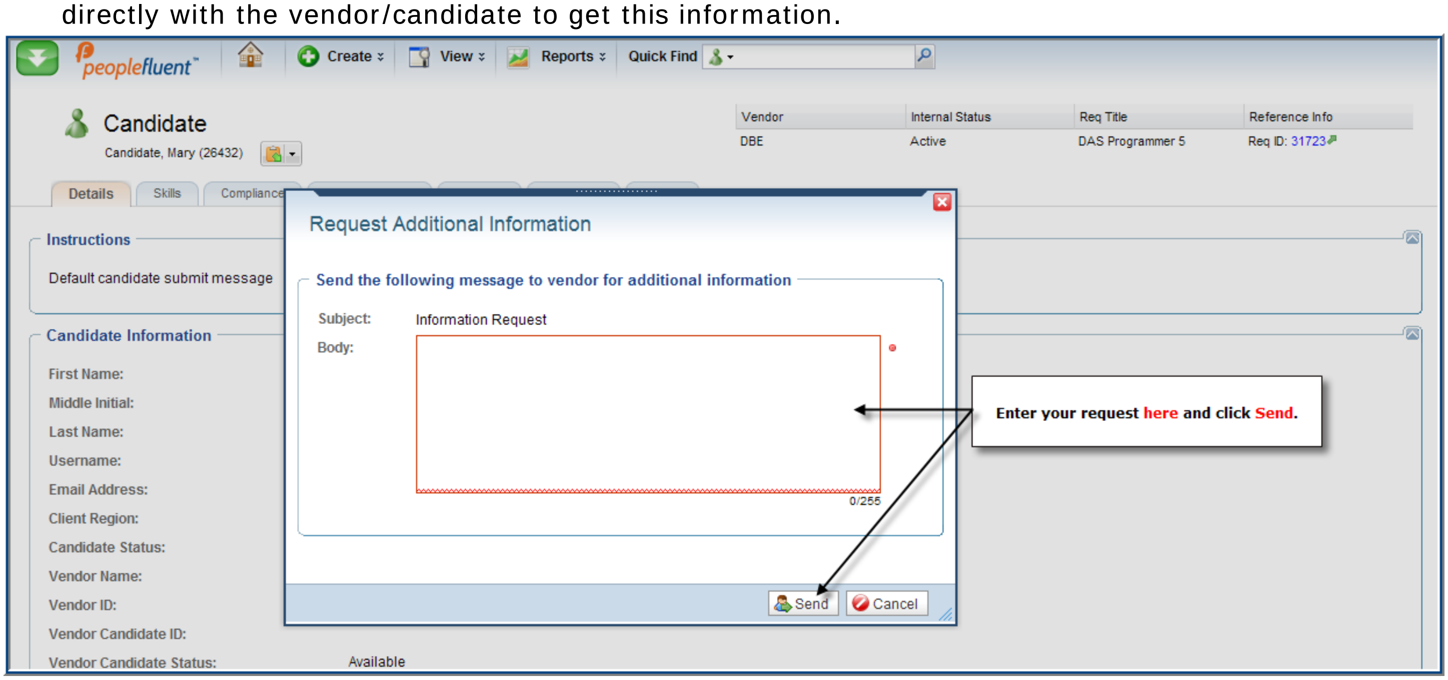
These action items, highlighted in the screen shot below, are sometimes referred to as "email generators", as they initiate emails to CAI, requesting that action be taken.



The following sections describe these "email generators" in greater detail.

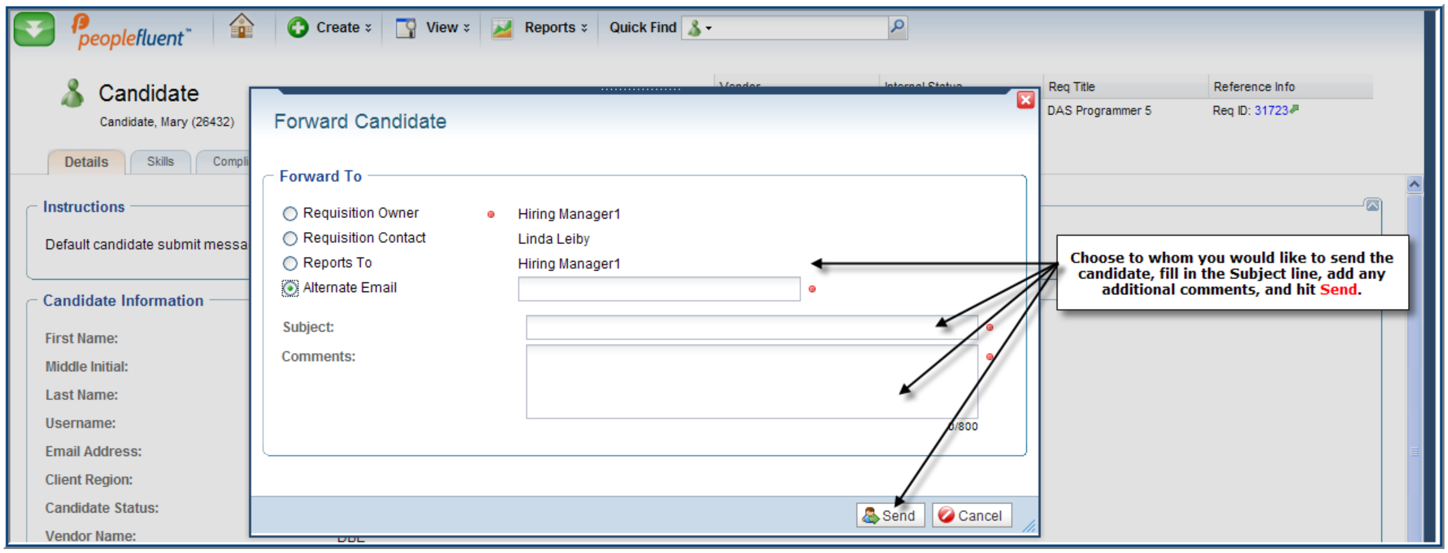
Request Information

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.



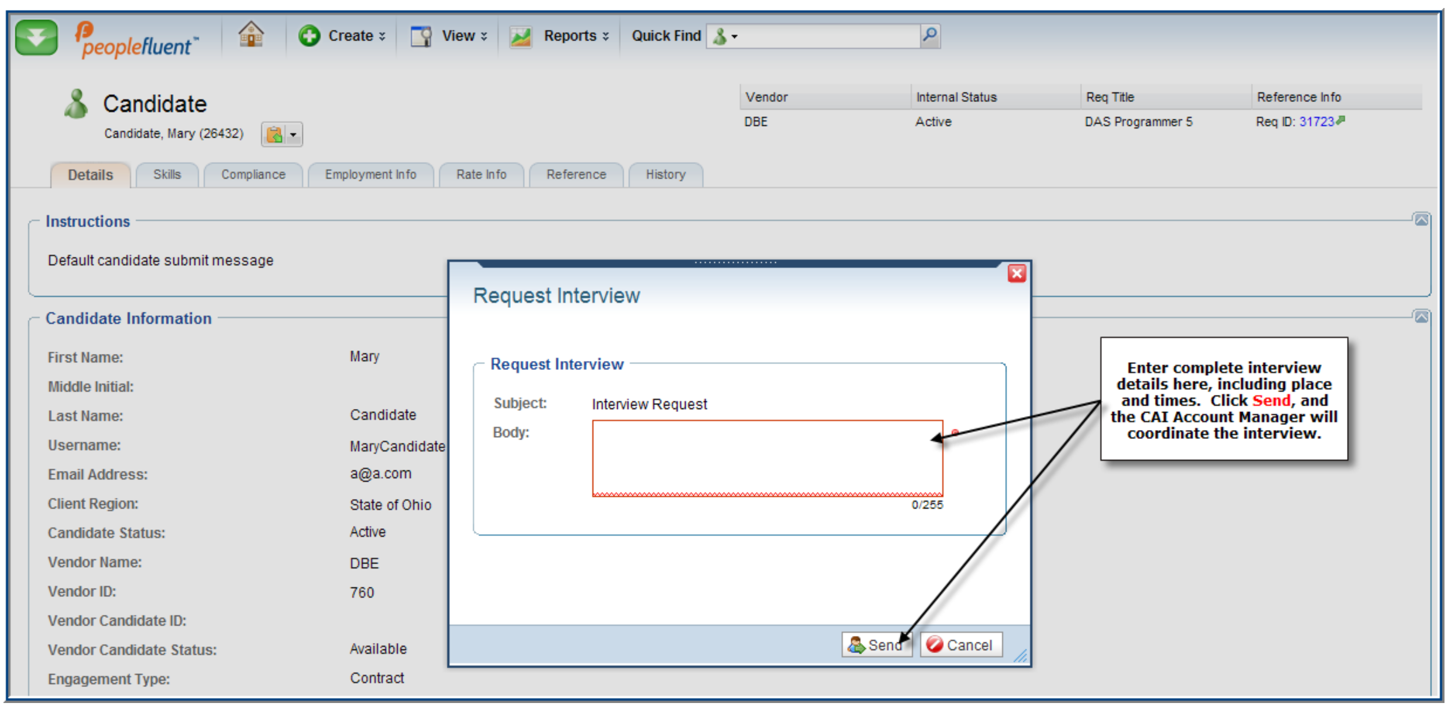
Forward Candidate

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.



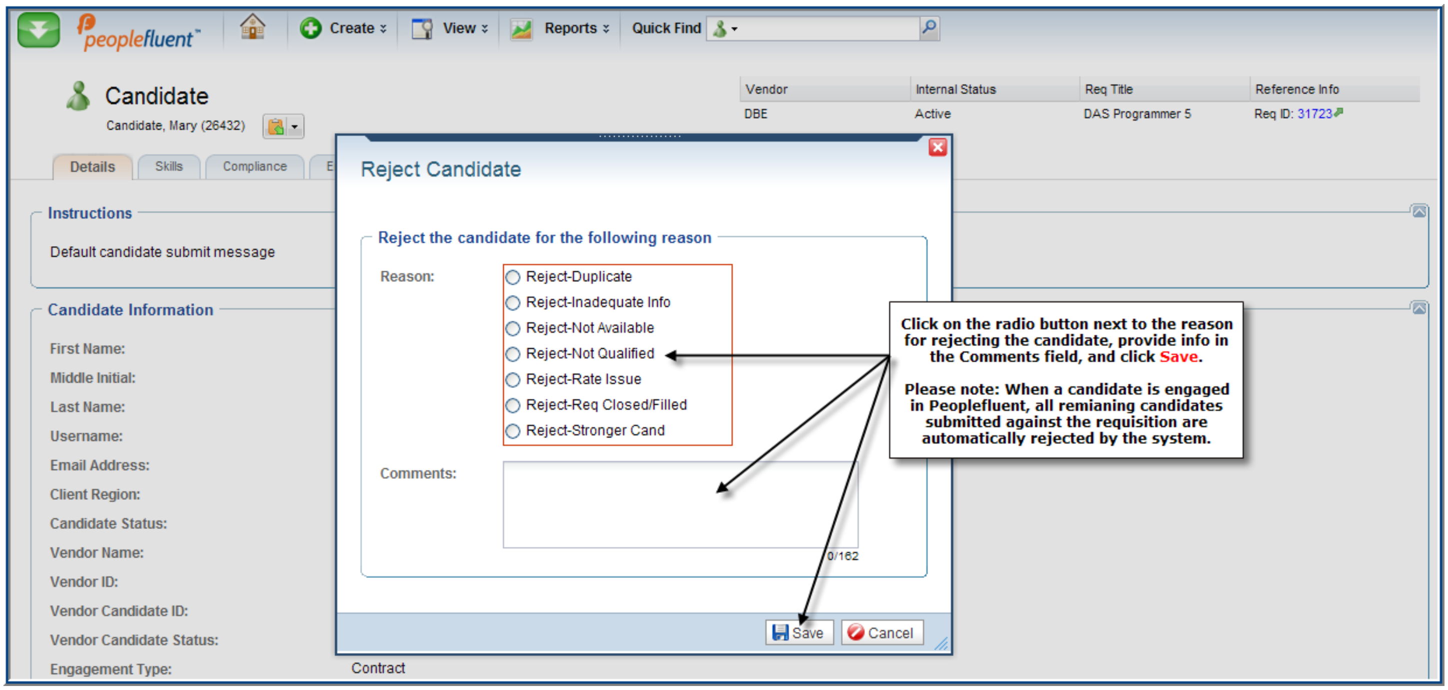
Request Interview

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.



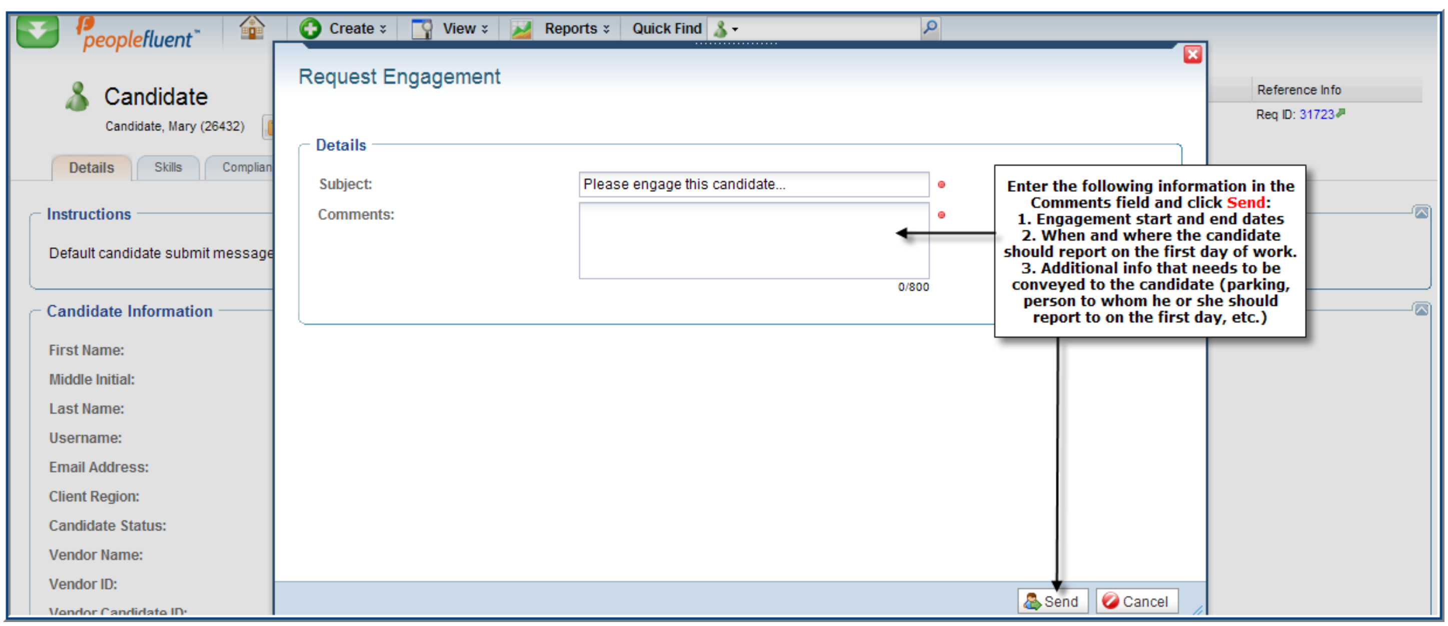
Reject Candidate

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.



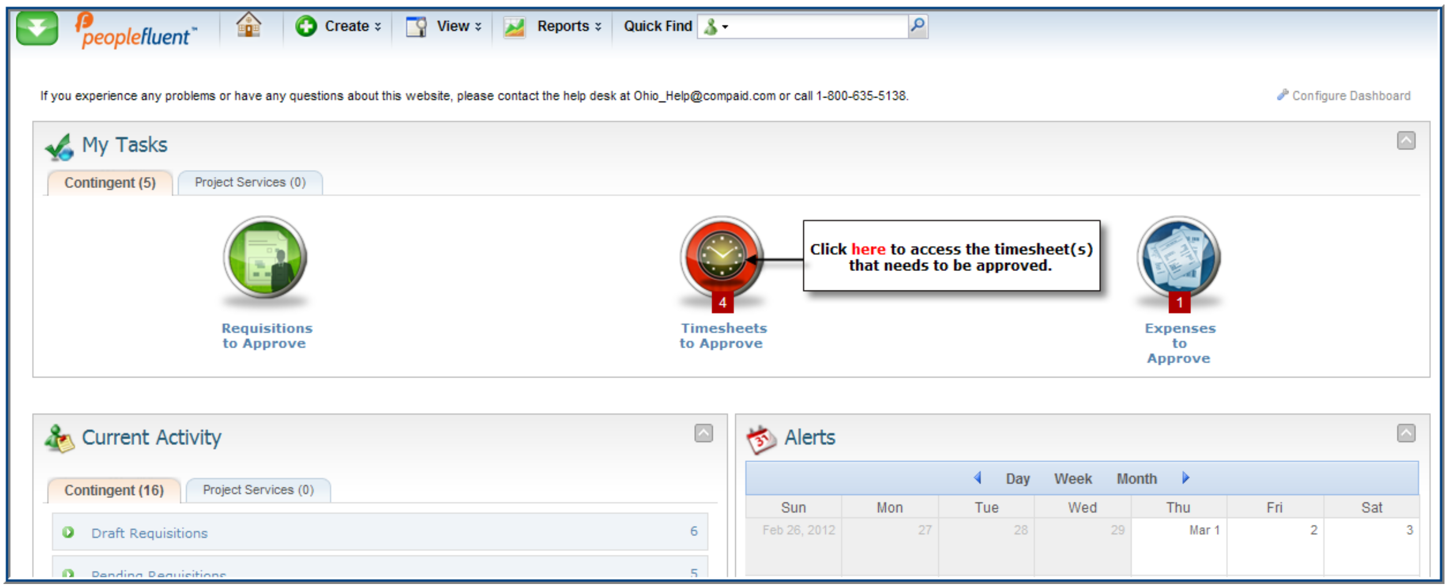
APPROVING A TIMESHEET

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.

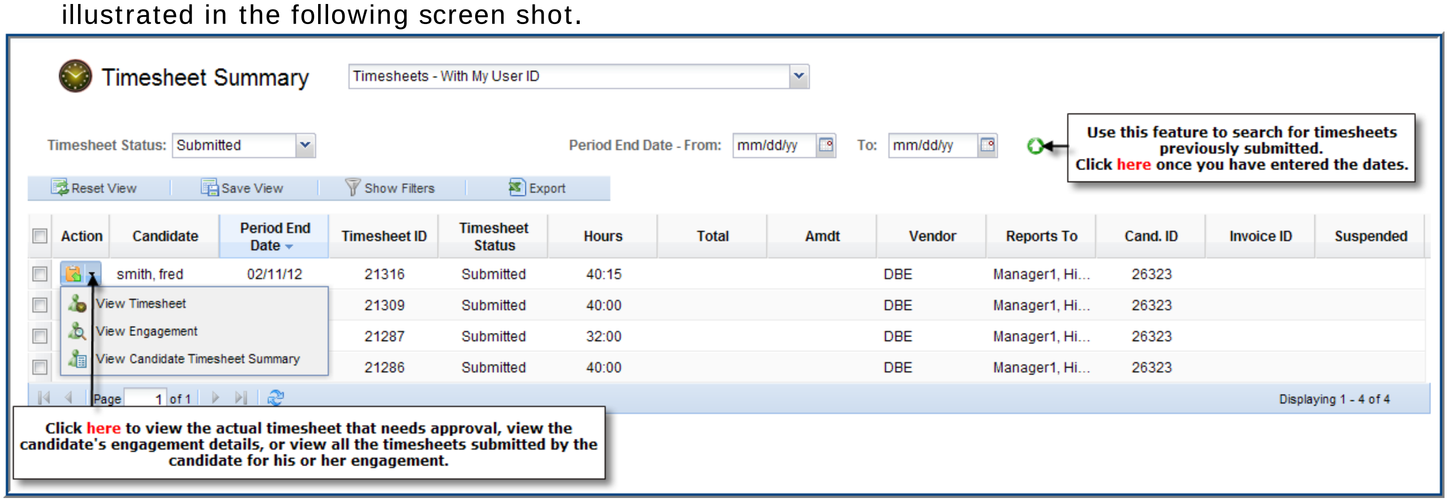
Go to the Timesheet Summary Page

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



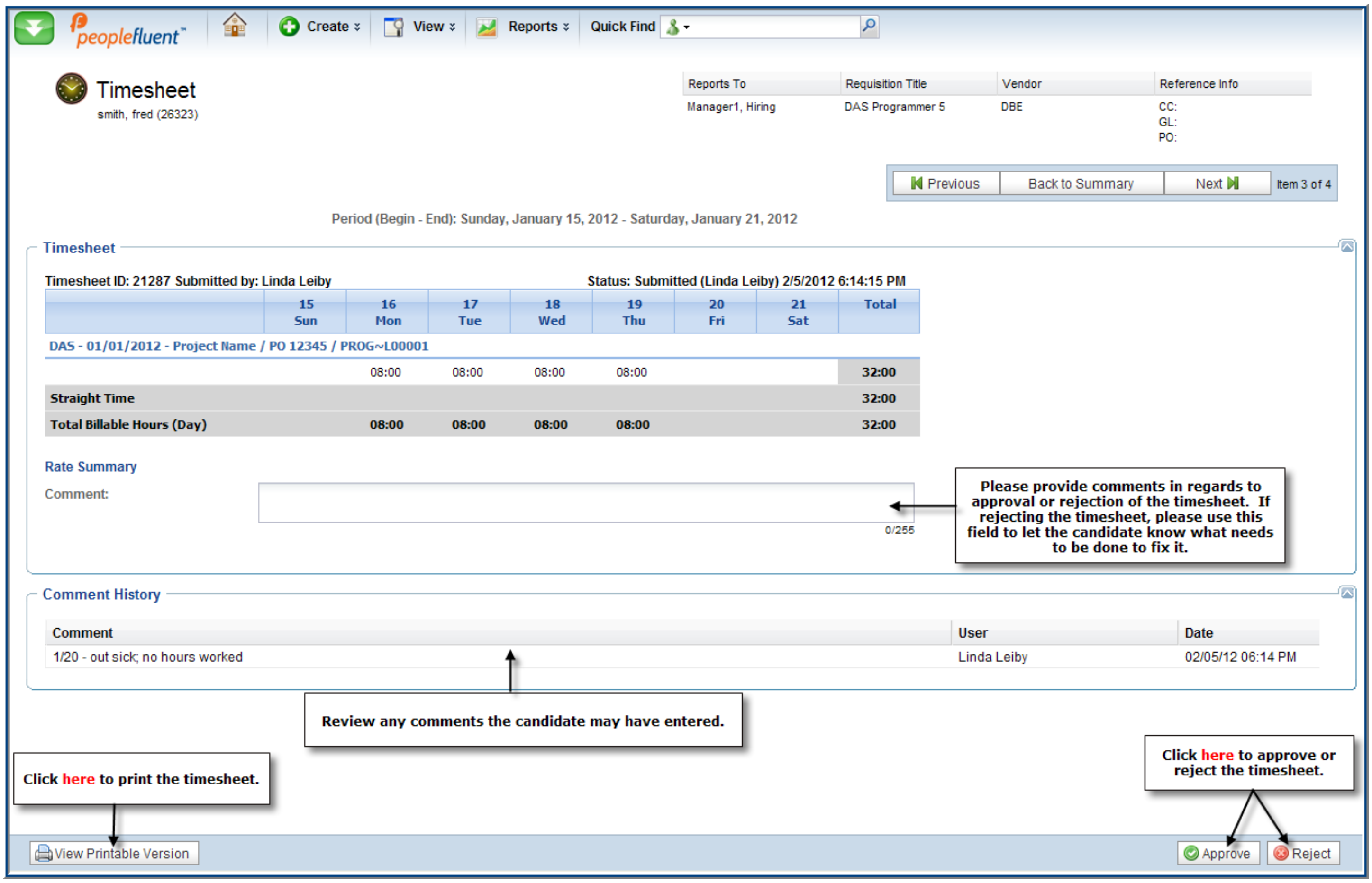
Access the Timesheet

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.



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.

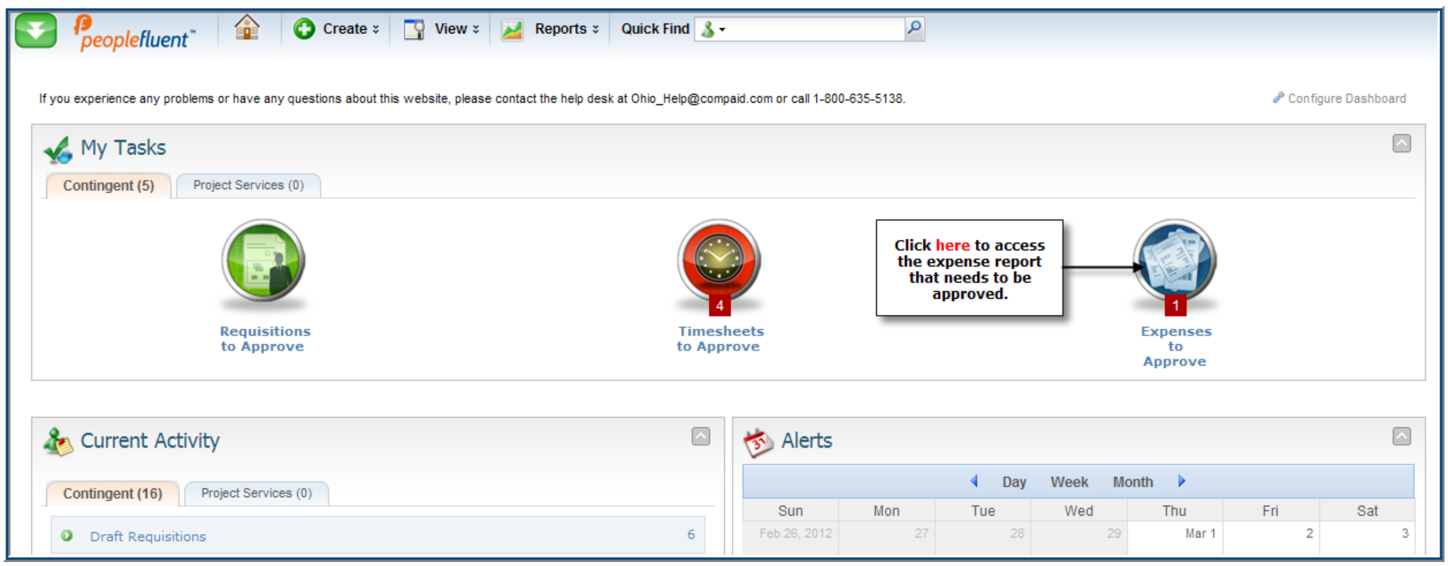
APPROVING AN EXPENSE REPORT

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.

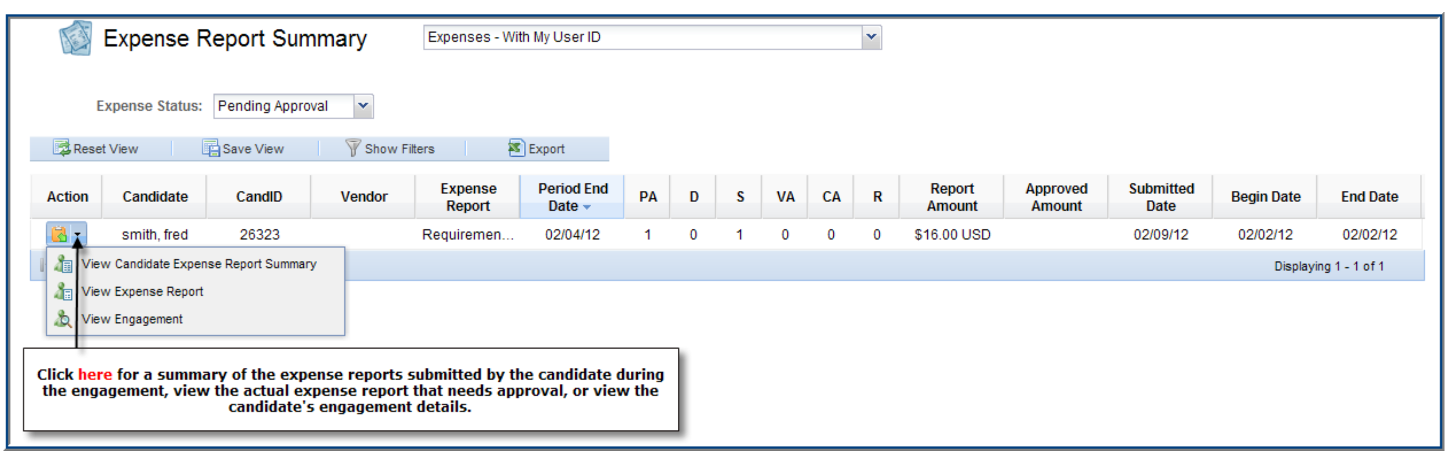
Go to the Expense Report Summary Page

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



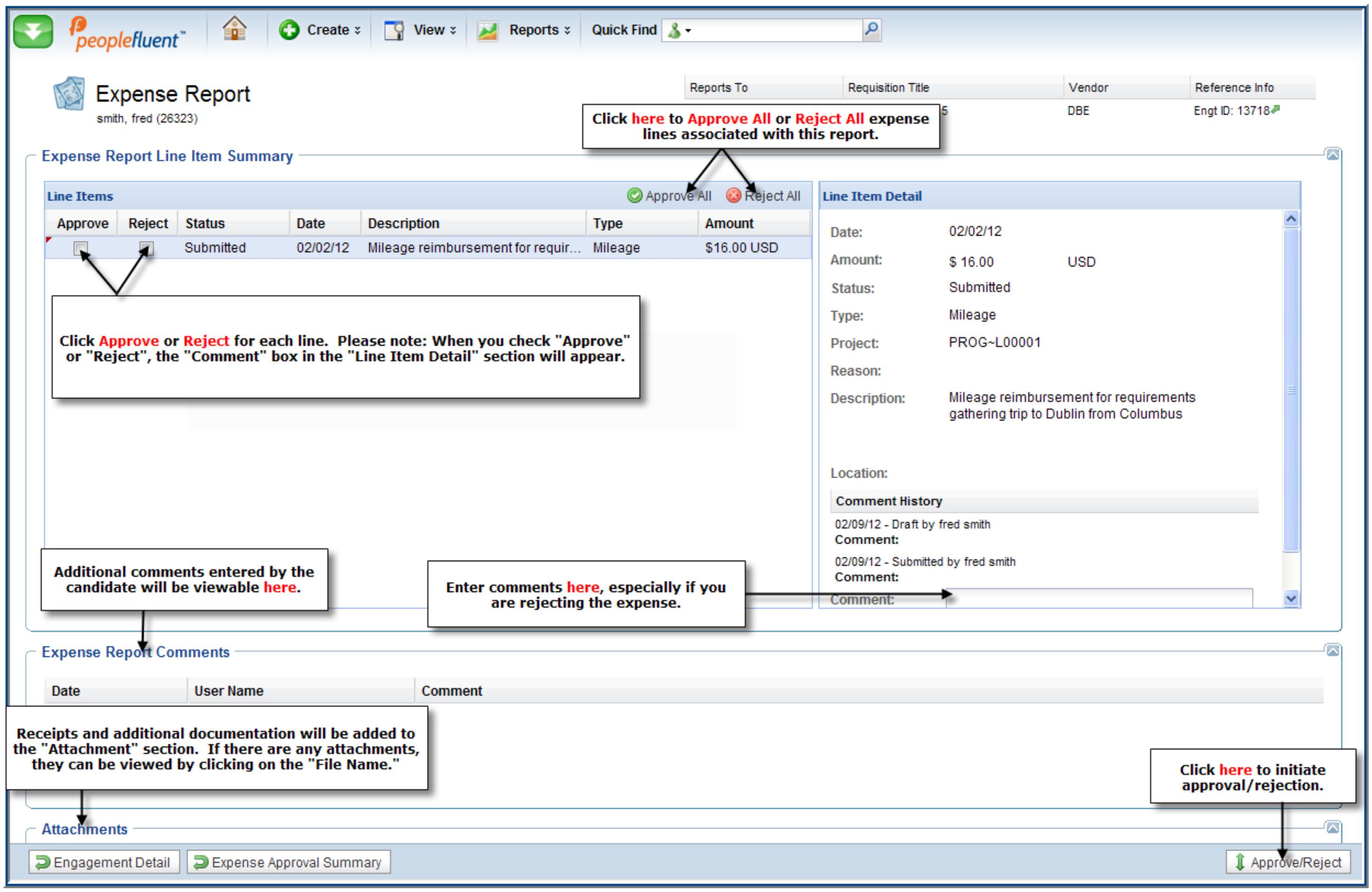
Access the Expense Report

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.



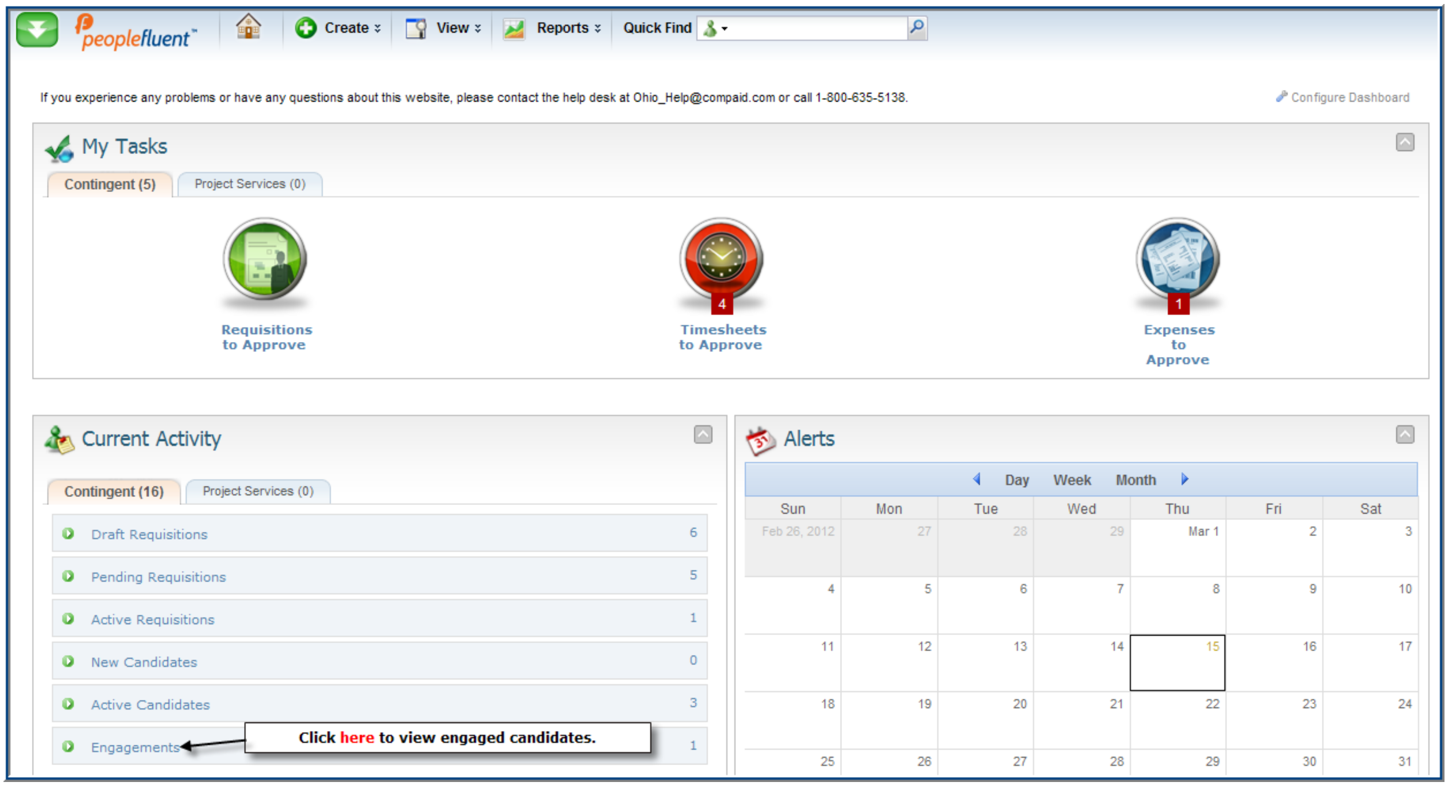
Expenses should only be approved if they have provided complete information, and have attached receipts for all expenses requiring such documentation. If you are not sure which expenses should include receipts, please feel free to contact your CAI Account Manager.

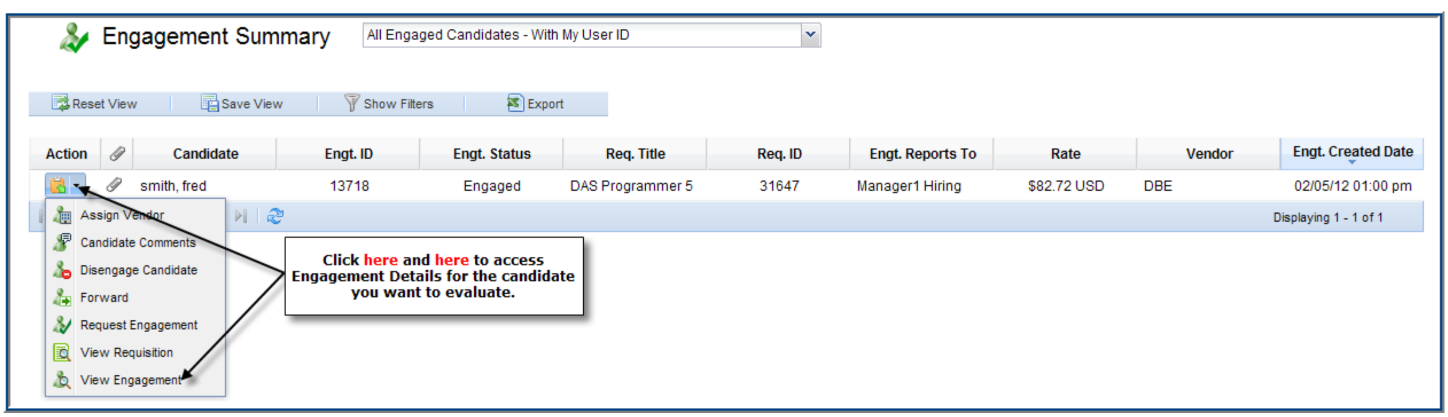
If you reject the expense report, the candidate will need to resubmit. If you discover an error on the expense report after you have already approved it, please contact the CAI Account Manager or the CAI-managed help desk. The CAI team will then ensure that it is corrected.

EVALUATING A CANDIDATE

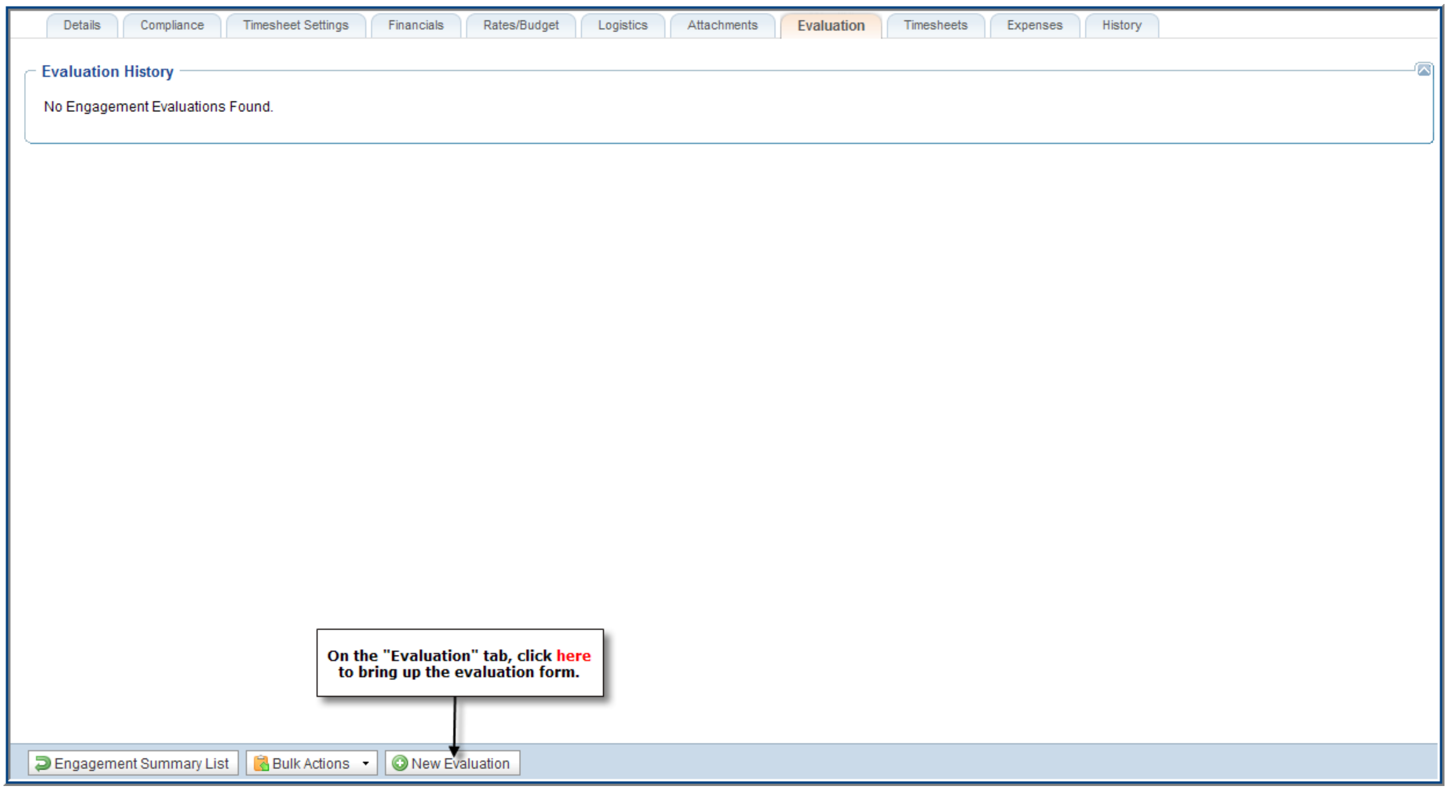
For each candidate you have engaged under the contract, you will also receive an email request to complete an engagement evaluation form. Evaluation requests will be made after first thirty (30) days, six (6) months, and one (1) year. The evaluations are not required but highly recommended as they will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

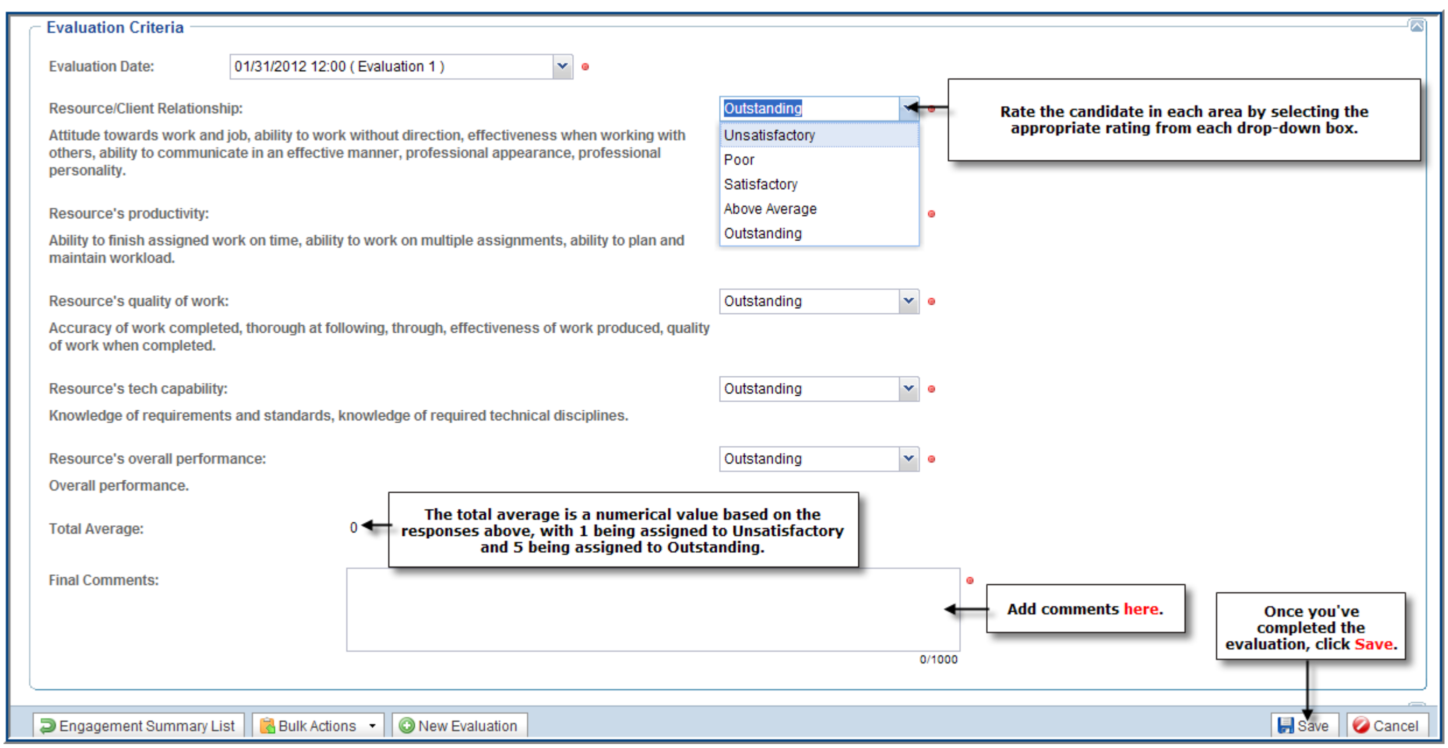
If you receive a Peoplefluent email request, simply click on the link within the notification and fill in the fields as instructed in the last screen shot in this section. Or, if you decide to do an "unscheduled" evaluation, you can access the form by completing the steps detailed in the next four screen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






Engagement
fred smith (13718)
Vendor
DBE
Engagement Status
Engaged
Req Title
DAS Programmer 5
Reference Info
Req ID: 31647
Cand ID: 26323
Details
Compliance
Timesheet Settings
Financials
Rates/Budget
Logistics
Attachments
Evaluation
Timesheets
Expenses
History
Candidate Information
Client Name:
Click on the Evaluation tab of the Engagement Detail.


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:
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
Rate the candidate in each area by selecting the appropriate rating from each drop-down box.
Resource's productivity:
Ability to finish assigned work on time, ability to work on multiple assignments, ability to plan and maintain workload.
Resource's quality of work:
Outstanding
Accuracy of work completed, thorough at following, through, effectiveness of work produced, quality of work when completed.
Resource's tech capability:
Outstanding
Knowledge of requirements and standards, knowledge of required technical disciplines.
Resource's overall performance:
Outstanding
Overall performance.
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:
0/1000
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.