PUGET SOUND ENERGY

Resource Tracking in Beeline

Supplier Job Aid

Version 1.0

PUGET SOUND ENERGY

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PUGET SOUND ENERGY

Program Overview & Getting Started

Who is Beeline?

- The leading vendor management system (VMS) provider.
- Specializes in contingent workforce management.
- Trusted by Fortune 500 companies, globally.
- Has a proven track record in utility industry implementations.

Beeline Benefits for PSE

- Enhances contactor selection process.
- Streamlined and centralized onboarding workflow minimizes manual mistakes and processing delays.
- Seamless and systematic off-boarding procedures decrease administrative workload and associated expenses.
- Live tracking and monitoring of contractor onboarding and off-boarding progress
- Links contractors directly to their corresponding contract agreements
- Integration with other business systems, improved data accuracy, and reduced manual data entry.
- Coordinated integration with comprehensive contractor off-boarding workflows.

What is Changing vs. What is NOT Changing?

<u>Changing</u>

- Beeline will replace the BCAF (Begin Contractor Assignment Form)
- Functions formally managed by HR will now be administered through Beeline.
- Off-boarding procedures will now be automatic via Beeline.

<u>NOT Changing</u>

- Timesheet/ expense entry process, including any timesheet/ expense modification.
- Financial authorization remains in Ariba.
- Existing Supplier and Hiring Manager relationships can be maintained.

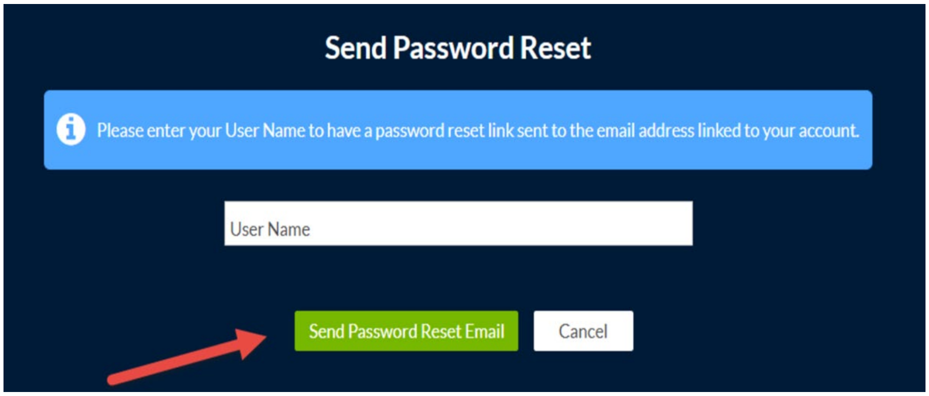
Access to the Beeline Tool

The Beeline tool can be accessed with a username and password. Login information will be delivered in a Welcome Email from Beeline.

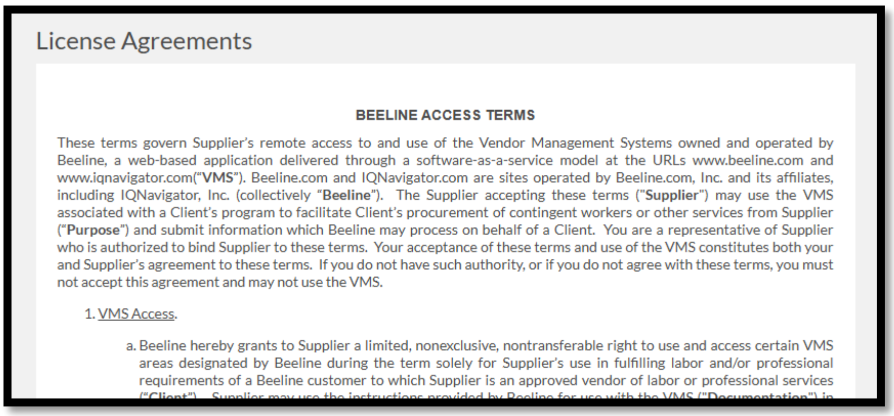
Beeline Notification: donotreply@BEELINENOTIFY.COM
Production Site: https://prod.beeline.com/pse

You will need to follow the prompts to reset your password when first login in to Beeline. Once the password has been reset navigate back to Beeline to formally login using username and new password.

PUGET SOUND ENERGY



Upon logging into the tool, you will need to review and accept a Beeline license agreement.


License Agreements

BEELINE ACCESS TERMS

These terms govern Supplier's remote access to and use of the Vendor Management Systems owned and operated by Beeline, a web-based application delivered through a software-as-a-service model at the URLs www.beeline.com and www.iqnavigator.com("**VMS**"). Beeline.com and IQNavigator.com are sites operated by Beeline.com, Inc. and its affiliates, including IQNavigator, Inc. (collectively "**Beeline**"). The Supplier accepting these terms ("**Supplier**") may use the VMS associated with a Client's program to facilitate Client's procurement of contingent workers or other services from Supplier ("**Purpose**") and submit information which Beeline may process on behalf of a Client. You are a representative of Supplier who is authorized to bind Supplier to these terms. Your acceptance of these terms and use of the VMS constitutes both your and Supplier's agreement to these terms. If you do not have such authority, or if you do not agree with these terms, you must not accept this agreement and may not use the VMS.

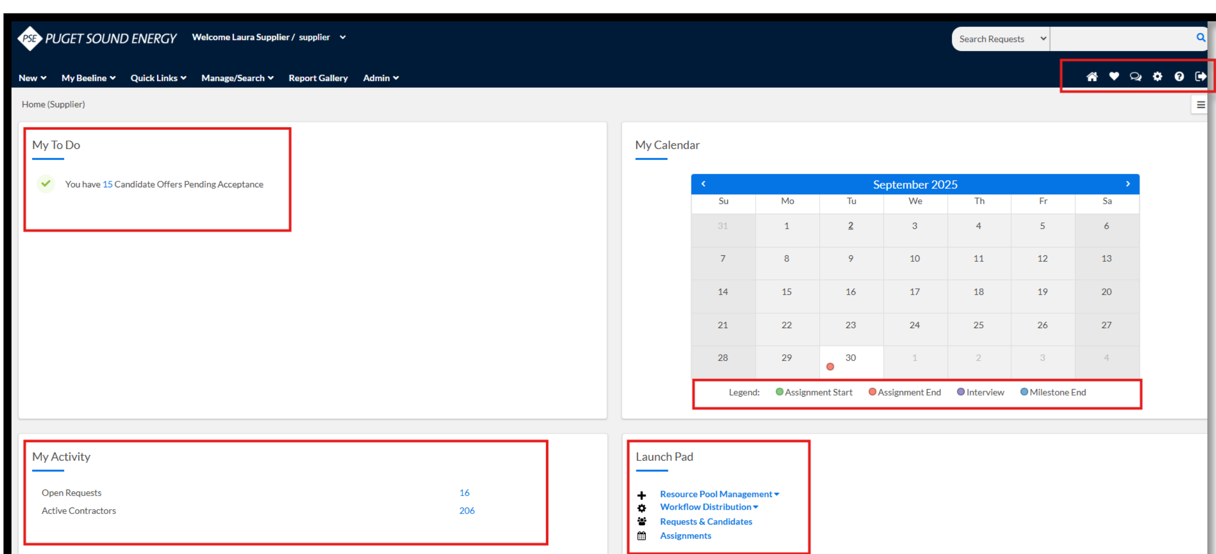
1. VMS Access.

a. Beeline hereby grants to Supplier a limited, nonexclusive, nontransferable right to use and access certain VMS areas designated by Beeline during the term solely for Supplier's use in fulfilling labor and/or professional requirements of a Beeline customer to which Supplier is an approved vendor of labor or professional services

Navigating your Home Screen

Broken into four quadrants (My To Do, My Calendar, My Activity and Quink Links).

My To Do: Provides you with alerts and links right on the home page so you can easily take action and manage items pending your review.
My Calendar: Provides a monthly view of important dates. To view additional information, you can click directly on a specific date.

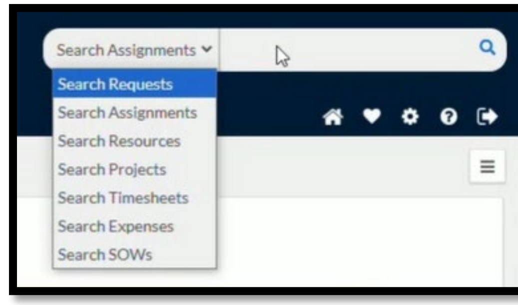


My Activity: Provides you a place to get an overview of your Supplier organization's overview activities as well as a place to track candidate information.

Launch Pad: Here you have quick access to your Resource Pool Management, Workflow Distribution, Requests and Candidates and Assignments.

PSE Logo: You can find this in the top left-hand corner or your screen. The logo acts as a Home button to get you back to your main dashboard at any time.

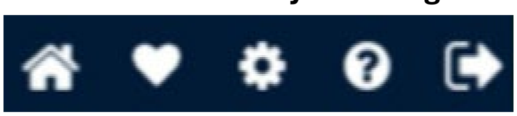
Simple Search: You can find this in the upper right-hand corner of your screen. You can quickly search for a variety of things.



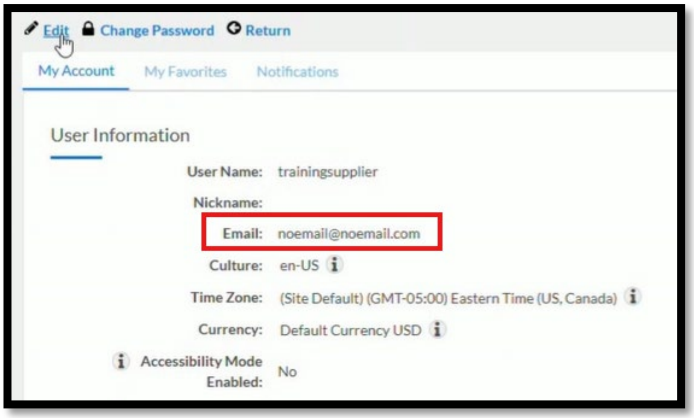
Header Bar:

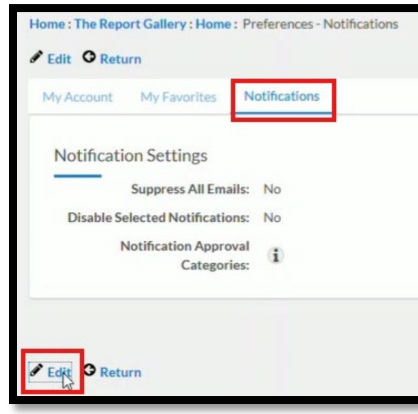
- **My Beeline**: Allows you to access any scheduled reports and customized dashboards.
- **Quick Links:** Provides you with access to email support along with any other help links loaded into the tool by PSE.
- **Manage/Search**: This drop-down allows you to find all *Assignments, Candidates, Requests* and your *Resource Pool.*
- **Report Gallery**: Provides you with access to all reports that you can create or customize.
- **Admin**: Allows you to complete administrative actions

Additional Icons in your Navigation Bar:



- **Home Icon**: Will bring you back to your home page if you have navigated away.
- **Heart/Favorites Icon**: Will bring you to all favorites you have saved in the report gallery.
- **Gear Icon**: This is your *preferences* and by clicking it, you can view and edit your *Account, My Favorites* and edit *Notifications. B*e sure that the email address is accurate as this is where you will receive all notifications.





- **Help Icon**: Provides additional resources for help within the tool including Beeline help, Contact Us link.
- **Sign-out Icon**: Signs you out of the application.

Accessibility Mode

In the bottom right-hand corner of your screen, you will see the below icon which will allow you to make edits to your Accessibility Mode. Once you click on the icon, you can make edits to your widgets throughout your Beeline experience.

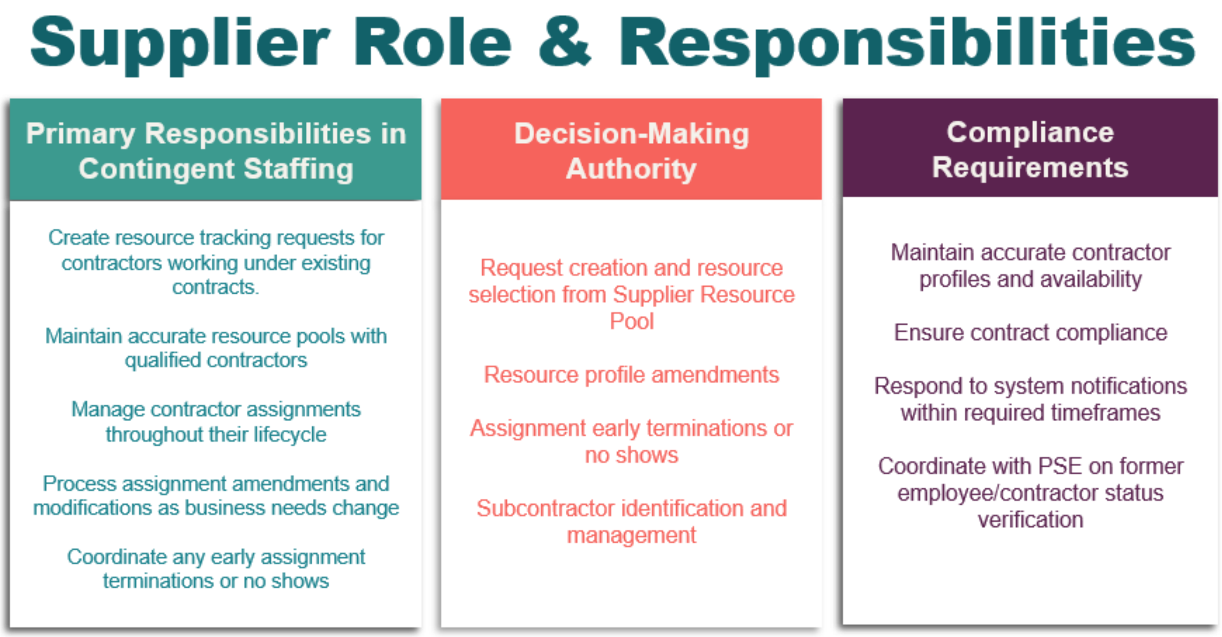
Resource Tracking Overview

<u>What is Resource Tracking?</u>

Resources or workers who are part of a contracted service with a third-party supplier or service provider. These contractors provide deliverable outcomes. The individual resources are interchangeable at the discretion of the supplier. The individual resources are of no consequence to PSE. They are not evaluated, selected, or named in the contract. The Supplier (their employer) directs their work and delivers the services according to requirements in the contract. These contracted workers do not typically perform work that PSE employees perform.

Examples: Managed Service (Service Providers), Professional Services (Specialty Trade, Independent Contractors)

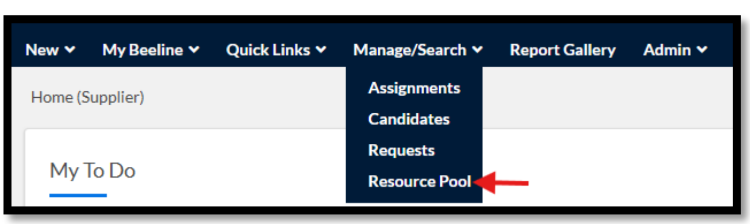
Your Role as the Supplier

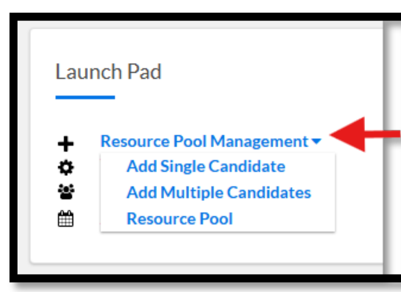


Resource Pool Management

Follow the steps below to add new resources to the Beeline tool as a part of your Resource Pool. When a Request is open for your candidate, you will then easily be able to add a Resource from your Resource Pool.

1. Navigate to Resource Pool section from the Navigation Bar at the top of your Home screen OR use the Launch Pad and Add from the Resource Pool Management.





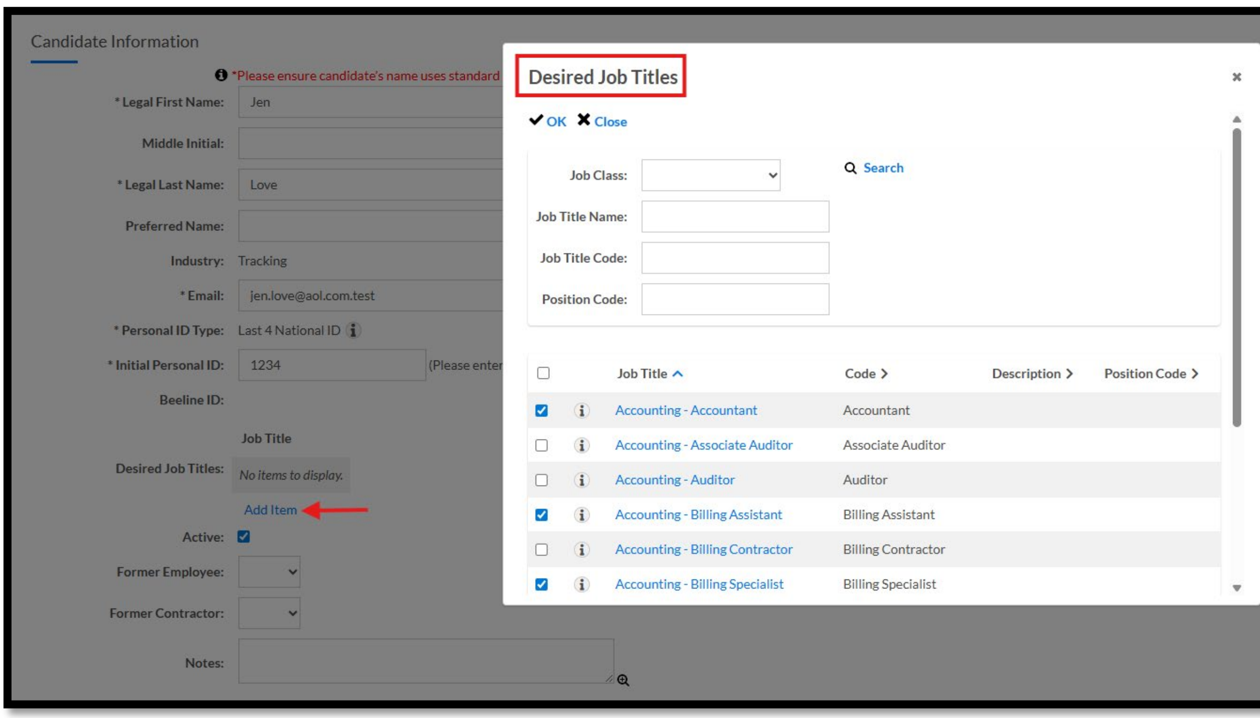
2. Create new resource profile

- ***Add New*** for a single resource or ***Import*** to create a larger quantity of resources.

3. **Select Candidate Industry**: *Tracking*

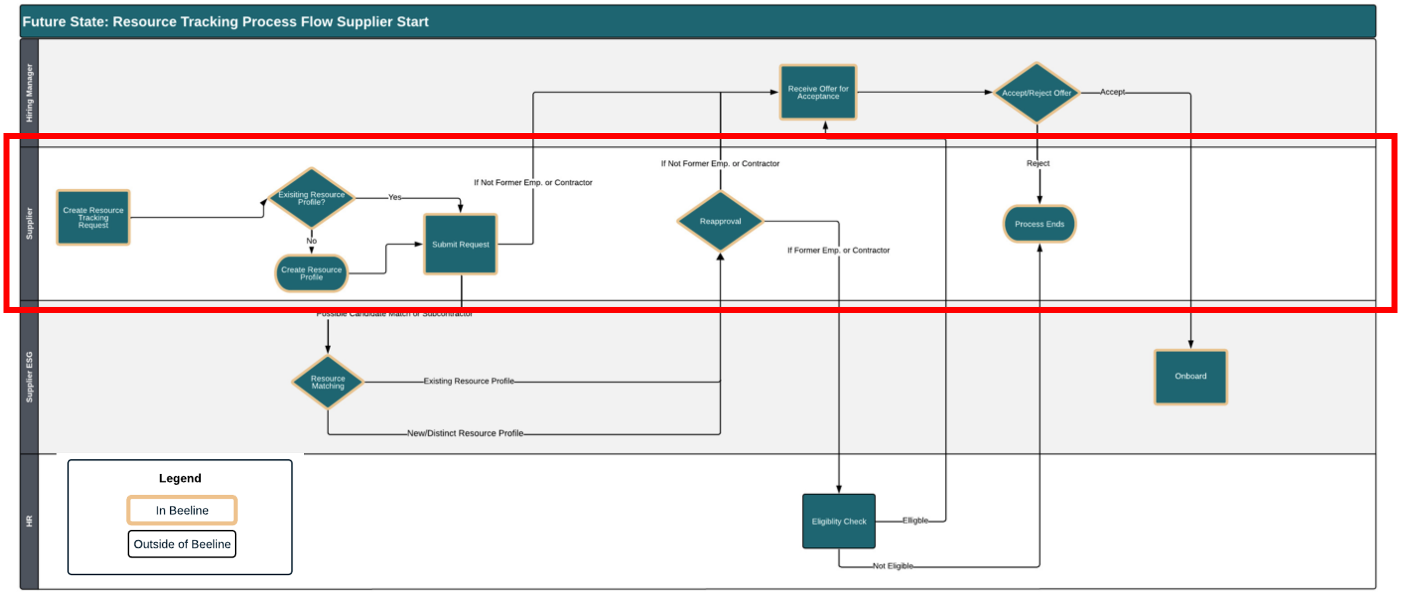
- For Resource Tracking you should see the candidate industry "Tracking" available. If this option is not visible, contact Supplier ESG

4. **Required Fields**
   - Legal First Name (use standard capitalization and no special character or symbols)
   - Legal Last Name (use standard capitalization and no special character or symbols)
   - Preferred Name (not required but useful if candidate does not go by legal first name)
   - Email
   - Initial Personal ID (last 4 of Resource National ID, *example: SSN*)
   - Desired Job Title: not required but useful when adding resources to requests as it allows for a deeper filter functionality
   - Former Employee
   - Former Contractor



If you've loaded your Resource into your Resource Pool and you are looking to view the Resource or make edits to their profile, utilize the Search Options and filter by typing in any of the candidate's information.

Request Process Flow



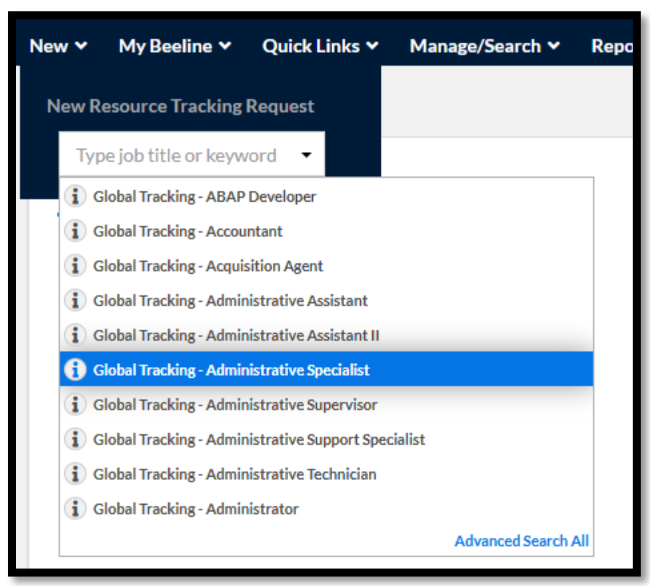
Request Submission Process: Resource Tracking Request

How to create a new Resource Tracking Request

- From your *Home* screen, choose New Resource Tracking Request from the New drop-down menu on the navigation bar. You can type ahead to search for a given job title and even use the advanced search options.

  Job Search Functions

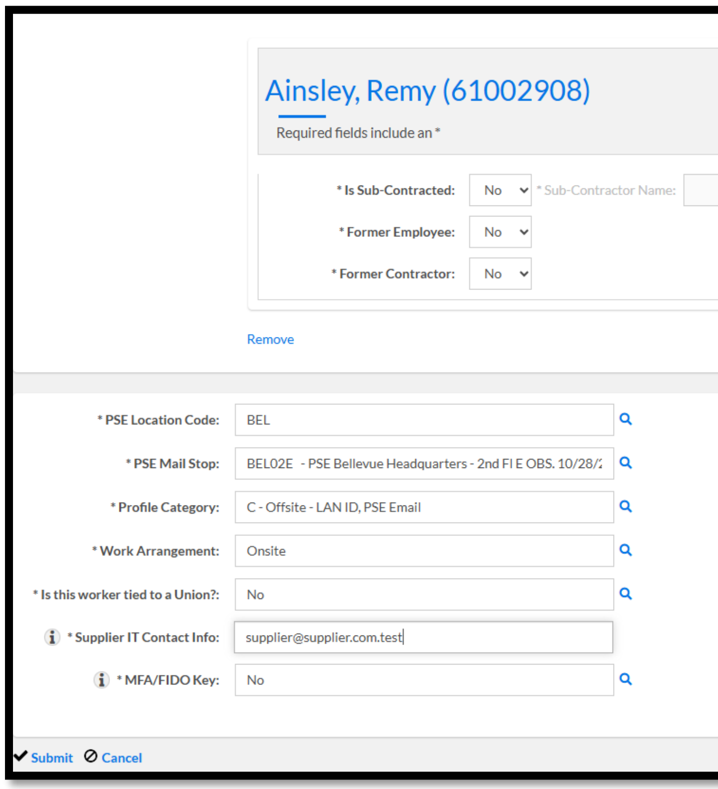
  i. Type Ahead
  ii. Recent Job Titles Used – *Get Started* button
  iii. *Copy Request* button



- Required fields and information
  - Hiring Manager: Defaults to blank, but you will need to be updated to the correct Hiring Manager name (you can type ahead or use the eye glass for a more detailed search).
  - Cost Center: Defaults to the selected Hiring Manager Cost Center.
  - Hiring Managers Location: Tied to Hiring Manager, not the contractor (PSE Location will be further down the request and this is to identify the contractor's location).
  - Job Description: Defaults to blank but can be modified.

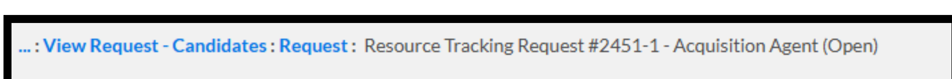
- <u>Quantity</u>: Default is one (1) but if the Hiring Manager needs to on-board several contractors at once the quantity can be changed. The only caveat would be that the contractors would all need the same job title and supplier.
- <u>Desired Start Date</u>: Defaults to today's date (editable).
- <u>End Date</u>: Resource Tracking as no limit on end date, however it does need to fall withing the contract dates. Best Practice: Enter the end date to match the contract date.
- <u>Select Worker</u>: Search for an existing resource (pre-loaded from the Supplier resource pool) using drop down and advance search or type ahead. Suppliers can also *Add New*.

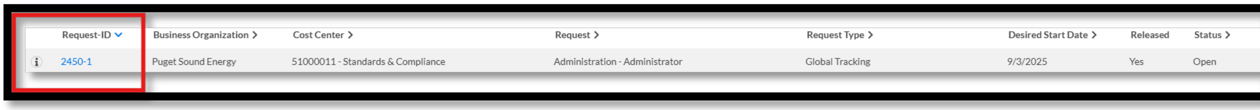
- Once selected, the below three subfields display
  - <u>Is Sub-Contracted</u>: Sub-contracted means the contractor works for a sub-supplier that is contracted by PSE's main Supplier.
  - <u>Former Employee</u>: You will have already completed this field when you created the Resource; however, if not documented or if the status has changed, please update it now.
  - <u>Former Contractor</u>: You will have already completed this field when you created the Resource; however, if not documented or if the status has changed, please update it now.
- **Additional Custom Define Fields (CDF's)**
  - <u>PSE Location Code:</u> This is a parent child relationship to PSE Mail Stop - three letter location code. Only the top 10 are displayed, but you can utilize the type ahead or the eye glass to expand the search. If contractor is off site use the code "COS".
  - <u>PSE Mail Stop</u>
  - <u>Profile Category:</u> A-Physical Access Only, B-Basic Profile, C-Offsite PSE Email, D - Offsite NO PSE Email, E-No Access
  - <u>Work Arrangement</u>: Onsite, Remote, Hybrid
  - <u>Is this worker tied to a Union?</u>
  - <u>Supplier IT Contact Info</u>: (Info bubble to help)
  - <u>MFA/FIDO Key</u>: (Info bubble to help)



- Click "SUBMIT" once all required fields are completed.

- Once the request has been created it will be assigned a *Request ID* for reference.



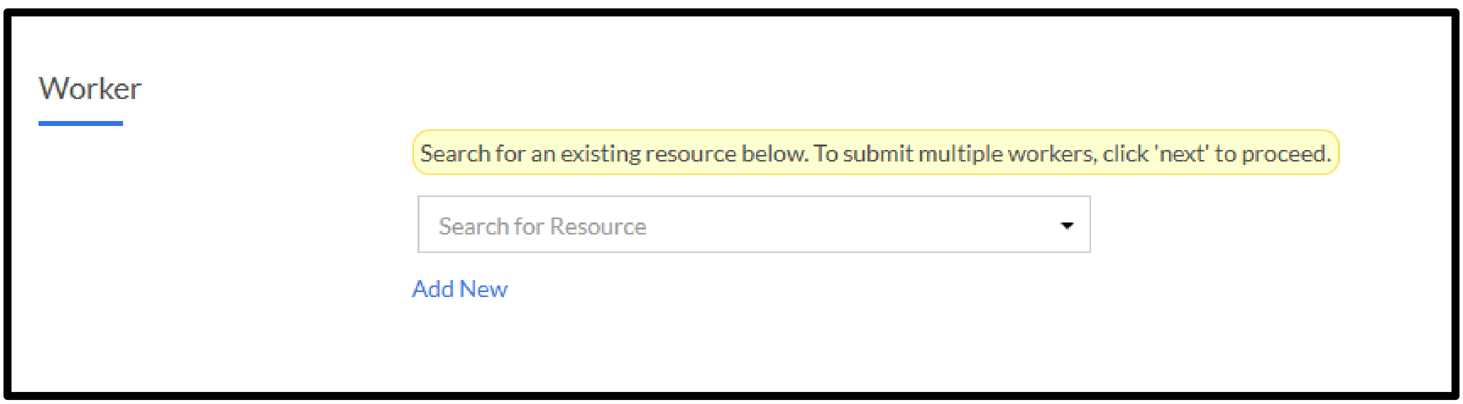


	Request-ID	Business Organization	Cost Center	Request	Request Type	Desired Start Date	Released	Status
i	2450-1	Puget Sound Energy	51000011 - Standards & Compliance	Administration - Administrator	Global Tracking	9/3/2025	Yes	Open

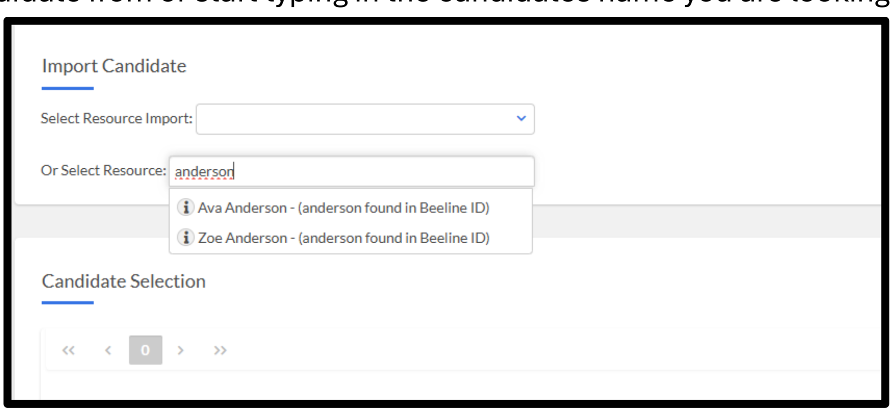
Create Request with Multiple Candidates

This process looks slightly different when selecting the worker than a singular candidate request. When creating your Request the ***Qty*** field defaults to one (1), to load in multiple candidates with the same job title change this field to the quantity needed.

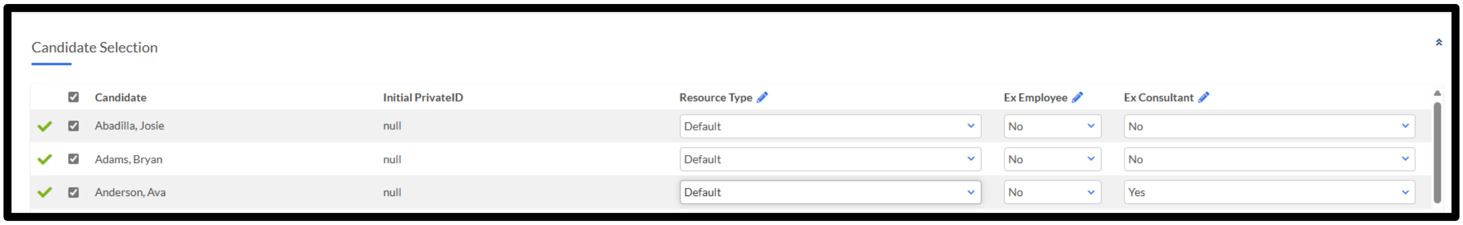
In the worker section on the Request there will be a yellow notification "Search for an existing resource below. To Submit multiple workers, click 'next' to proceed". Leave the ***Worker*** field blank and continue filling in the remaining fields on the request. Select ***Next.***



You will be brought to a "Submit Multiple Candidates" screen. From here you can select a Resource Import to choose candidate from or start typing in the candidates name you are looking for.

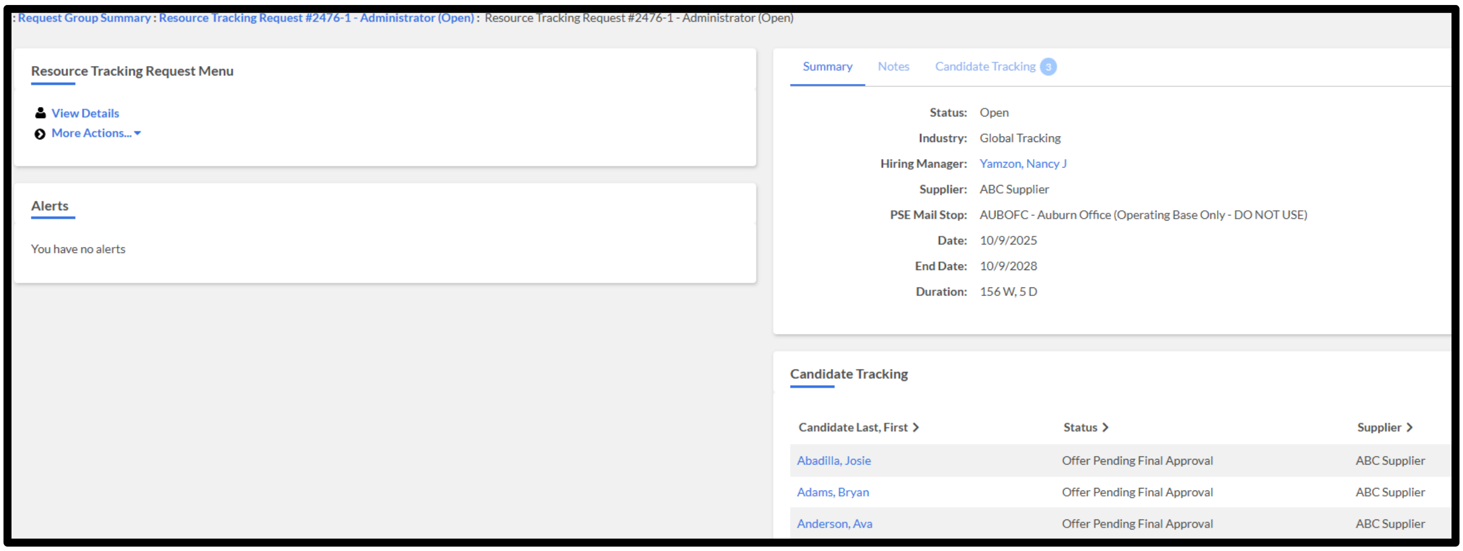


Once you have loaded all the candidate into the candidate selection area click the check box next to each and update the “Resource Type” to “Default”



Select ***Submit Multiple Candidates*** and ***Ok.***

Your Request will not be created with multiple candidates submitted for review and onboarding. Keep in mind that Beeline does have a delay when displaying the multiple candidates.



Communication Protocol

If any questions arise about the Request, you can email the Hiring Manager. The Hiring Manager’s email alias is accessible via the Request.

Click on the Request from your Dashboard, *View Details* -> click on the Hiring Manager name which will then populate the email alias.

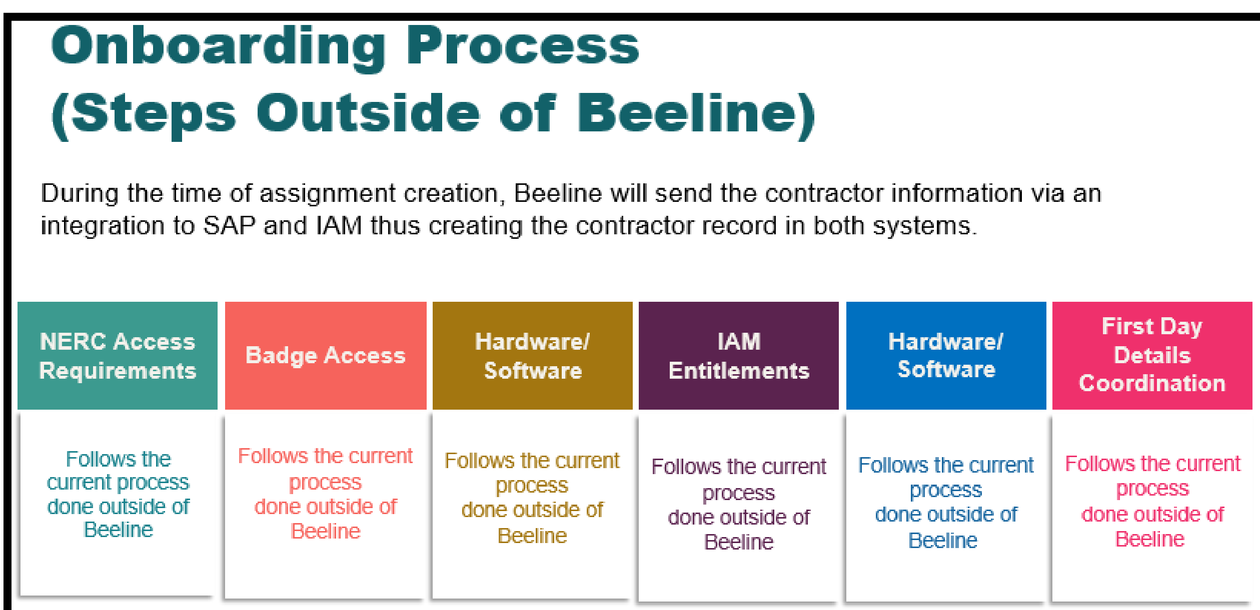
Onboarding Process

After the Request has been *Submitted,* the Request will go through a series of approvals.

- Resource Matching or Subcontractor Identified: Upon identification of a Resource with a potential match to an existing profile or association with a Subcontractor Supplier, Beeline will submit the approval to PSE Supplier ESG Team for evaluation.
  - The workflow will require Supplier acceptance after this step is complete to review for accuracy.
- Former Contractor/ Former Employee: Upon detecting a former contractor or former employee designation, the workflow will direct the Request to PSE HR Team for eligibility determination.
- Hiring Manager: The workflow routes the Request to the PSE Hiring Manager for validation that the identified Resource is correct and still matches the Request requirements. The Hiring Manager will need to fill out the following fields during the approval task
  - Contract Number
  - Contract Start Date
  - Contract End Date
  - Is NERC Access Required?
  - Resource Type
  - Reports to

Onboarding: The Supplier ESG team performs a final accuracy check and activates the onboarding function to transfer details to SAP and IAM systems.

Onboarding Process (Steps Outside of Beeline)



Assignment Management

Active Assignment Oversight

- Monitor Assignment status and key dates in Beeline.
- Track Assignment progress against original timelines and end dates.

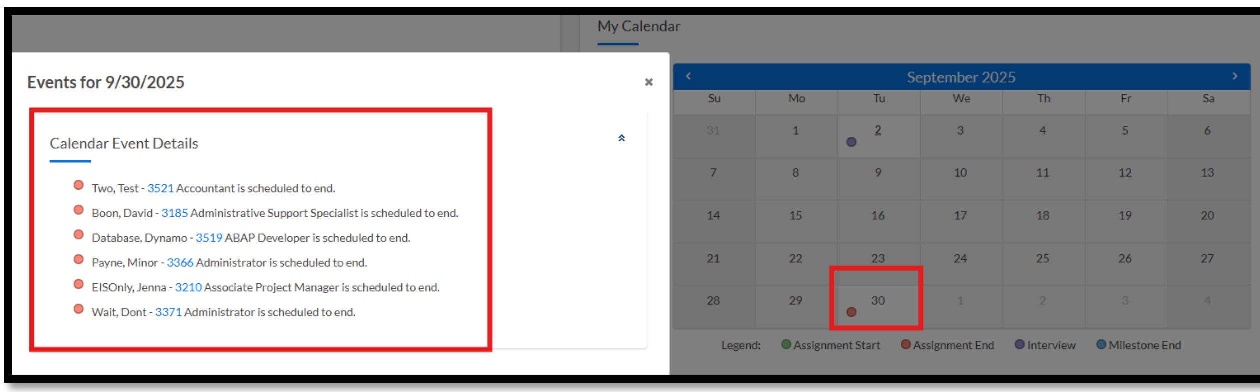
Ongoing Management Tasks

- Review and respond to system notifications.
- Process assignment modifications as business needs change.
- Maintain accurate assignment information and reporting relationships in the system.

End of Assignment Coordination

- Plan for Assignment renewals or terminations as end dates approach.
- Coordinate offboarding processes including badge return.
- Process final Assignment Amendments or early terminations as needed.

Utilize the calendar on your Home screen to help with ongoing maintenance and management.



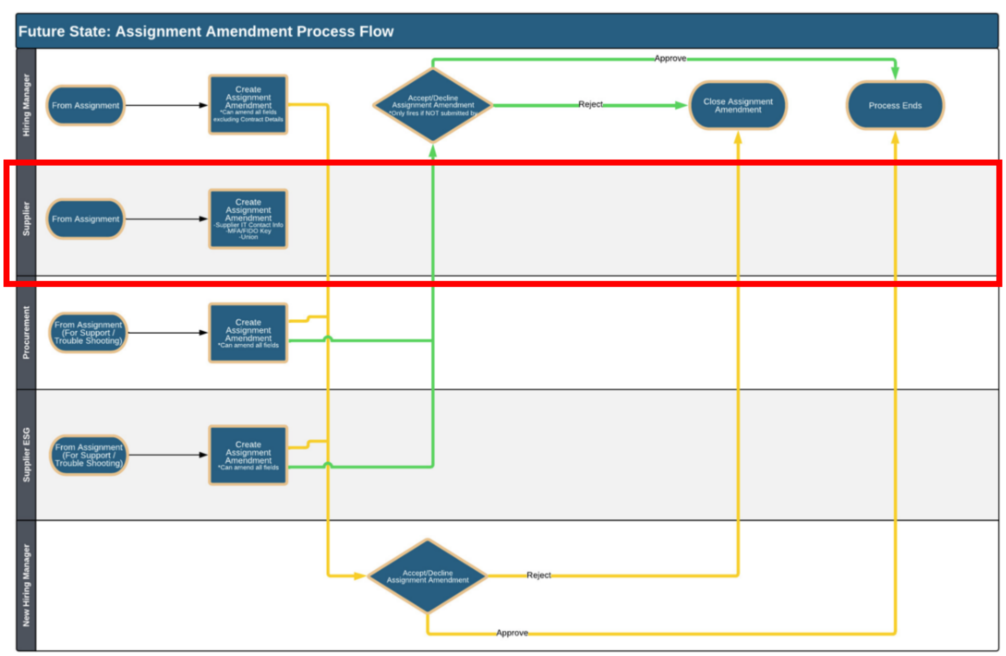
Amendments to your Assignment

Search for the Assignment in which you are looking to Amend/Extend.

Amendable Fields

- Supplier IT Contact Information
- MFA/FIDO Key
- Is this worker tied to a Union?

Mass Amendments: Only Supplier ESG can make mass amendments. Please reach out to SupplierESG@PSE.com for assistance.

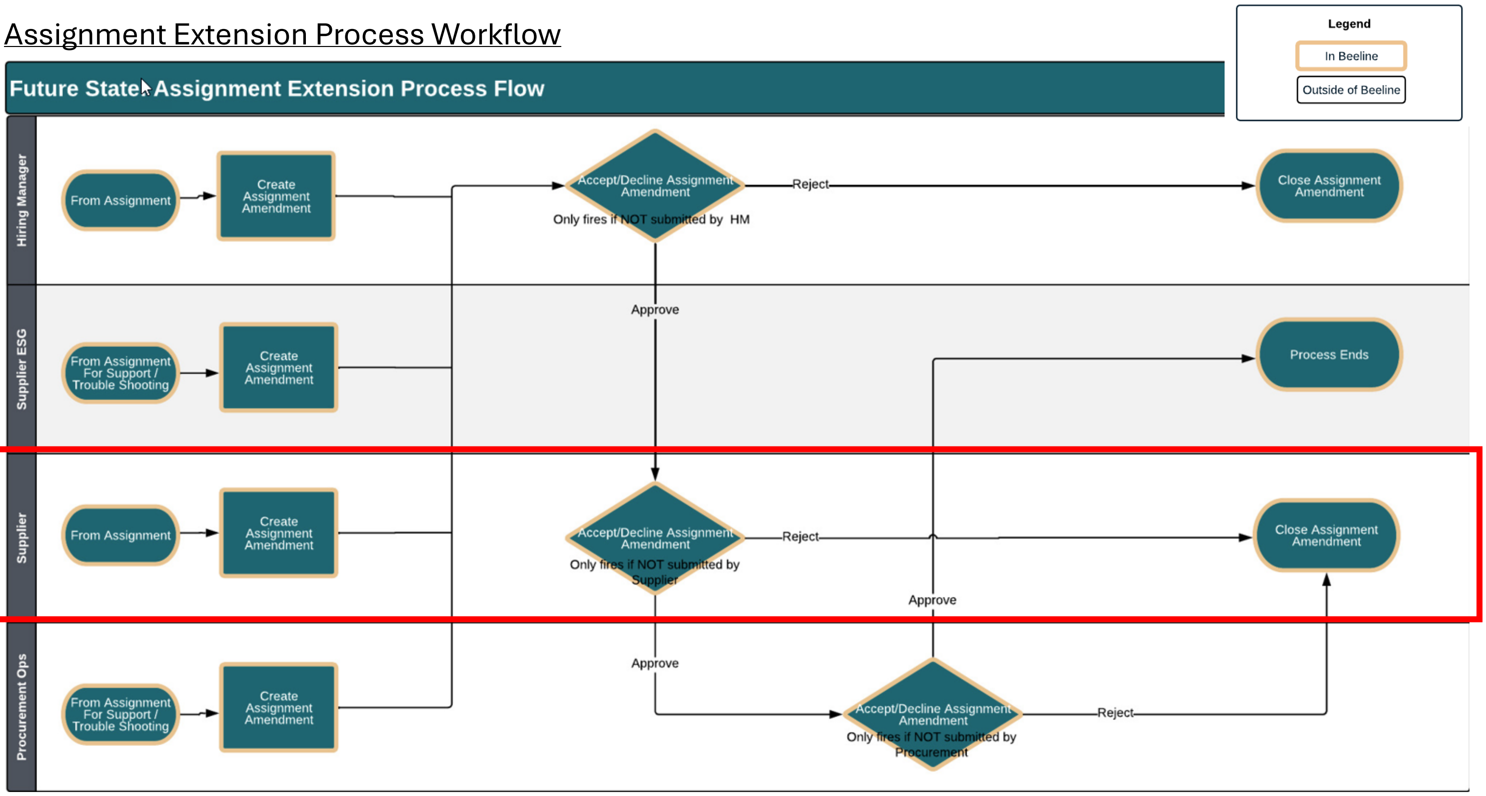


Extensions

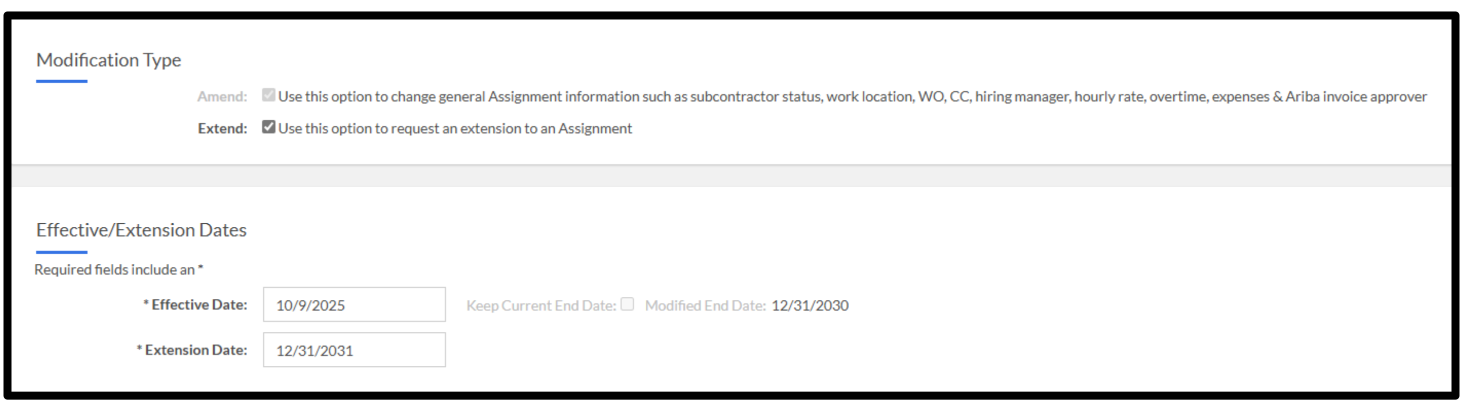
When to submit an Extension? When the original work requires more time due to project scope changes, business continuity needs, replacement delay.

When submitting an Extension, an Amendment can also be initiated during the Extend event.

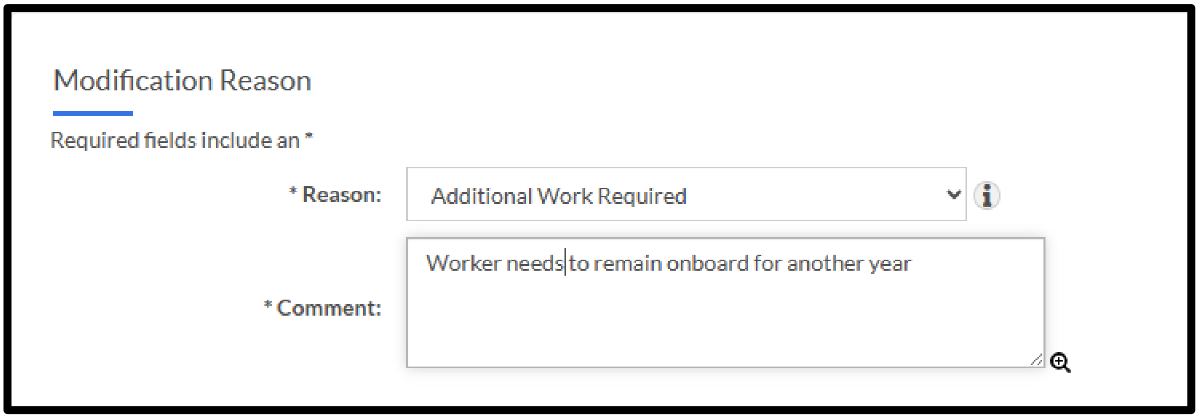
<u>Assignment Extension Process Workflow</u>



1. Choose the Active Assignment in which you would like to “Extend”. Fill in the necessary fields. **NEVER** change the “Effective Date” as it always needs to be the date the Request is submitted. The” Extension Date” will be the new end date requested for the Assignment. Select ***Next***.

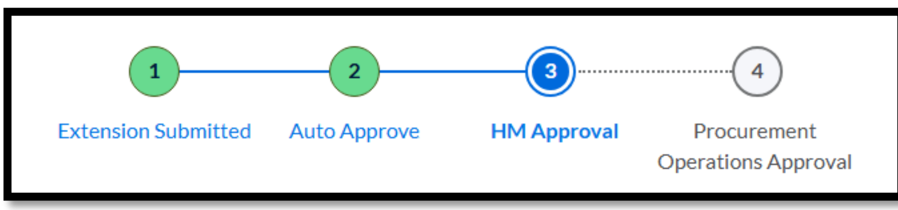


2. Select a *Modification Reason* and click ***Next***.



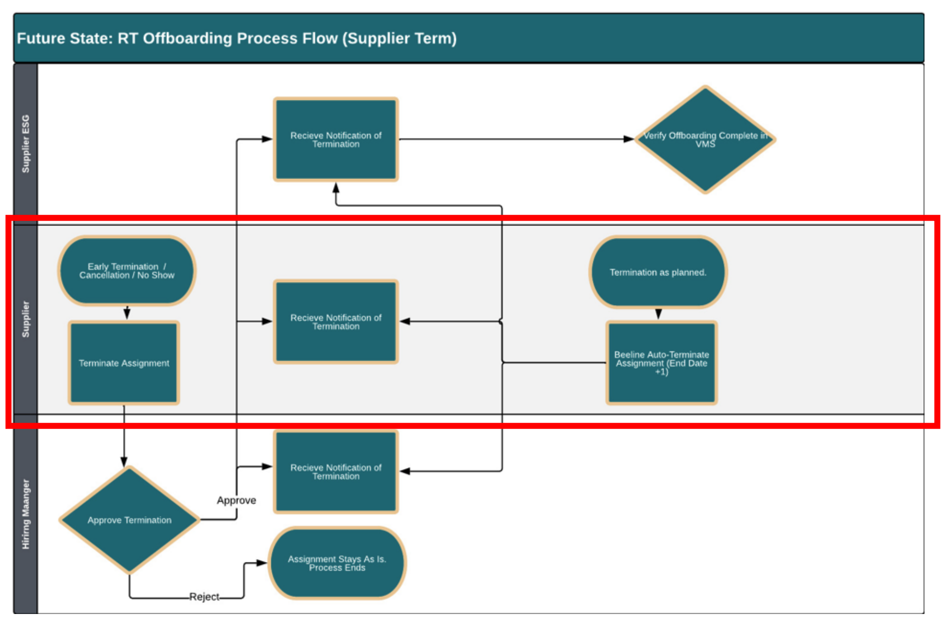
Be mindful of the multi-approvals that will take place depending on the given Amendment

3. Click *Next* and the following screen will show the *Approver Selection* to provide visibility to the Supplier specific to the next steps.
4. Upon submitting your Amendment, it will route to the Hiring Manager and then to Procurement Ops to review and approve.



Assignment Terminations

Your contractor will naturally expire in Beeline based on the end date on their Assignment. If no action is taken to extend the Assignment, the contractor record will be deactivated on that Assignment end date.



Termination Procedures

- **No Show**: If the contractor did not show up for their first day.
- **Cancellation**: If the project has been cancelled, thus the contractor would be terminated.

- **Early Termination**: Several reasons exist (main examples; project ended early, contractor was converted to a PSE employee, contractor took a different position)

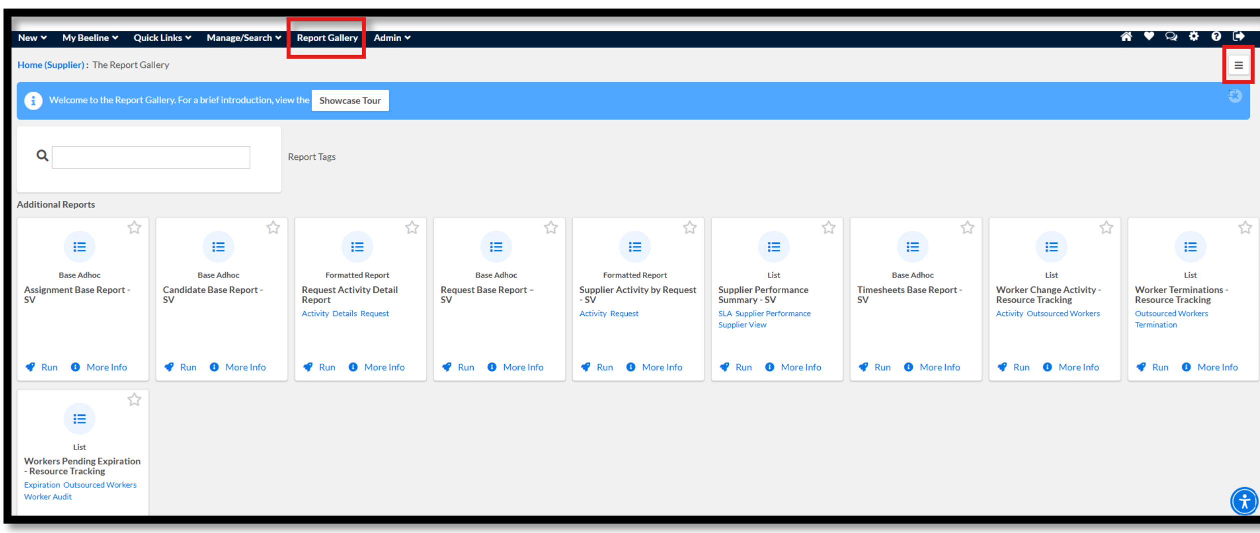
Beeline will trigger an off-boarding notification alerting you of the termination. In addition, please assist the Hiring Manager in a badge return if “A1-Badge Only” or “B1-Basic Profile” profile types are selected.

Notifications & Tasks

- Email notifications are automatically sent to Suppliers in two situations:
  - When they have a pending action item
  - When they need to be notified of an activity on requests or assignments under their ownership
- Email notification will provide links to the task that is needed the Supplier review
- Tasks can also be found on the *Dashboard* or the *My To Do* quadrant.

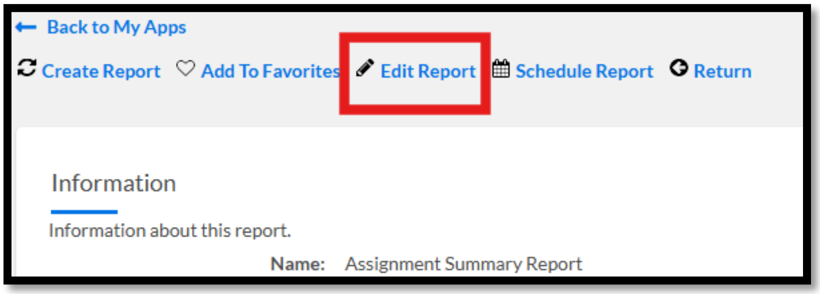
Reporting & Tools

You can access Reports from the Report Gallery, on your Home screen. Simply click on the report name to open it up to view, edit, run, send or schedule. You can also click the three dots next to the report name to add the report to your Favorites.

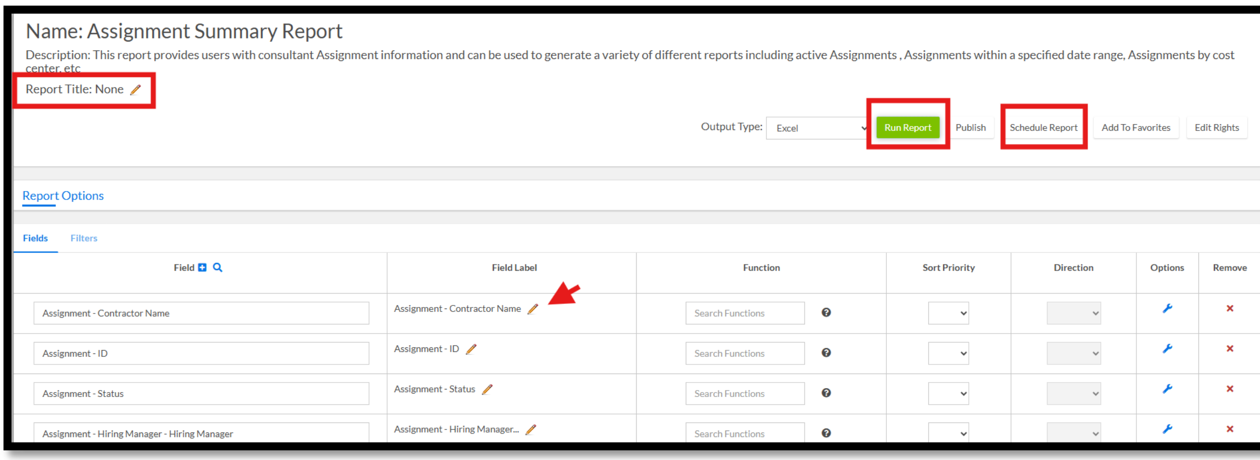


Viewing and Running your Report

1. Use the search functionality to find the desired report you are looking for. After clicking on the report, you will want to choose *Edit Report* at the top of your screen.

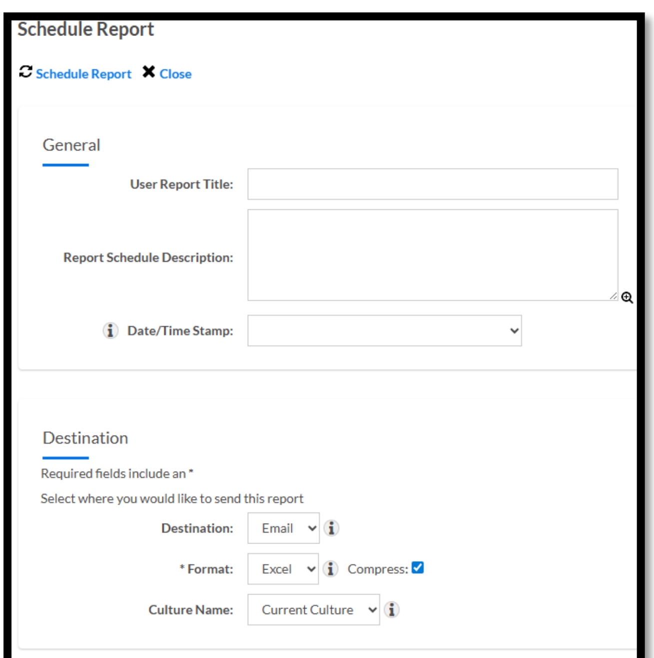


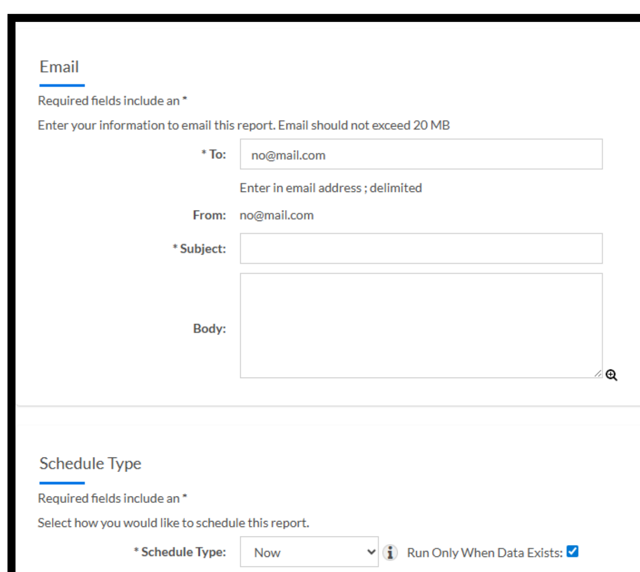
2. You can run the report as is or make edits via pencil icons.



Favorites: When adding a report to your Favorites, you will have the option to edit it, remove parameters, rename it and even schedule it.

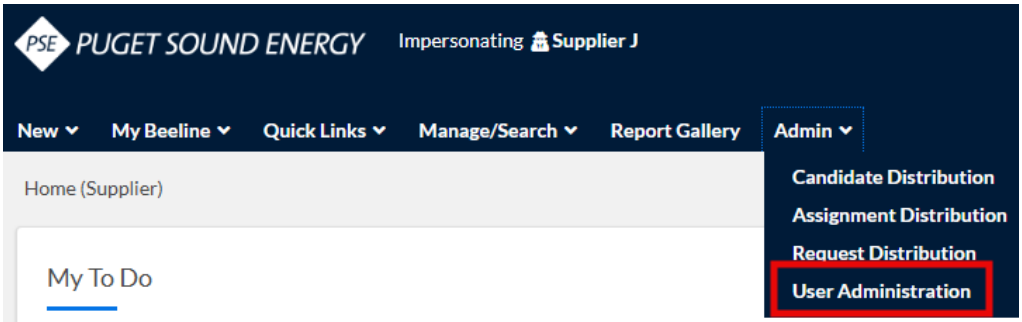
Schedule a Report: After choosing the report that you want to schedule, make edits as needed and fil in the required information to schedule it.





Supplier User Maintenance

To add or maintain your Supplier User profiles navigate to ***Admin*** and ***User Administration***.

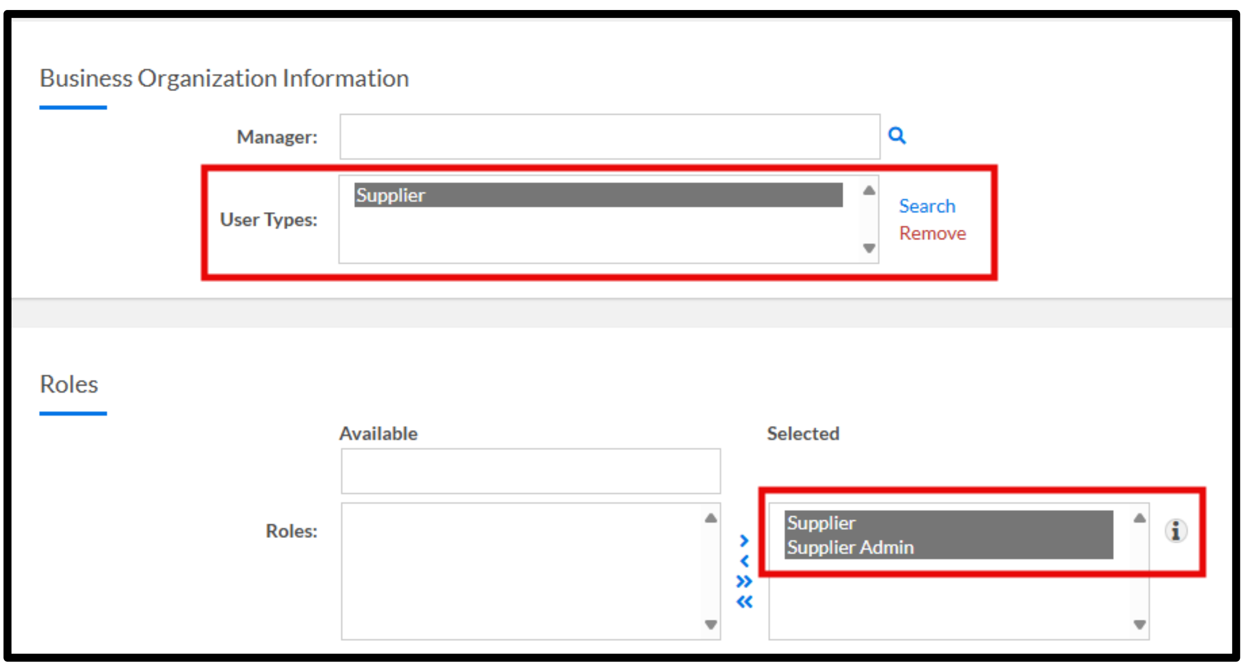


1. From the list that appears, select ***Supplier Admin*** and ***Supplier*** roles, then click ***OK.***

2. Click the main ***Search*** button located in the top right of the filter section. This will show all the current Supplier Users. To edit an existing user, click on their name, or select ***Add New*** to create a new user.

3. When adding a new Supplier user, ensure that:

   - ***User Types*** under Business Organization Information section is ***Supplier***
   - The Roles section includes either ***Supplier***, ***Supplier Admin*** or ***both***.



Resources

For all questions, please email Supplier ESG at SupplierESG@PSE.com.

PUGET SOUND ENERGY

Resource Links

- Supplier Resource Tracking FAQ: PSE | Beeline
- Supplier Resource Tracking Training Presentation (includes demos): PSE | Beeline
- Beeline Specific Supplier Training: Course | Supplier Training