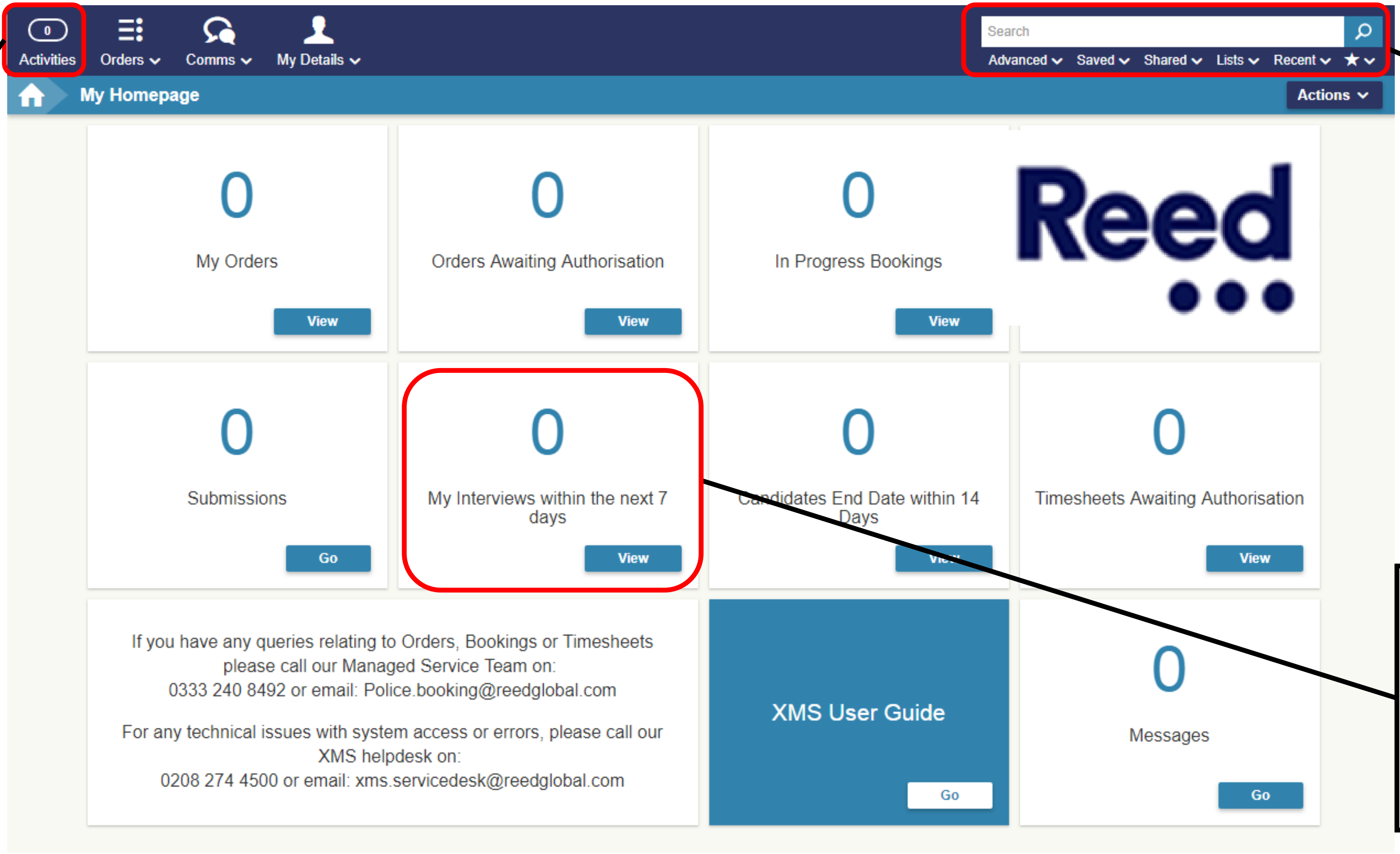
XMS User Guide

Hiring Manager

XMS Dashboard

Activity Centre: This is where all notifications are received. (e.g. Timesheets awaiting authorization, New Submissions, etc.)



Search: Here you can search for anything (Bookings, Orders, Submissions, etc.)

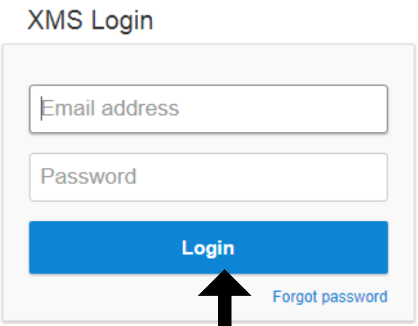
The Advanced search is really useful for filtering specific things (e.g. Timesheets, Candidates, etc.)

These boxes are referred to as 'Pods'. They are shortcuts to view something specific (e.g. Interviews in the next 7 Days). You could alternatively use the Advanced search to view the same results.

How to Place an Order

Step 1 – Login to XMS

https://www.xms-portal.com/xms/login/auth

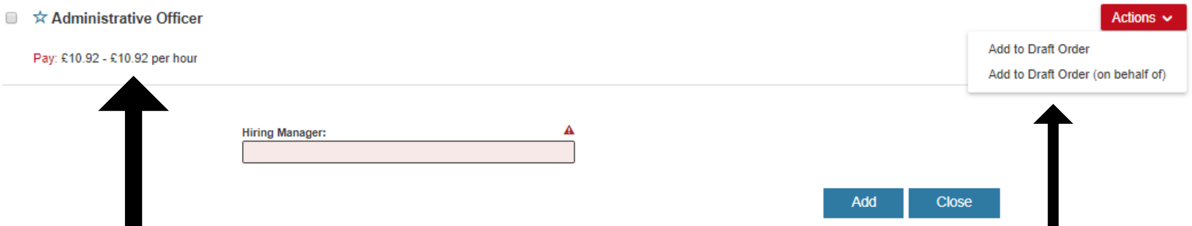


Open XMS in your internet browser and enter your Username and Password
N.b. For best experience, use the Google Chrome browser!

Step 2 – Place an Order

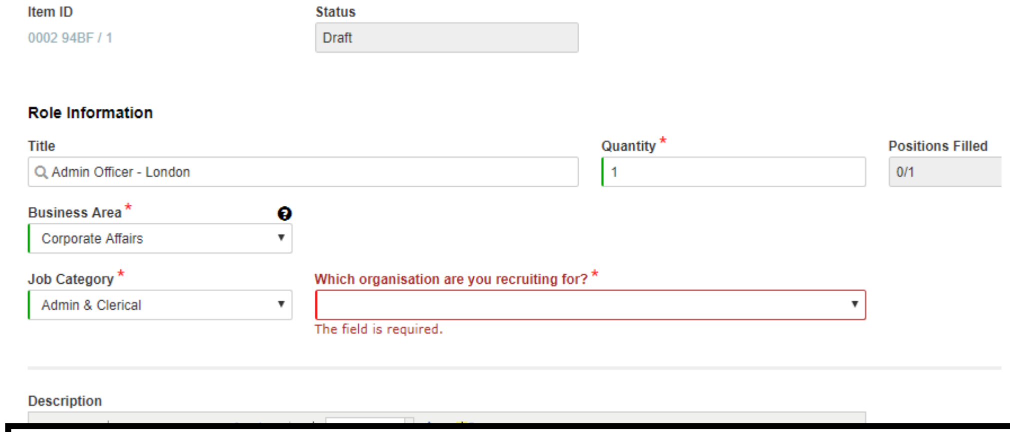
Click on the Place Order pod to view the Job Catalogue. You can filter based on 'Job Category' to locate the required Job Template

Step 3 – Select a Job Template and Enter Order Details



Choose the required Job Template and select Add to Draft Order in the actions.
Alternatively, if you are placing an order on behalf of another manager, select Add Draft order (on behalf of) and select the hiring manager in the lookup pop up. *(In this case, you will be the 'Ordering Manager' and whoever you select will be the 'Hiring Manager'. Only the Hiring Manager will receive notifications regarding this order, but will be visible for both of you).*

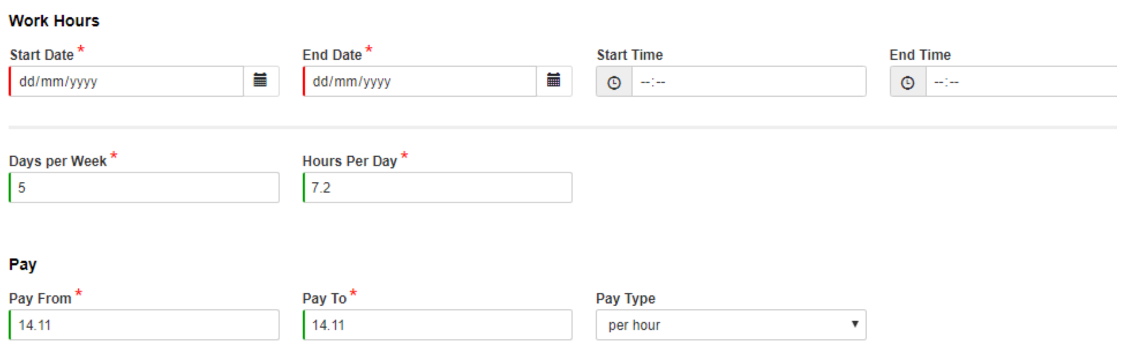
Step 4 – Complete Mandatory fields



Complete the mandatory fields which are highlighted in red or with a *, you will not be able to save the order without completing these

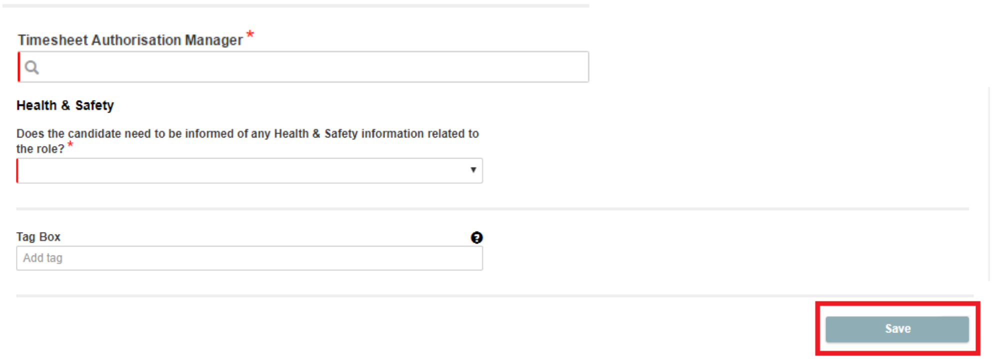
How to Place an Order continued

Step 5 – Enter Work Hours & Pay



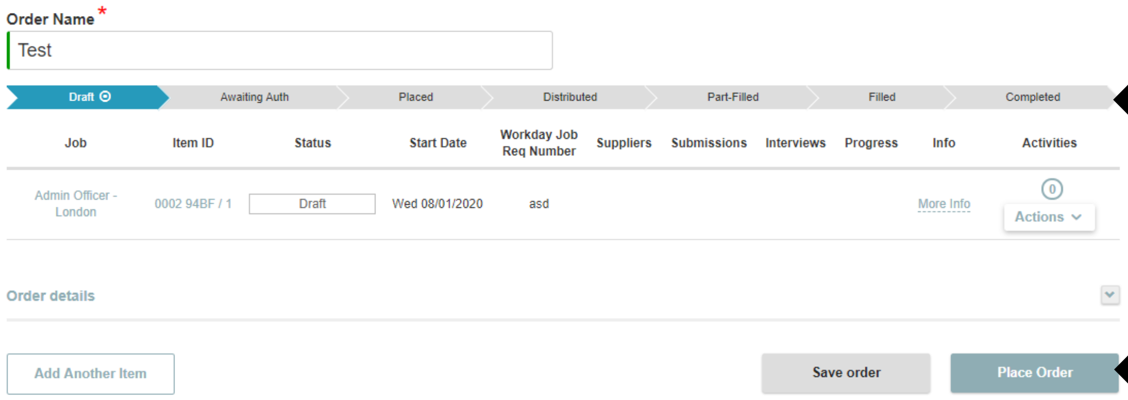
Ensure you enter the correct Start Date/End Date as these will define how long the candidate is in booking for
Pay from and Pay to will dictate the potential candidates pay range in the role

Step 6 – Add Timesheet Authoriser & Save



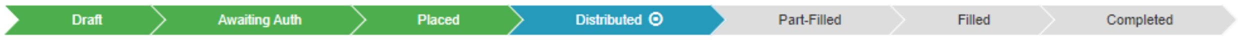
The Timesheet Authorisation Manager is the person who will authorise the timesheet (this person will be able to authorise the timesheet as well as the Hiring Manager).
Save the item, this will take you to the order screen

Step 7 – Place Order



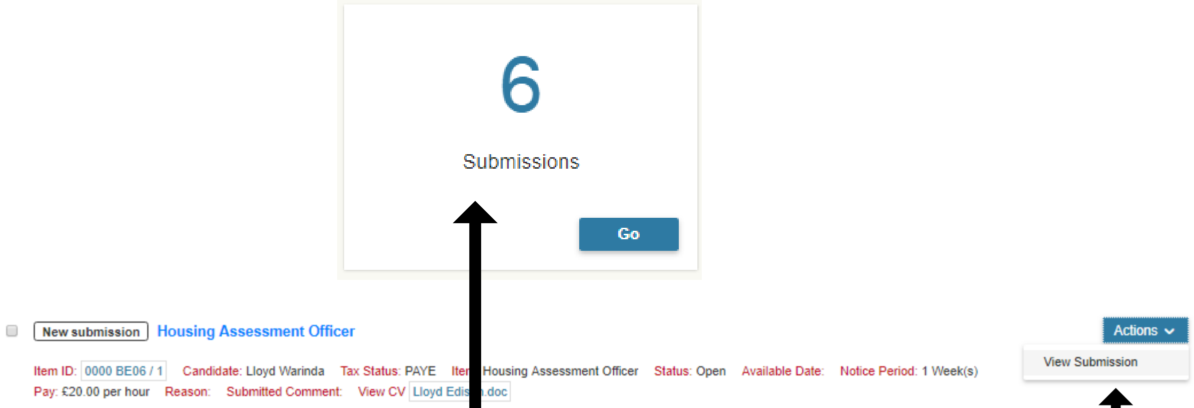
On the left you can see the ordering screen, here you can check the order details, give the order a name and check its status. In the example on the left the milestone bar states that the Order is currently at the Draft stage. Once you are happy with the order you can go ahead and click on Place Order

This will be forward the order onto the relevant Manager to authorise/work on, you will be able to track the progress of the order through the milestone bar



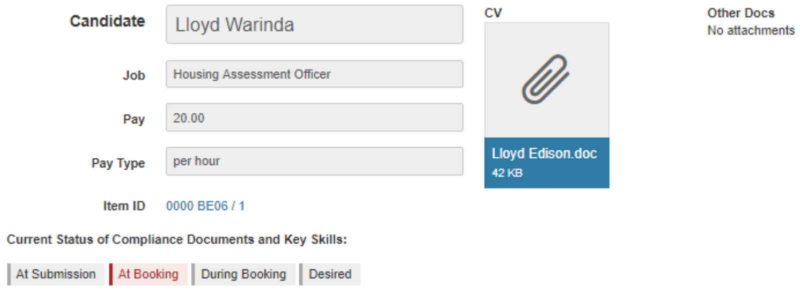
Reviewing Submissions

Step 1 – Click on the CVs for Review Pod



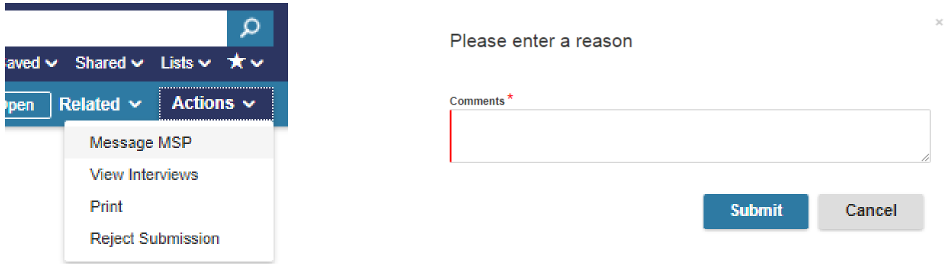
Click on the Submissions pod to view candidates submitted to your orders. Then select View Submission from Actions dropdown

Step 2 – View Submission



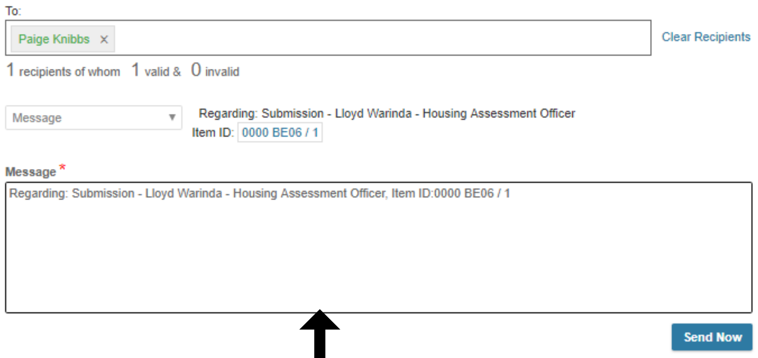
This will open the Submission record and you will be able to see the Submission details for that Candidate.
You can expand the different sections using the '+' icon. Selecting 'View CV' will download the CV attached

Step 3 – Providing Feedback on Submission



Reject Submission – Rejects Submission record and informs MSP and Supplier with Rejection reasons & comments
Message MSP – Can message MSP to provide feedback and request interview or booking

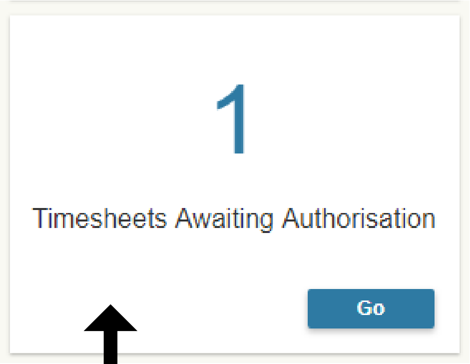
Step 4 – Message MSP with Request



Message the MSP specifying your feedback and interview availability, including any relevant details.
There is a prepopulated reference containing the submission details.
The message centre can also be used to request bookings.

Authorising Timesheets – Activity Centre

Step 1 – Click on the Awaiting Authorisation pod

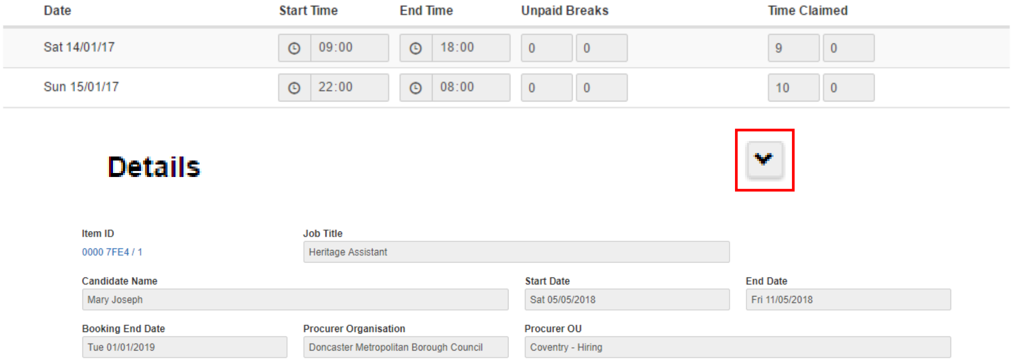


Click on the Timesheets Awaiting Authorisation pod to view all timesheets assigned to you for review in your Activity Centre

Step 2 – Select timesheet

Locate the timesheet and either action directly or select View via the Actions button to see the details

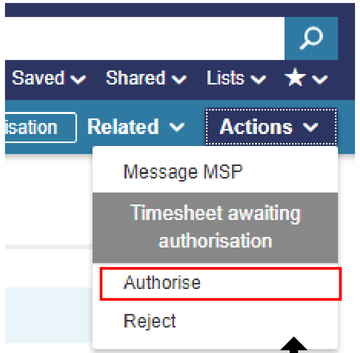
Step 3 – Review timesheet



Review the submitted timesheet details

N.b. There is a “ ” icon that can be selected to reveal further details, for example, Job Title, Candidate Name etc.

Step 4 – Authorise timesheet

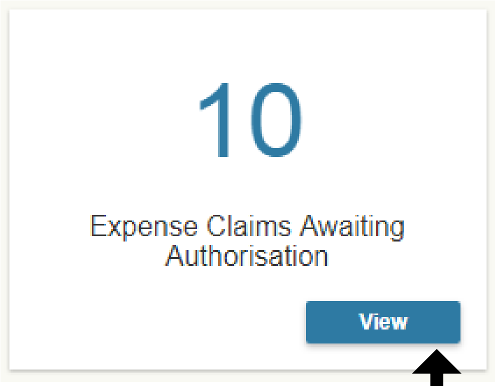


You can Authorise the timesheet from the record via the actions dropdown

N.b. “Authorise” will also display on the timesheet record

Authorise/Reject Expense Claims

Step 1 – View your New Expense Claims

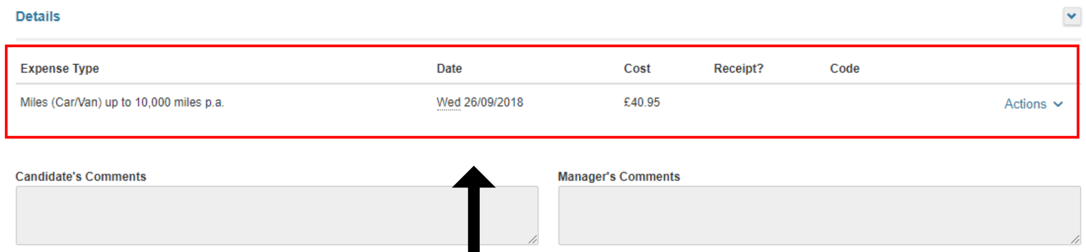


Click on the Expense Claims Awaiting Authorisation pod to view all expense claims assigned to you for review in your Activity Centre

Step 2 – Select an Expense Claim

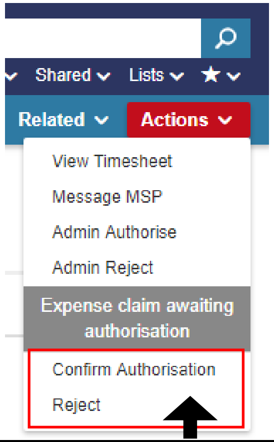
Locate the expense claim you want to review and click on the red title (Comprised of candidate name and job title)

Step 3 – Review the Expense Claim



Review the details of the Expense Claim i.e Expense types, date, cost etc.

Step 4 – Authorise/Reject Expense Claim



Once the Expense Claim has been reviewed you can Authorise or Reject the claim via the actions drop down

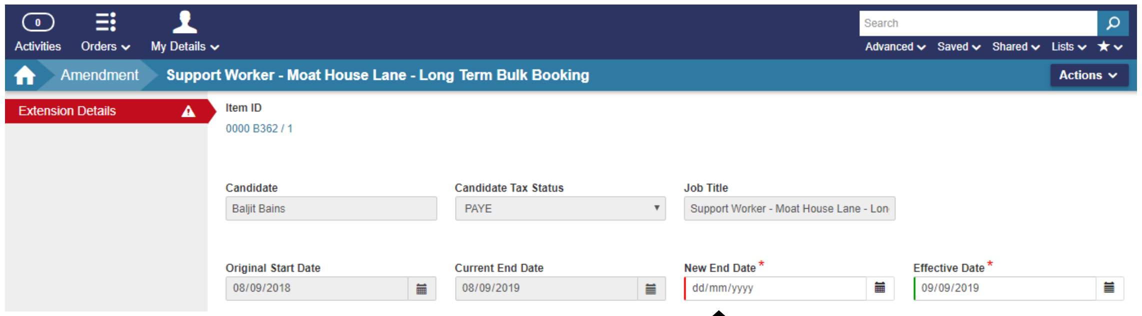
Requesting a Booking Extension

Step 1 – Click on Actions

On a booking record, click on the Actions button and select Extend Booking.

n.b. you will not be able to extend a Booking that already has a pending amendment attached or that has not yet had a Timesheet submitted

Step 2 – Select Extend Booking



Enter a New End Date

N.b. You can also change the pay rate and Cost Centre.

Step 3 – Click on Create

Click on Submit to submit the Extension Request for authorisation

Step 4 – Confirmation Screen

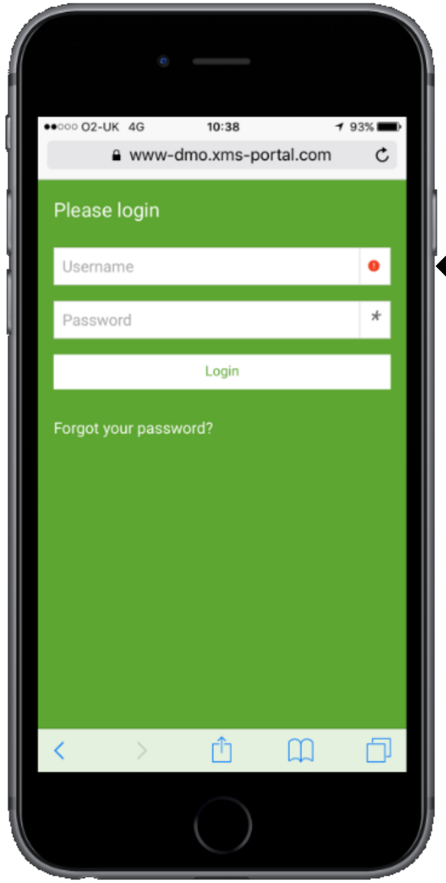
You will be taken to a request confirmation screen

N.b. The Approver will be notified. Once approved, the end date will be updated and the supplier will be notified.

How to Authorise a Timesheet from a Mobile Device

Step 1 – Login to XMS on your Mobile Device

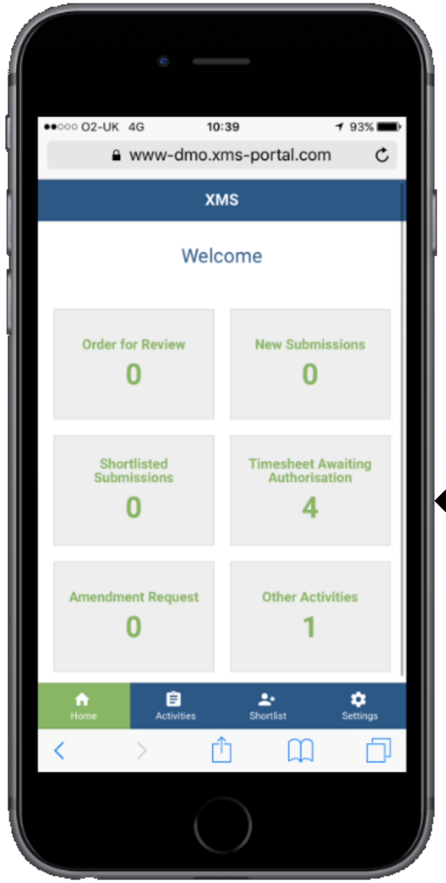
https://www.xms-portal.com/xms/login/auth



Open XMS in your internet browser and enter your Username and Password

XMS is compatible with a range of devices including Apple iPhone, Android and Windows Mobile.

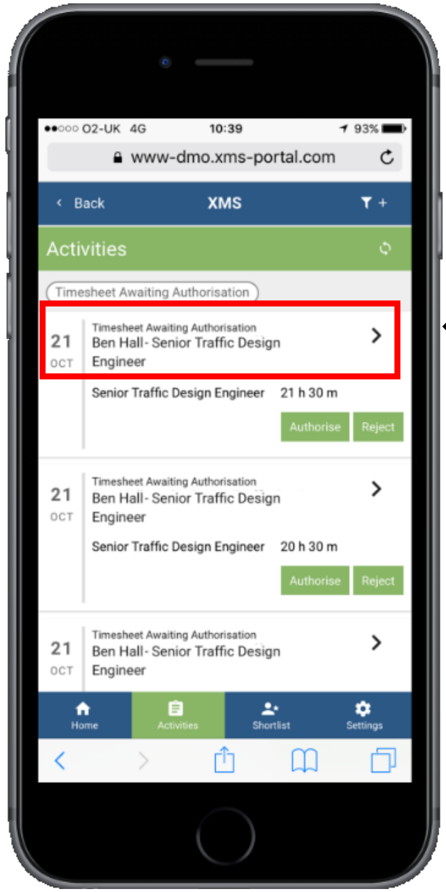
Step 2 – Press the Awaiting Authorisation pod



Press Timesheets Awaiting Authorisation to view timesheets

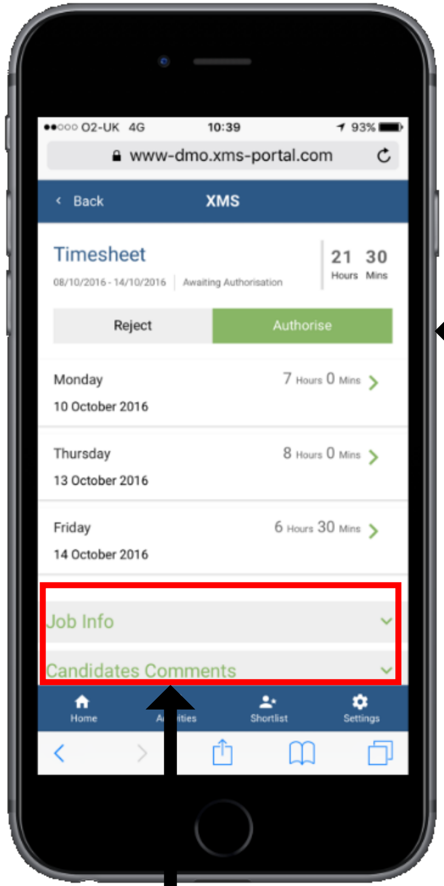
How to Authorise a Timesheet from a Mobile Device

Step 3 – Select timesheet to view details



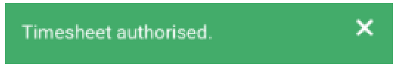
Select the timesheet to view the details

Step 4 – Review the timesheet details



Check the hours are correct and then click on **Authorise**

N.b. you will receive a authorisation



Click on the Job Info and Candidate Comments to view more information

If you have any further issues or questions, please contact the XMS Helpline on 0208 274 4500

Managed Agency Privacy Notice

Reed Specialist Recruitment Limited (“REED”) is part of the REED Group of companies. REED acts as both a recruitment agency and a recruitment business, introducing job seekers to hirers for permanent and temporary vacancies respectively.

REED is often asked by its clients to manage their entire supply of temporary and permanent workers (referred to as ‘candidates’), which requires REED to process the personal data of candidates who are engaged or introduced by other recruitment businesses and are supplied to REED’s clients via REED.

This document explains how REED uses the personal data it is given about candidates who are supplied or introduced to REED’s clients by other recruitment businesses.

This can include limited sensitive or special category personal data relating to criminal records or health (“sensitive personal data”). REED will only ask for sensitive personal data if clients require that information to be collected as part of the recruitment process. Clients and support suppliers must satisfy themselves that they are entitled to request and supply this information before they do so.

What information do we collect about support supplier candidates?

Support suppliers provide REED and its clients with personal data about the candidates they supply to REED clients as part of the recruitment process.

That personal data includes name, contact details, work history, employment preferences, references and the usual information contained on a CV.

Support suppliers may also provide REED with information relating to health or criminal records if the client deems that data relevant to the role they are seeking to fill and the support supplier is able to share that information.

What does REED do with the personal data?

As the personal data does not relate to candidates who are registered directly with REED, their personal data is only processed by REED in order to administer and facilitate their assignment with REED’s clients and for ensuring that clients and support suppliers are charged and/or paid as appropriate.

Support suppliers, REED and REED’s clients normally share this personal data using REED’s appointed e-procurement systems. These systems are referred to as vendor management systems.

Personal data that is uploaded to REED vendor management systems or to any other similar system can be viewed by REED, by the support suppliers who upload it and by the relevant REED clients.

Clients and support suppliers will both be data controllers for the purposes of the personal data that they access via REED vendor management systems (or any alternative system or process) and will need to review their processing arrangements with that in mind. Any questions about how support supplier agencies or clients use the personal data in their possession should be addressed to them directly.

Similarly, if clients require REED to use an e-procurement system of their choice in preference to REED’s own software, any questions about how the systems in question hold that personal data will need to be addressed with directly with the relevant client.

Marketing

REED does not market its services to candidates who are registered with support suppliers unless those candidates are also registered with REED, in which case a different privacy notice applies.

Data Sharing and Transfers

REED does not share the personal data of candidates engaged by support suppliers with anyone apart from their supplying agency and the client with whom they are on assignment.

Any personal data that is held by REED (for instance on REMAS, X3 and XMS) is stored securely on servers in the European Economic Area.

If clients require REED and REED’s support suppliers to use third party systems or software for processing candidate data, clients must satisfy themselves that the processing of candidate data using those systems is appropriate and lawful.