WAND MSP Quick Reference Guide

Managed Services Request

Create Request

1. From the WAND home page, scroll down to the **Create Request** section.
2. Type and select the **Manager's Name**.
3. Select the **Operating Unit**.
4. Select the **Requisition Type** (Managed Services).
5. If this position has been used before, select the job title from **Previous Position**.
6. Click **Go**.
7. Enter **Job Title**.
8. Click **Attach** to upload documents according to the account SOPs.
9. Enter the **Start Date**.
10. Enter the **End Date**.
11. Verify the **# Positions**, modify if necessary.
12. Verify the **Hours Per Week**, modify if necessary.
13. Verify the **Hours Per Day**, modify if necessary.
14. Verify the **Days Per Week**, modify if necessary.
15. Type and select the **Location**.
    Note: If the manager has a default location displaying and the work will not be completed at this location, you can select Other Client Location and select the correct location.
16. If work is to be performed entirely offsite, check **Work Performed Offsite** and enter **Work City** and **Work Country**.
17. Select the **Reason**.
18. Complete all **Custom Fields** if present.
19. Select the **Department**.
    Note: Click on the **Add New** link to search for and add a new department not currently associated with the client manager.
20. Enter the **Bill Rate**.
21. Select the **Rate Information**.
22. Select the **Currency**.
23. Complete all **Custom Fields** if present.
24. Enter the worker's **First Name** and **Last Name**.
25. Select **Supplier**.
    Note: If **Other** is selected as the Supplier, the request will be in a pending status until the Supplier record is created and linked with the request and worker.
26. Enter the worker's **Email**.
27. Click the **Add New Worker** link to add additional workers.
    Note: In order to add additional workers, the number of positions must be greater than 1.
28. Complete all **Custom Fields** if present.
    Note: Custom Fields may appear in several sections. All sections will need to be completed according to the account SOPs.
29. Enter **Additional Contact**, if applicable.
30. Click the **Add Another Person** link to add additional contact names and email addresses.
31. Enter **HR Contact**, if applicable.
32. Select the **MSP Contact**.
33. DO NOT TOUCH **Operational Parameters**. Leave this section as is.
34. Click **Continue to Confirmation**.
35. Review the Request.
36. If corrections are needed, click **Edit**.
37. If no corrections are needed, click **Submit**.

Note: If your client is configured for Headcount Approvals, you will be prompted to modify the approver list at this point. Please refer to the **Approval Routing QRG** for more information.

Update Financials

1. Search for the filled **Engagement**.
2. On the **Details** tab, click **Edit** in the **Financials** section.
3. Update the **Invoice Option** field, use the start date as the **Effective Date**, and enter a **Justification**.
4. Click **Save**.

Close Engagement

1. Search for the Engagement.
2. From the **Details** tab, scroll to the bottom of the screen.
3. Click **Change Status**.
4. Select the **Status**.
5. Select the **Status Reason**.
6. Confirm **Date End**.
7. Click **Save**.