






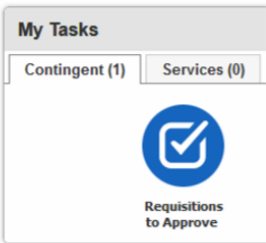


VectorVMS User Guide for Hiring Managers

Below is a step by step guide on how to use VectorVMS, Sevenstep's portal, to support the MSP program at the Commonwealth. VectorVMS also has a very comprehensive help section and user guides within their platform, so please feel free to reference their materials in addition to this guide. To access their reference materials, click the drop-down next your name and select *Help*.

If you have any questions or concerns, please reach out to us at Commonwealth@sevensteprpo.com.

VectorVMS Terminology

| Term | Icon | Definition |
|-------------|---|--|
| User |  | An individual provided with a VectorVMS user record and login to perform actions or view information. |
| Requisition |  | Completed request form outlining requirements for contingent or service (statement of work) assignments. |
| Candidate |  | Individual submitted to a contingent requisition or service engagement based on qualifications. May also refer to a worker on assignment (Engaged Candidate). |
| Engagement |  | Active (Engaged) record with assignment details; work order. |
| Vendor |  | A staffing company who submits and manages candidates/workers. In some programs, this term may also refer to an independent contractor/1099. |
| Disengage |  | Termination of assignment (engagement) record (good or bad). |
| Dashboard |  | Interactive and configurable home page. |
| Widgets |  | Interactive panels that provide actionable data. Standard widgets are applied to each user's dashboard, however, users can configure their dashboard to add, remove, and move widgets. |

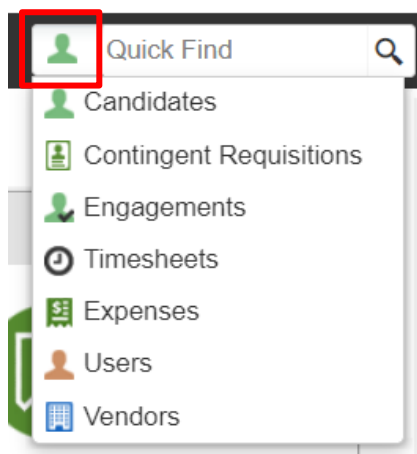
Logging In / Dashboard Overview

1. Login [here](#)
2. Type in your username (firstname.lastname) password, and i4625 for the organization key and click the Login button
 - a. If this is the first time logging in, you will need to reset your password

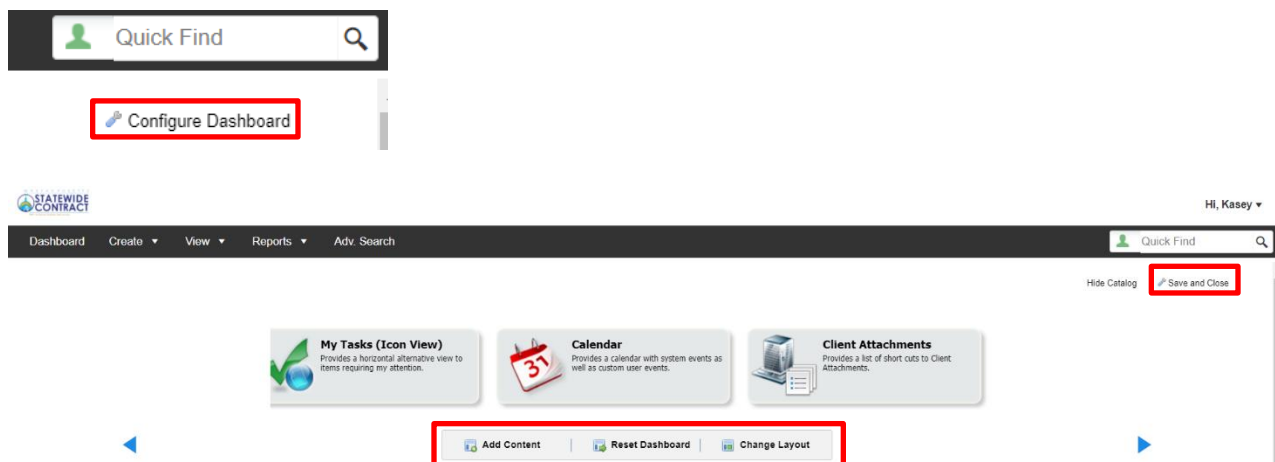
The below screenshot is what your dashboard should look like upon logging in.

- If you have any tasks to complete, such as requisitions to approve, timesheets or expenses to approve, the icon under *My Tasks* will have a number over it based on the number of items you need complete.
- Under *Current Activity*, you can see your requisitions, candidates, interviews, and engagements. If you click the green arrow icon, it will expand to show you the actual requisitions, candidates, interviews or engagements. You can also just click the box and it will expand to show you.
- The *Alerts* (or calendar) will show you any temporary workers with upcoming end dates, as a reminder or alert.
- The black toolbar has additional options to select, as well as dropdowns with further options.
- The *Quick Find* box allows you to search (quickly) and you can click the green person icon to change the selection based on what you are looking for. Example: If you are looking for a requisition you just created, click the green person and select *Contingent Requisition* from the dropdown.

SEVENSTEP



- You can also configure how you'd like to arrange your dashboard view. You can accomplish this by clicking, *Configure Dashboard* (right under the quick find box). You can add content to your dashboard view and change your layout. After you make any changes, click the *Save and Close* button.

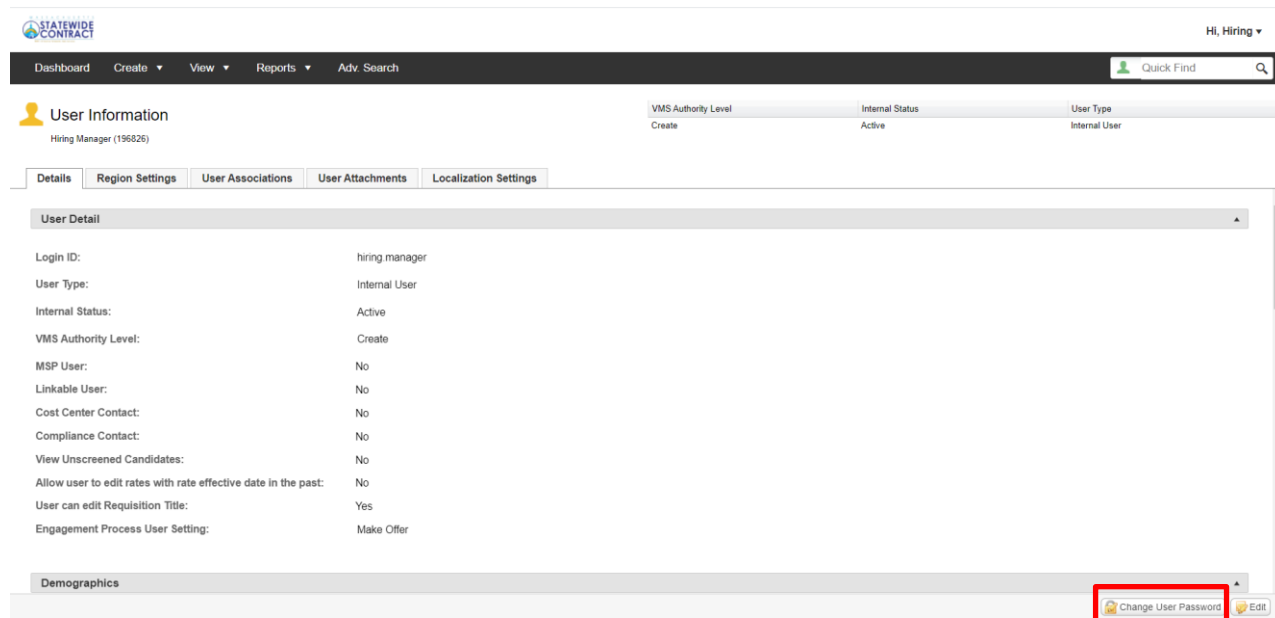


How to Change Your Password

1. Click *My Account* under your name dropdown on your dashboard.



2. Click *Change User Password*.



3. Click *Change User Password*. The below will pop up.

A screenshot of the 'Change User Password' dialog box. It contains the following fields and text:

- User Name (ID):** hiring.manager
- Current Password:** A text input field with a red dot to its right.
- New Password:** A text input field with a red dot to its right.
- Confirm Password:** A text input field with a red dot to its right.
- Password Hint Question:** A text input field containing 'SITA' with a red dot to its right.
- Password Hint Answer:** A text input field containing '****' with a red dot to its right.
- Email associated to this account:** anamarie.devito@sevenstepro.com with a red dot to its right.
- Password Requirements:**
 - Password is case sensitive
 - Cannot be the same as the previous password
- Buttons:** 'Save' (highlighted with a red box) and 'Cancel'.

4. Type in your current password, your new password, update your password hint Q&A, if you'd like and Click *Save*.

How to Create a Requisition (Work Order for Temp Help Worker)

1. Click the *Create* dropdown from the black toolbar on your Dashboard and select *Contingent Requisition*.
2. Click the folder with the green arrow icon to further drill down on title of requisition.

STATEWIDE CONTRACT

Hi, Kasey ▾

Dashboard Create ▾ View ▾ Reports ▾ Adv. Search Quick Find 🔍

Create Requisition Reports To Req. Status Start Date End Date

Job Selection Details Skills Compliance Distribution Approval

Region: Commonwealth of Massachusetts ▾

Choose a Job Title and select 'Next' Type 3 characters to search...

| Name | Low Rate | High Rate | Short Description | Req Class ID | Details |
|-----------|----------|-----------|---------------------|--------------|---------|
| July 2020 | \$0.00 | \$0.00 | July 2020 Rate Card | 97952 | |

3. Click the Green + icon for the job title you want to use for your requisition and Click Next.

STATEWIDE CONTRACT

Hi, Kasey ▾

Dashboard Create ▾ View ▾ Reports ▾ Adv. Search Quick Find 🔍

Create Requisition Reports To Req. Status Start Date End Date

Job Selection Details Skills Compliance Distribution Approval

Region: Commonwealth of Massachusetts ▾

Choose a Job Title and select 'Next' Type 3 characters to search...

| Name | Low Rate | High Rate | Short Description | Req Class ID | Details |
|--------------------------------|----------|-----------|--------------------------------|--------------|---------|
| Accountant | \$1.00 | \$41.40 | Accountant | 97955 | |
| Accountant - Senior | \$41.41 | \$58.06 | Accountant - Senior | 98003 | |
| Accounting Support | \$1.00 | \$25.53 | Accounting Support | 97956 | |
| Administrative Assist - Senior | \$1.00 | \$47.10 | Administrative Assist - Senior | 98004 | |
| Administrative Support | \$1.00 | \$24.15 | Administrative Support | 97954 | |
| Buyer | \$1.00 | \$27.60 | Buyer | 97957 | |
| Certification Coordinator | \$1.00 | \$24.15 | Certification Coordinator | 97958 | |
| Clinical Support | \$1.00 | \$23.46 | Clinical Support | 97959 | |

Page 1 of 4

Displaying 1 - 15 of 58

Cancel Next

4. Begin filling in the requested fields. Any field with a red circle is a required field.

Requisition Details

Requisition Template: ☐

Requisition Class: July 2020 : Accountant Region Name:

Title/Role:

No. of Openings: No. Filled:

Start Date: End Date:

No New Submittals After:

Max Submittals by Vendor: Per Opening

- When you get to the Requisition Description section – you will see a field for a short description and a complete description.
 - The short description should be anything specific or required that we should know about the requisition.

SEVENSTEP

- The complete description is similar to the actual job description.

Requisition Description

Engagement Type: ☐ Contract ☐ Contract to Perm

Short Description: 0/254

Complete Description:

- When you get to the Contact Information section, whoever you add in the *Reports To* field will receive email notifications when a temporary worker's assignment is ending.
- The *Client Contact* on the requisition and agreements will be able to see all requisitions and engagements associated with that client contact and this role can be distinct and separate from each *Hiring Manager/Reports To* field.

STATEWIDE CONTRACT Hi, hiring ▾

Dashboard Create ▾ View ▾ Reports ▾ Adv. Search Quick Find

Create Requisition Reports To Req. Status Start Date End Date

Job Selection Details Skills Compliance

24/10000

Contact Information

Client Contact: manager, hiring

Req. Owner: manager, hiring

Reports To: manager, hiring

- When you get to the Required / Desired Skills section – click the Green +Add icon to include any required or desired skills, along with number of years of experience they should have.

STATEWIDE CONTRACT Hi, hiring ▾

Dashboard Create ▾ View ▾ Reports ▾ Adv. Search Quick Find

Create Requisition Sr. Accountant (105266) Reports To Req. Status Start Date End Date

hiring manager Draft 07/01/2020 12/31/2020

Job Selection Details Skills Compliance

Required / Desired Skills

| Remove | Skill | Required / Desired | Amount of Experience |
|--------|-------|--------------------|----------------------|
|--------|-------|--------------------|----------------------|



Create Requisition

Sr. Accountant (105266)



| Reports To | Req. Status | Start Date | End Date |
|----------------|-------------|------------|------------|
| hiring manager | Draft | 07/01/2020 | 12/31/2020 |

Required / Desired Skills

| Remove | Skill | Required / Desired | Amount | of Experience |
|--------------------------|--------------|--------------------|--------|---------------|
| <input type="checkbox"/> | Pivot Tables | Required | 5 | Years |
| <input type="checkbox"/> | Word | Required | 3 | Years |

https://vms-b2.vectorvms.com/7000/tabReqSkills.aspx?last_step=&req_id=1...

Previous Save as Draft Submit Now **Next**

- Click *Next* after you complete the requisition details.
- The next screen will show you the compliance tasks that need to be completed as part of the Engagement process.
- You should select the compliance tasks that are required for your specific requisition or need. This is accomplished by clicking on the data sheet icon in the upper right corner of the grid.

This section outlines Compliance and/or On/Offboarding tasks that will need to be completed as part of the Candidate Submit and/or Engagement process.

| Selected | Group Name | Details | Linked | Global |
|--------------------------|----------------------|---------|--------|--------|
| <input type="checkbox"/> | Background Checks | | | |
| <input type="checkbox"/> | Candidate References | | | |
| <input type="checkbox"/> | DOR Requirements | | | |
| <input type="checkbox"/> | Finger Print Check | | | |

No data to display

- You will then be presented with a list of compliance options that you can choose from as appropriate for your specific requisition, per below.

This section outlines Compliance and/or On/Offboarding tasks that will need to be completed as part of the Candidate Submit and/or Engagement process.

| Selected | Group Name | Details | Linked | Global |
|--------------------------|----------------------|---------|--------|--------|
| <input type="checkbox"/> | Background Checks | | | |
| <input type="checkbox"/> | Candidate References | | | |
| <input type="checkbox"/> | DOR Requirements | | | |
| <input type="checkbox"/> | Finger Print Check | | | |

Displaying 1 - 4 of 4

SEVENSTEP

- Click *Next*.
 - This will bring you to the final page (approval) before your requisition is complete.
 - The approval path/hierarchy will be specific to each agency and/or Hiring Manager. The MSP will always be the final approver.
- 5. Click *Submit* to complete your requisition. The requisition will follow the approval hierarchy for approval before the requisition is released to suppliers.
 - a. You can add attachments to the justification of the requisition before submitting it.

STATEWIDE CONTRACT

Hi, Hiring ▾

Dashboard Create ▾ View ▾ Reports ▾ Adv. Search Quick Find 🔍

Create Requisition
Test (105298)

Job Selection Details Skills Compliance Approval 9

Internal Approval Request

| Assigned Approver Name | Approval Level |
|------------------------|----------------|
| Approving Manager | Hiring Manager |
| MSP MSP | SevenStep MSP |

Justification Attachments

Add New Attachment

| Action | Attachment Type | Description | File Name | Created By | Created Date |
|--------|-----------------|-------------|-----------|------------|--------------|
|--------|-----------------|-------------|-----------|------------|--------------|

Page 1 of 1

No data to display

Previous Save as Draft Submit

- After you click *Submit*, your requisition status should be showing as Pending approval. If you click the *Approval/History* tab of the requisition after submittal, you are able to see who the requisition is sitting with for approval.

STATEWIDE CONTRACT

Hi, Hiring ▾

Dashboard Create ▾ View ▾ Reports ▾ Adv. Search Quick Find 🔍

Requisition
Test (105298)

Job Selection Details Skills Compliance Candidates Distribution Reference ApprovalHistory

Approval Summary

| Date | Name | Level | Status | Comments |
|--------------------|-------------------|----------------|-----------------------------|----------|
| 06/17/2020 3:38 PM | Hiring Manager | Hiring Manager | Submitted - Client Approval | |
| | Approving Manager | Hiring Manager | Next Approver | |
| | MSP MSP | SevenStep MSP | Next Approver | |

- The Hiring Manager and requisition owner will receive an email when the requisition has been approved. The status will also change on the dashboard

Review Submitted Candidates

- There are two ways to view submitted candidates:
 - By Clicking *View > Candidates* from the black toolbar, or
 - By Clicking *Active Candidates* from *Current Activity* on your Dashboard.
- You can click the candidate's name to review the candidate and all of their details.

The screenshot shows the 'Requisition' page for 'Sr. Buyer (105261)'. The top navigation bar includes 'Dashboard', 'Create', 'View', 'Reports', and 'Adv. Search'. A 'Quick Find' search bar is on the right. Below the navigation bar, there are tabs for 'Job Selection', 'Details', 'Skills', 'Compliance', 'Candidates', 'Distribution', 'Reference', and 'Approval/History'. The 'Candidates' tab is selected. Below the tabs, there are buttons for 'Reset View', 'Save View', 'Show Filters', and 'Export'. A table displays the list of submitted candidates:

| Action | Candidate | Cand. Status | Req. Title | Req. ID | Req. Status | Req. Reports To | Rate | Vendor | Submitted Date |
|--------|----------------|--------------|------------|---------|-------------|-----------------|-------------|--------|--------------------|
| | Gacia, Sally | Active | Sr. Buyer | 105261 | Open | manager hiring | \$13.70 USD | | 06/10/2020 05:0... |
| | Walker, Joseph | Active | Sr. Buyer | 105261 | Open | manager hiring | \$27.40 USD | | 06/10/2020 04:5... |

At the bottom of the table, it says 'Page 1 of 1' and 'Displaying 1 - 2 of 2'.

The screenshot shows the bottom of the 'Requisition' page. It includes a 'Requisition Summary List' button, a 'Bulk Actions' dropdown menu, and a 'Compare Candidates' button. There is also a 'Print' button.

Note: You can also easily compare submitted candidates by clicking the *Compare Candidates* button on the bottom of your screen.

The screenshot shows the 'Requisition' page for 'Sr. Accountant (195286)'. The top navigation bar includes 'Dashboard', 'Create', 'View', 'Reports', and 'Adv. Search'. A 'Quick Find' search bar is on the right. Below the navigation bar, there are tabs for 'Job Selection', 'Details', 'Skills', 'Compliance', 'Candidates', 'Distribution', 'Reference', and 'Approval/History'. The 'Candidates' tab is selected. Below the tabs, there are buttons for 'Reset View', 'Save View', 'Show Filters', and 'Export'. A table displays the list of submitted candidates:

| Action | Candidate | Cand. Status | Req. Title | Req. ID | Req. Status | Req. Reports To | Rate | Vendor | Submitted Date |
|--------|-------------------|--------------|----------------|---------|-------------|-----------------|-------------|--------|---------------------|
| | Candidate3, Trial | New | Sr. Accountant | 105266 | Open | Manager Hiring | \$15.07 USD | | 06/11/2020 09:13 pm |
| | Candidate2, Trial | New | Sr. Accountant | 105266 | Open | Manager Hiring | \$20.55 USD | | 06/11/2020 09:12 pm |
| | Candidate, Trial | New | Sr. Accountant | 105266 | Open | Manager Hiring | \$17.81 USD | | 06/11/2020 09:11 pm |

At the bottom of the table, it says 'Page 1 of 1' and 'Displaying 1 - 3 of 3'.

The screenshot shows the bottom of the 'Requisition' page. It includes a 'Requisition Summary List' button, a 'Bulk Actions' dropdown menu, and a 'Compare Candidates' button. There is also a 'Print' button.

- You can use the toggle on the left-hand side of the screen or click the green + icon to choose your selection criteria you want to use to compare the candidates.

SEVENSTEP

Candidate Compare
Sr. Accountant (105266)

4 of 4 selected Candidate(s) satisfy criteria.
0 Candidate(s) in pool also satisfy criteria.
0 Candidate(s) do not meet selected criteria.

Selection Criteria

| Candidate | Client Rate | Vendor Rate | Pay Rate | Employed Previously | Composite Score |
|-------------------------|-------------|-------------|----------|---------------------|-----------------|
| 38733 Candidate3, Trial | \$15.07 | \$14.62 | \$11.00 | Yes | 29.412 |
| 38731 Candidate, Trial | \$17.81 | \$17.28 | \$13.00 | Yes | 50 |
| 38732 Candidate2, Trial | \$20.55 | \$19.93 | \$15.00 | Yes | 117.647 |
| 30311 Walsh, June | \$64.00 | \$64.00 | \$61.44 | No | 104.412 |

- You can see as you chose your selection criteria, the candidates who don't meet the criteria are grayed out.

Candidate Compare
Sr. Accountant (105266)

1 of 4 selected Candidate(s) satisfy criteria.
0 Candidate(s) in pool also satisfy criteria.
3 Candidate(s) do not meet selected criteria.

Selection Criteria

| Candidate | Client Rate | Vendor Rate | Pay Rate | Employed Previously | Composite Score |
|-------------------------|-------------|-------------|----------|---------------------|-----------------|
| 38733 Candidate3, Trial | \$15.07 | \$14.62 | \$11.00 | Yes | 29.412 |
| 38731 Candidate, Trial | \$17.81 | \$17.28 | \$13.00 | Yes | 50 |
| 38732 Candidate2, Trial | \$20.55 | \$19.93 | \$15.00 | Yes | 117.647 |
| 30311 Walsh, June | \$64.00 | \$64.00 | \$61.44 | No | 104.412 |

This is a helpful tool for Hiring Managers to narrow down the candidate pool.

Select Candidate to Interview

1. View your candidates (by following the step above).
2. If you are a Hiring Manager who prefers to interview your candidates:
 - a. Click the *Actions* icon/dropdown next to the candidate you would like to interview and Select *Interview* (and proceed to the next step; inputting interview availability).
3. If you are a Hiring Manager who does not want to interview your candidates and would like the MSP to interview your candidates:
 - a. Click *Forward* next to the candidate you would like to interview to share with the Program Manager.
 - b. Input the Commonwealth@sevensteprpo.com email address into the alternate emails field, include a subject line and comment and click *Send*.
 - c. The Program Manager will work with the supplier from there to schedule and conduct the interview.



Dashboard
Create ▼
View ▼
Reports ▼
Adv. Search



Candidate Summary

All Active Candidates

Reset View
Save View
Show Filters
Export

| | Action | Candidate | Cand. Status | Req. Title | Req. ID |
|--|--------|-------------------|--------------|-----------------|---------|
| | | Williams, Dolores | Make Offer | Admin Assistant | 105262 |
| | | oway, Lisa | Active | Accountant | 105260 |
| | | iams, Johnny | Active | Accountant | 105260 |

Candidate Comments
Deployable Rating
Forward
Interview
Reject
Request Info
View Requisition
View Offer

Input Interview Availability

NOTE: You only need to complete this step if you plan on interviewing the candidate versus having the MSP handle the interview process.

1. Click on the Candidate Name for the candidate you would like to interview and Click *Add Interview Option*.

The screenshot displays the SevenStep application interface. At the top, there is a navigation bar with 'Dashboard', 'Create', 'View', 'Reports', and 'Adv. Search'. Below this, the 'Candidate Summary' page is shown for 'All Candidates - With My User ID'. A table lists candidates with columns for Action, Candidate, Cand. Status, and Req. Title. The 'Interview' option is highlighted in the left-hand menu. Below the table, the 'Candidate Interview History' section is visible, showing a table with columns for Interview ID, Status, Interviewer, Updated Date, Updated User, and Details. The 'Add Interview Option' button is highlighted in the top right corner.

2. Input the date, time, interview type, any additional interviewers, and location. In the details field, you can include anything the candidate should be aware of for their interview.
 - a. The time zone field should default to Eastern Time.
 - b. There are only two options for interview type (phone or in-person), if you would like to use Zoom, Go To Meeting, etc. for your interview, select phone as the interview type and input the Zoom (or whichever technology you are using for the interview) information including login info in the details field.
3. You can either Click *Submit* or *Add Another Option*.

- The interview request will be sent to the supplier who will then confirm the interview details with the candidate. Upon acceptance of the interview request, the Hiring Manager will be notified via email.

Provide Interview Feedback

1. To provide interview feedback on a candidate, click the box with the number next to *Interviews Accepted* under Current Activity on your dashboard.

| Activity | Count | Count |
|----------------------|-------|-------|
| Draft Requisitions | 2 | 11 |
| Pending Requisitions | 0 | 5 |
| Active Requisitions | 1 | 13 |
| New Candidates | 0 | 0 |
| Active Candidates | 0 | 17 |
| Interviews Accepted | 0 | 1 |
| Engagement Requests | 0 | 0 |
| Engagements | 0 | 9 |

2. Click the clipboard with green arrow icon and select *Interview* or click the candidate name and go to the interview tab.

| Action | Candidate | Cand. Status | Req. Title | Req. ID | Req. Status | Req. Reports To | Rate | Vendor | Submitted Date |
|-----------|---------------|--------------------|-------------|---------|----------------------|-----------------|-------------|----------------|---------------------|
| Interview | Jean, Lillian | Interview Accepted | Call center | 105282 | Interviews occurring | Scuto Alyssa | \$19.18 USD | Sevenstep_Demo | 06/15/2020 06:15 pm |

3. Click the clipboard with green arrow icon under *Actions* and select *Complete*. You have to mark the interview as complete in order to provide feedback.

STATEWIDE CONTRACT

Hi, Kasey

Dashboard Create View Reports Adv Search Quick Find

Candidate

Jean, Lillian (38744)

Vendor: Sevenstep_Demo Candidate Status: Interview Accepted Req Title: Call center Reference Info: Req ID: 105282

Details Skills Compliance Employment Info Rate Info Reference **Interview** History

Current Interview

Interview ID: 3824 Interview Status: Interview Accepted

Actions Interview Information

Date/Time: 06/24/2020 9:00 AM Time Zone: (GMT-05:00) Eastern Time (US & Canada)

Interview Type: Phone Interviewer: Hiring Manager

Location: Zoom Call Candidate will arrive 10 mins

Add to Calendar Complete

Interview History

| Interview ID | Status | Interviewer | Updated Date | Updated User | Details |
|--------------|--------------------|----------------|--------------------|--------------|---------|
| 3824 | Interview Accepted | Hiring Manager | 06/23/2020 3:35 PM | Brian Knapp | |

https://vms-b2.vectorvms.com/8000/candidate_interview.aspx?cand_id=387...

4. After marking the interview as *Complete*, the below will pop up and you can add your interview feedback into the *Comment* field and click *Submit*.

STATEWIDE CONTRACT

Hi, Kasey

Dashboard Create View Reports Adv Search Quick Find

Candidate

Jean, Lillian (38744)

Vendor: Sevenstep_Demo Candidate Status: Interview Accepted Req Title: Call center Reference Info: Req ID: 105282

Details Skills Compliance Employment Info Rate Info Reference Interview History

Current Interview

Interview ID: 3824 Interview Status: Interview Accepted

Actions Interview Information

Date/Time: 06/24/2020 9:00 AM Time Zone: (GMT-05:00) Eastern Time (US & Canada)

Interview Type: Phone Interviewer: Hiring Manager

Location: Zoom Call Candidate will arrive 10 mins

Add to Calendar Complete

Candidate Interview History

| Interview ID | Status |
|--------------|--------------------|
| 3824 | Interview Accepted |

Complete Interview

Enter Interview Completion Info

Date: 06/24/2020 Time: 09:00 am Time Zone: (GMT-05:00) Eastern Time (US & Canada)

Interviewer: Hiring Manager

Comment:

Submit Cancel

Select Candidate for Offer

1. Click on the Candidate Name for the candidate you would like to make an offer to and Click *Make Offer*.



Dashboard Create View Reports Adv. Search

Candidate Summary All Candidates - With My User ID

Reset View Save View Show Filters Export

| Action | Candidate | Cand. Status | Req. Title | Req. ID |
|--------|-------------------|--------------------------|-----------------|---------|
| | Candidate3, Trial | Schedule interview | Sr. Accountant | 105266 |
| | Candidate2, Trial | Schedule interview | Sr. Accountant | 105266 |
| | Candidate, Trial | Active | Sr. Accountant | 105266 |
| | Williams, Dolores | Make Offer | Admin Assistant | 105262 |
| | ia, Sally | Engaged | Sr. Buyer | 105261 |
| | ker, Joseph | Reject-Req Closed/Filled | Sr. Buyer | 105261 |

Candidate Comments
 Deployable Rating
 Forward
 Interview
Make Offer
 Reject
 Request Info
 View Requisition
 View Offer

2. Input "Candidate Name – Offer" in the *Subject* field, input start and end date and other pertinent information in the *Comments* field.

Make Offer

Offer Instructions

Please enter a subject line and complete this form for the e-mail to the person who will present your offer to the vendor:

Subject:

Comments:

Candidate Rates

Payment Basis:

Currency: \$ USD

| Rate Type | Rule Name | Client Rate | Vendor Rate | Pay Rate |
|-----------|-----------------|-------------|-------------|-------------|
| Current | Standard Hourly | \$27.40 USD | \$26.58 USD | \$20.00 USD |
| Offer | Standard Hourly | \$27.40 USD | \$26.58 USD | \$20.00 USD |

Dates of Engagement

Start Date:

End Date:

3. Click *Send*.
4. This will then go to the Sevenstep MSP team to review, approve, and submit to the Supplier.
5. The supplier will then review the offer and approve or reject the request.

Timesheet Approval

1. If you have any timesheets to approve, you will have a number on the *Timesheets to Approve Icon* on your Dashboard, but you can also check by going to *View* on the black toolbar and selecting *Timesheets*.

The screenshot shows the Sevenstep dashboard. At the top, the 'View' menu is highlighted with a red box. Below the dashboard, the 'My Tasks' section contains three icons: 'Requisitions to Approve', 'Timesheets to Approve' (highlighted with a red box), and 'Expenses to Approve'. The 'Current Activity' section on the left lists various tasks with counts. The 'Alerts' section on the right shows a calendar for May 2020.

2. Click *Action* (folder with green arrow) and select *View Timesheets*.

The screenshot shows the 'Timesheet Summary' page. The 'Action' menu is highlighted with a red box, and the 'View Timesheet' option is selected. The table below shows a list of timesheets with columns for Action, Candidate, Period End Date, Timesheet ID, Timesheet Status, Hours, Total, Amt, Vendor, Reports To, Cand. ID, Requisition Title, Invoice ID, and Suspended.

| Action | Candidate | Period End Date | Timesheet ID | Timesheet Status | Hours | Total | Amt | Vendor | Reports To | Cand. ID | Requisition Title | Invoice ID | Suspended |
|--------|---------------|-----------------|--------------|------------------|-------|------------|-----|-----------------|-----------------|----------|-------------------|------------|-----------|
| | Garcia, Sally | 06/06/2020 | 27871 | Approved | 40.00 | \$0.00 USD | | Commonwealth... | Manager, Hiring | 38726 | Sr Buyer | | |

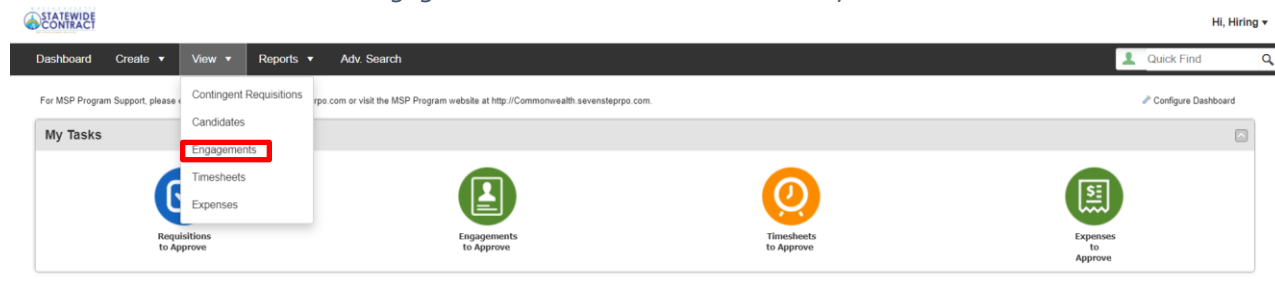
3. Click *Approve* or *Reject*.

The screenshot shows the 'Timesheet' form. The 'Approve' and 'Reject' buttons are highlighted with a red box. The form includes fields for Start time of Day, End time of Day, Non-billable hours, State Entity, Cost Center, Standard Hourly, Total Billable Hours (Day), Rate Summary, and Comment.

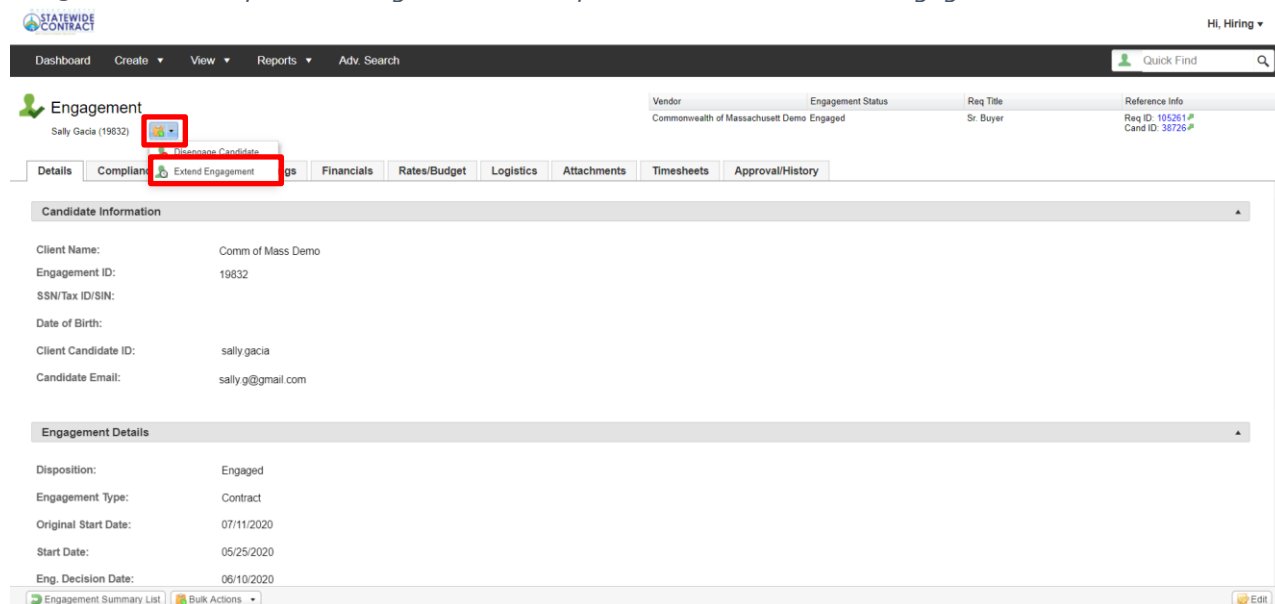
NOTE: You can approve (or reject expenses) the same way you do for timesheets but click *Expenses* instead of *Timesheets*.

Extend Engagement

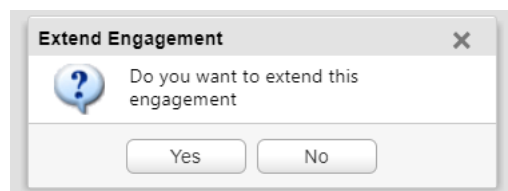
1. Click **View** and select *Engagements* from the black toolbar of your dashboard.



2. Click the *Candidate Name* or Click the *Action* dropdown and Select *View Engagement* for the Candidate you would like to extend their engagement. Either way it is going to bring you to the Engagement Screen.
3. Click the *Clipboard with green arrow dropdown* and Select *Extend Engagement*.



4. You will get the below pop-up and Click **Yes**.



5. It will now allow you to edit the extend through date field under Engagement Details in the candidate's record.

STATEWIDE CONTRACT

Hi, Hiring ▾

Dashboard Create ▾ View ▾ Reports ▾ Adv. Search Quick Find

Engagement Sally Gacia (19632) ▾

Vendor: Commonwealth of Massachusetts Demo Engaged Engagement Status: Sr. Buyer Req Title: Reference Info: Req ID: 105261 Cand ID: 38726

Details Compliance Time/Expense Settings Financials Rates/Budget Logistics Attachments Timesheets Approval/History

Engagement Details

Disposition: Engaged
Engagement Type: Contract
Original Start Date: 07/11/2020
Start Date: 05/25/2020
Eng. Decision Date: 06/10/2020
Current Through Date: 12/31/2020
Extend Through Date: 12/31/2020
Change Reason:
Change Requested By: Client
Work Location: Salem Juvenile Court

Engagement Contacts

Engagement Summary List Bulk Actions **Save** Cancel

6. Either type in or select the new end date for the engagement in the *Extend Through Date* field.
7. Enter a Change Reason in the *Change Reason* field.
8. Click **Save**.
9. The Supplier now needs to accept the extension, so you will see the below pop up. Click **Yes**.

Approval / Vendor Acceptance Required ✕

Recent changes require approval / vendor acceptance.
Would you like to submit them for approval / vendor acceptance?

Yes No

10. The approval hierarchy will show and *Click Submit Changes for Approval*.

STATEWIDE CONTRACT

Hi, Hiring ▾

Dashboard Create ▾ View ▾ Reports ▾ Adv. Search Quick Find

Engagement Sally Gacia (19632) ▾

Vendor: Commonwealth of Massachusetts Demo Engagement Draft Engagement Status: Sr. Buyer Req Title: Reference Info: Req ID: 105261 Cand ID: 38726

Details Compliance Time/Expense Settings Financials Rates/Budget Logistics Attachments Timesheets Approval/History

Internal Approval Request

| Assigned Approver Name | Approval Level |
|------------------------|----------------|
| Approving Manager | Hiring Manager |
| MSP MSP | SevenStep MSP |

Justification Attachments

Add New Attachment

| Action | Attachment Type | Description | File Name | Created By | Created Date |
|--------------------|-----------------|-------------|-----------|------------|--------------|
| No data to display | | | | | |

Engagement History

| Transa... # | Change User | Change Date | Reports To | Client Contact | Engaged By | Bill Rate | Vendor Rate | Pay Rate | Rate Effective Date | Cost Center | Type | Engage... Through Date | Disposition Status | Comn |
|-------------|----------------|---------------------|-----------------|-----------------|------------------|-----------|-------------|----------|---------------------|-------------|----------|------------------------|--------------------|------|
| Current | Hiring Manager | 06/19/2020 09:45 am | Manager, Hiring | Manager, Hiring | Williams, Carrie | \$13.70 | \$13.29 | \$10.00 | 05/25/20 | Default C. | Contract | 01/01/20 | Engaged | Test |

Engagement Summary List Bulk Actions **Submit Changes For Approval**

SEVENSTEP

11. After you Click *Submit Changes for Approval*, you will see the engagement status will be changed to *Changes Pending Approval*.

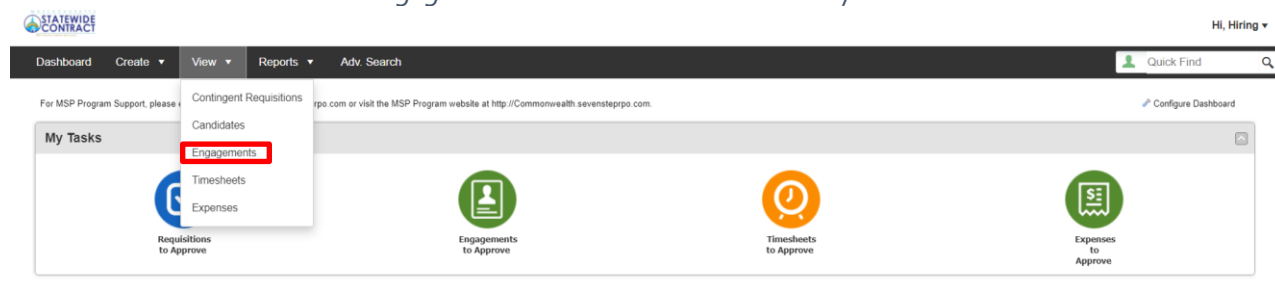
| Vendor | Engagement Status | Req Title | Reference Info |
|------------------------------------|-----------------------|-----------|----------------------------------|
| Commonwealth of Massachusetts Demo | Changes Pend Approval | Sr. Buyer | Req ID: 105261 Cand ID: 38726 |

12. Once the approval process is complete, including supplier acceptance, then the change is applied, and timesheets and expenses are eligible for entry up to the new date.

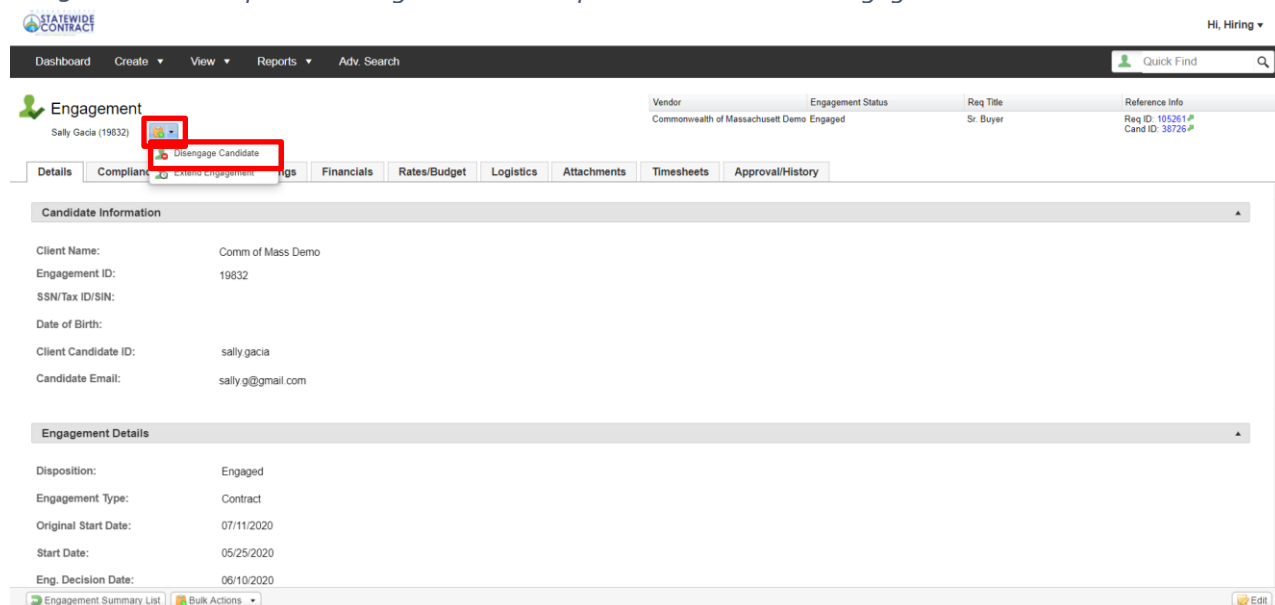
NOTE: Engagements are not extended until all approvals/acceptances are complete.

End (Disengage) Engagement

1. Click *View* and Select *Engagements* from the black toolbar of your dashboard.



2. Click the *Candidate Name* or Click the *Action dropdown* and Select *View Engagement* for the Candidate you would like to end their engagement. Either way it is going to bring you to the Engagement Screen.
3. Click the *Clipboard with green arrow dropdown* and Select *Disengage Candidate*.



4. You will get the below pop-up.
 - a. Select the *Reason* from the dropdown.
 - b. Select *Yes* or *No* if they are eligible to return and add *Comment* as to why.
 - c. Ensure you have the correct end date in the *Engagement Through Date* field.
 - d. Click *Save*

SEVENSTEP

Disengage Dolores Williams

Disengage the candidate for the following reason

Reason:

Reason Detail:

Is this candidate eligible to return?: ☒ Yes ☐ No

Return Comments:

Engt Through Date: 12/31/2020

Current Engt Through Date: 12/31/2020

Change Reason:

0/254

Save Cancel

5. The below will pop up and Click *Continue*.

Early Termination

The end date of this engagement is listed as 12/28/2020. If this is correct, click "Continue" to continue, or click "Cancel" and edit the "Engt Through Date" to reflect the correct end date of this engagement.

Continue Cancel

6. After you Click *Continue*, you should see the candidate shows as being successfully disengaged. Click *Close*.

Candidate was successfully disengaged

Disengage the candidate for the following reason

Reason: Disengaged-Terminated

Reason Detail:

Is this candidate eligible to return?: ☐ Yes ☒ No

Return Comments: Test

Engt Through Date: 12/28/2020

Current Engt Through Date: 12/31/2020

Change Reason:

4/254

Close