



# **Client User Guide**

## **8.0.1.2**

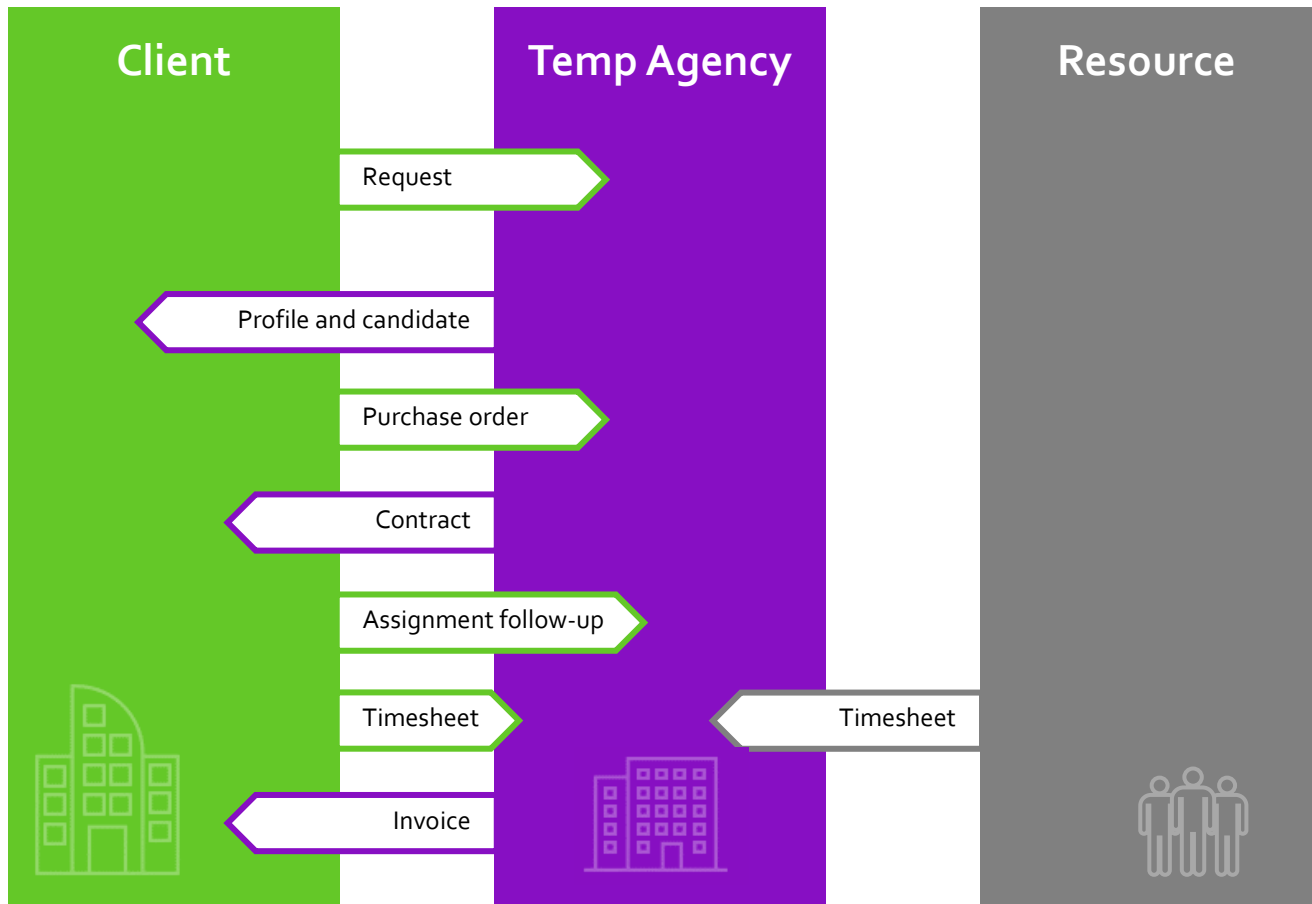
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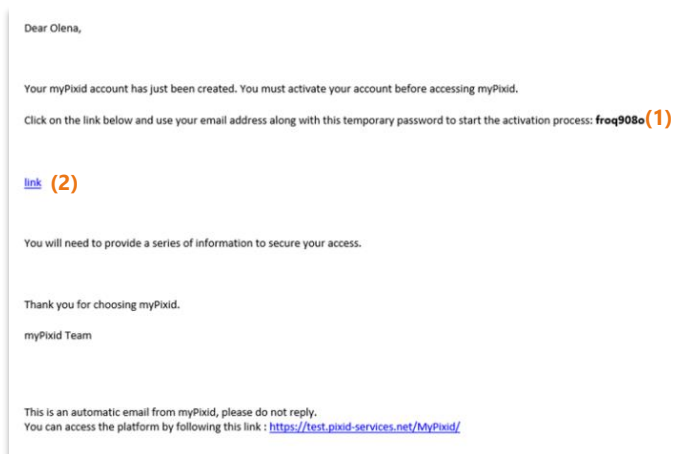
## 1. General process workflow

The process flow displayed below shows the types of exchanges that can be digitalised with the use of Pixid VMS platform. This guide is addressed to the users performing the actions of the user representing a Client (green).



## 2. myPixid account activation

Activating your account is a necessary step before you can access Pixid VMS. Please use the **account creation email** to complete this step.





Use the email information to start activating your account:

- (1) Copy the **temporary password**.
- (2) Click on the **link**.



Username

Password   

- (3) Enter your email address in the **Username** field.
- (4) Paste the temporary password in the **Password** field.
- (5) Click on **GO!**




Blocked your account or forgot your password?  
Click [here](#)

## 2.1. Terms of Use

The following screen will allow you to read and accept the **Terms of Use**.

**Be sure to read all pages** using the arrow buttons at the top or the vertical scrollbar on the right side of the viewing window.



(6)

### General Terms of Use

**my pixid**

You may only tick the box below after having viewed the entire document.

☐ I have read and agree to the Terms of Use. (7)

I do not agree to the Terms of Use (8) Agree to the Terms of Use

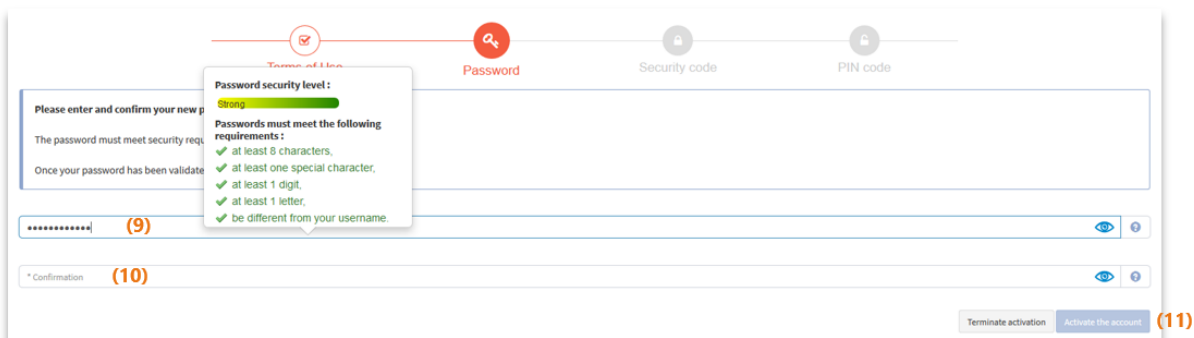
(6) Display and read **all the pages** of the Terms of Use.

(7) Check the **I have read and agree to the Terms of Use** box.

(8) Click **Agree the Terms of Use** to go to the next screen.

## 2.2. Password

The **Password** screen allows you to set a new personal password which will be required to connect to the Pixid VMS platform.



Terms of Use Password Security code PIN code

Please enter and confirm your new password

The password must meet security requirements:

Once your password has been validated

\*\*\*\*\* (9)

\* Confirmation (10)

Terminate activation Activate the account (11)

Password security level: Strong

Passwords must meet the following requirements:

- ✓ at least 8 characters,
- ✓ at least one special character,
- ✓ at least 1 digit,
- ✓ at least 1 letter,
- ✓ be different from your username.

Only passwords that meet the **security requirements** may be accepted. You can view your entry at any time by clicking on .

(9) Set your new password according to the **security requirements**.

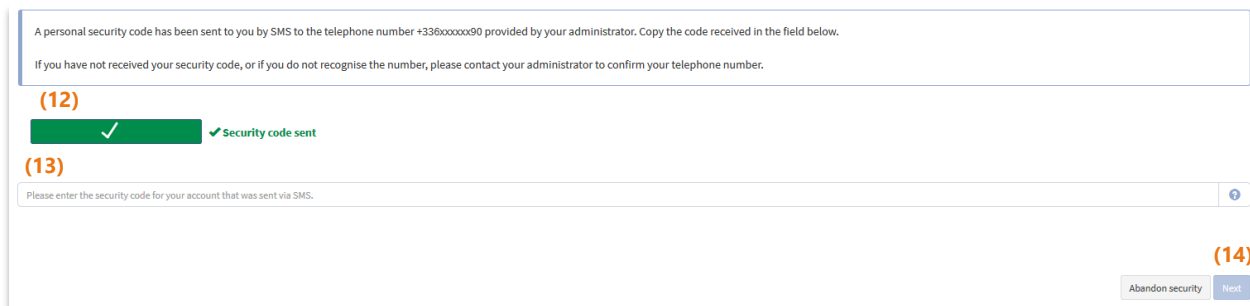
(10) **Confirm** your password.

(11) Click **Activate the account** to move to the next step.

## 3. Secure your myPixid account

### 3.1. Security code

Securing your account **guarantees your identity** and allows you to **electronically sign your documents** on myPixid. The information defined on the following screens **commits your responsibility** and is **strictly confidential; it must not be divulged to any third party**.



(12) A personal security code has been sent to you by SMS to the telephone number +336xxxxxx90 provided by your administrator. Copy the code received in the field below. If you have not received your security code, or if you do not recognise the number, please contact your administrator to confirm your telephone number.

✓ Security code sent

(13) Please enter the security code for your account that was sent via SMS.

(14) Abandon security Next

Please use the phone number that has been communicated to your agency to carry out the next step.

A **Security code** is sent **on demand** to the phone number you have provided to your agency. This 4-digit code is valid for **15 minutes**.

- By text message using your mobile phone number.
- By phone or voice message using your landline (the code will be communicated to you after a few seconds if you answer the call or it will be left on your voicemail if necessary).

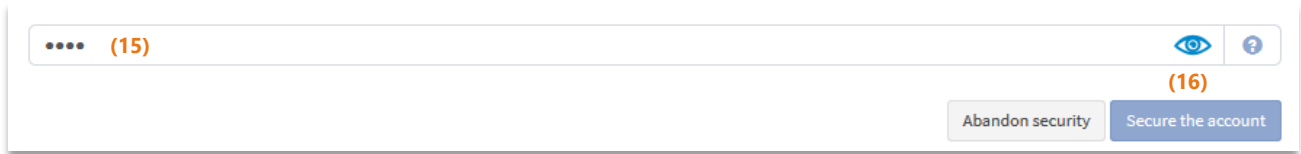
If you have not received the **Security code**, check the number displayed on the screen or contact your agency. If your code has expired, click again on **Send me a security code**.

- (12) Click **Send me a security code** (a message will confirm that the code has been sent).
- (13) Enter the **4-digit code received on your mobile or landline**.
- (14) Click **Next** to go to the next screen.

## 3.2. PIN code

The PIN code you will be setting up in this step, will be requested for each act of signature on Pixid VMS.

- (1) Set a **4-digit PIN**.
- (2) Click **Secure the account** to complete the security process.

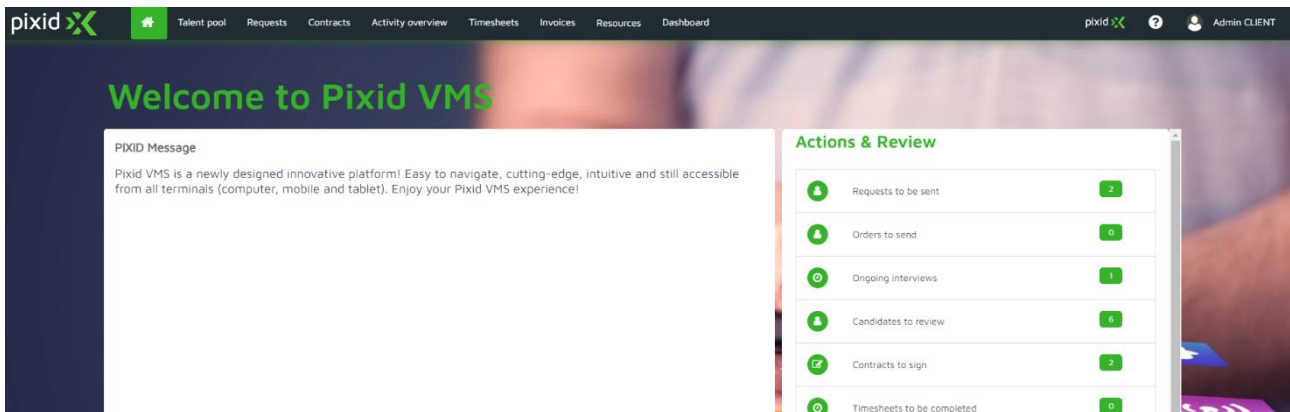


All the information defined during your first access can be modified by clicking on **My account** in the menu displayed under your name (top right corner).

**Your account is activated and secured!**  
**You can now access Pixid VMS!**



## 4. Your Pixid VMS environment



The top menu shows the modules that you can access:

- **Home screen:** Click on the Pixid logo or the house icon to return to the home screen.
- **Talent pool:** Create a pool to source for talent in a specific timeframe and job category.
- **Requests:** Create candidate requests or resource orders and manage applications.
- **Contracts:** Sign, store, and view list of assignment contracts.
- **Activity overview:** Follow the different assignments and their statuses.
- **Timesheets:** Complete or validate the timesheets.
- **Invoice:** Access and download the invoices.
- **Resources:** Search and view the resources' details (assignments, documents, etc.).
- **Dashboard:** Preview and select the dashboards you want to display on the welcome page.
- **Self:** Through the question mark icon you can enter the support environment.
- **Profile:** The profile icon gives you access to your profile settings.

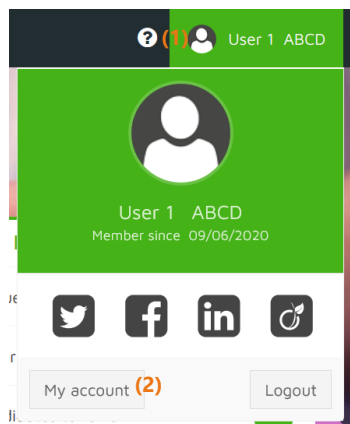
The **Pixid Message Box** provides you updates on useful information.

The **Actions & Review** list appears on the right side of your environment and indicates when an action is required on your side.

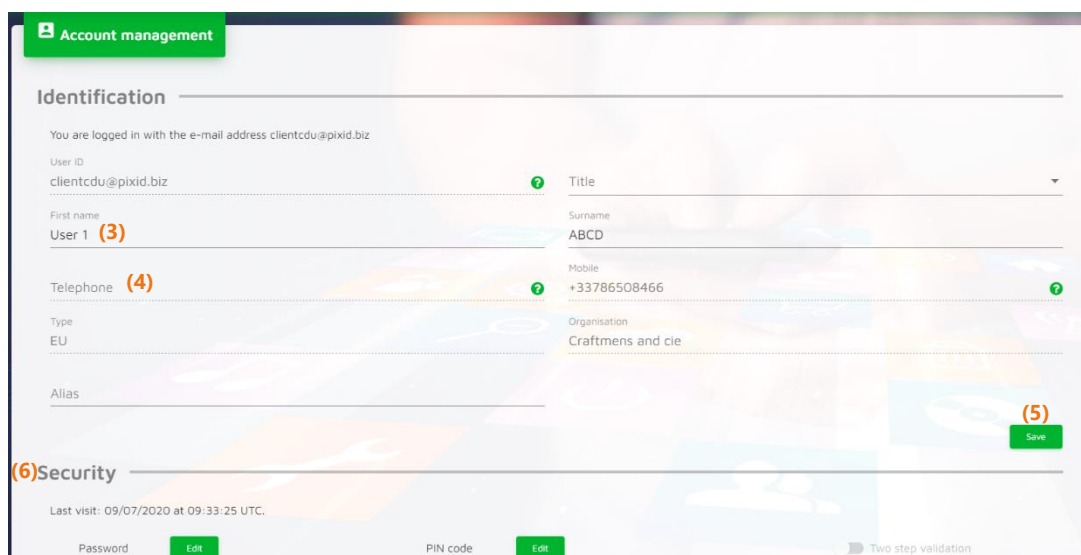
In the following chapters the modules will be explained in detail.

## 5. My account

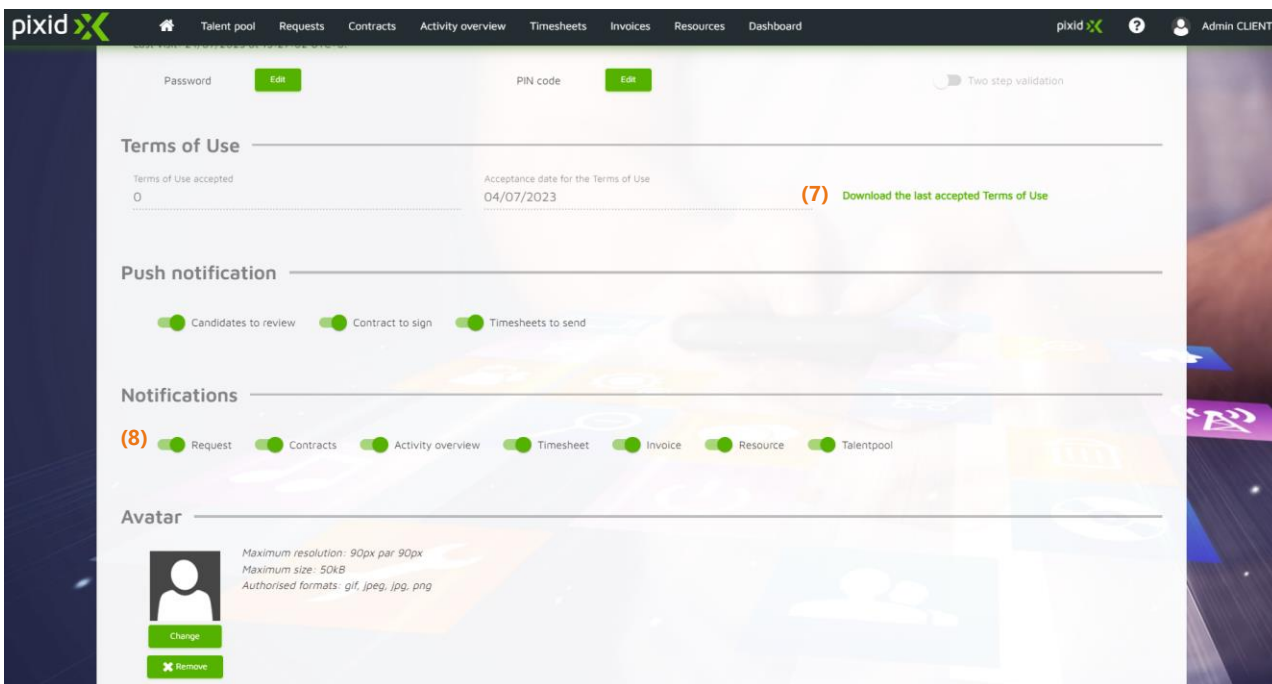
The **My account** module is where you can set your personal account preferences including password, PIN code, and language. In addition, you can review terms of use and set security verification.



- (1) Click on the **Profile** icon in the top right.
- (2) Click on **My account**.

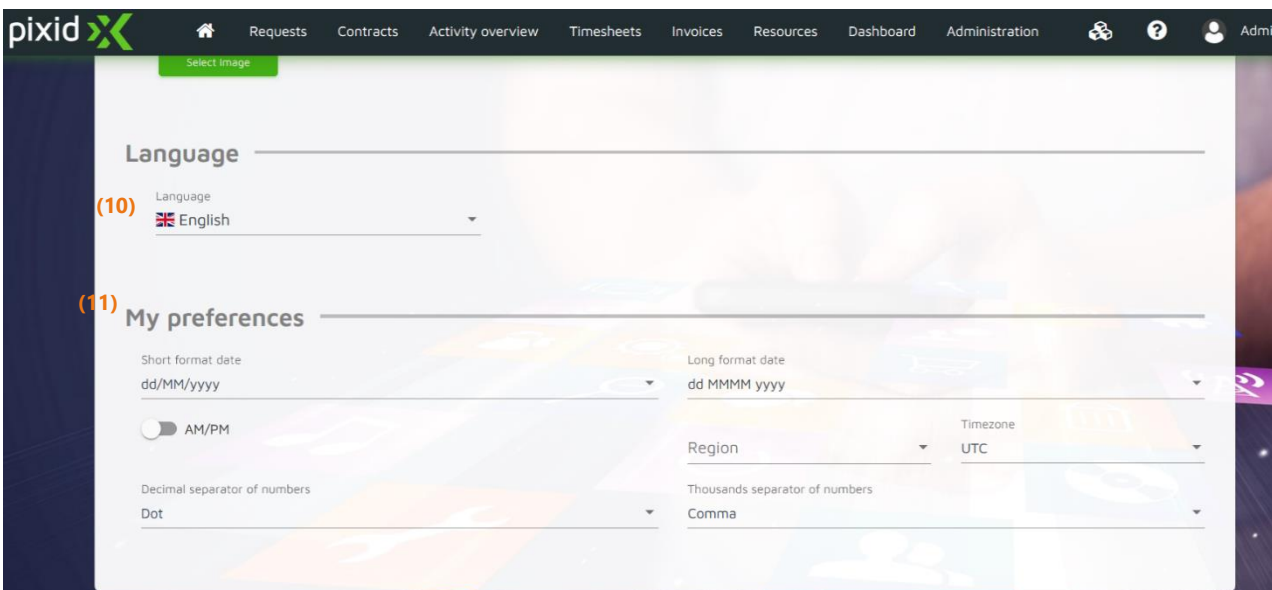


- (3) Change your **title**, **first name**, or **last name** if needed.
- (4) Contact your administrator to update your **telephone number** or **email address**.
- (5) Click **Save** to retain changes.
- (6) Edit your security settings including **password** and **PIN code**.



The screenshot shows the 'Admin CLIENT' profile page. At the top, there's a navigation bar with links: Talent pool, Requests, Contracts, Activity overview, Timesheets, Invoices, Resources, and Dashboard. Below this, the profile section includes fields for Password and PIN code, both with 'Edit' buttons. A 'Two step validation' toggle is also present. The 'Terms of Use' section shows the acceptance date as 04/07/2023 and a link to download the last accepted Terms of Use, marked with a red (7). The 'Push notification' section has three toggle switches for 'Candidates to review', 'Contract to sign', and 'Timesheets to send', all of which are turned on. The 'Notifications' section has a red (8) and a row of toggle switches for 'Request', 'Contracts', 'Activity overview', 'Timesheet', 'Invoice', 'Resource', and 'Talentpool'. The 'Avatar' section shows a placeholder image with instructions on resolution (90px par 90px), size (50KB), and formats (gif, jpeg, jpg, png), along with 'Change' and 'Remove' buttons.

- (7) Download the last accepted version of **Terms of Use**.
- (8) By activating the green button select the **push notifications**.
- (9) By activating the green button select the modules you want to **receive email notifications** for.

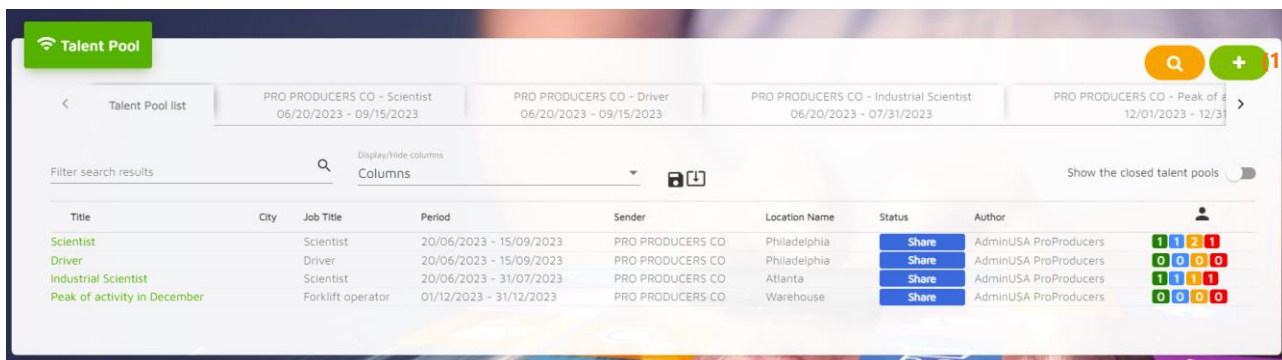


The screenshot shows the 'Administration' tab of the profile page. The 'Language' section has a dropdown menu currently set to 'English', marked with a red (10). The 'My preferences' section, marked with a red (11), contains several settings: 'Short format date' (dd/MM/yyyy), 'Long format date' (dd MMMM yyyy), 'AM/PM' toggle (set to AM), 'Region' dropdown, 'Thousands separator of numbers' (set to Comma), 'Decimal separator of numbers' (set to Dot), and 'Timezone' (set to UTC).

- (10) Select your **language** preference.
- (11) In the "**My preferences**" tab you can selection the dates and hours format displayed in the platform. You can also choose a time zone and separators of numbers.

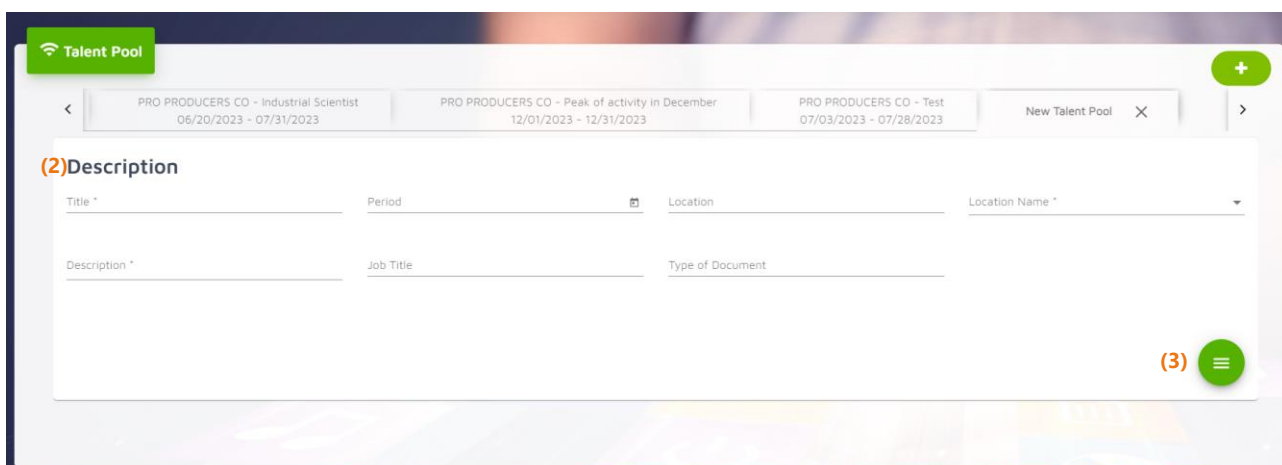
## 6. Talent Pool

The **Talent Pool** module allows you to **create** a pool to source for talent in a specific timeframe and job category.



### 6.1. Create a new Talent Pool

(1) Click on **+** to access the creation of a new Talent Pool.



(2) Enter all the **required data**: (\* = mandatory)

**Title (\*)** = name of job position

**Description (\*)** = Short description can enter any valuable information (for example - why the sourcing is needed, expectations, job description etc.)

**Period (\*)** = for what time period the talent should be sourced

**Location** = location of the workplace

**Location Name (\*)** = department/location of client structure

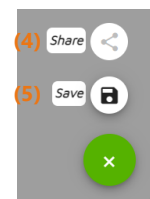
**Job Title** = name of position

**Type of document** = required document(s) from the resource

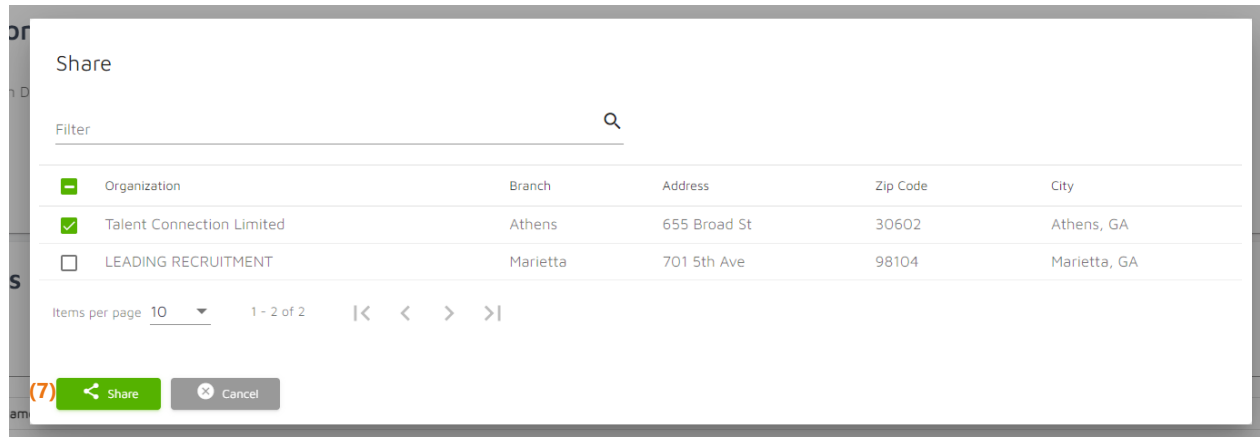
(3) Click on the  button on the right bottom.

(4) Select **Share** to forward the talent pool to your agency(ies).

(5) Select **Save** to create a private talent pool, which can still be edited and only seen by you.




(6) If Share has been selected, a pop-up will appear where the agency(ies) **to share the talent pool** with can be selected.



(7) After clicking the check boxes at the selected agency(ies), click on **Share**.

(8) Now a talent pool has been created and the agencies can send resources.

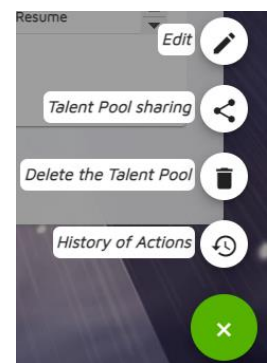
(9) By clicking on the  button on the right bottom, a setting menu opens, which can:

**Edit** the created Talent Pool

**Talent Pool sharing**, to modify the current sharing or share it if the Talent Pool was private

**Delete the Talent Pool**

To see **History of Actions**

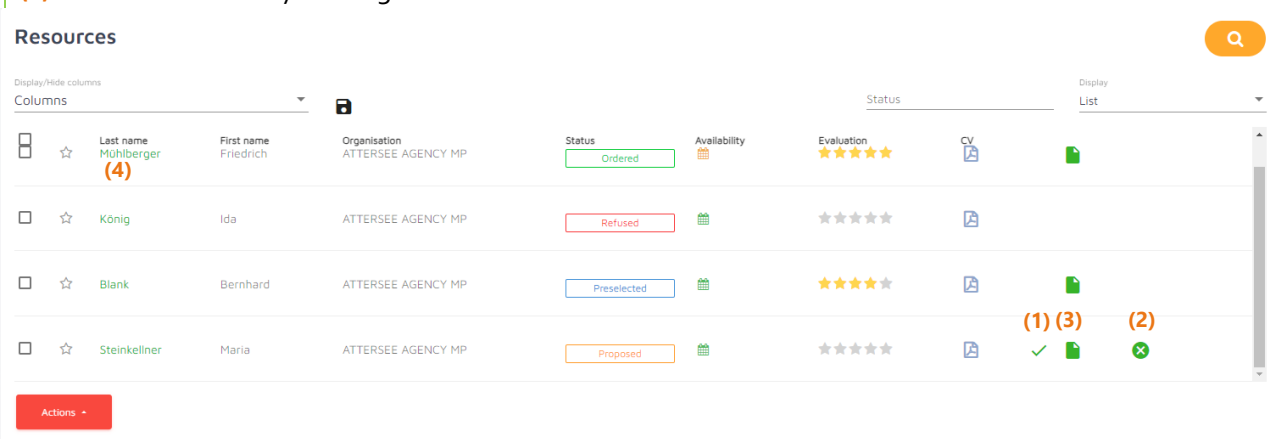


## 6.2. Accept or refuse resources

(1) Accept a resource by clicking on the  button.


(2) Refuse a resource by clicking on the  button.

(3) Order a resource by clicking on the  button.



The same actions can be done in the display "Tiles".

(4) You can view the profile of the resource by clicking on the name or on the  button.







**Steinkellner Maria**

★★★★★

Proposed

**Organisation** ATTERSEE AGENCY MP  
**Resource ID** 000082393  
**Address** WienAT  
**Organisation** ATTERSEE AGENCY MP  
**City** Wien  
**On assignment** No  
**Date of submission** 22/06/2023 at 07:42:04 UTC+0

(1) (3) (2) (4)

## 6.3. Search in a talent pool

- (1) If resources were added it's possible to **search** within the list (on name, ID, or location name).
- (2) Click on **Display** and select the type of presentation of the candidatures. The candidatures can be displayed in list or in tiles.
- (3) Start typing the candidature **Status** you want to see in the Resources tab.

The **different statuses** are:

Preselected = The candidate was accepted by the client.

Refused = The candidate was declined by the client.

Proposed = The resource was added to the talent pool.

Ordered = The client directly created an order through the talent pool for this candidate.

Private = The resource/talent pool is not shared with the client.

Closed = The talent pool is no longer available.

Shared = The talent pool is shared with the client.

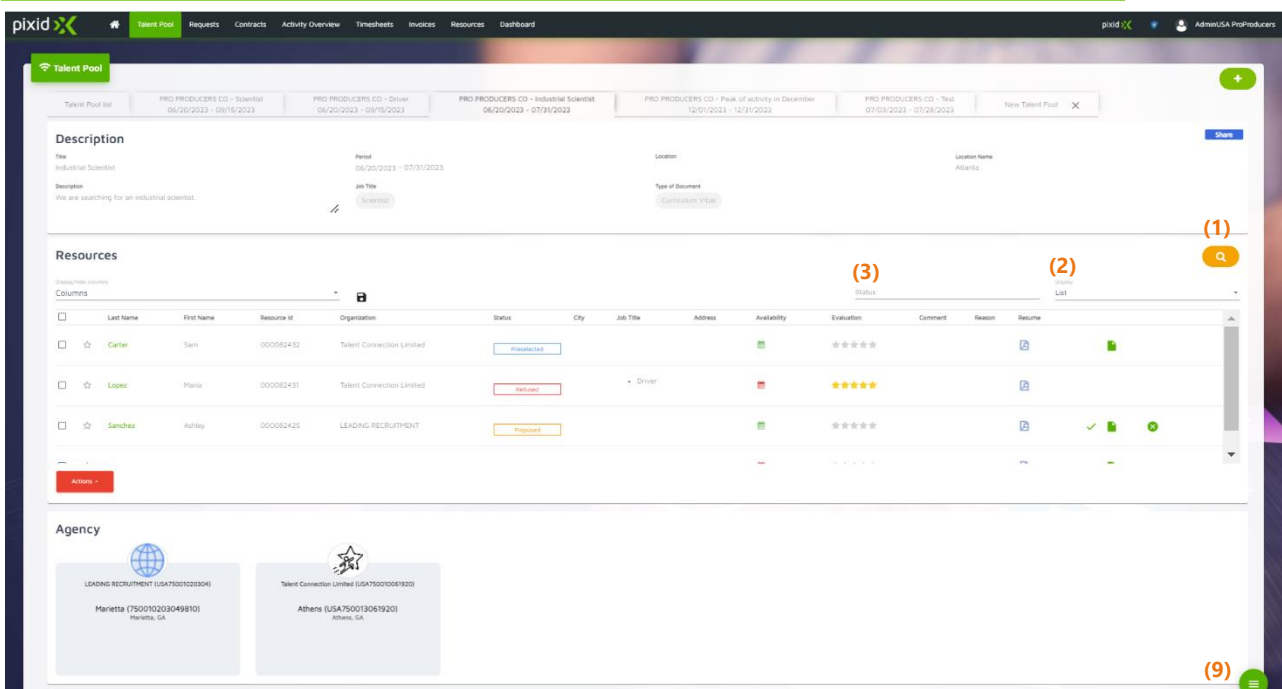
Status

Preselected

Refused

Proposed

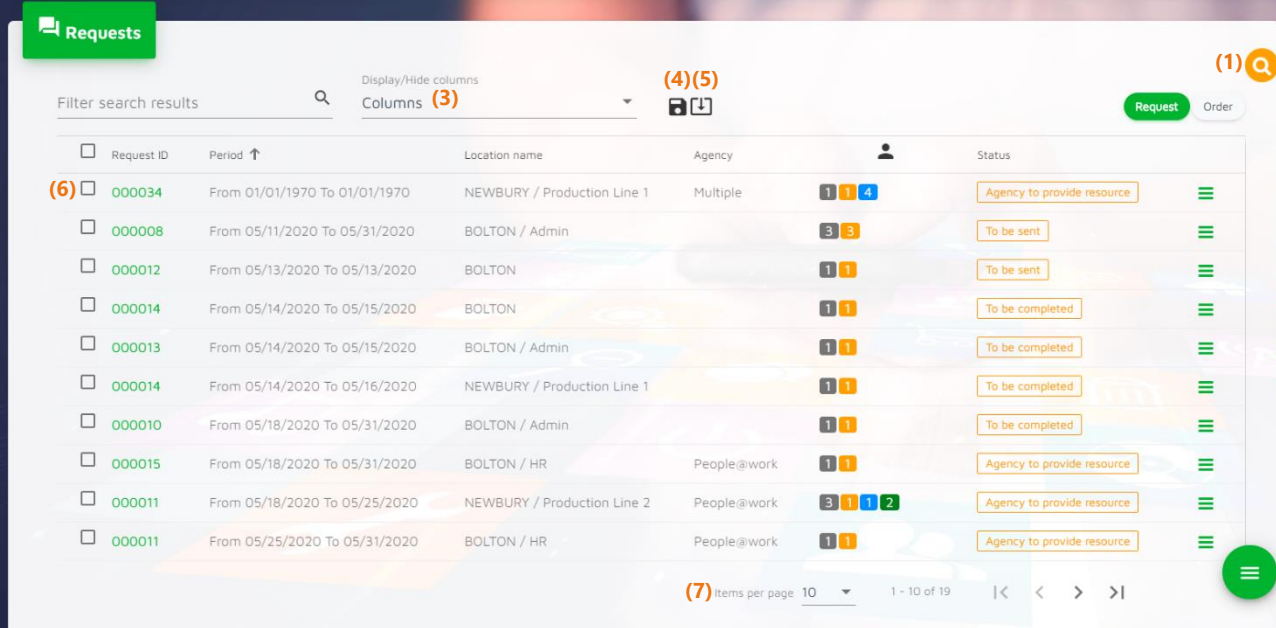
Ordered



The screenshot shows the 'Talent Pool' interface in the pixid application. At the top, there's a navigation bar with tabs like 'Talent Pool', 'Requests', 'Contracts', etc. Below this, a 'Description' section shows details for a 'Scientist' role. The main part of the interface is the 'Resources' table, which lists candidates with columns for Last Name, First Name, Resource ID, Organisation, Status, City, Job Title, Address, Availability, Evaluation, Comment, Reason, and Resume. Three callouts are present: (1) points to the search bar in the top right of the Resources section; (2) points to the 'Display' button above the table; (3) points to the 'Status' filter dropdown. At the bottom, there's an 'Agency' section showing logos for 'LEADING RECRUITMENT' and 'Talent Connection Limited'.

## 7. Requests




The **Requests** module allows you to **list** the staff requests for your organisation, **create** new requests, and **review** candidates.



The screenshot shows the 'Requests' module interface. At the top, there's a 'Requests' tab and a search bar. Below the search bar, there are options to 'Filter search results' and 'Display/Hide columns' with a dropdown showing 'Columns (3)'. There are also icons for saving and exporting. The main table has columns: Request ID, Period, Location name, Agency, and Status. The table contains several rows of requests. On the right side, there are buttons for 'Request' and 'Order'. At the bottom, there's a pagination bar showing 'Items per page: 10' and '1 - 10 of 19'.

Request ID	Period	Location name	Agency	Status
000034	From 01/01/1970 To 01/01/1970	NEWBURY / Production Line 1	Multiple	Agency to provide resource
000008	From 05/11/2020 To 05/31/2020	BOLTON / Admin		To be sent
000012	From 05/13/2020 To 05/13/2020	BOLTON		To be sent
000014	From 05/14/2020 To 05/15/2020	BOLTON		To be completed
000013	From 05/14/2020 To 05/15/2020	BOLTON / Admin		To be completed
000014	From 05/14/2020 To 05/16/2020	NEWBURY / Production Line 1		To be completed
000010	From 05/18/2020 To 05/31/2020	BOLTON / Admin		To be completed
000015	From 05/18/2020 To 05/31/2020	BOLTON / HR	People@work	Agency to provide resource
000011	From 05/18/2020 To 05/25/2020	NEWBURY / Production Line 2	People@work	Agency to provide resource
000011	From 05/25/2020 To 05/31/2020	BOLTON / HR	People@work	Agency to provide resource

### 7.1. Search and export

- (1) Click on  to access the multi-criteria search options.
- (2) Use the **Search box** to do a simplified search on one of the document's characteristics (Contract number, Client, Date, etc.). The filter will not display closed or cancelled requests or orders.
- (3) Choose the **columns to display** in the table. It can be useful to have a more precise export.
- (4) Click on  to save the display options.
- (5) Click on  to export the table data to **Clipboard** and **Print** or extract it to **Excel**, **CSV**, and **PDF**.
- (6) By clicking on a **request ID number**, the request details screen will open.
- (7) **Adjust the items** displayed per page.

### 7.2. List columns




The screenshot shows the 'Requests' module interface. At the top, there's a 'Requests' tab and a search bar. Below the search bar, there are options to 'Filter search results' and 'Display/Hide columns' with a dropdown showing 'Columns (3)'. There are also icons for saving and exporting. The main table has columns: Request ID, Period, Location name, Job title, and Status. The table contains several rows of requests. On the right side, there are buttons for 'Request' and 'Order'. At the bottom, there's a pagination bar showing 'Items per page: 10' and '1 - 10 of 19'.

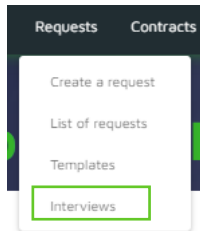
Request ID	Period	Location name	Job title	Status
000034	From 01/01/1970 To 01/01/1970	NEWBURY / Production Line 1	Electrician	Agency to provide resource
000011	From 05/18/2020 To 05/25/2020	NEWBURY / Production Line 2	Business Development Manager	Agency to provide resource
000015	From 05/18/2020 To 05/31/2020	BOLTON / HR	Electrician	Agency to provide resource

- (1) **Positions requested** indicates the initial number of vacancies in the request. (dark grey)
- (2) **Remaining position(s) to be filled** indicates the number of available vacancies in the request. (orange)
- (3) **Candidate(s) to select** indicates the number of candidates proposed to the client so far. (blue)
- (4) **Candidate(s) accepted** indicates the number of vacancies filled (candidates accepted by the client). (green)
- (5) **Status** indicates if the document is to be sent, awaiting resources from the agency(ies), or closed.





(6) Click on  to **Offer** candidates, **View** the request, or **Put forward** the request to sub-suppliers depending on its status.

## 7.3. Create a request template



In the menu "request" you can also find the category "templates". This functionality allows you to create templates for frequently used requests and let you prefill certain data.

By clicking on the  symbol, a new view will open where you can start to create your template. Fill out all the fields which would be practical for you to be prepopulated in a new request.

An already created template can be edited, duplicated, or deleted through clicking on the  symbol in the "Actions" column.

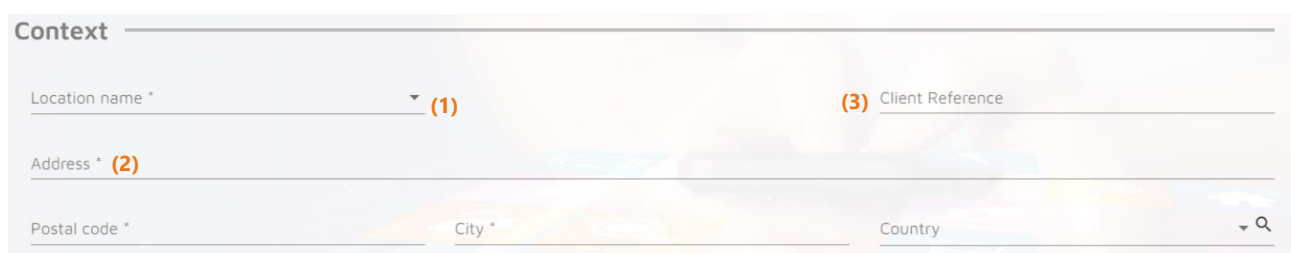
## 7.4. Create a request

From the Welcome page click on **Requests > Create a request** to start the request and order creation process.



Use the top selectors to add a request and receive applications (**Find a profile**), or select a resource with whom you have already worked, or received candidature for (**Request a resource**).

The **context** section allows you to select the specific location of the assignment within your organisation.



- (1) Use the **location name** dropdown list to **select the specific site location** you wish to associate with the assignment.
- (2) The **address** will automatically populate based on the site location selected but **can be edited if necessary**.
- (3) The **client reference** is an optional field that can be **used for tracking purposes** on both the client and agency sides.

The **assignment** section is used to describe the details of the job.

There are 3 different ways to fill in the working hours details, which will be explained in detail below:

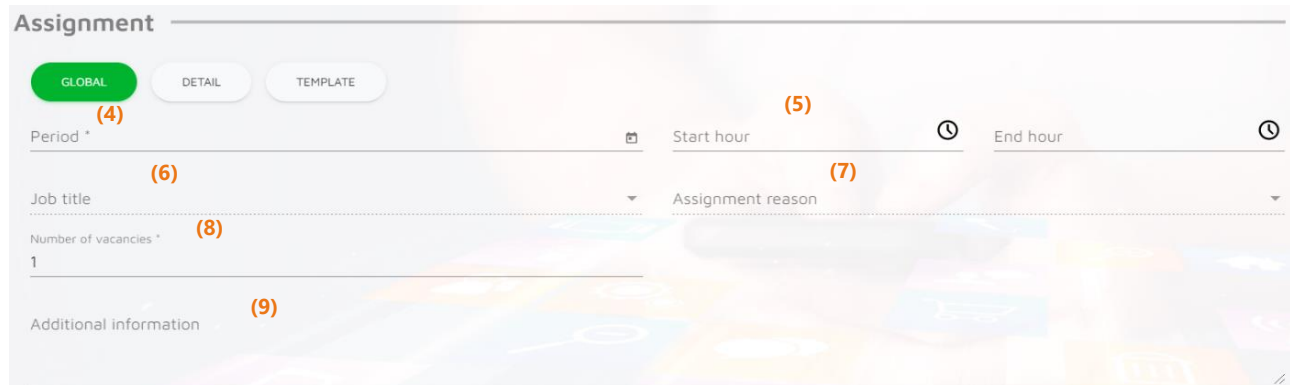
- If the start and end hour are the same for all assignment days → select the **Global** tab
- If every working days have a different start and end hour → select the **Detail** tab
- If every weekday has a specific start and end hour → select the **Template** tab



By default, the **Global** tab is selected but by choosing other tabs you can personalize the working hours and be more precise.

## Global tab

The **Global** tab can be used to choose a Start Hour and End Hour that will be the same for all assignment days.

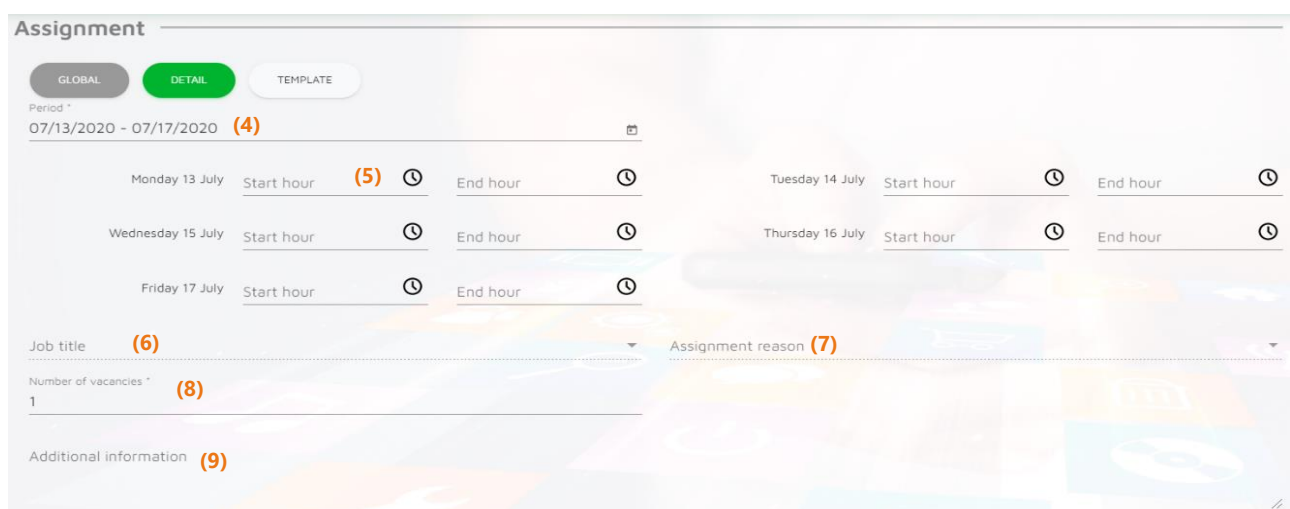


- (4) Select the **Start Date** and **End Date** (Period) of the assignment.
- (5) The **Start Hour** and **End Hour** fields are optional.
- (6) Use the **Job title** dropdown list to specify the profession requested.
- (7) Select the **Assignment reason** in the list. This field is optional.
- (8) Choose the **number of vacancies** to indicate the number of resources needed. This will automatically be defined to 1 if you decide to select a resource you have already worked with (Request a resource tab).
- (9) The **Additional information** box can be used to specify requirements (education, training, permit, speciality, shifts worked, starting time etc.).

**Note:** If you want to receive applications that include one or more resources you've already worked with you can use the Additional information box to specify the name(s).

## Detail tab

The **Detail** tab can be used to choose a customized **Start Hour** and **End Hour** for every assignment day.



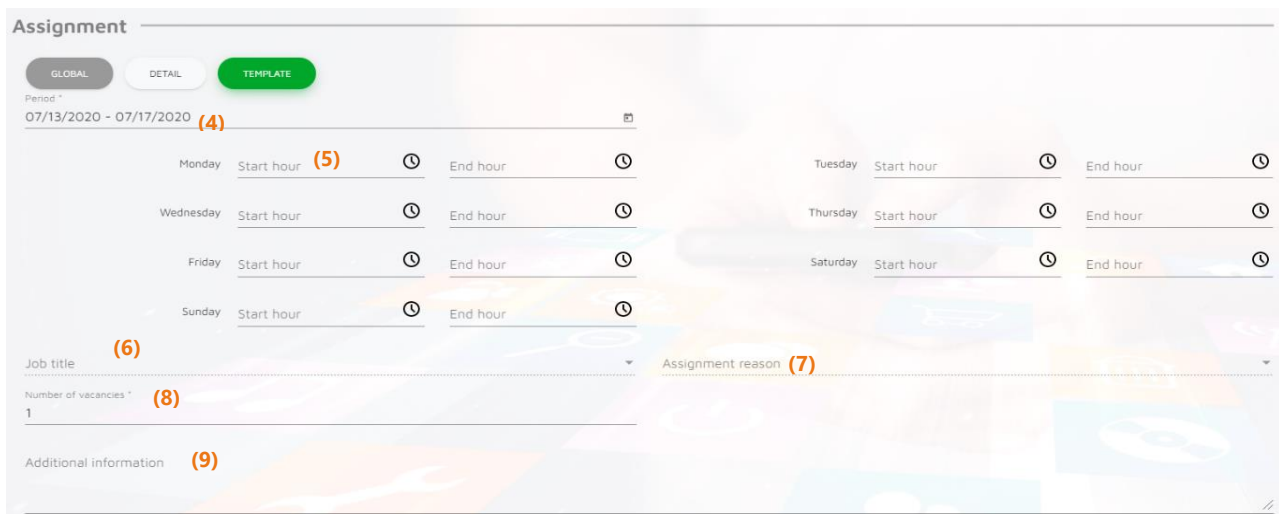
- (4) Select the **Start Date** and **End Date** (Period) of the assignment.
- (5) The **Start Hour** and **End Hour** fields are optional. By clicking on the **Detail** button, every assignment day can have specific working hours.
- (6) Use the **Job title** dropdown list to specify the profession requested.

- (7) Select the **Assignment reason** in the list. This field is optional.
- (8) Choose the **Number of vacancies** to indicate the number of resources needed. This will automatically be defined to 1 if you decide to select a resource you have already worked with (Request a resource tab).
- (9) The **Additional information** box can be used to specify requirements (education, training, permit, speciality, shifts worked, starting time etc.).

**Note:** If you want to receive applications that include one or more resources you've already worked with you can use the Additional information box to specify the name(s).

## Template tab

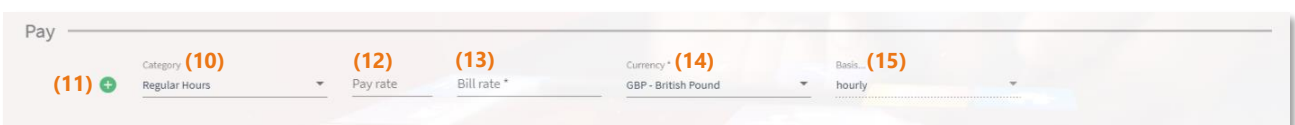
The **Template** tab can be used to define a specific **Start Hour** and **End Hour** for every weekday.



- (4) Select the **Start Date** and **End Date** (Period) of the assignment.
- (5) The **Start Hour** and **End Hour** fields are optional. By clicking on the **Template** button, every weekday can have specific working hours.
- (6) Use the **Job title** dropdown list to specify the profession requested.
- (7) Select the **Assignment reason** in the list. This field is optional.
- (8) Choose the **number of vacancies** to indicate the number of resources needed. This will automatically be defined to 1 if you decide to select a resource you have already worked with (Request a resource tab).
- (9) The **Additional information** box can be used to specify requirements (education, training, permit, speciality, shifts worked, starting time etc.).

**Note:** If you want to receive applications that include one or more resources you've already worked with you can use the Additional information box to specify the name(s).

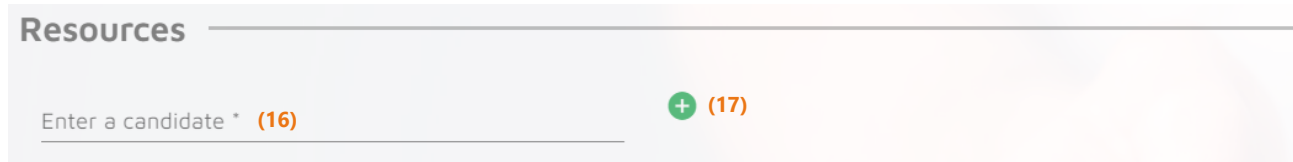
The **Pay** section can be used to indicate the wage of the Resource and the expected amount charged by the Agency.



- (10) The **Category** indicates the timely category chosen.
- (11) Click on **+** to add another category.
- (12) Use the **Pay rate** field to indicates the resource wage for the job performed.

- (13) The **Bill rate** indicates the expected amount charged by the Agency. The Bill rate is composed of the Pay rate and the amount to be charged for the Agency services.
- (14) Select the appropriate **Currency**.
- (15) Adapt the **Basis** for the rate calculation, if the automatic defined one is not suitable.

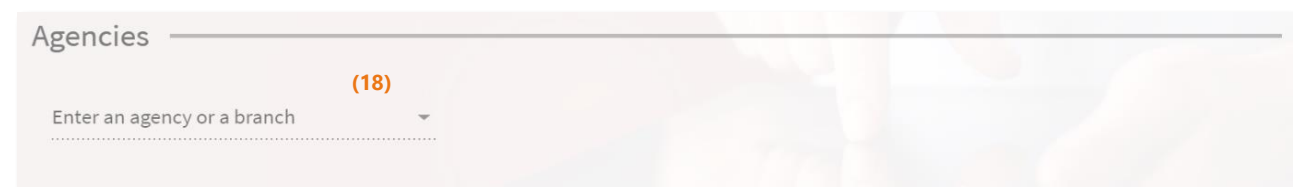
The **Resources** section is shown when selecting **Request a resource (Order)**.



The screenshot shows the 'Resources' section of the interface. It features a search bar with the placeholder text 'Enter a candidate \*' and a green plus icon button. The search bar is labeled with '(16)' and the plus icon is labeled with '(17)'.

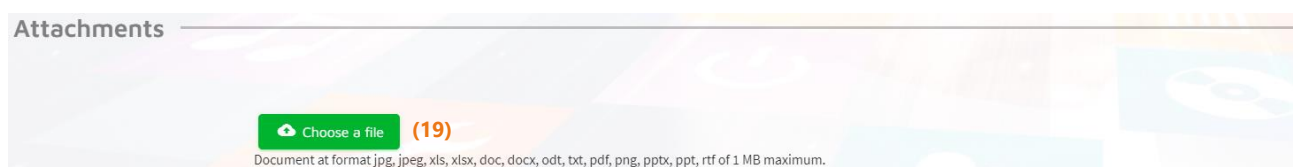
- (16) The **Resource** field can be used to look of a resource you have already worked with or who has already been proposed as a candidate for previous request. Start typing the name of the **Resource** you want to request and click on a proposed name to add it to the request. Only one specified resource can be given per Order.
- (17) Click on **+** to ask for a resource with who you've never worked before or who has never been proposed to you as a candidate by typing its first name and last name.

The **Agency** section is shown when selecting **Request a resource (Order)** and is used to look for an agency or a branch you have already worked with.



The screenshot shows the 'Agencies' section of the interface. It features a search bar with the placeholder text 'Enter an agency or a branch' and a dropdown arrow. The search bar is labeled with '(18)'.

- (18) Start typing the name of the **Agency** or the **Branch** to which you want to send your order and click on their name to add it to the recipient list. Your **Prime** Agency, if you have one, will automatically be selected and cannot be removed.



The screenshot shows the 'Attachments' section of the interface. It features a green button with a cloud icon and the text 'Choose a file'. Below the button, it says 'Document at format jpg, jpeg, xls, doc, docx, odt, pdf, png, pptx, ppt, rtf of 1 MB maximum.' The button is labeled with '(19)'.

- (19) Clicking on the button will open a new screen allowing you to upload a file from your computer. In case you want to add several files, repeat the action.



To finish creating your request or your order:

(20) Click on **Send** to transmit the request to the Agency. A pop-up window will open when selecting **Find a profile (Request)** to select the branch(es) you want to send it to. Default branches will automatically be selected but you can click on **All branches** to select others.

**A request will not be conveyed to the Agency until you click Send.**

(21) Click on **Save** to keep the request on your (Client) side, the document will be under the status **To be sent**.

(22) Click on **Save a draft** to keep the request on your (Client) side. The document will be under the status **To be completed**.

## 7.5. Review candidates

Once the **Request** is sent, your Agency will be able to propose candidates. You can review and select the candidates.

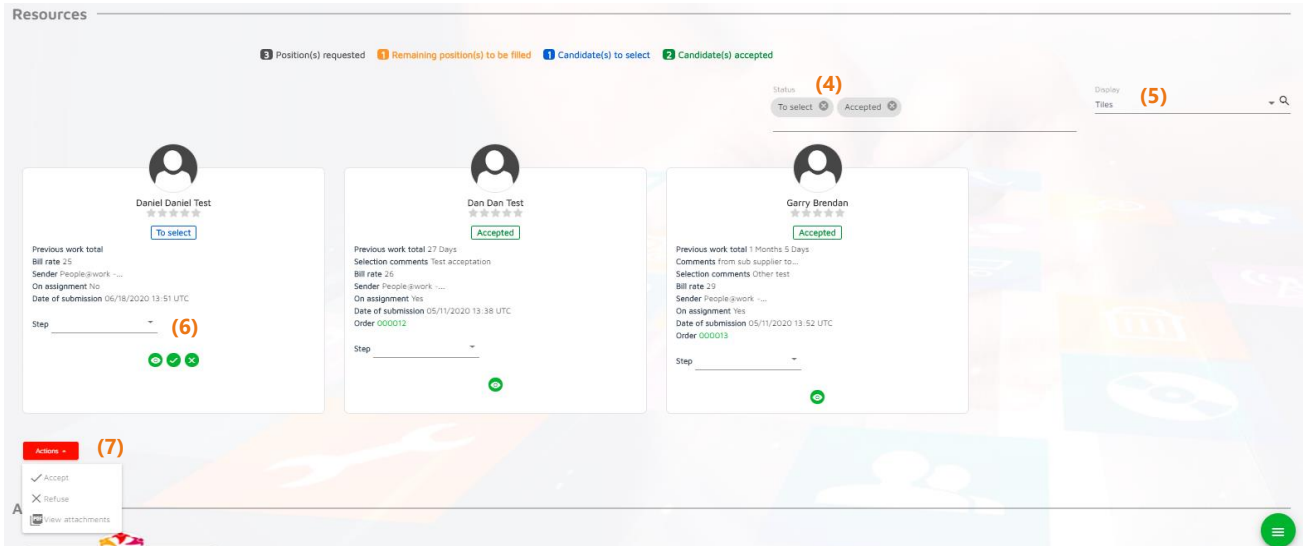
Request ID	Period	Location name	Agency	Status
000034	From 01/01/1970 To 01/01/1970	NEWBURY / Production Line 1	Multiple	Agency to provide resource
000008	From 05/11/2020 To 05/31/2020	BOLTON / Admin		To be sent
000012	From 05/13/2020 To 05/13/2020	BOLTON		To be sent
000014	From 05/14/2020 To 05/15/2020	BOLTON		To be completed
000013	From 05/14/2020 To 05/15/2020	BOLTON / Admin		To be completed
000014	From 05/14/2020 To 05/16/2020	NEWBURY / Production Line 1		To be completed
000010	From 05/18/2020 To 05/31/2020	BOLTON / Admin		To be completed
000015	From 05/18/2020 To 05/31/2020	BOLTON / HR	People@work	Agency to provide resource
000011	From 05/18/2020 To 05/25/2020	NEWBURY / Production Line 2	People@work	Agency to provide resource
000011	From 05/25/2020 To 05/31/2020	BOLTON / HR	People@work	Agency to provide resource

(1) Click on **Requests > List of requests** to display the ongoing requests.

(2) The **Request** tab will automatically be selected.

(3) The requests displaying a blue number <sup>2</sup> will have candidates to review. Click on the **Request ID** to display the Request detail page.

On the Request detail page, the **Resources** section will provide the profiles of resources that have been proposed by your agency(ies).

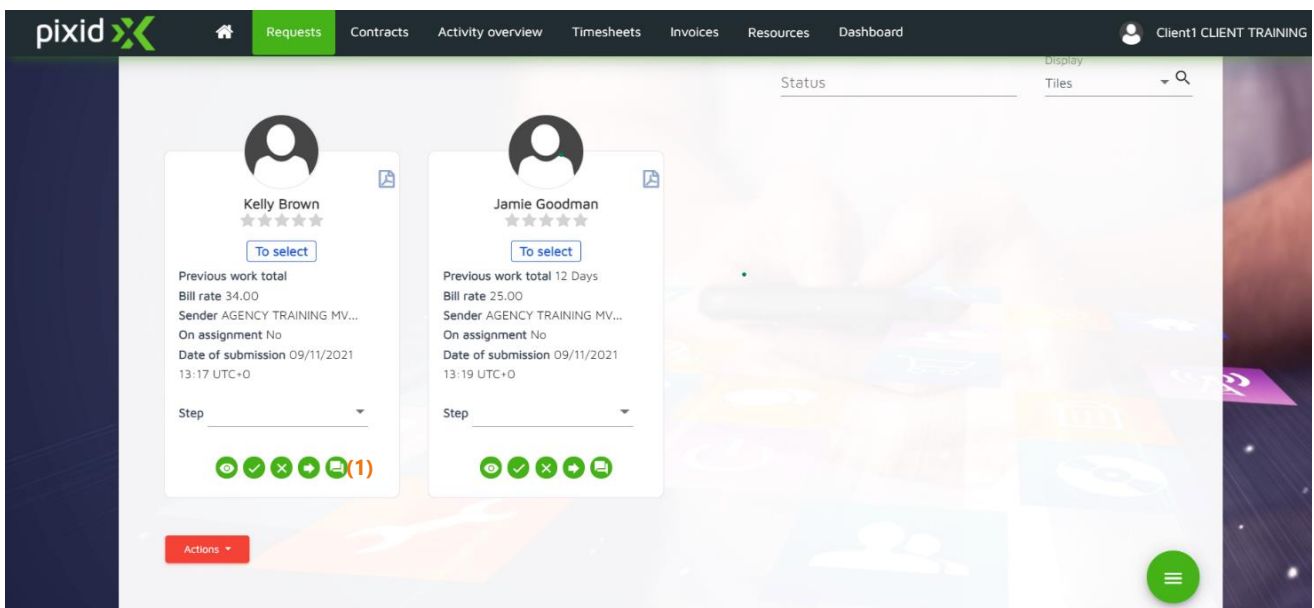


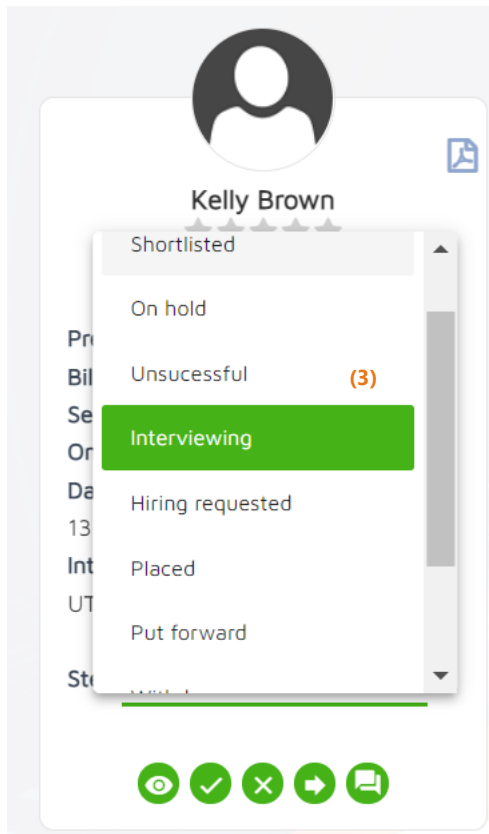
- (4) Start typing the candidature **Status** you want to see in the Resources tab.
- (5) Click on **Display** and select the type of presentation of the candidatures. The candidatures can be displayed in list or in tiles.
- (6) The **Step** button allows you to update the candidate status during the recruitment process.
- (7) Click on **Actions** to **View attachments**, **Accept**, **Refuse**, or **Put forward** the candidate to a non-Pixid user. View attachments will allow you to see the documents attached to the candidate profile. Refuse will change the status of the candidate to Refused and will notify the Agency that the candidate is not a fit for the assignment.

## 7.6. Interview Process

Click on **Requests > Interviews** to display the interview list.

- (1) Click the  icon to request an interview.
- (2) Fill in relevant interview information and click **Send**. The request will be sent to the agency.





- (3) Track the potential resource **steps** by selecting the appropriate progression description on the dropdown list. The selection of the steps and comments are visible to the agency.
- (4) Add **comment** if desired and **Save**.
- (5) The steps are tracked in the **journal**.

Interview request

Date

Hour

Attendees

Client1 CLIENT TRAINING

\*Separator ;

Address

Totton, Southampton, United Kingdom

Comment

(2)

Send

Cancel

Comment for the step

X

Comment

Scheduling interview for week of 13/12.

//

\* 150 characters maximum

(4)

Save

Cancel

Journal of steps <span>X</span>			
Date of selection step ↓	User	Step	Comment
(5) 09/12/2021 at 11:41:02 UTC+0	Client1 CLIENT TRAINING client1.client@pixid.biz	Interviewing	Scheduling interview for week of 13,

**pixid**

- Requests
- Contracts
- Activity overview
- Timesheets
- Invoices
- Resources
- Dashboard

Client1 CLIENT TRAINING

---

### Interviews

Filter search results 🔍 Status Status Display/Hide Columns 🗑️

<input type="checkbox"/> Last Name First Name	Interview date	Request id	Client location	Branch	Status	
<input type="checkbox"/> Brown Kelly	10/01/2022 15:00	000238	Southampton-Office/Contact Centre	LONDON	Scheduled	(6) Journal (7) ✕ Cancel
<input type="checkbox"/> Goodman Jamie	14/12/2021 17:00	000238	Southampton-Office/Contact Centre	LONDON	Scheduled	(8) Enter an interview report (9) ➡ Put forward (10) 👤 No show (11) ➡ Add to my agenda

Items per page 10 1 - 2 of 2

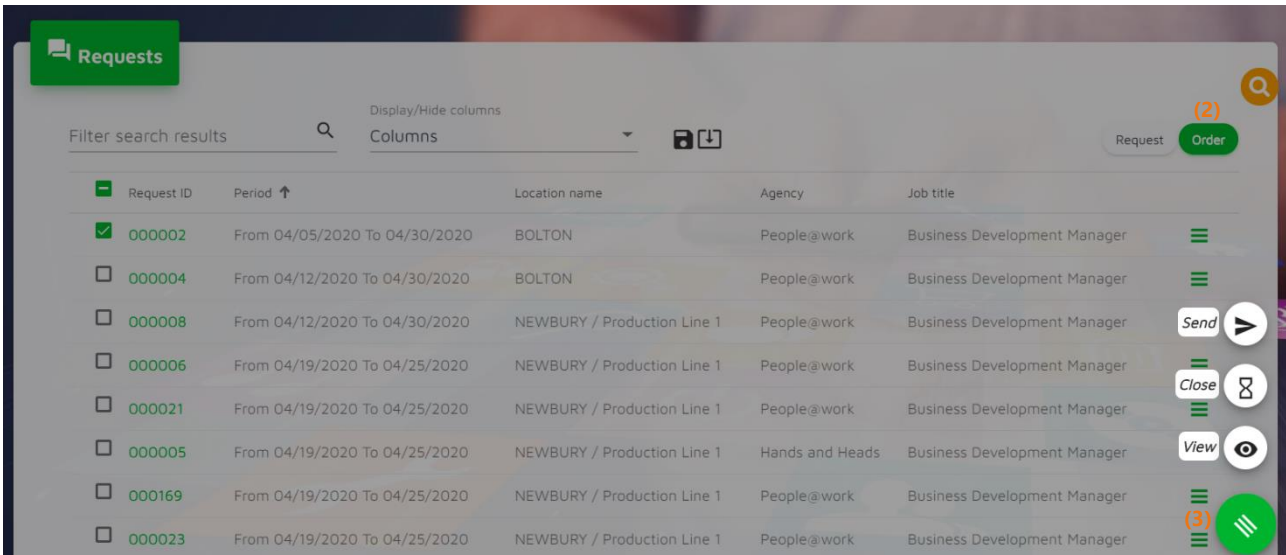
- (6) See the action history by click on the **Journal**.
- (7) **Cancel** the interview and notify the Agency.
- (8) **Enter an interview report** by attaching a document and comment, which is shared with the Agency.
- (9) **Put forward** the resource profile to another person who does or does not have a Pixid account.
- (10) **No show** to indicate that the candidate did not attend the scheduled interview.
- (11) **Add to my agenda** sends the meeting request to your external calendar.





## 7.7. Purchase Order

 The application of Peter WATKINS has been accepted and the purchase order 000003 has been created. (1)

- (1) When you **Accept** the candidate, the status changes to Accepted and a **Purchase Order** is automatically created with an incremented request ID number. The notification is displayed on top of the page.



Request ID	Period	Location name	Agency	Job title
<input checked="" type="checkbox"/> 000002	From 04/05/2020 To 04/30/2020	BOLTON	People@work	Business Development Manager
<input type="checkbox"/> 000004	From 04/12/2020 To 04/30/2020	BOLTON	People@work	Business Development Manager
<input type="checkbox"/> 000008	From 04/12/2020 To 04/30/2020	NEWBURY / Production Line 1	People@work	Business Development Manager
<input type="checkbox"/> 000006	From 04/19/2020 To 04/25/2020	NEWBURY / Production Line 1	People@work	Business Development Manager
<input type="checkbox"/> 000021	From 04/19/2020 To 04/25/2020	NEWBURY / Production Line 1	People@work	Business Development Manager
<input type="checkbox"/> 000005	From 04/19/2020 To 04/25/2020	NEWBURY / Production Line 1	Hands and Heads	Business Development Manager
<input type="checkbox"/> 000169	From 04/19/2020 To 04/25/2020	NEWBURY / Production Line 1	People@work	Business Development Manager
<input type="checkbox"/> 000023	From 04/19/2020 To 04/25/2020	NEWBURY / Production Line 1	People@work	Business Development Manager

- (2) Please note the **purchase order ID number**, search for it in the **List of orders**. To access the list of orders, click on **Requests > List of requests** and click on the **Order** tab.
- (3) Select the order, click on the menu button , and click on  to Send, Close, or View. By clicking on **View**, you'll access the order detail page where the order can be edited, closed, sent, and duplicated.

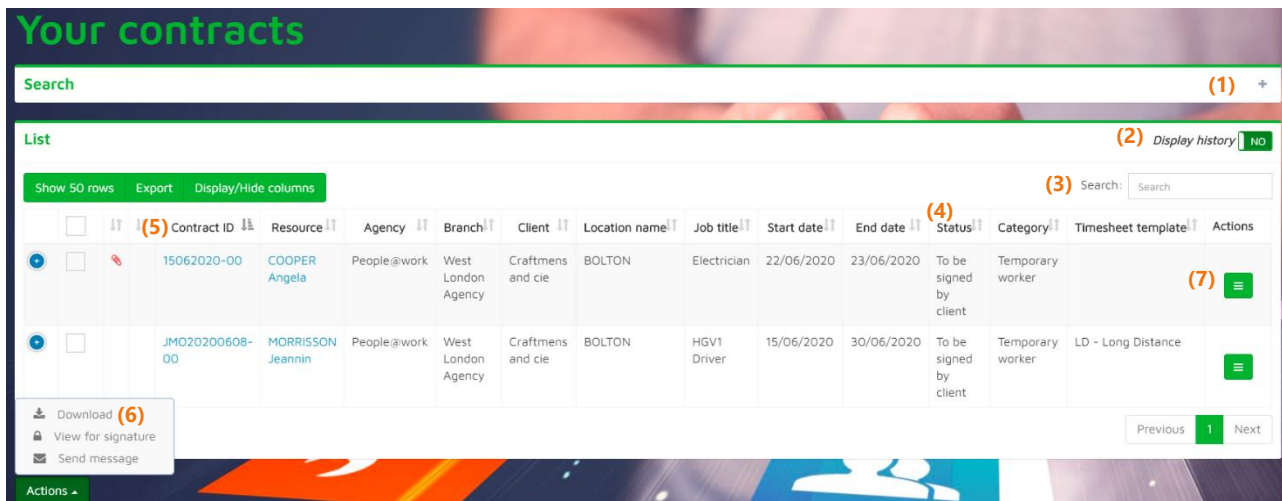
**Note:** If process flow requires you to accept the Resource and Order separately, make sure to send the Order to the Agency.



## 8. Contracts

The **Contracts** module displays the list of the contracts sent by your temp agencies on Pixid VMS. You can **browse**, **download**, and **sign** your documents.

### 8.1. Browse and download





**Your contracts**

Search (1) +

List (2) Display history NO


Show 50 rows Export Display/Hide columns (3) Search: Search

	(5) Contract ID	Resource	Agency	Branch	Client	Location name	Job title	Start date	End date	(4) Status	Category	Timesheet template	(7) Actions
<input type="checkbox"/>	15062020-00	COOPER Angela	People@work	West London Agency	Craftmens and cie	BOLTON	Electrician	22/06/2020	23/06/2020	To be signed by client	Temporary worker		
<input type="checkbox"/>	JMO20200608-00	MORRISON Jeannin	People@work	West London Agency	Craftmens and cie	BOLTON	HGV1 Driver	15/06/2020	30/06/2020	To be signed by client	Temporary worker	LD - Long Distance	

Download (6) View for signature Send message

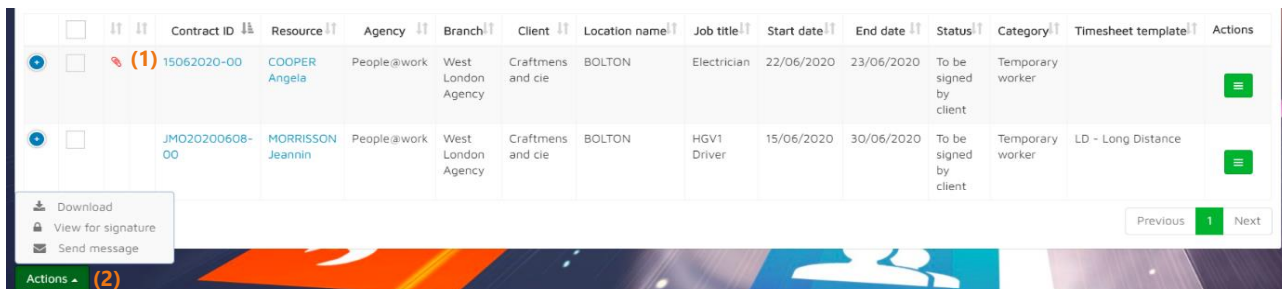
Previous 1 Next

Actions (2)

- (1) The **Search** panel (deployed when clicking on +) gives you access to the multi-criteria search options.
- (2) The **Display History** option can be activated if you want to display the signed or stored documents.
- (3) The **Search box** gives you the ability to do a simplified search on one of the document's characteristics (Contract number, Supplier, Job title, etc.).
- (4) The **Status** column shows if the document is signed, to be signed, archived, or stored.
- (5) Clicking on the **Contract ID** will display the document.
- (6) You can Download your contract(s) by ticking the corresponding tick boxes and clicking on **Actions** > **Download**.
- (7) You can also use the  button to access the **Actions** menu of each documents.

### 8.2. Sign your contract

The signature of your contracts is done directly on Pixid VMS. You can sign your documents one-by-one or in bulk.



**Your contracts**

Search

List

Show 50 rows Export Display/Hide columns


(1) 15062020-00 COOPER Angela People@work West London Agency Craftmens and cie BOLTON Electrician 22/06/2020 23/06/2020 To be signed by client Temporary worker

JMO20200608-00 MORRISON Jeannin People@work West London Agency Craftmens and cie BOLTON HGV1 Driver 15/06/2020 30/06/2020 To be signed by client Temporary worker LD - Long Distance

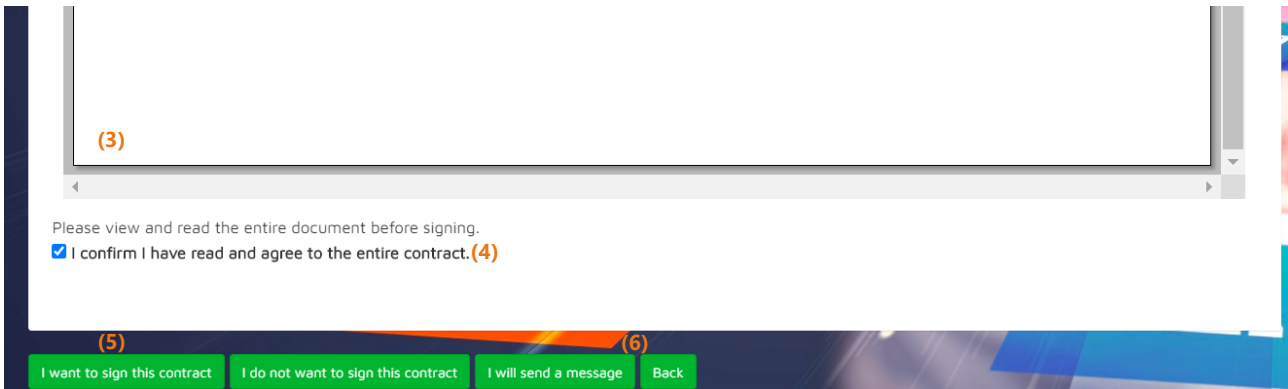
Download View for signature Send message

Previous 1 Next

Actions (2)

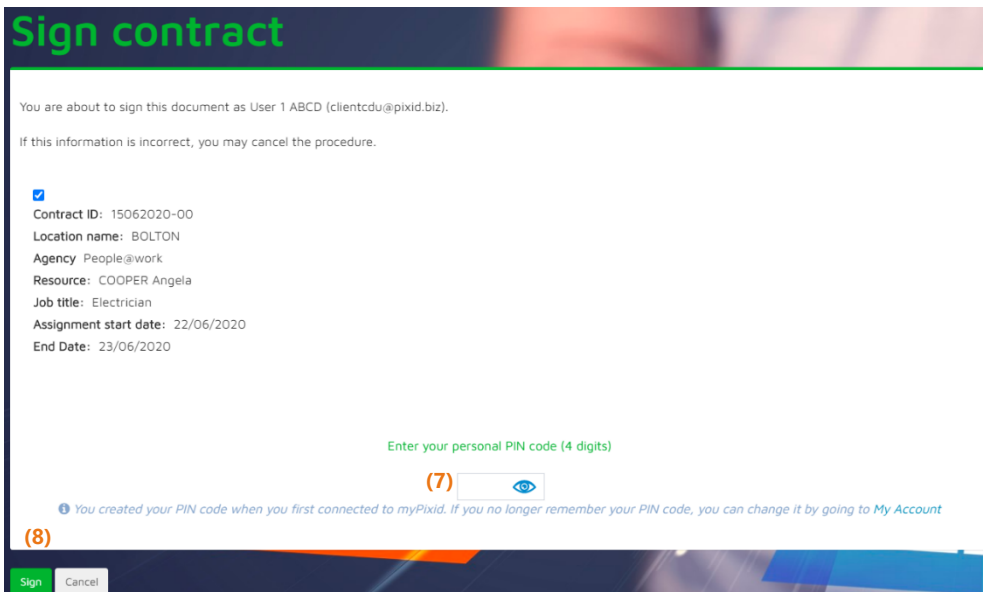
- (1) Click on the **Contract ID** to access the document.
- (2) Use the  or "Actions" button and click on **View for signature** to access the document.

**Note:** You can click on the tick boxes of the documents you wish to sign and use Actions > View for signature to bulk sign your documents.



The document displayed is either a pdf version of the contract prepared by your agency or an automatically generated document containing all the contractual information provided by your agency and serves for a confirmation of the assignment.

- (3) Display **all the pages** of the contract.
- (4) Check the **'I confirm I have read and agree to the entire contract.'** box.
- (5) Click **I want to sign this contract** button to go to the next screen.
- (6) Click **I will send a message** button if you have spotted a mistake in the contract, or you need to contact the Agency (e.g. the assignment will not take place).



To confirm the signature of your contract:

- (7) Enter your **PIN code** (chosen during your account securing). If you don't remember your PIN code, you can edit it by clicking on your username on the top right and on **My account - Security** tab.

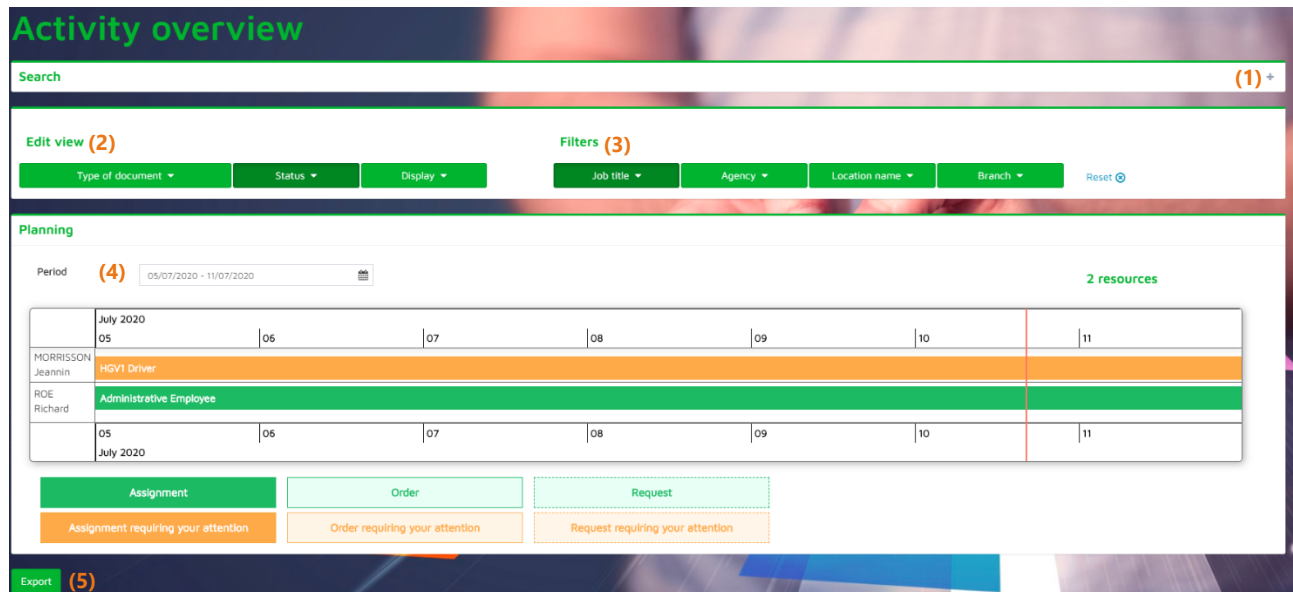
- (8) Click on **Sign** to confirm the electronic signature.
- (9) A confirmation message will be displayed on top of the following screen.

 Your contract COL-STG 190401-00 has been signed. (9)

**The contract is signed!**

## 9. Activity overview

The **Activity overview** module displays the statuses of requests, orders, and assignments for a defined time period.



**Activity overview**

Search (1) +

Edit view (2) Filters (3)

Type of document Status Display Job title Agency Location name Branch Reset

Planning

Period (4) 05/07/2020 - 11/07/2020 2 resources

	July 2020	05	06	07	08	09	10	11
MORRISON Jeannin	HGV1 Driver							
ROE Richard	Administrative Employee							

Assignment Order Request

Assignment requiring your attention Order requiring your attention Request requiring your attention

Export (5)

- (1) The **Search** panel (deployed when clicking on +) gives you an access to the multi-criteria search options.
- (2) The **Edit View** section allows you to filter the **Type of document**, **Status**, and edit the **Display**.
- (3) The **Filters** section allows you to refine the display by **Job title**, **Supplier**, **Location name**, and **Agency**.
- (4) Select the **Period** on which you want to display the assignments and requests.
- (5) **Export** allows you to export the data to an Excel file format.

You view the assignment People@work, West London Agency, **MOJ2020-01-1003** from ROE Richard, Administrative Employee for BOLTON / HR.

Assignment from 13/01/2020 to 16/07/2020

✓ You are requesting a change to the end date of the assignment

Evaluation : 

✓ You have evaluated the assignment

Comments :

This message will be send to your supplier

Journal

Save Cancel

Clicking on one of the information displayed will open a pop-up window that can be used to see the details and history of exchanges (journal) with the Agency.

In the case of Assignments, the pop-up will provide a link (blue) to the document and allows you to shorten, or extend the period of assignment, evaluate it, and add comments, which will be communicated with your Agency.

	June 2023				
	13	14	15	16	17
Andrea Furlinger	Labormitarbeiter*in				
Blank Bernhard	End Date Requested Labormitarbeiter*in				
Friedrich Muhlberger		Agents de maîtrise en fabrication de matériel électrique, électronique			
	13	14	15	16	17
	June 2023				

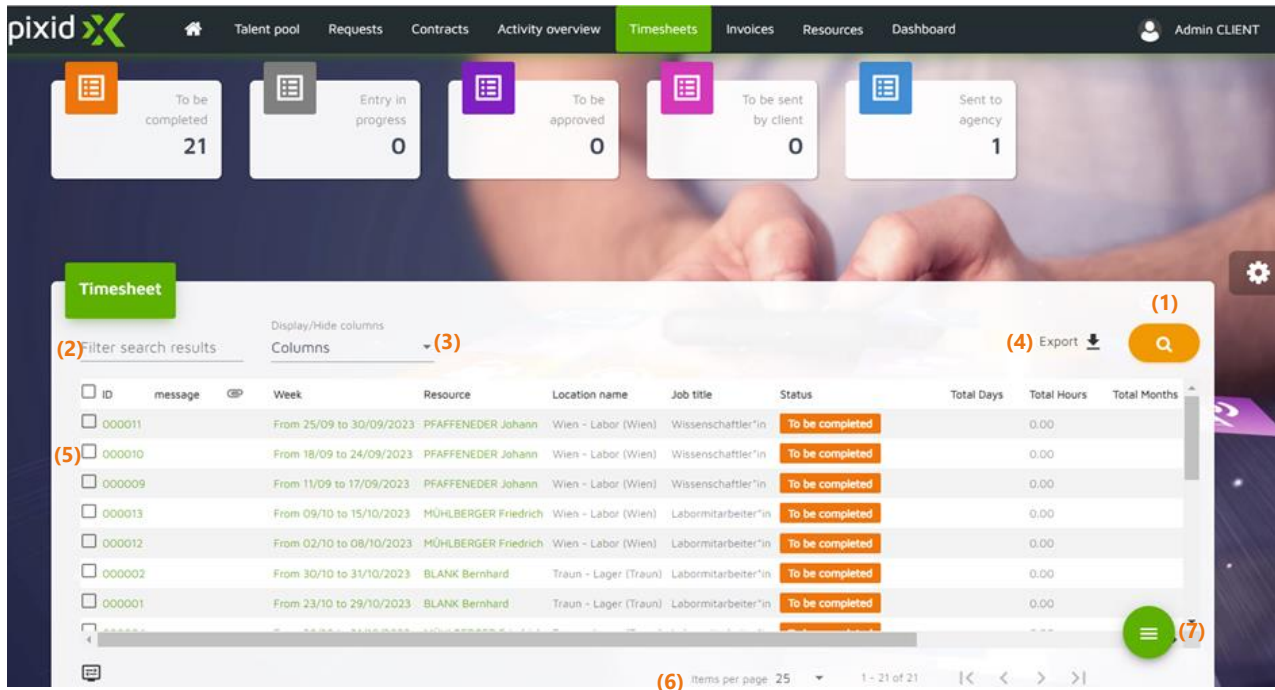
(6) **End Date Requested**: Indicates if the assignment will end earlier as planned.




(7) **Yellow dotted line**: Indicates that the assignment length should be extended, which has not been accepted yet by the agency.

## 10. Timesheets

The **Timesheet** module allows you to enter time worked or, depending on configuration, approve the timesheets filled in by the resources. Timesheets are organised on a weekly basis.

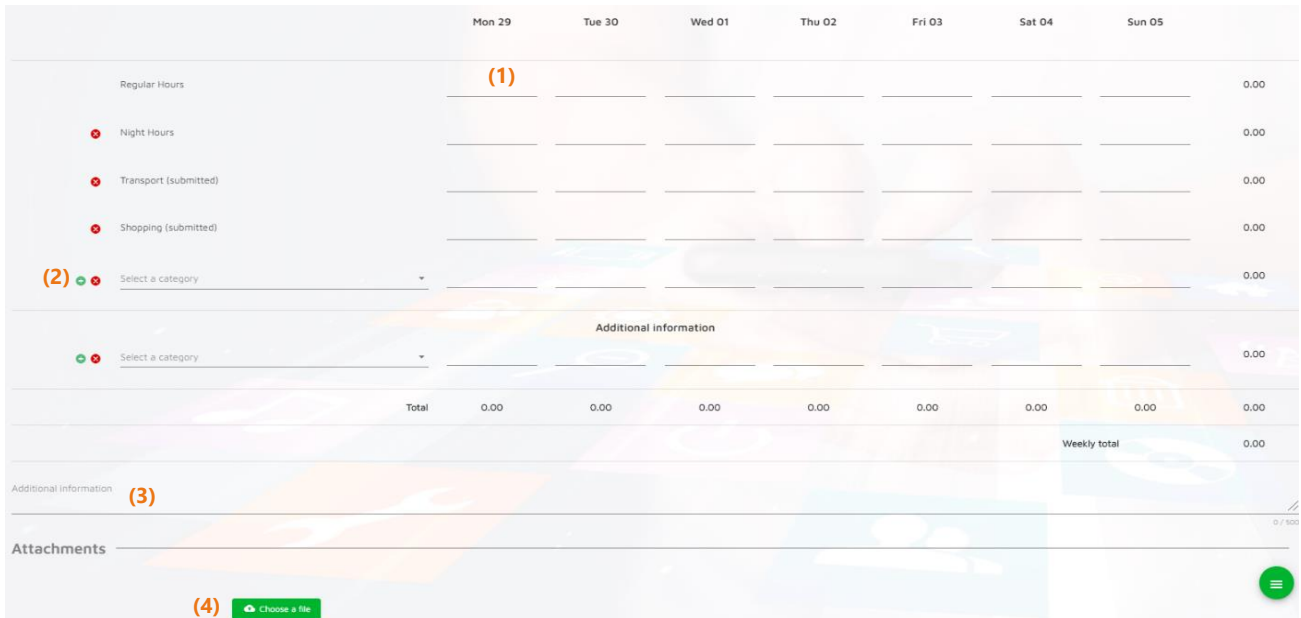
### 10.1. Search and export



- (1) Click on  to access the multi-criteria search options.
- (2) The **Search box** gives you the ability to do a simplified search on one of the document's characteristics (Assignment, Job title, Resource, etc.).
- (3) Choose the **columns to display** in the table. It can be useful to have a more precise export.
- (4) Click on  to export the table data to **Clipboard** and **Print** or extract it to **Excel**, **CSV**, and **PDF**.
- (5) Clicking on the **timesheet number** or the **timesheet week** will open the timesheet details page where you can enter the time worked by the resource.
- (6) Adjust the **number of items** displayed per page.
- (7) Click on  to access mass actions.

## 10.2. Complete the timesheets

The timesheet detail page displays the hour details of a resource for a given week. Its template is managed by the Agency providing the resource and can be modified by adding, removing, or changing the categories to reflect your needs.



(1) Click on the desired slot to **type the number of hours**.

(2) You can **add or delete** a time category.

(3) Use the **Additional information** box to add any supplementary information or context for this timesheet. This information will be transmitted to the Agency once the timesheet is sent.

(4) You **Add attachments** to the timesheet by clicking on this button.

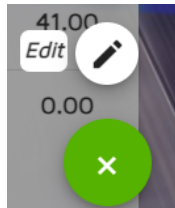


(5) **Back** returns the user back to the timesheet list.

(6) The **Journal** button allows to display all historical actions performed on the timesheet.

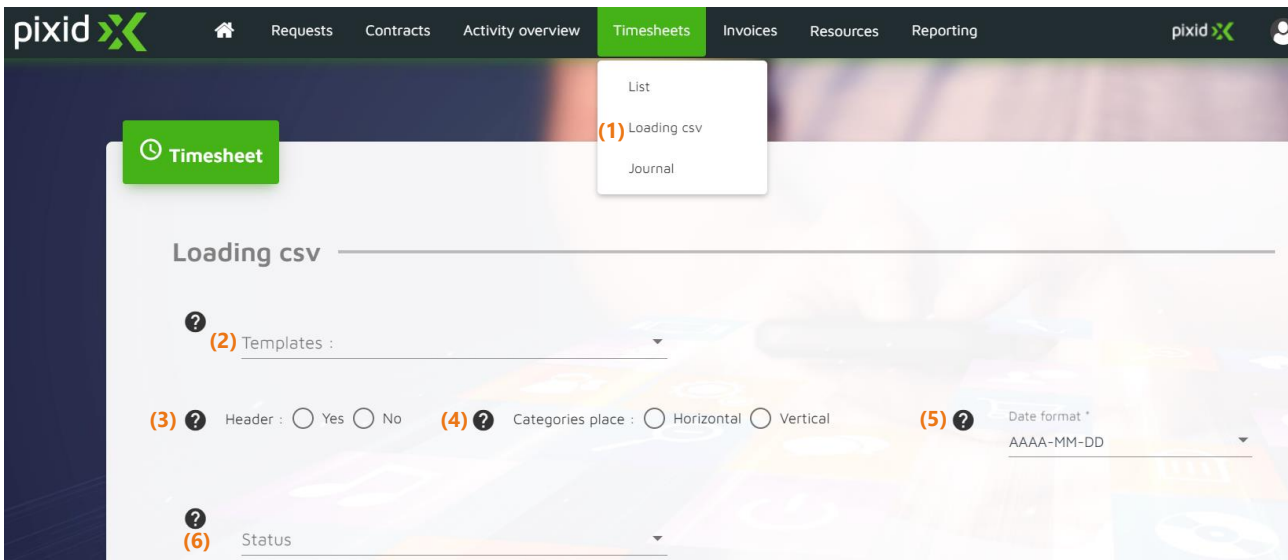
(7) Click on **Message** if you wish to communicate with the Agency about this specific timesheet. The Agency will receive a notification once the message is sent.

(8) **Print** allows the timesheet to be printed.

Action	Change of status	Description
<b>Entry completed (9)</b>	Timesheet is postponed for its completion or sending -> client needs to transfer or depending on the process approve the timesheet	The client has completed the timesheet, but not yet transferred to the agency.
<b>Save (10)</b>	Timesheet is postponed for its completion or sending	Data is saved on the client side, but still needs to be internally approved or transferred to the agency.
<b>Send (11)</b>	Timesheet was transferred to the Agency	<p>The timesheet is sent from the client to the agency, but still needs to be revised by the agency.</p> <p>The client is still able to modify a sent timesheet, through the "edit" button.</p> 

Please keep in mind, that there are up to five possible approval steps. That is why the status "to be approved 2", "to be approved 3", etc. can appear.

### 10.3. Load timesheet data from csv



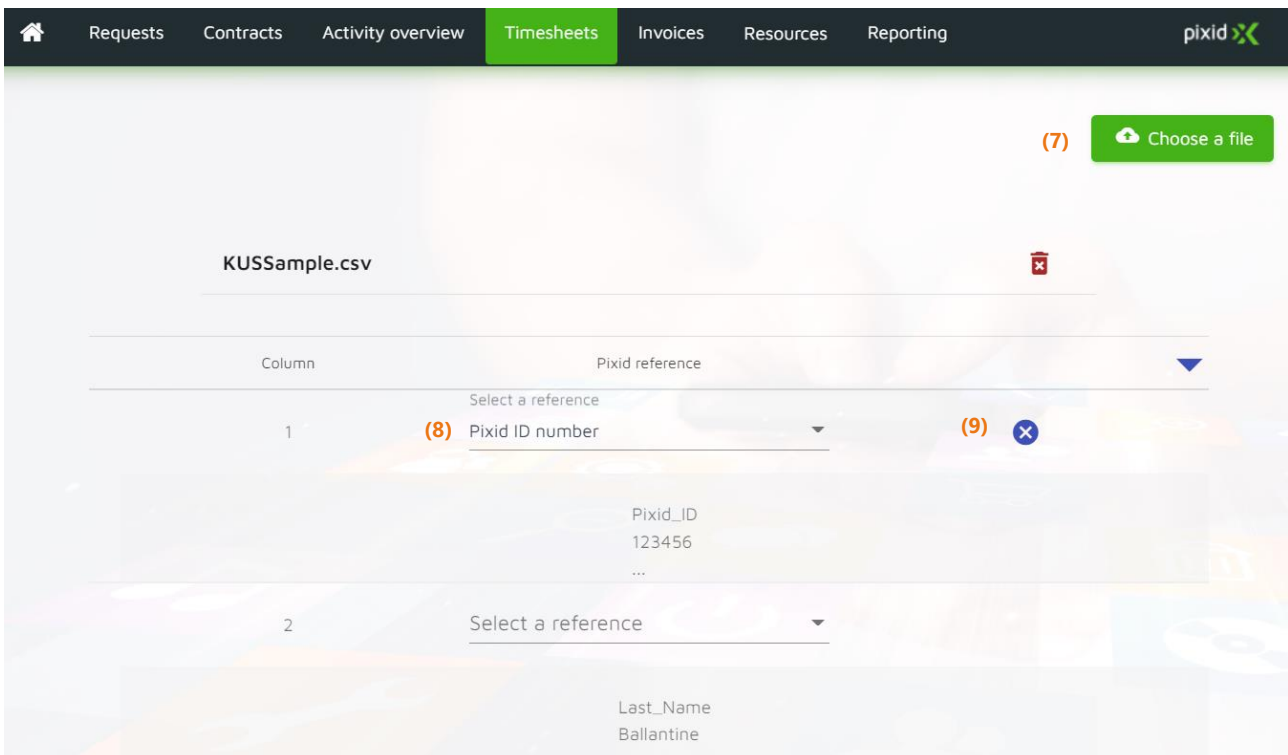
The screenshot shows the 'Loading csv' form in the 'Timesheets' module. The form has a green 'Timesheet' button at the top left. A dropdown menu is open, showing 'List', '(1) Loading csv', and 'Journal'. The form fields are:


- (2) Templates : [dropdown]
- (3) Header : ☐ Yes ☐ No
- (4) Categories place : ☐ Horizontal ☐ Vertical
- (5) Date format \* : AAAA-MM-DD [dropdown]
- (6) Status : [dropdown]


- (1) In the Timesheet module go to **Loading csv**.
- (2) Select the corresponding **Template** if a template has been saved.
- (3) If no template has been saved, select if the document has **Headers**.
- (4) Select if the document data orientation is **Horizontal** or **Vertical**.
- (5) Select the **date format** of the document.
- (6) Select the import **status** of the timesheets.


**Note:** A CSV file is in **vertical** format if it contains one column per category. The correct category for each column will then be selected for loading the timesheet with the values contained in each category column. If all the categories in your timesheets are entered in one column, it is a **horizontal** format. You will then need to indicate that this column contains the categories codes for loading the timesheet.

Status	Description
To be completed	<b>No data</b> has been entered
Entry in progress	<b>Some data</b> has been entered
To be approved	All data entered and is <b>waiting for client approval</b> (if “approve” and “send” are two steps for the project)
To be sent by client	All data entered and is <b>waiting for client to send</b>
Sent to agency	All data entered, approved, and <b>transmitted to agency</b>
Processed	Agency received and <b>acknowledged the timesheet</b>



(7) 

KUSSample.csv 

Column	Pixid reference
1	Select a reference (8) Pixid ID number (9) 
2	Select a reference Last_Name Ballantine

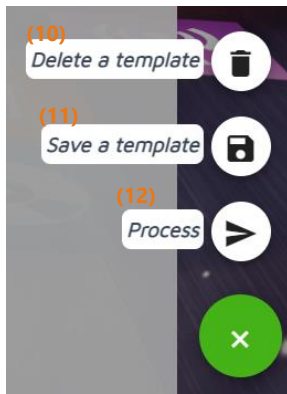
Pixid\_ID  
123456  
...

(7) **Select** the cvs to upload.

(8) **Match** the data or headers in the cvs with the fields of the timesheet from the dropdown.

(9) Click  to **clear** selection.











(10) Remove a previously saved template.

(11) Create a new template for future use.

(12) Load the data from the csv.

**Timesheet** (13)

csv filename	Start time of loading	End time of loading	Total number of timesheets	Number of integrated timesheets	Number of failed timesheets	Status	Type of load
(14) Pixid Upload 09_02_2023.csv	07/09/2023 15:01:06	07/09/2023 15:01:12	51	34	17	Closed	Manuel 
Pixid Upload 09_02_2023 v3.csv	06/09/2023 20:51:48	06/09/2023 20:51:49	5	0	5	Closed	Manuel 
Pixid Upload 09_02_2023.csv	06/09/2023 20:44:47	06/09/2023 20:44:49	17	0	17	Closed	Manuel 
Pixid Upload 09_02_2023.csv	06/09/2023 20:30:43	06/09/2023 20:30:45	17	0	17	Closed	Manuel 
Pixid Upload 08_26_2023 (1).csv	30/08/2023 23:34:05	30/08/2023 23:34:06	4	3	1	Closed	Manuel 
Pixid Upload 08_26_2023.csv	30/08/2023 22:10:20	30/08/2023 22:10:25	28	18	10	Closed	Manuel 
Pixid Upload 08_19_2023.csv	24/08/2023 17:32:59	24/08/2023 17:33:00	3	3	0	Closed	Manuel 
Pixid Upload 08_19_2023.csv	23/08/2023 23:37:14	23/08/2023 23:37:14	1	1	0	Closed	Manuel 
Pixid Upload 08_19_2023.csv	23/08/2023 20:16:47	23/08/2023 20:16:51	38	17	21	Closed	Manuel 
Pixid Upload 08_12_2023.csv	16/08/2023 22:40:12	16/08/2023 22:40:15	18	18	0	Closed	Manuel 


Items per page: 10 1 - 10 of 100 < > >>

(13) After the successful CSV upload, you can click on the register card "Journal" and you will be forwarded to the **overview of CSV uploads**.

(14) Click on a name of one CSV upload to reach the **detailed view of the CSV upload**.

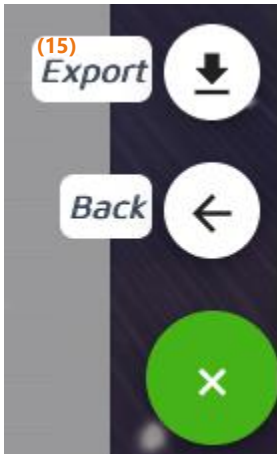
**Timesheet**

csv loading journal

 Upload new csv file

Position	Status	Commentaire	Date traitement
Timesheet from the line 2 to 5	✓	Timesheet Id 001083 created	07/09/2023 15:01:06
Timesheet from the line 6	✓	Timesheet Id 001084 created	07/09/2023 15:01:06
Timesheet from the line 7 to 10	✓	Timesheet Id 001085 created	07/09/2023 15:01:06
Timesheet from the line 11	✓	Timesheet Id 001086 created	07/09/2023 15:01:06
Timesheet from the line 12 to 15	✓	Timesheet Id 001087 created	07/09/2023 15:01:06
Timesheet from the line 16 to 17	✓	Timesheet Id 001088 created	07/09/2023 15:01:06
Timesheet from the line 18	✗	Assignment not identified	07/09/2023 15:01:06
Timesheet from the line 19	✗	Assignment not identified	07/09/2023 15:01:06
Timesheet from the line 20	✗	Assignment not identified	07/09/2023 15:01:06

(15) The detailed view can be **exported** through the **green button** on the right bottom.



## 11. Invoice







The **Invoice** module displays the invoices sent by your Agency(ies).

**Your invoices**

Search

List

Show 10 rows Export Display/Hide columns Search:

<input type="checkbox"/>	Type	Invoice	Agency	Invoiced period	Location name	Client reference	Term	Amount excl. taxes	Status	Actions
<input type="checkbox"/>	(1) Invoice	<a href="#">JMO2020-01-1002</a>	People@work	From 01/02/2020 to 29/02/2020	NEWBURY		31/03/2020	3,289.09	Stored	
<input type="checkbox"/>	Invoice	<a href="#">JMO2020-01-1001</a>	People@work	From 01/01/2020 to 31/01/2020	NEWBURY		31/03/2020	4,289.09	Stored	 (3)
<input type="checkbox"/>	Invoice	<a href="#">JMO201910</a>	People@work	From 01/10/2019 to 31/10/2019	NEWBURY		30/11/2019	4,289.09	Stored	
<input type="checkbox"/>	Invoice	<a href="#">JMO201909</a>	People@work	From 01/09/2019 to 30/09/2019	NEWBURY		31/10/2019	3,289.09	Stored	
<input type="checkbox"/>	Invoice	<a href="#">UKFR09876</a>	People@work	From 01/05/2017 to 31/05/2017	NEWBURY		31/07/2017	1,129.78	Stored	
<input type="checkbox"/>	Invoice	<a href="#">KU456789876</a>	People@work	From 01/04/2017 to 30/04/2017	NEWBURY		30/06/2017	3,129.78	Stored	

Showing 1 to 6 of 6 entries

Download (2)

Actions

(1) Click on the **Invoice ID** to consult the document.

(2) Tick the invoice(s) you want to download and click on **Actions > Download**

OR

(3) Click on the  button and on **Download** of the invoice you want to download.

## 12. Resources

### 12.1. Search for a resource

The **Resources** module is used to view candidate profiles that include their assignments and documents. The resources **Search panel** allows you to search for a resource you have worked with in the past.

Search

(1) -

Resource

Resource ID

Agency

Location name

On assignment from

dd/mm/yyyy

To

dd/mm/yyyy

Job title

Reason

Available from

dd/mm/yyyy

Available to

dd/mm/yyyy

Evaluation

☆☆☆☆

Include candidates without rating

☐

Documents

(2)

Search

Reset

- (1) The **Search** panel (deployed when clicking on **+**) gives you access to the multi-criteria search options.
- (2) Enter known criteria on the resource and click on **Search**.

### 12.2. Resource list

Your resources

Search

+

List

(1) Display all NO

Show 50 rows Export Display/Hide columns

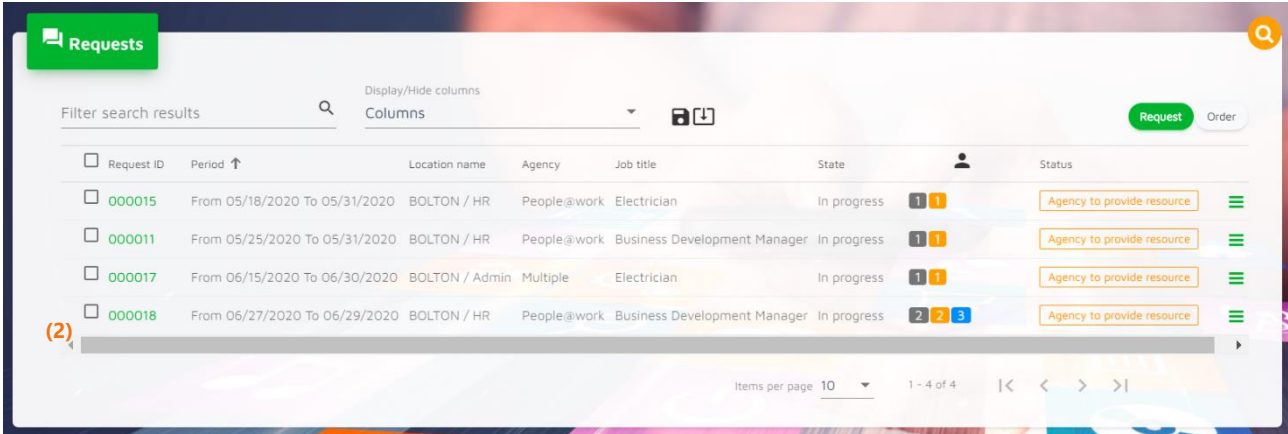
Search: Search

<input type="checkbox"/>	Last name	First name	City	Mobile	Personal email address	Job title	Start date	Branch	Evaluation	Actions
<input type="checkbox"/>	Andersen	Tarah	LONDON				06/06/2020	WHITEFIELD Stanley Road	☆☆☆☆	
<input type="checkbox"/>	Brendan	Garry	Bolton				18/05/2020	WHITEFIELD Stanley Road	☆☆☆☆	
<input type="checkbox"/>	COOPER	Angela	MANCHESTER		acooper@pixid.biz		23/05/2020	WHITEFIELD Stanley Road	☆☆☆☆	

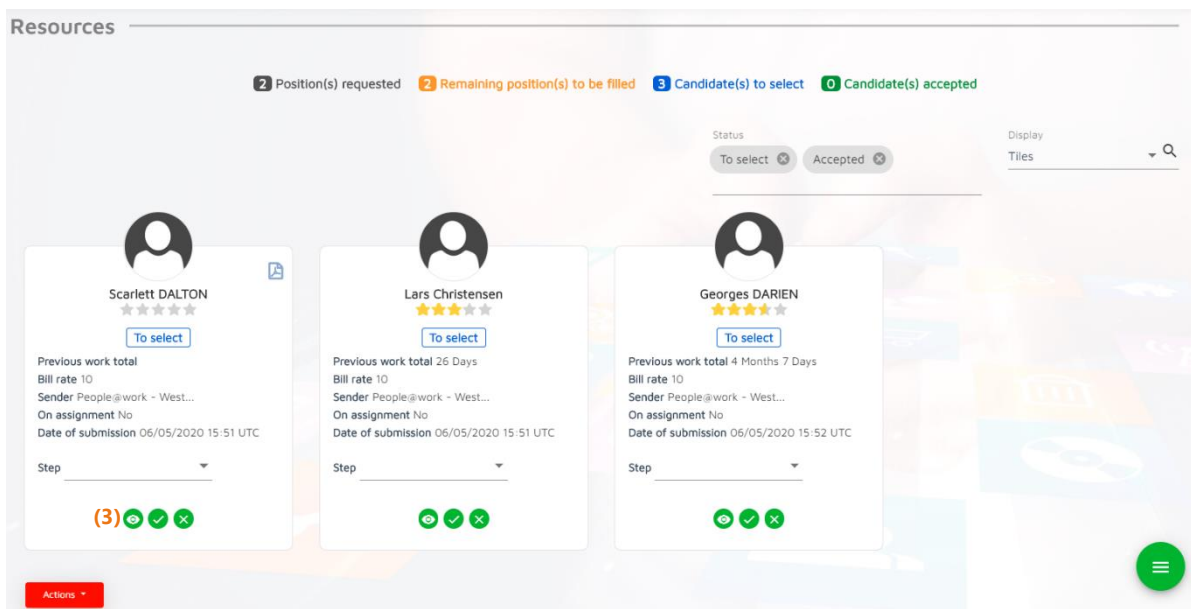
The resource **List** displays all resources who are on assignment presently.

- (1) To open the list of all the resources, click on **Display all YES**.

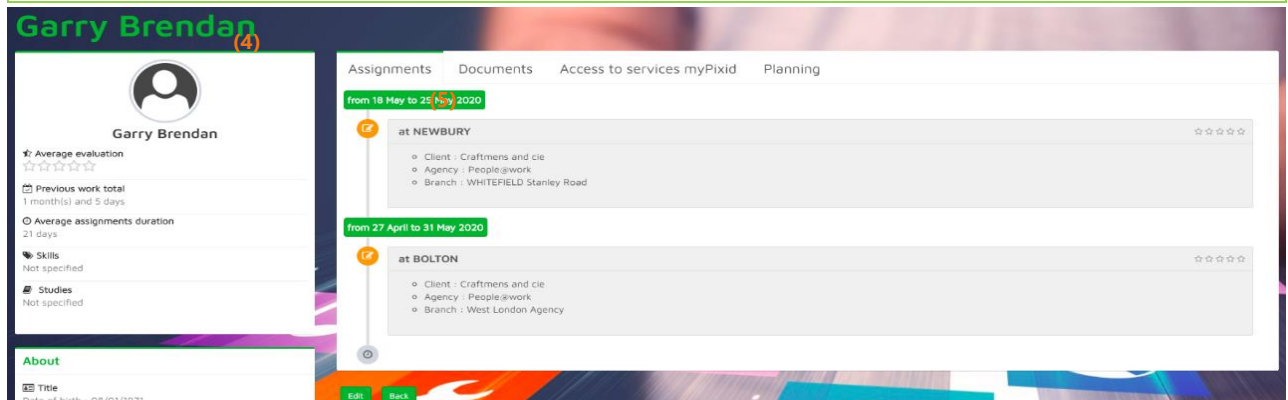
## 12.3. Candidate profile via requests



- (1) Go to the **Requests** module.
- (2) Click on the **Request ID number** of the request or order in which the resource is to be selected, accepted, or refused.

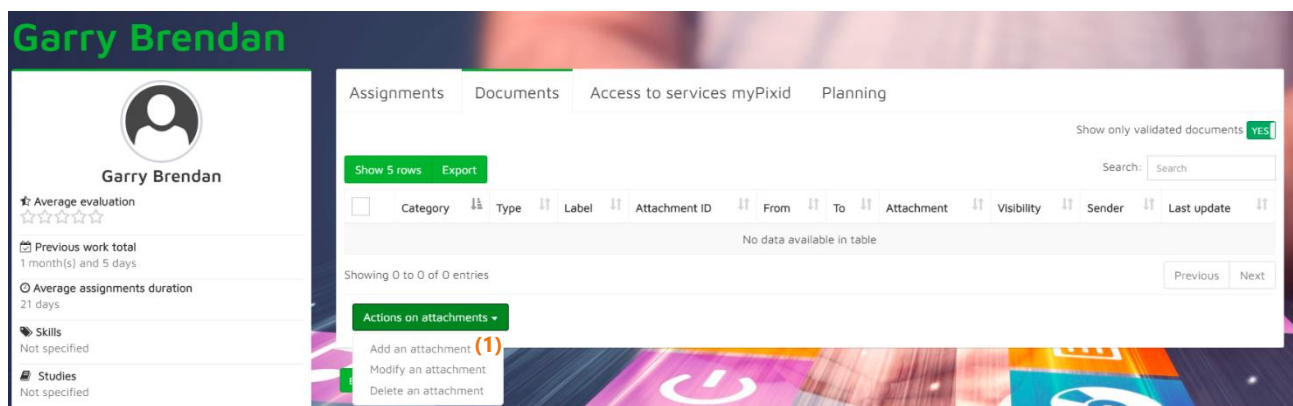


- (3) Click on the **Eye Icon** (in the request resource tab) on the candidature of the resource you want to see the profile.



- (4) The **Resource profile** will display.
- (5) Use the **Documents** tab to add or consult attachments.

## 12.4. Candidate file attachments



### Add an attachment

Category \* (2)

Administrative

Type \*

Validity start date

Validity end date

Attachment ID (3)

Attach a file

PDF, Word,... format document 3 MB maximum.

Visibility of the attachment: (4)

(5)

Save

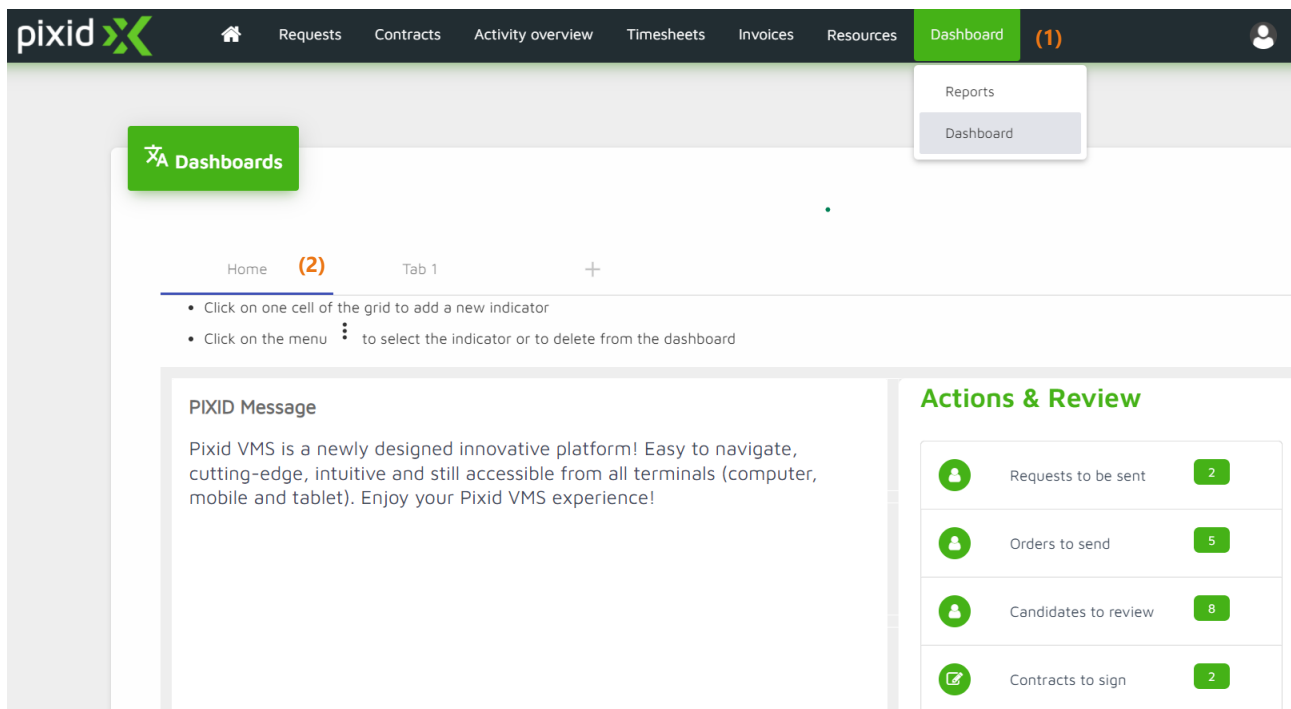
Cancel

- (1) You can add any attachments such as CV, driving license, or assessment form to the candidate file using **Add an attachment** button. Clicking on the button will open a new screen allowing you to upload a file from your computer.
- (2) You will be asked to select attachment **Category** and provide some optional information, such as Type, Validity, Date, or Attachment ID.
- (3) To upload the file, click on **Attach a file** button.
- (4) You can also decide what the **visibility of your attachment** should be: Private, Restricted, or visible to Public.
- (5) Click on the **Save** button.

## 13. Dashboard

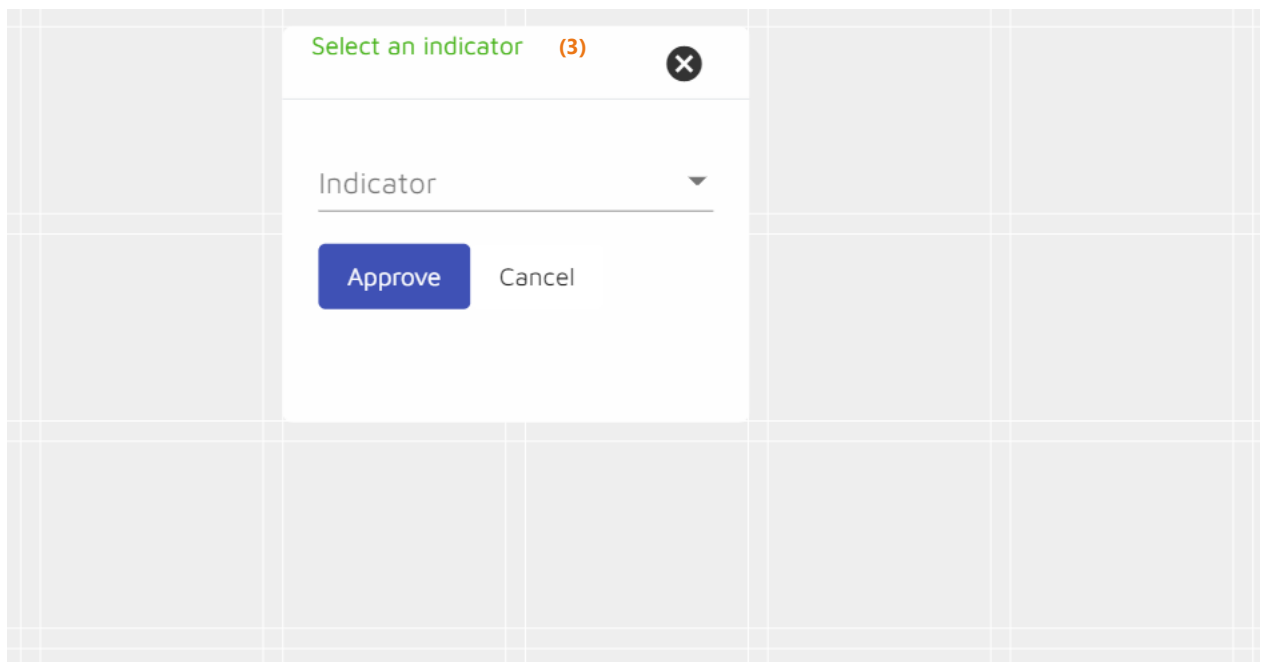
The **Dashboard** module allows you to view historical and current statistics for a variety of reports. You can adjust which infographics appear on the home page of Pixid VMS from the dashboard page. Information to create the infographics automatically comes from your activity on Pixid VMS. If you do not have activity in Pixid VMS, the infographics will not appear.

### 13.1. Homepage display preferences

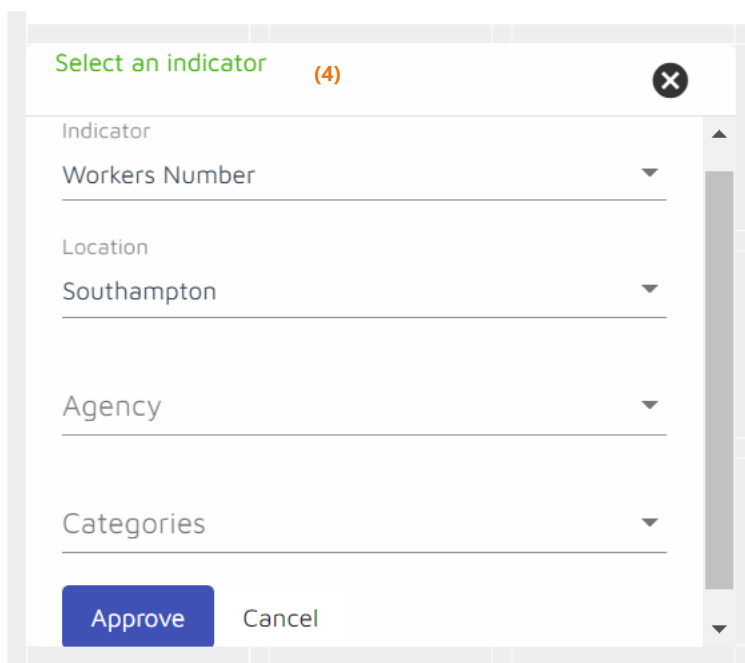


(1) Go to the **Dashboard** module → **Dashboard**

(2) Click on the **Home** tab to adjust the display of the home page. You can create additional dashboard pages that do not display on the home page by clicking on the Tab to the right of the Home tab.



(3) Click and drag to create the size of the infographic.



(4) Click the dropdowns to select the desired criteria for the infographic. Click **Approve** when done.



(5)

