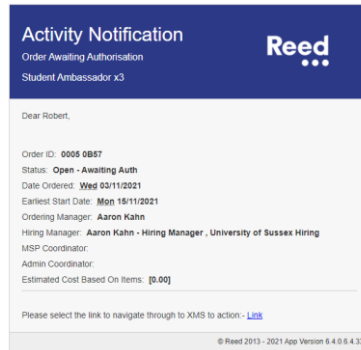


XMS User Guide

Level 3 Approver

How to Place an Order

Step 1 – Email Notification



You will receive an email from xms.noreply@xms-portal.com titled **Order Awaiting Authorisation** to let you know there is an outstanding request

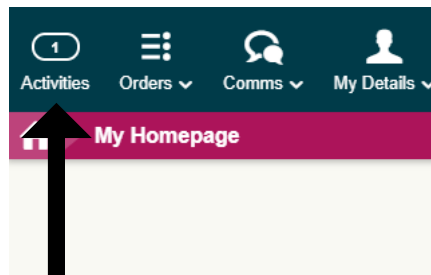
Step 2 – Login to XMS

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

Open **XMS** in your internet browser and enter your Username and Password
For best experience, use the Google Chrome browser

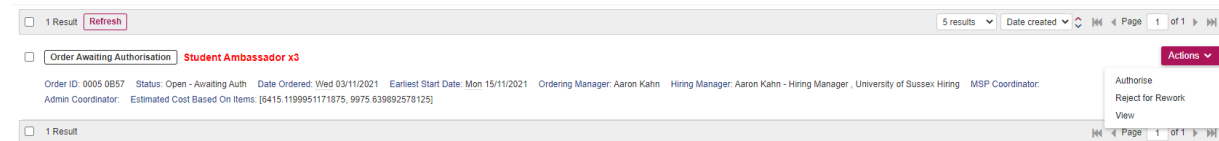


Step 3 – Open Your Activity Centre



Once in XMS, open your Activity Centre by clicking into **Activities** in the top left hand corner of the page

Step 4 – View the Order Notification



You will have a notification to advise you that the Order is Awaiting Authorisation. From here, go to **Actions - View** to open the Order page

How to Place an Order

Step 1 – View the Order Page

The screenshot shows the 'Order' page for 'Student Ambassador x3'. At the top, there's a breadcrumb trail: 'Order > Student Ambassador x3'. Below this, the 'Order Name' is 'Student Ambassador x3'. A progress bar shows the order status: 'Awaiting Auth.' (highlighted), 'Placed', 'Distributed', 'Part Filled', 'Filled', and 'Completed'. Below the progress bar is a table with columns: Job, Item ID, Status, Start Date, Address, Info, and Activities. One row is visible: 'Student Ambassador', '0005 0857 / 1', 'Open - Awaiting Auth.', 'Mon 15/11/2021', 'Cognitive Research Perception Centre, CRPC', and 'More info'. At the bottom, there's a red banner that says 'Mandatory fields need completing.' with an 'Edit Item' button.

On the Order page, you can view the basic details of the Order and XMS will flag that there are mandatory fields which need to be completed. Click **Edit Item** to open the full Item page

Step 2 – Review the Item

The screenshot shows the 'Item' page for 'Student Ambassador [0005 0857 / 1]'. The page has a left-hand navigation menu with tabs: Overview, Details, AWAK, and Address. The 'Overview' tab is active. It shows fields for 'Title' (Student Ambassador), 'Quantity' (2), and 'Positions Filled' (30). There are dropdown menus for 'Type of Working' (Student) and 'Student to Casual Worker' (Student). A section titled 'Description' contains a text area with a note: 'Please note if no job description is attached Description box below needs to populated or a file attached.' Below this is a 'Name of Worker Details (if applicable)' field.

On the Item page, you can review all the details of the role which has been requested. Details are split between tabs on the left hand side.

Step 3 – Add Approval Notes and Save

The screenshot shows the 'Approval Notes' field at the bottom of the page. The field is empty and has a red border with the text 'The field is required.' below it. To the right of the field is a 'Save' button. An arrow points from the text box below to the 'Approval Notes' field.

At the bottom of the page there will be an **Approval Notes** field which is mandatory for you to complete. Complete this and click **Save**

Step 4 – Authorise the Order

This screenshot is identical to the one in Step 1, showing the 'Order' page for 'Student Ambassador x3'. An arrow points from the text box below to the 'Authorise' button in the 'Actions' dropdown menu at the top right of the page.

You will be returned to the Order page, where you can go to **Actions -> Authorise** to approve the Order. *Once you have authorised, the Order will be sent to the HR team for a second authorisation.*

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.