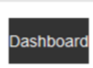
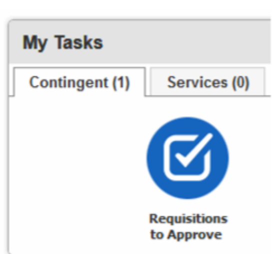
SEVENSTEP

# 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*.

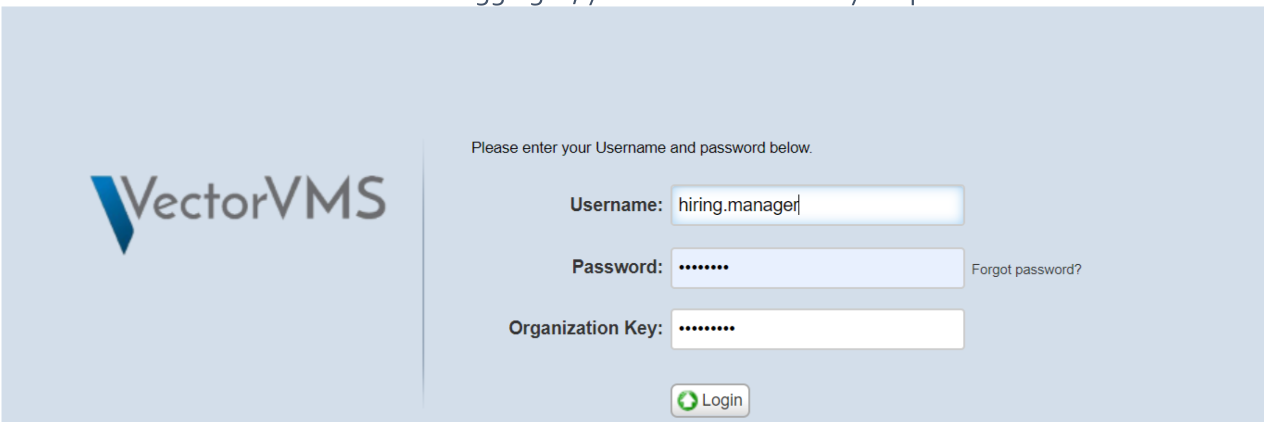
If you have any questions or concerns, please reach out to us at [Commonwealth@sevensteprpo.com](mailto:Commonwealth@sevensteprpo.com).

## VectorVMS Terminology

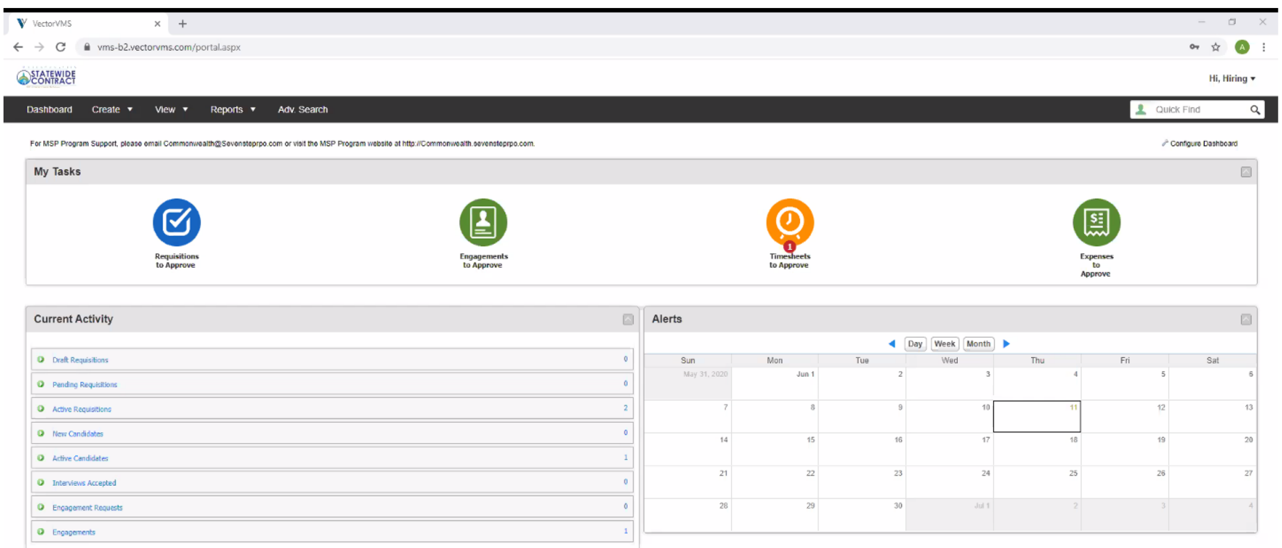
| Term | Icon | Definition |
|---|---|---|
| User |  | An individual provided with a VectorVMS user record and login to perform actions or view information. |
| Requisition |  | Completed request form outlining requirements for contingent or service (statement of work) assignments. |
| Candidate |  | 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

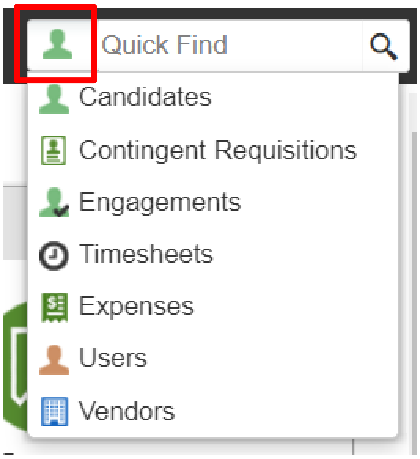
1. Login here
2. Type in your username (firstname.lastname) password, and i4625 for the organization key and click the Login button
   a. If this is the first time logging in, you will need to reset your password



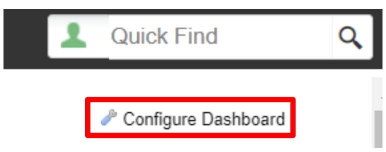

The below screenshot is what your dashboard should look like upon logging in.

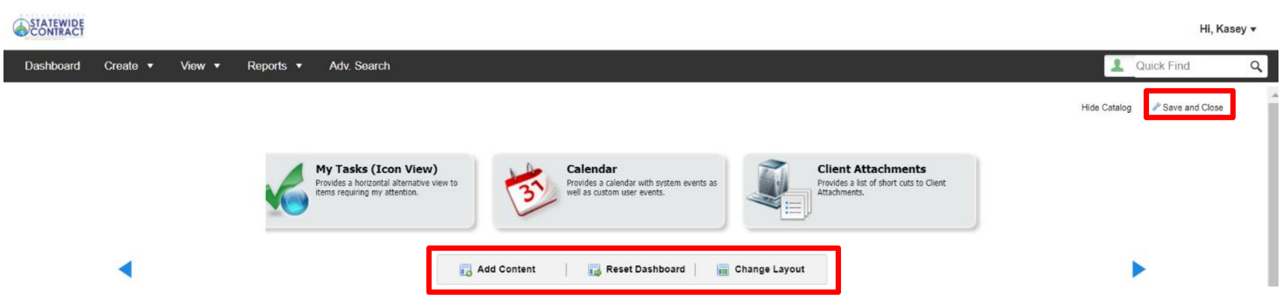



- If you have any tasks to complete, such as requisitions to approve, timesheets or expenses to approve, the icon under *My Tasks* will have a number over it based on the number of items you need complete.
- Under *Current Activity*, you can see your requisitions, candidates, interviews, and engagements. 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.



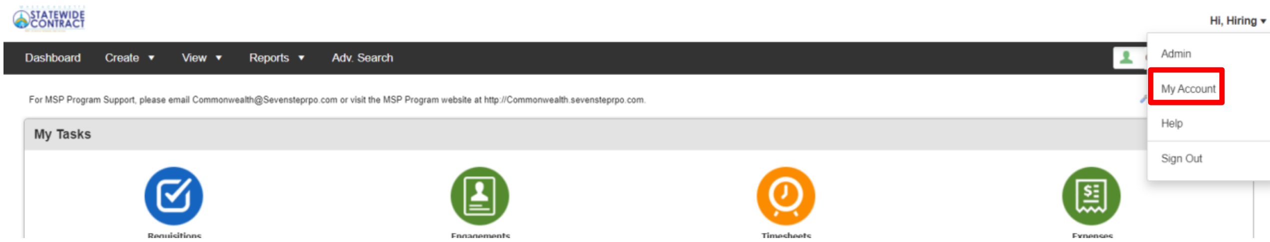

- You can also configure how you'd like to arrange your dashboard view. You can accomplish this by clicking, *Configure Dashboard* (right under the quick find box). You can add content to your dashboard view and change your layout. After you make any changes, click the *Save and Close* button.



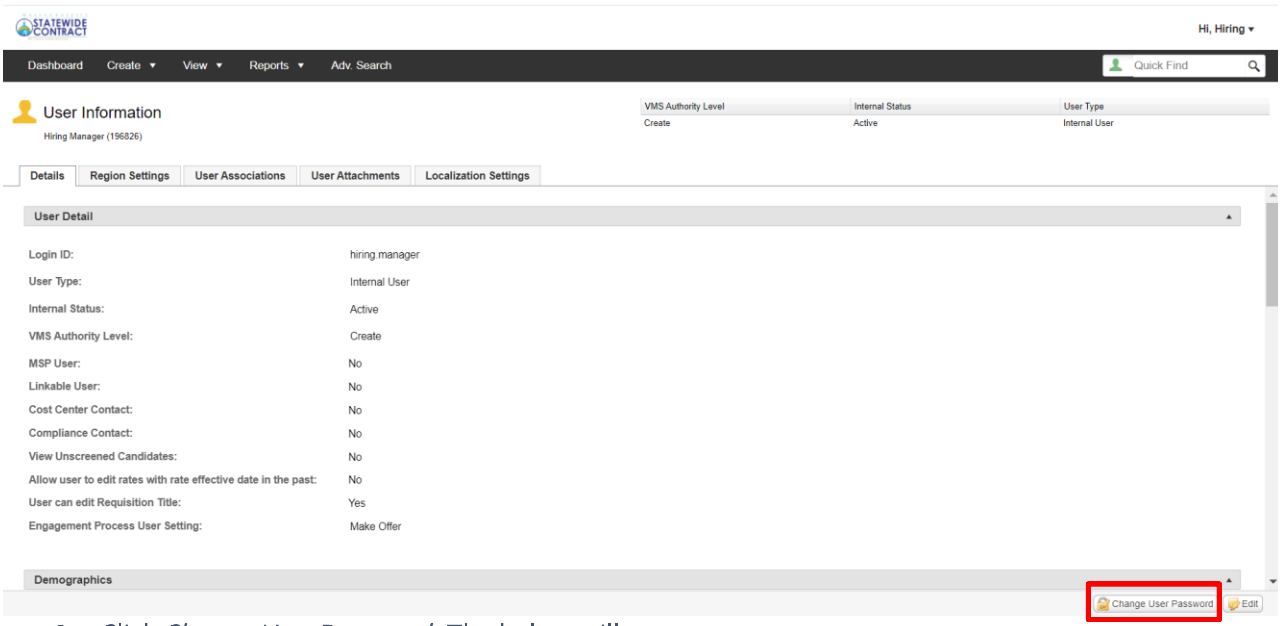



# How to Change Your Password

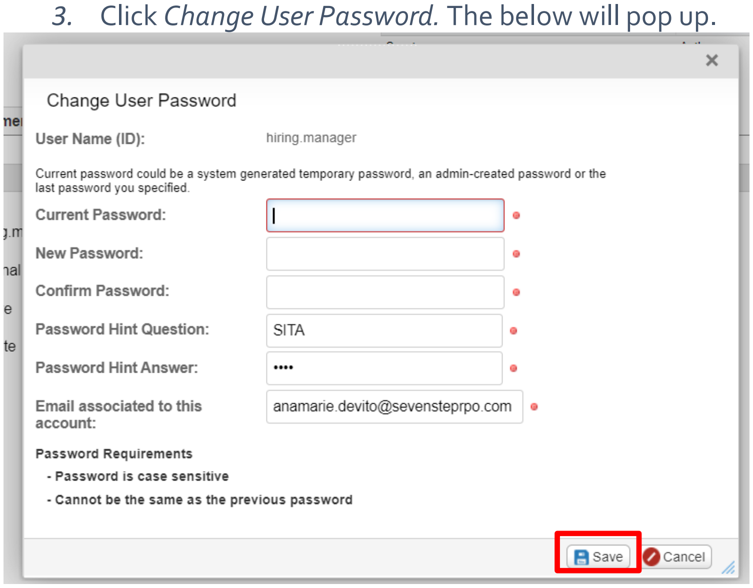
1. Click *My Account* under your name dropdown on your dashboard.




2. Click *Change User Password.*



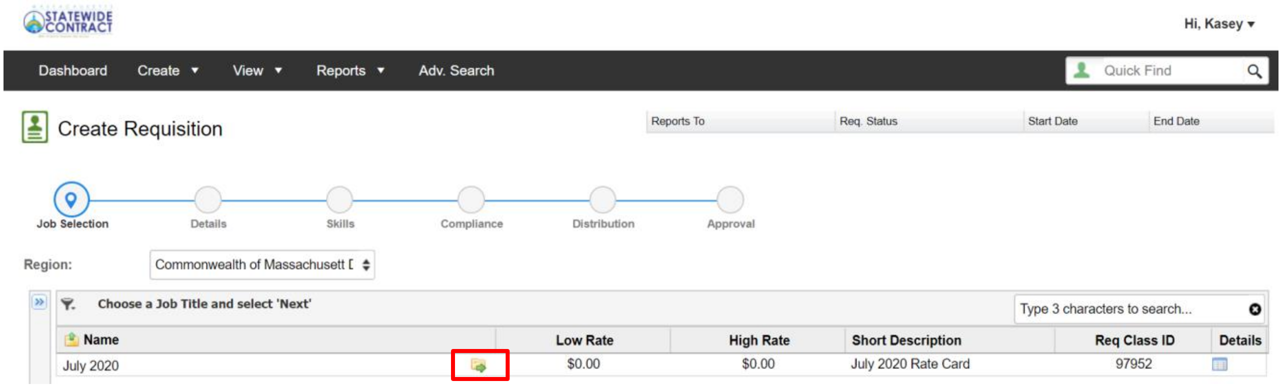

3. Click *Change User Password.* The below will pop up.



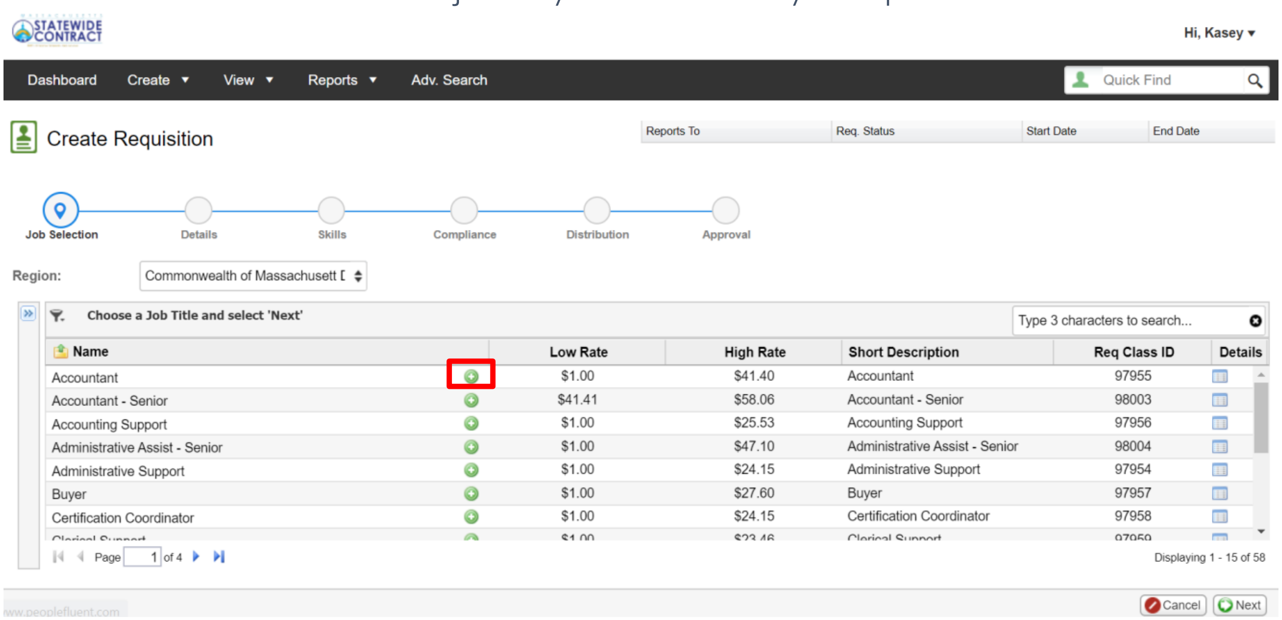

4. Type in your current password, your new password, update your password hint Q&A, if you'd like and Click *Save.*

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

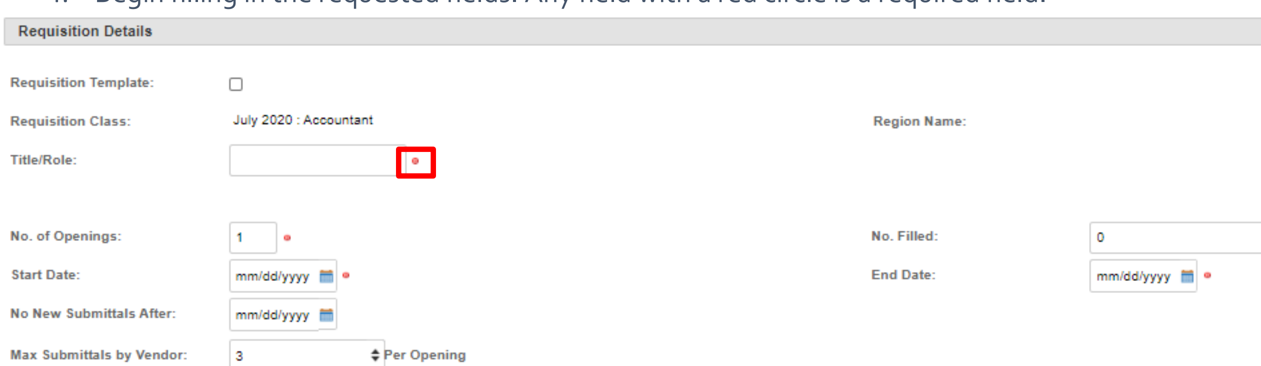
1. Click the *Create* dropdown from the black toolbar on your Dashboard and select *Contingent Requisition.*
2. Click the folder with the green arrow icon to further drill down on title of requisition.




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

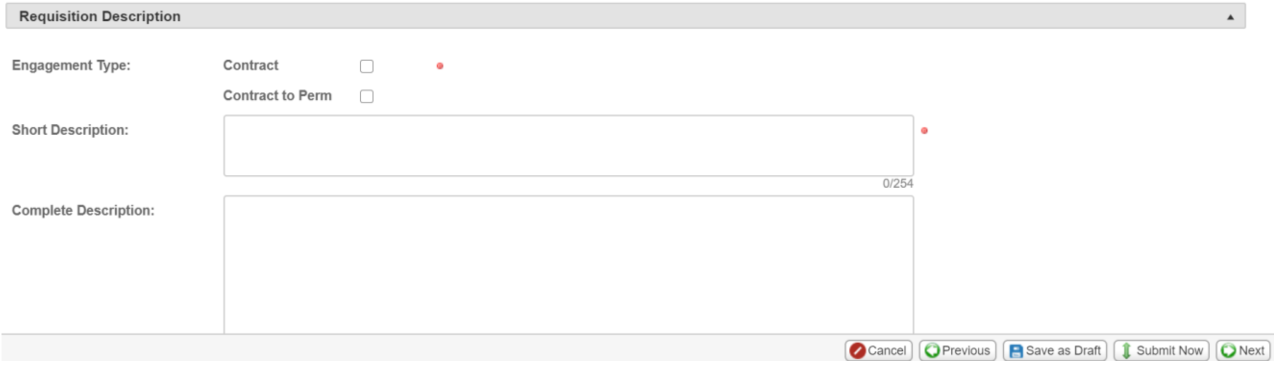



4. Begin filling in the requested fields. Any field with a red circle is a required field.

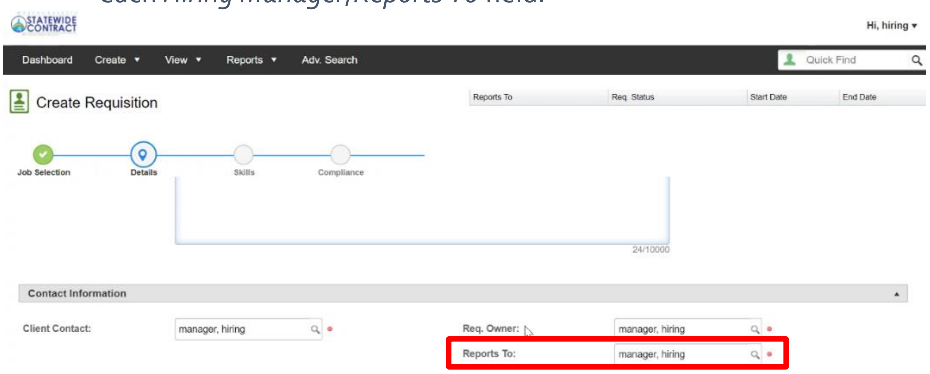



- When you get to the Requisition Description section – you will see a field for a short description and a complete description.
    - The short description should be anything specific or required that we should know about the requisition.

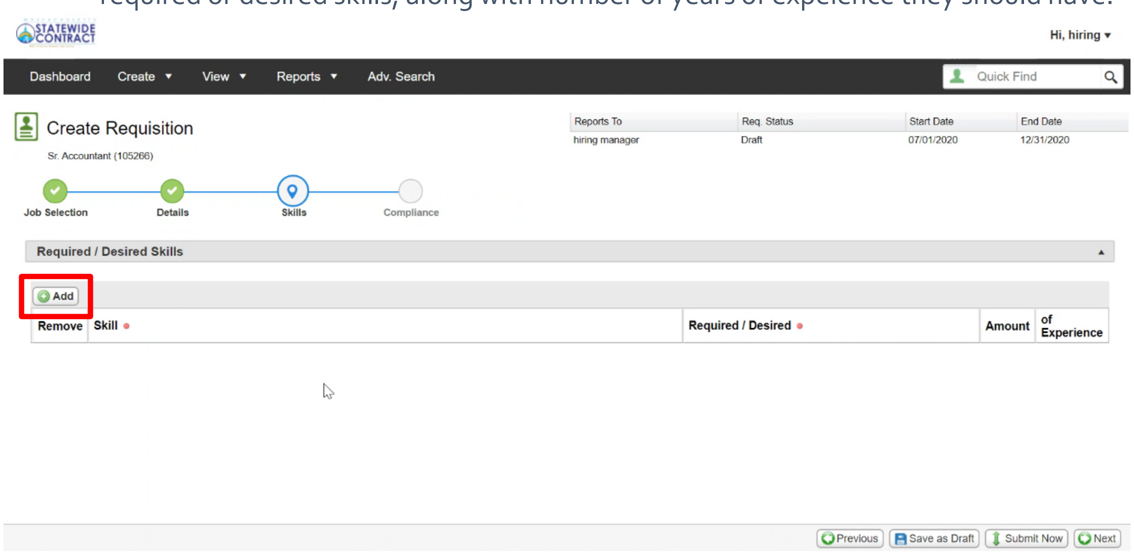
- The complete description is similar to the actual job description.

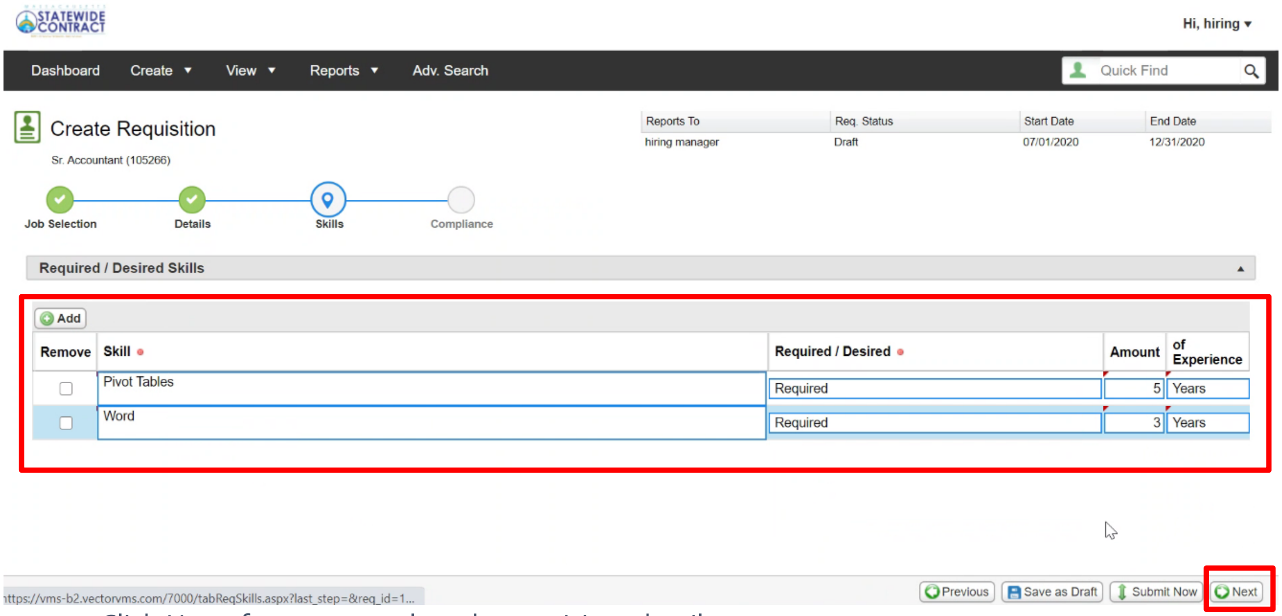



- When you get to the Contact Information section, whoever you add in the *Reports To* field will receive email notifications when a temporary worker's assignment is ending.
- The *Client Contact* on the requisition and agreements will be able to see all requisitions and engagements associated with that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

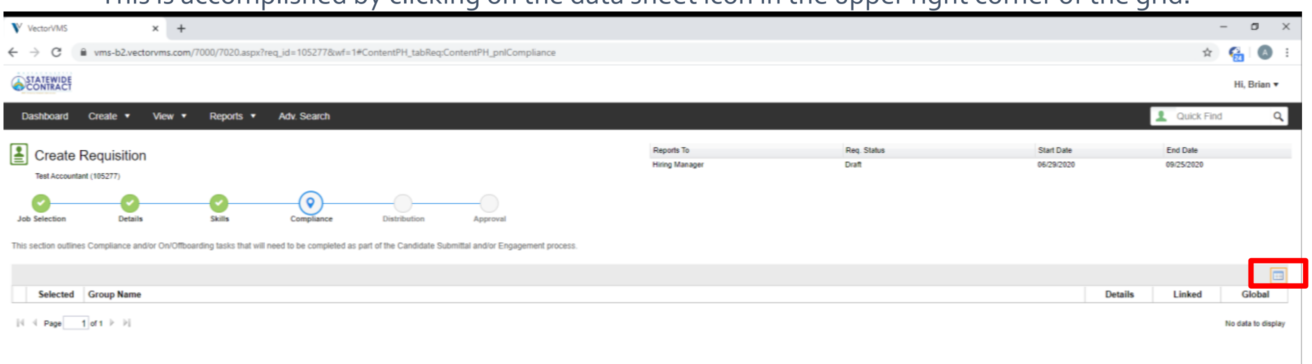



- When you get to the Required / Desired Skills section – click the Green +Add icon to include any required or desired skills, along with number of years of expeience they should have.

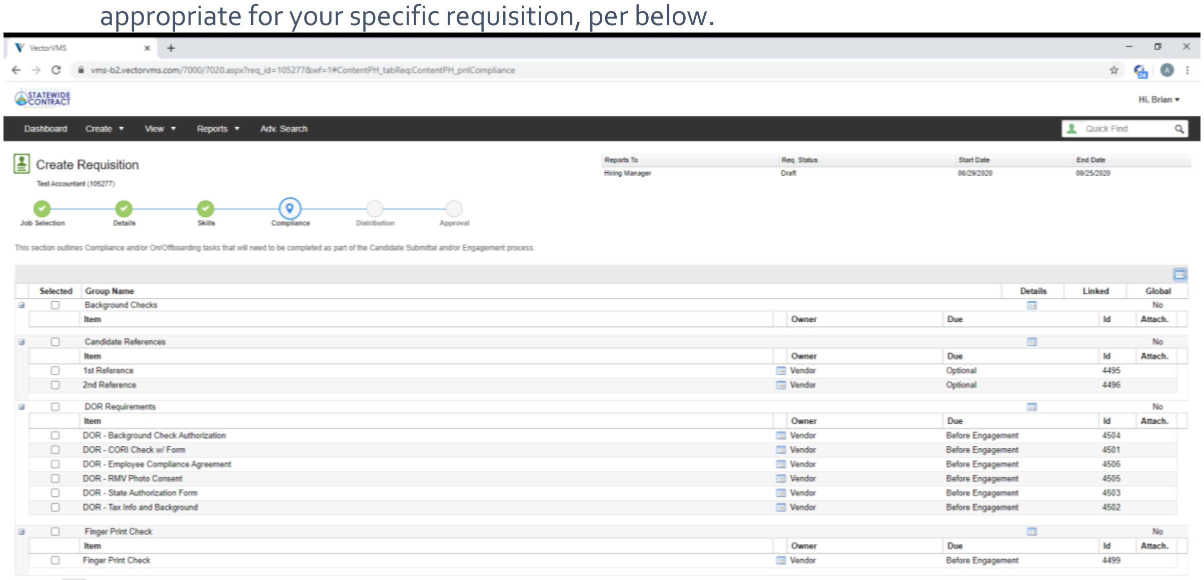





- Click *Next* after you complete the requisiton details.
- The next screen will show you the compliance tasks that need to be completed as part of the Engagement process.
- You should select the compliance tasks that are required for your specific requisition or need. This is accomplished by clicking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

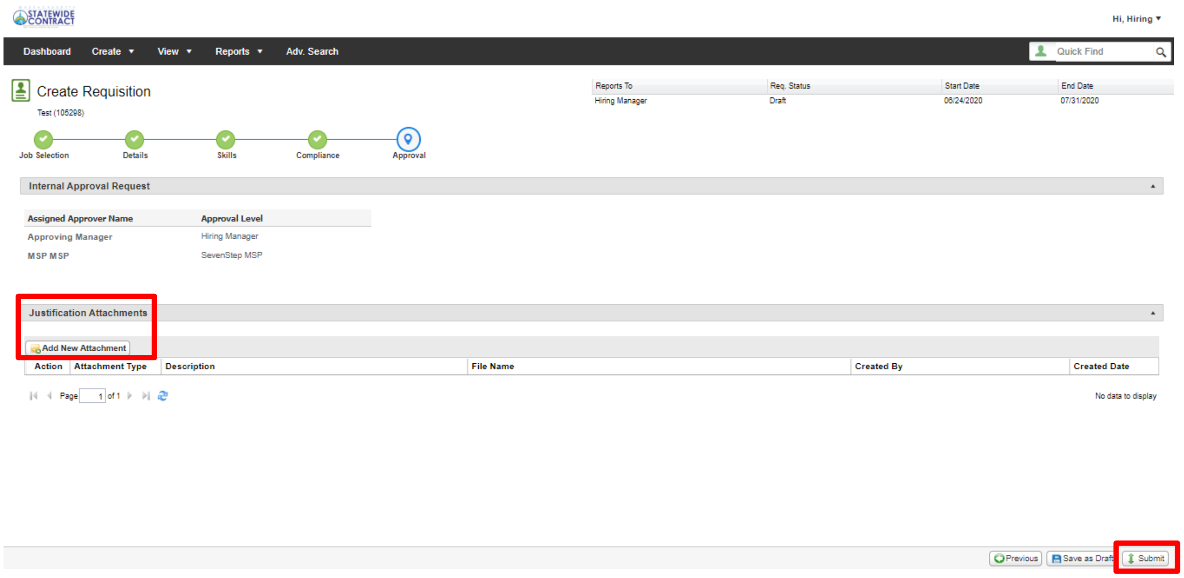



- You will then be presented with a list of compliance options that you can choose from as appropriate for your specific requisition, per below.

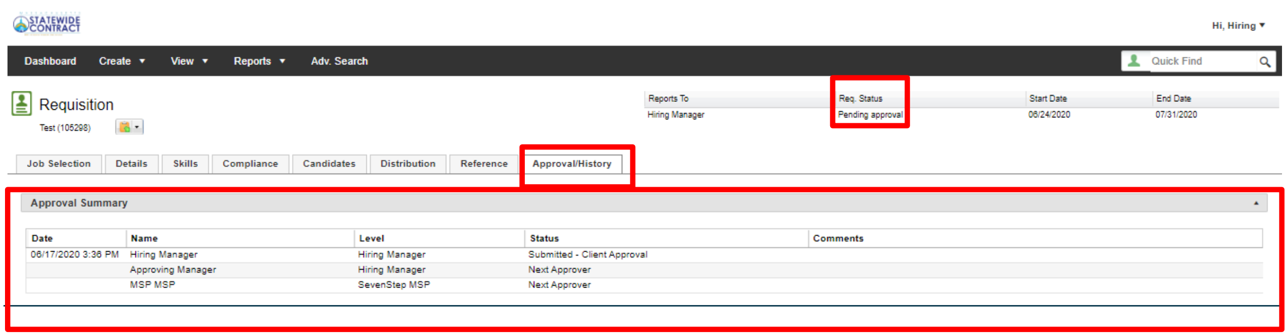


- Click *Next*.
  - This will bring you to the final page (approval) before your requistion is complete.
  - The approval path/hierarchy will be specific to each agency and/or Hiring Manager. The MSP will always be the final approver.

5. Click *Submit* to complete your requisiton. The requistion will follow the approval hierarchy for approval before the requisiton is released to suppliers.
   a. You an add atachments to the justificiation of the requsition before submitting it.



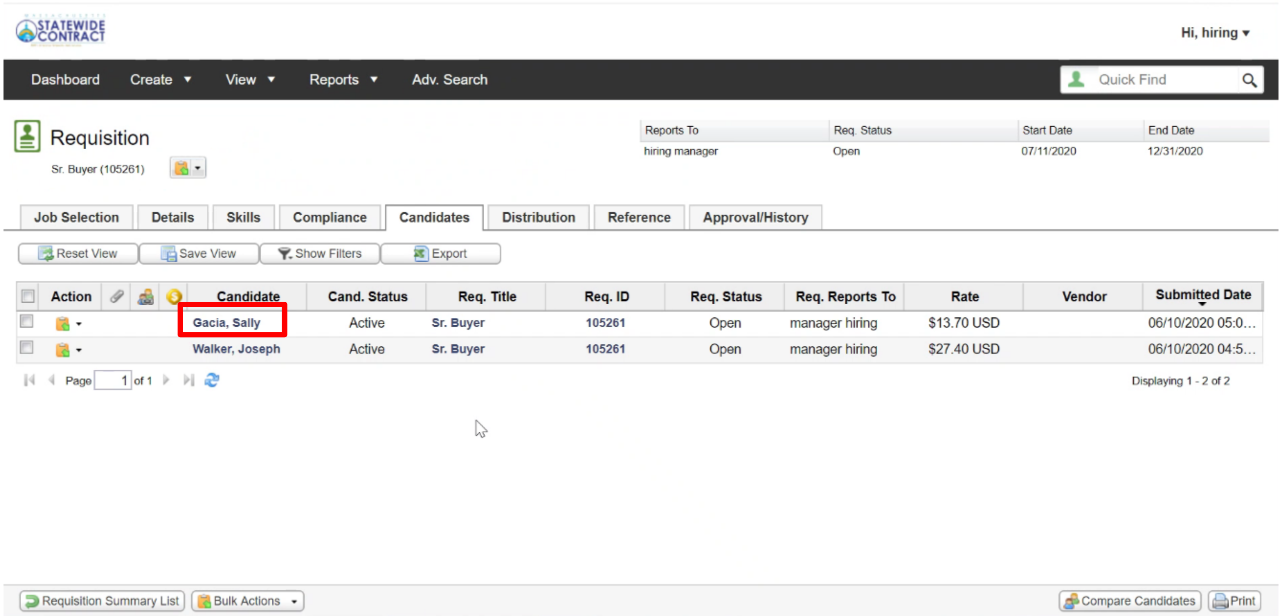

- After you click *Submit*, your rquisition status should be showing as Pending approval. If you click the *Approval/History* tab of the requisiton after submittal, you are able to see who the requisiton is sitting with for approval.



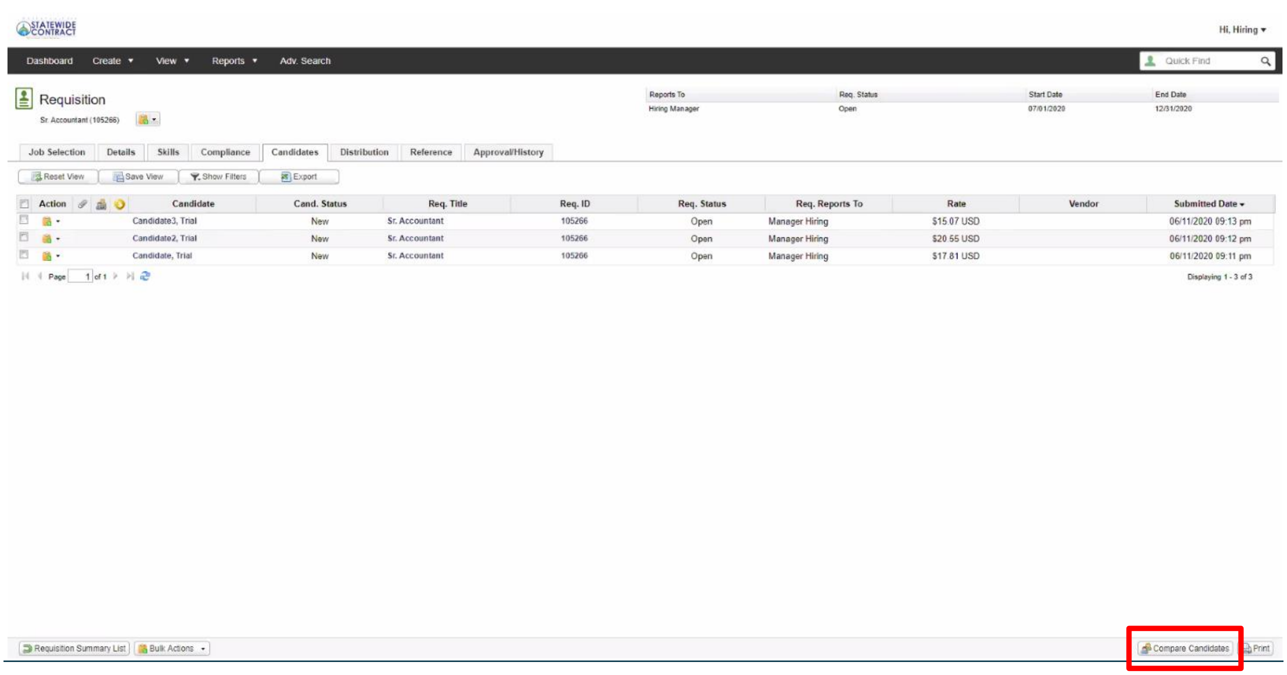

- The Hiring Manager and requisition owner will receive an email when the requistion has been aproved. The status will also change on the dashboard

# Review Submitted Candidates

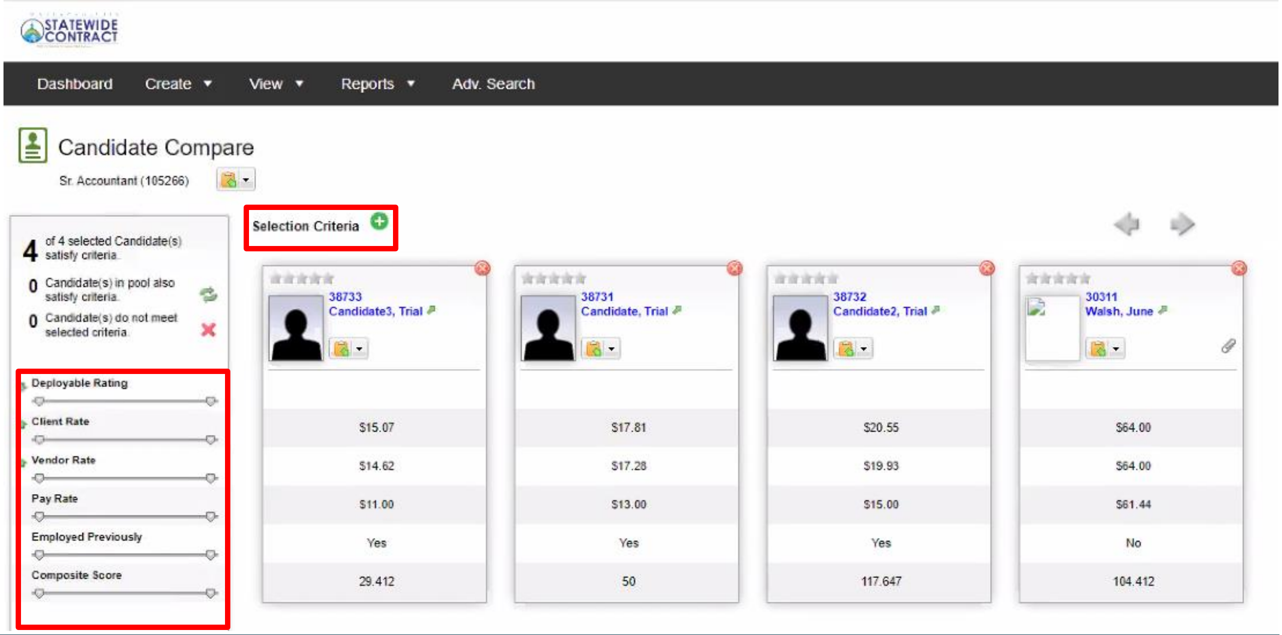
1. There are two ways to view submitted candidates:
   a. By Clicking *View > Candidates* from the black toolbar, or
   b. By Clicking *Active Candidates* from *Current Activity* on your Dashboard.
2. You can click the candidate's name to review the candidate and all of their details.



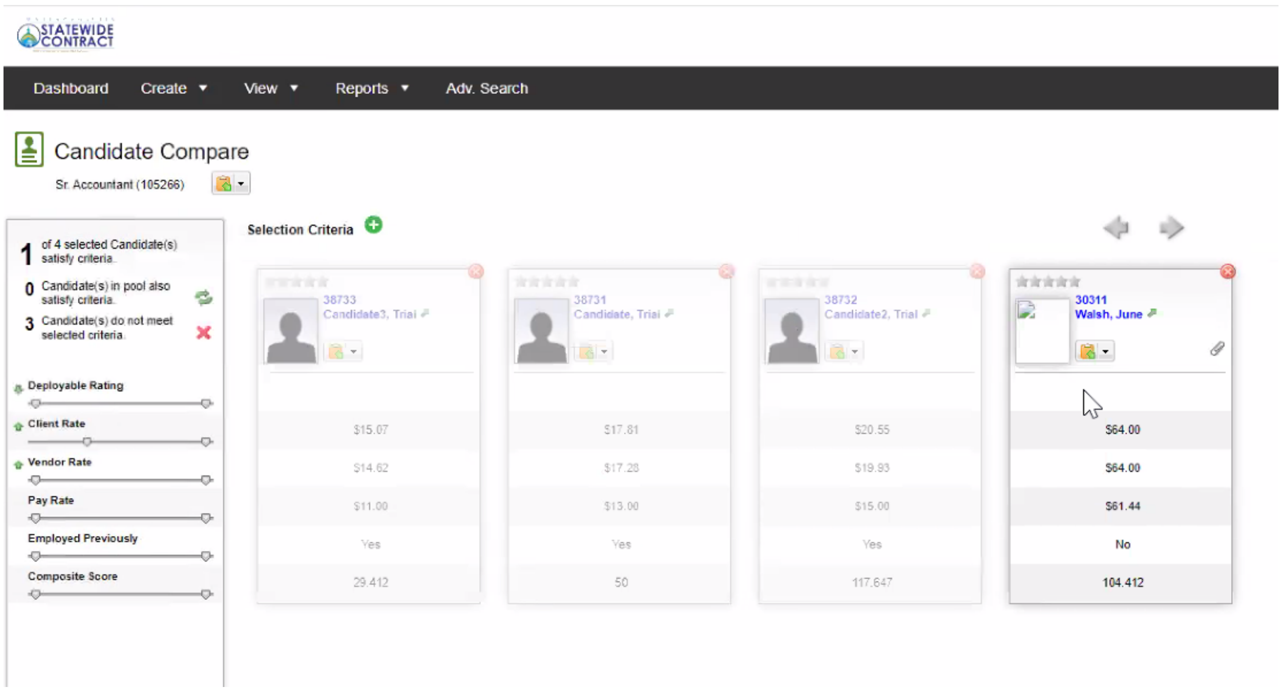

Note: You can also easily compare submitted candidates by clicking the *Compare Candidates* button on the bottom of your screen.




- 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.



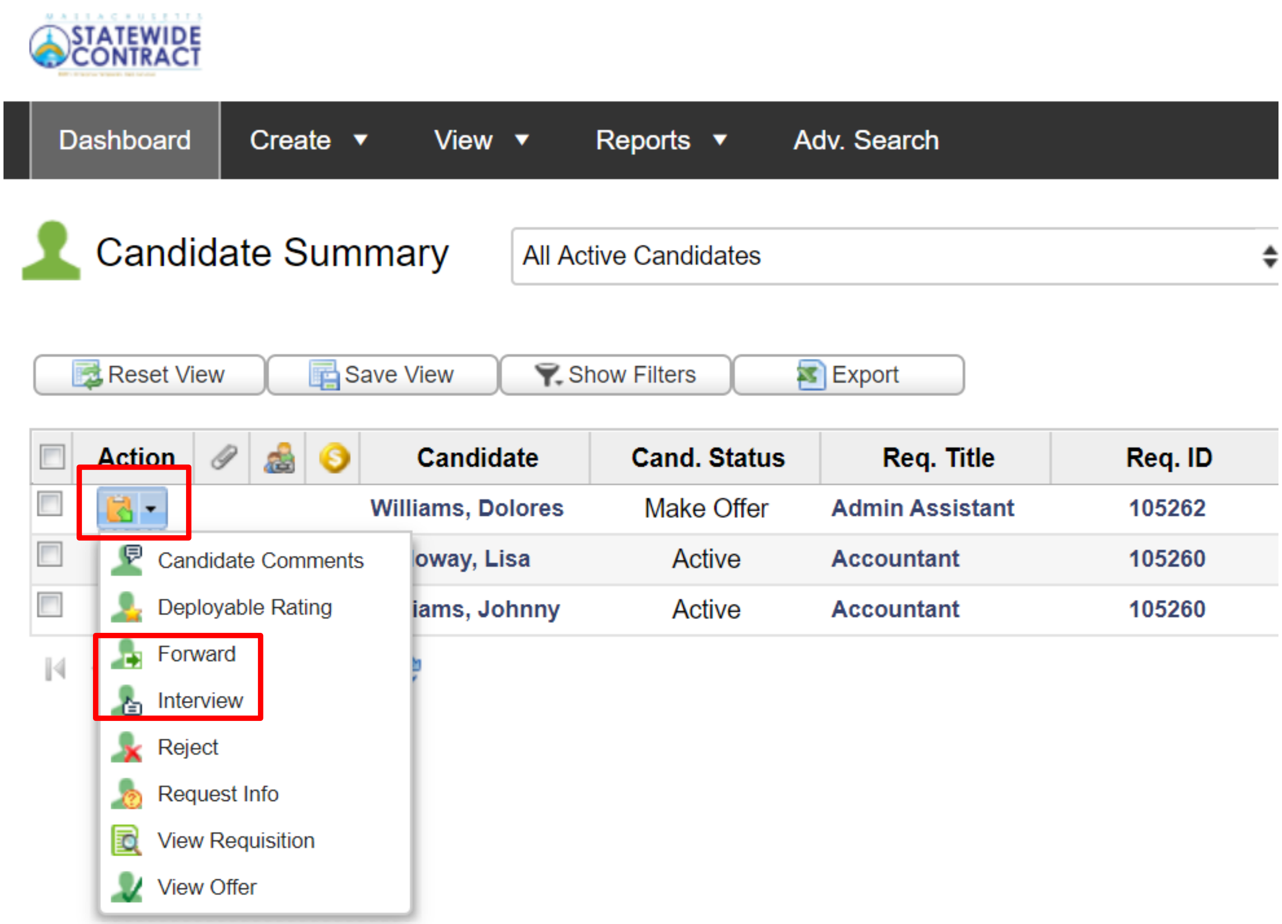

- You can see as you chose your selection criteria, the candidates who don't meet the criteria are grayed out.




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

## Select Candidate to Interview

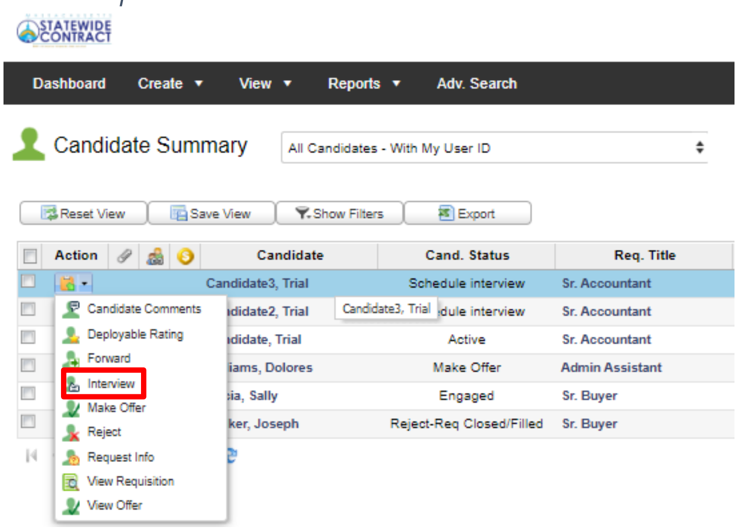
1. View your candidates (by following the step above).
2. If you are a Hiring Manager who prefers to interview your candidates:
    a. Click the *Actions* icon/dropdown next to the candidate you would like to interview and Select *Interview* (and proceed to the next step; inputting interview availability).
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](mailto: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.

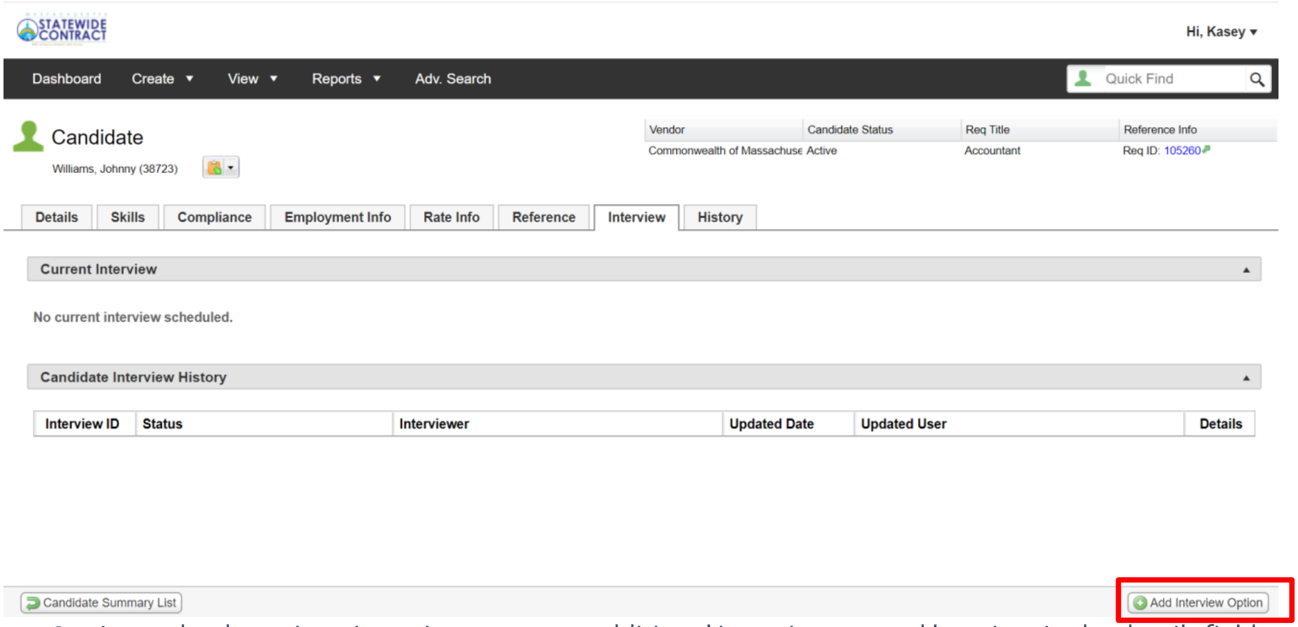


# Input Interview Availability

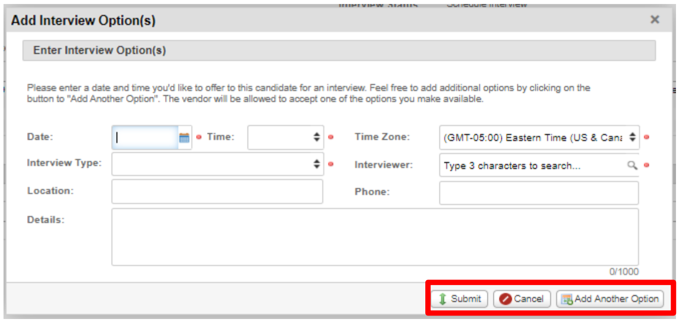
NOTE: You only need to complete this step if you plan on interviewing the candidate versus having the MSP handle the interview process.

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



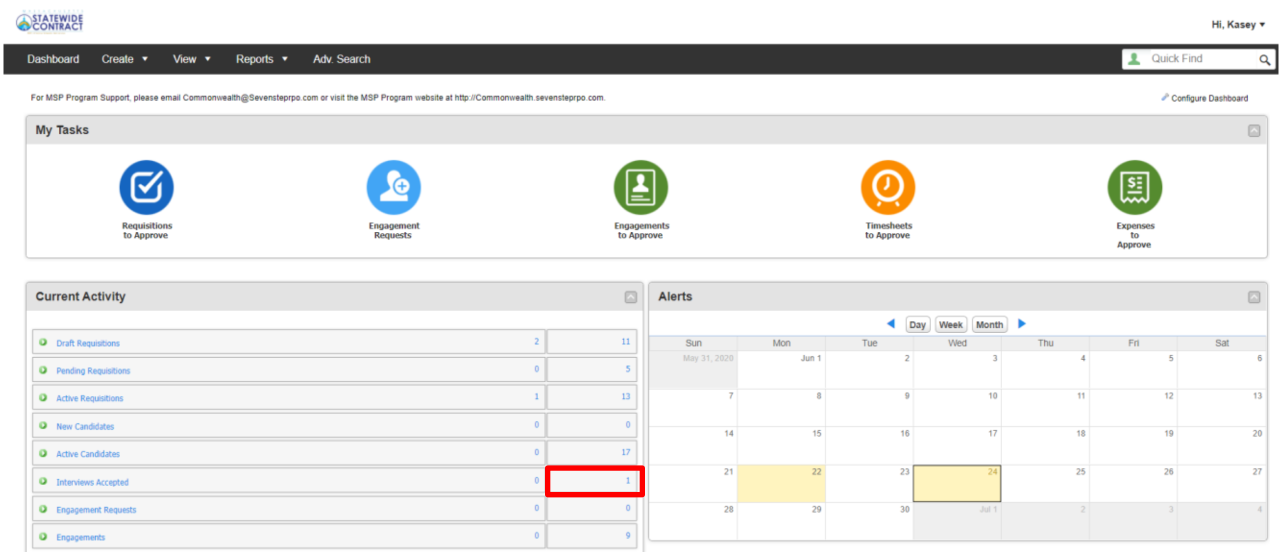

2. Input the date, time, interview type, any additional interviewers, and location. In the details field, you can include anything the candidate should be aware of for their interview.
   a. The time zone field should default to Eastern Time.
   b. There are only two options for interview type (phone 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*.



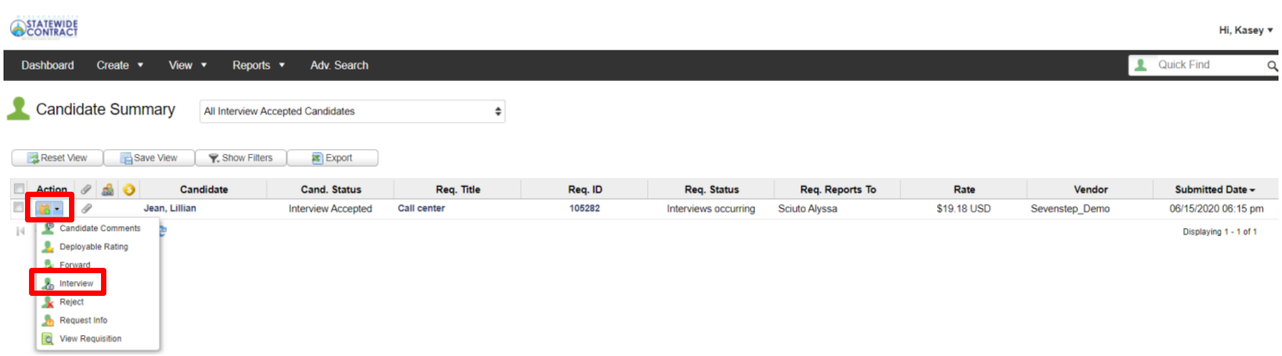

- The interview request will be sent to the supplier who will then confirm the interview details with the candidate. Upon acceptance of the interview request, the Hiring Manager will be notified via email.

## Provide Interview Feedback

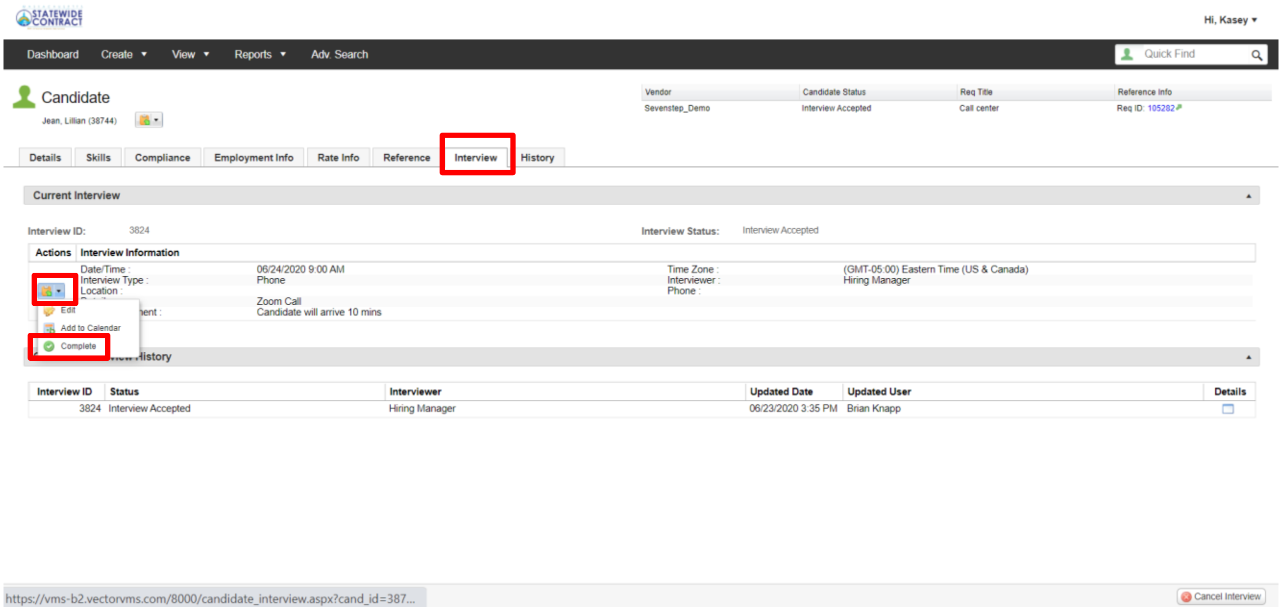
1. To provide interview feedback on a candidate, click the box with the number next to *Interviews Accepted* under Current Activity on your dashboard.



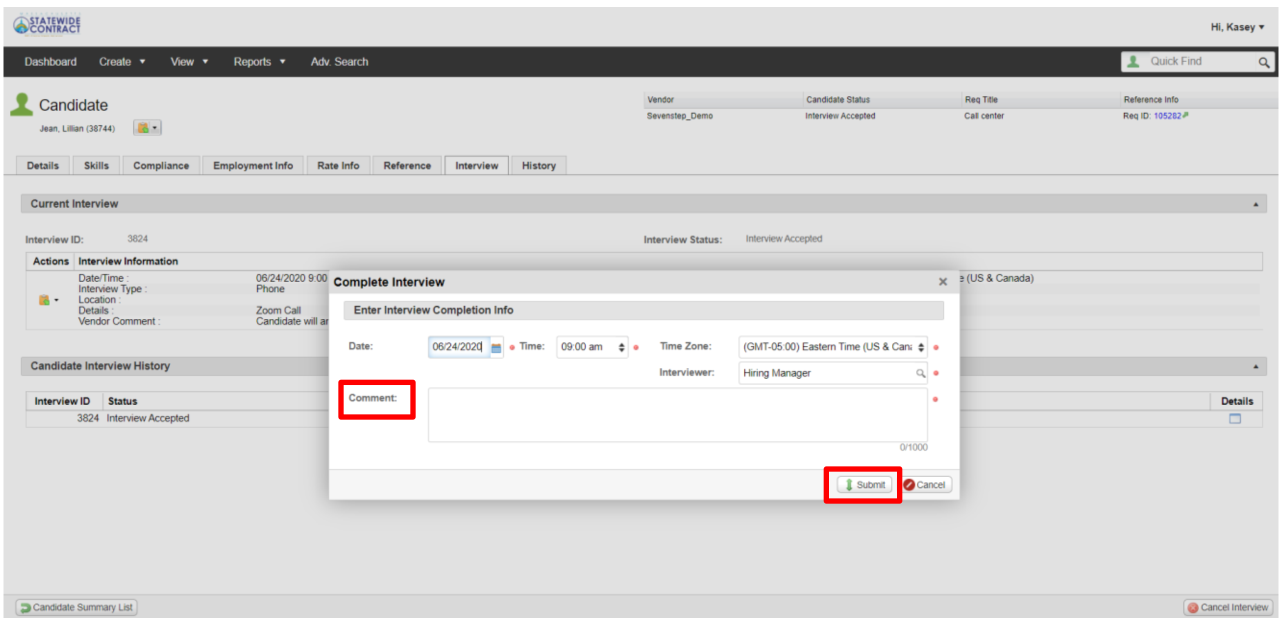

2. Click the clipboard with green arrow icon and select *Interview* or click the candidate name and go to the interview tab.




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.

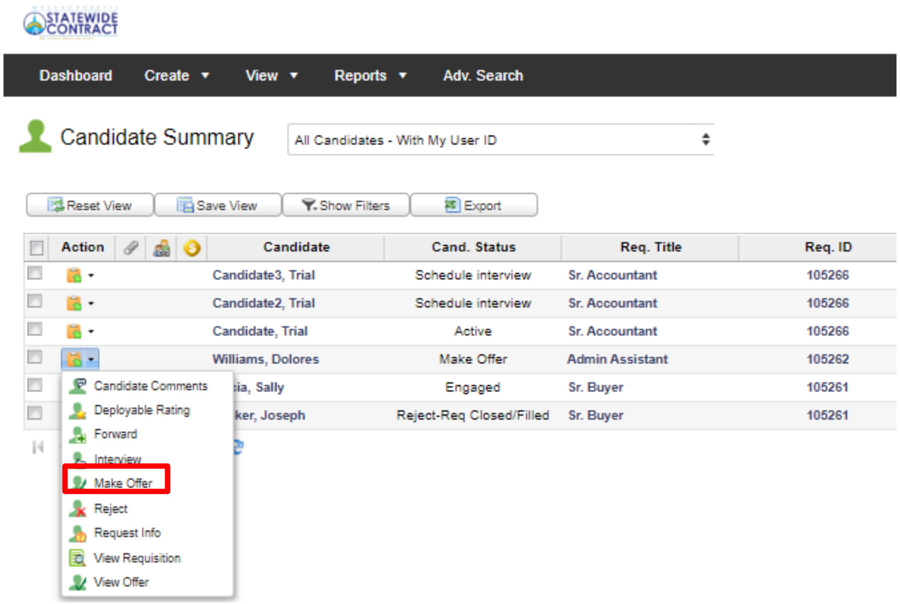



4. After marking the interview as *Complete*, the below will pop up and you can add your interview feedback into the *Comment* field and click *Submit*.

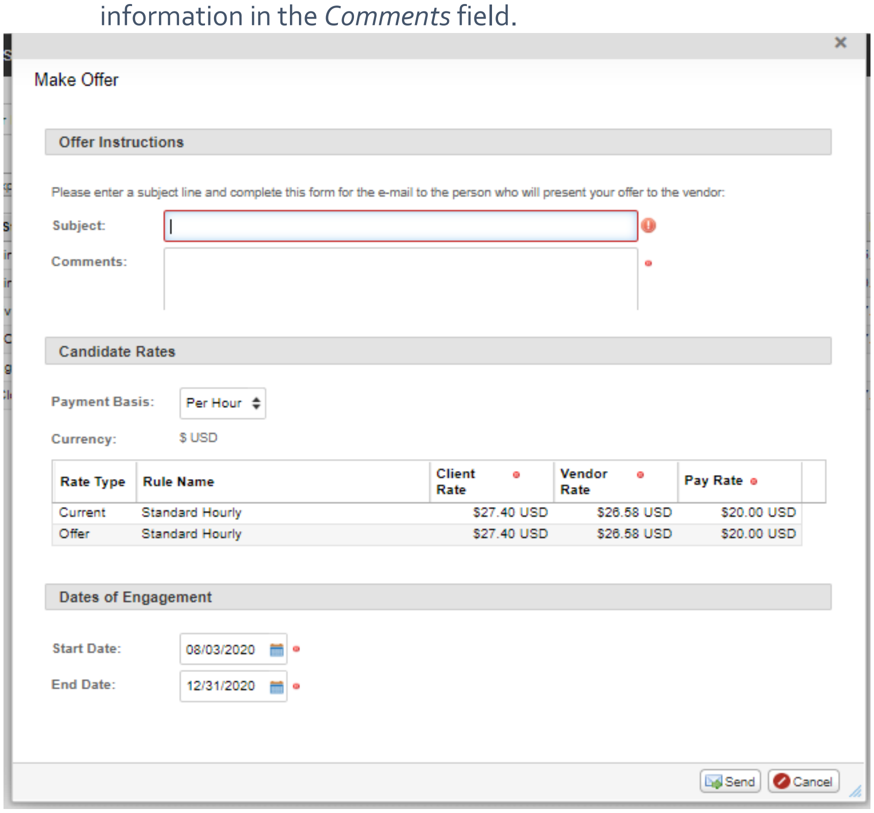


## Select Candidate for Offer

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



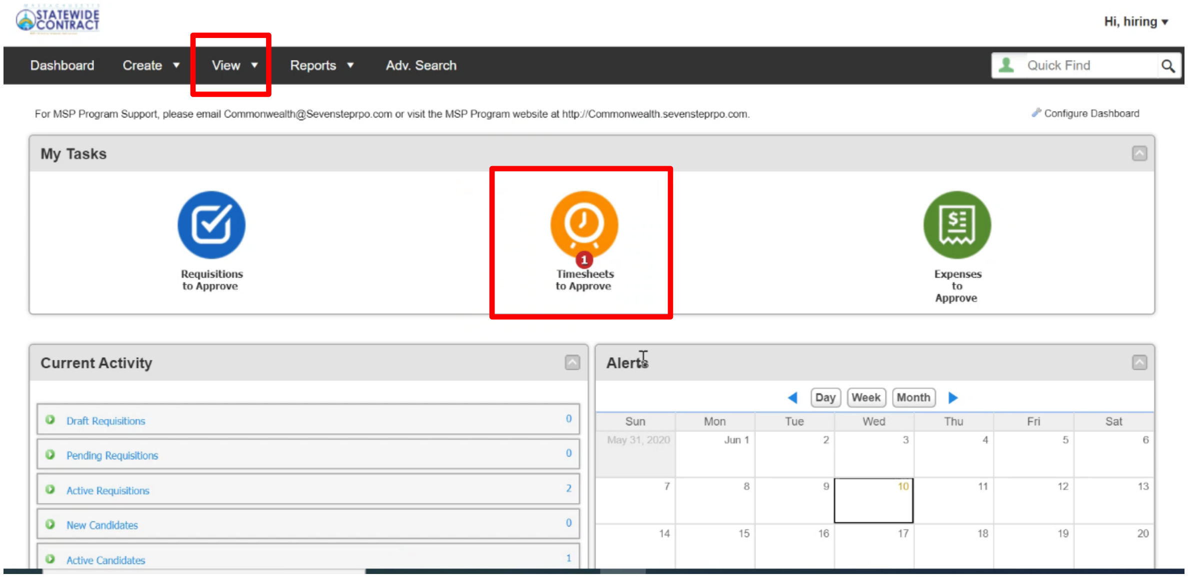

2. Input "Candidate Name – Offer" in the *Subject* field, input start and end date and other pertinent information in the *Comments* field.



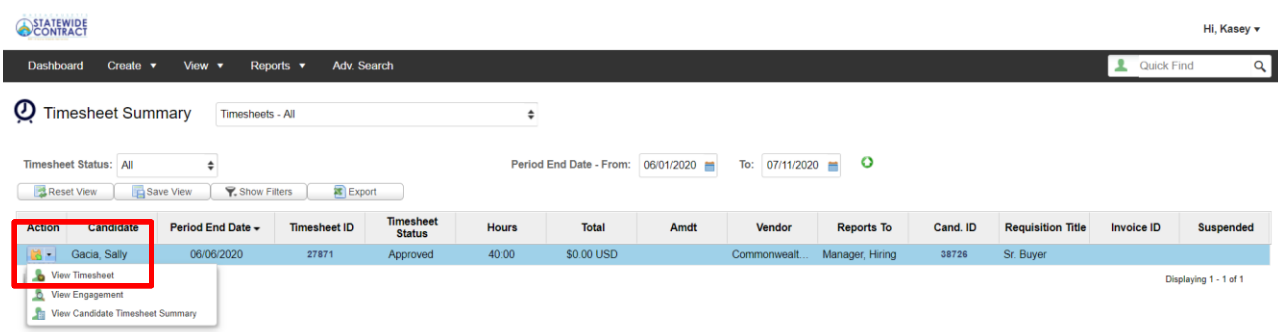

3. Click *Send.*
4. This will then go to the Sevenstep MSP team to review, approve, and submit to the Supplier.
5. The supplier will then review the offer and approve or reject the request.

# Timesheet Approval

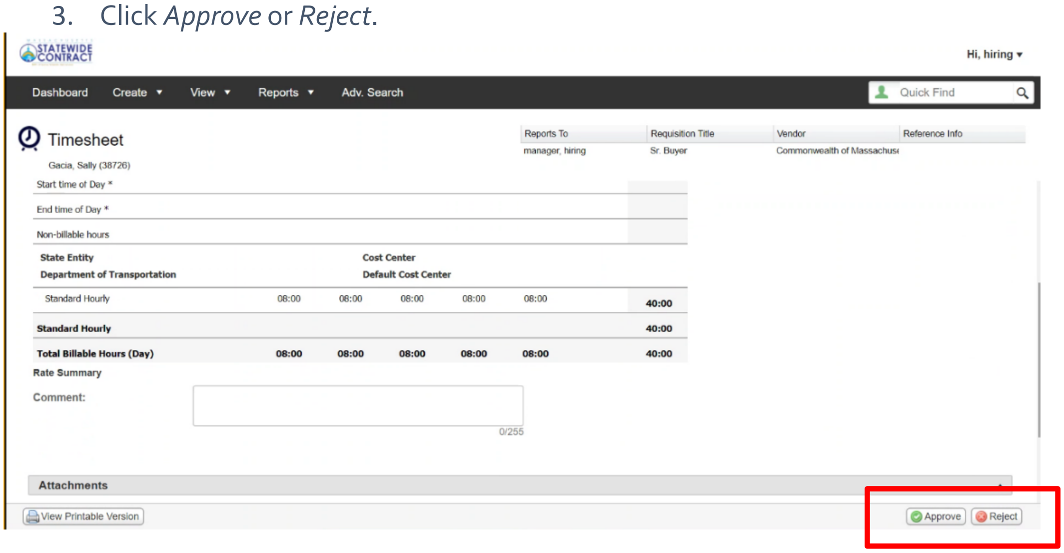
1. If you have any timesheets to approve, you will have a number on the *Timesheets to Approve Icon* on your Dashboard, but you can also check by going to *View* on the black toolbar and selecting *Timesheets.*




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



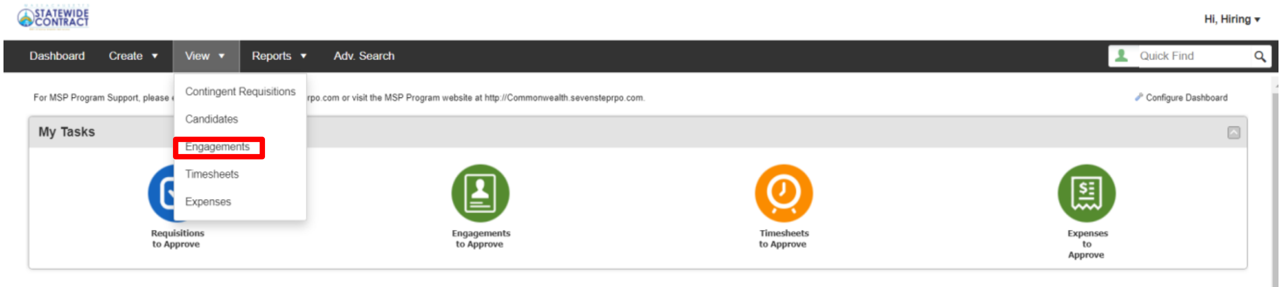

3. Click *Approve* or *Reject*.



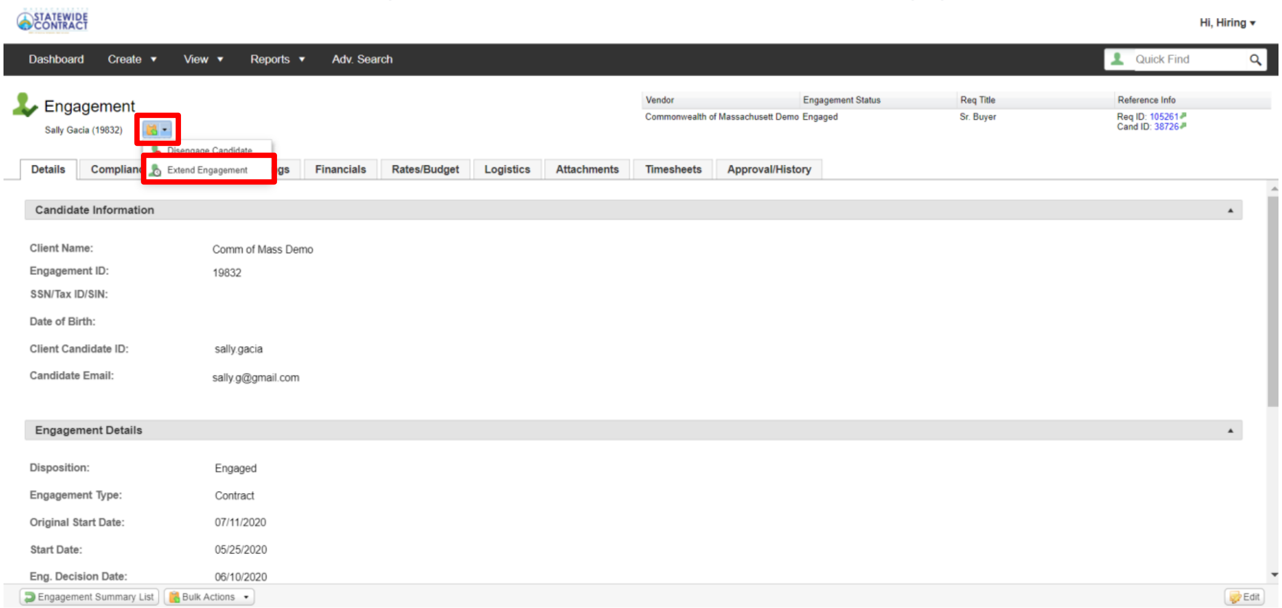

NOTE: You can approve (or reject expenses) the same way you do for timesheets but click *Expenses* instead of *Timesheets*.

## Extend Engagement

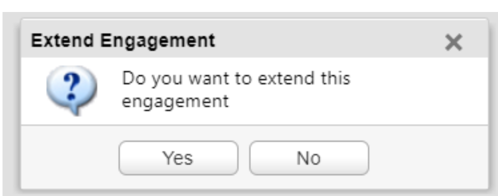
1. Click *View* and select *Engagements* from the black toolbar of your dashboard.



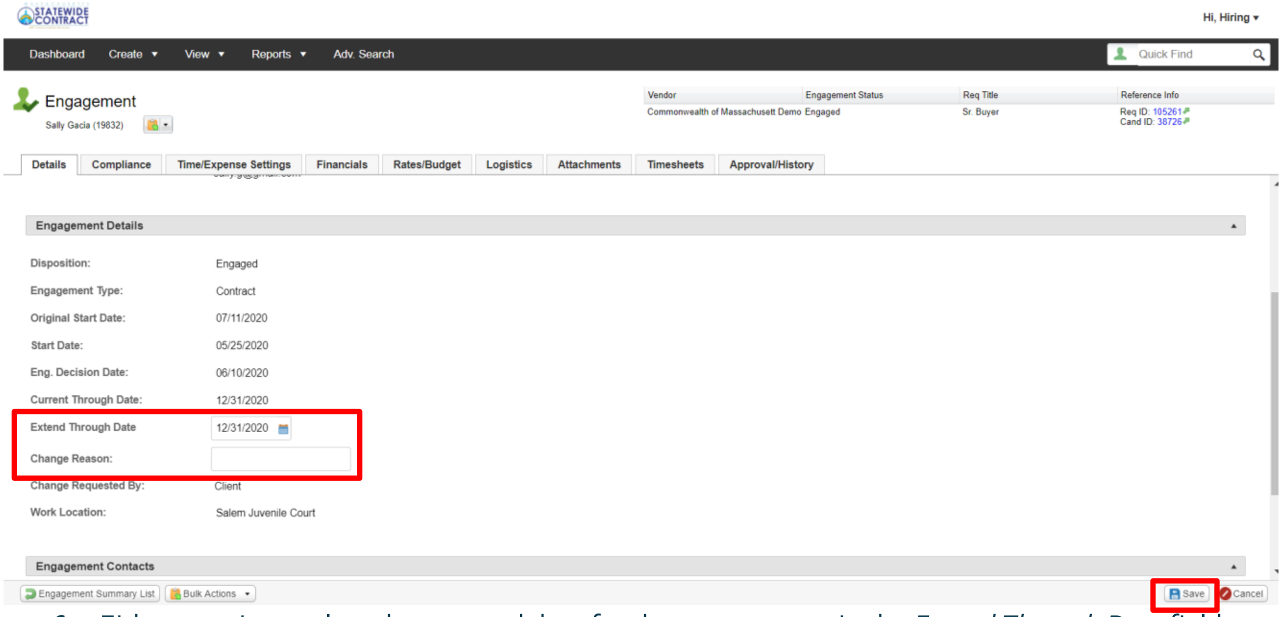

2. Click the *Candidate Name* <u>or</u> Click the *Action* dropdown and Select *View Engagement* for the Candidate you would like to extend their engagement. Either way it is going to bring you to the Engagement Screen.
3. Click the *Clipboard with green arrow dropdown* and Select *Extend Engagement*.



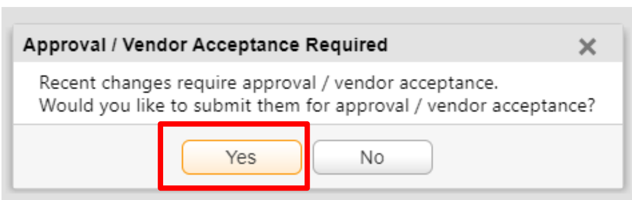

4. You will get the below pop-up and Click *Yes*.



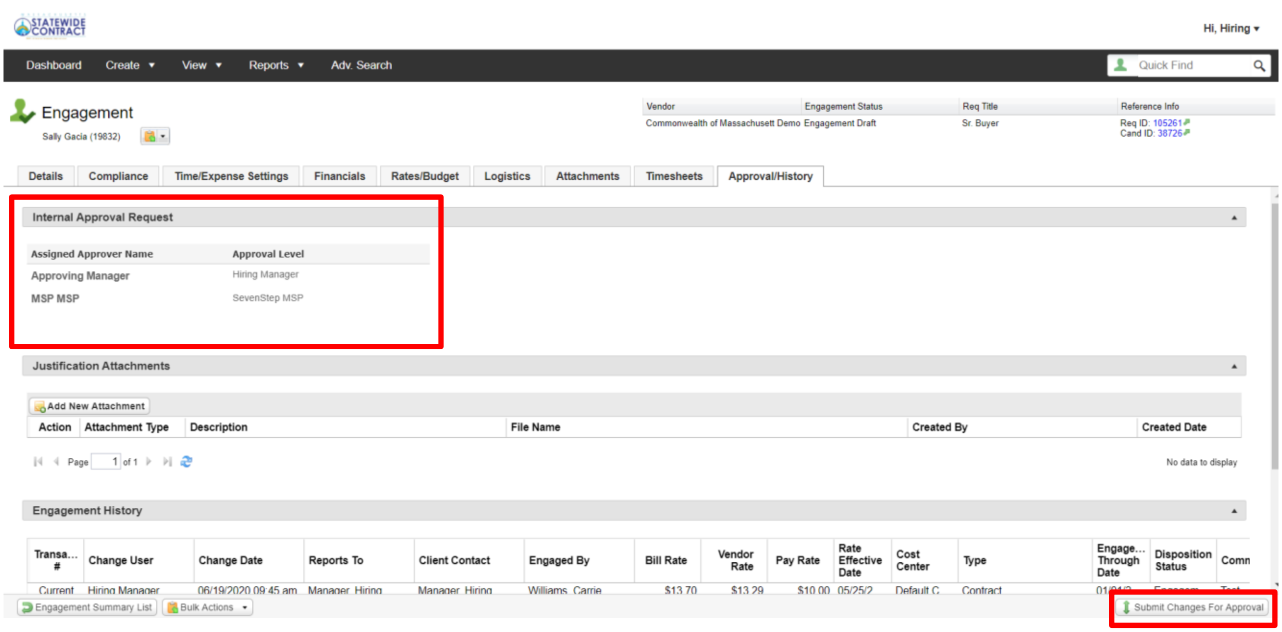

5. It will now allow you to edit the extend through date field under Engagement Details in the candidate's record.




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*.




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



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 Massachusett Demo | Changes Pend Approval | Sr. Buyer | Req ID: 105261<br>Cand ID: 38726 |

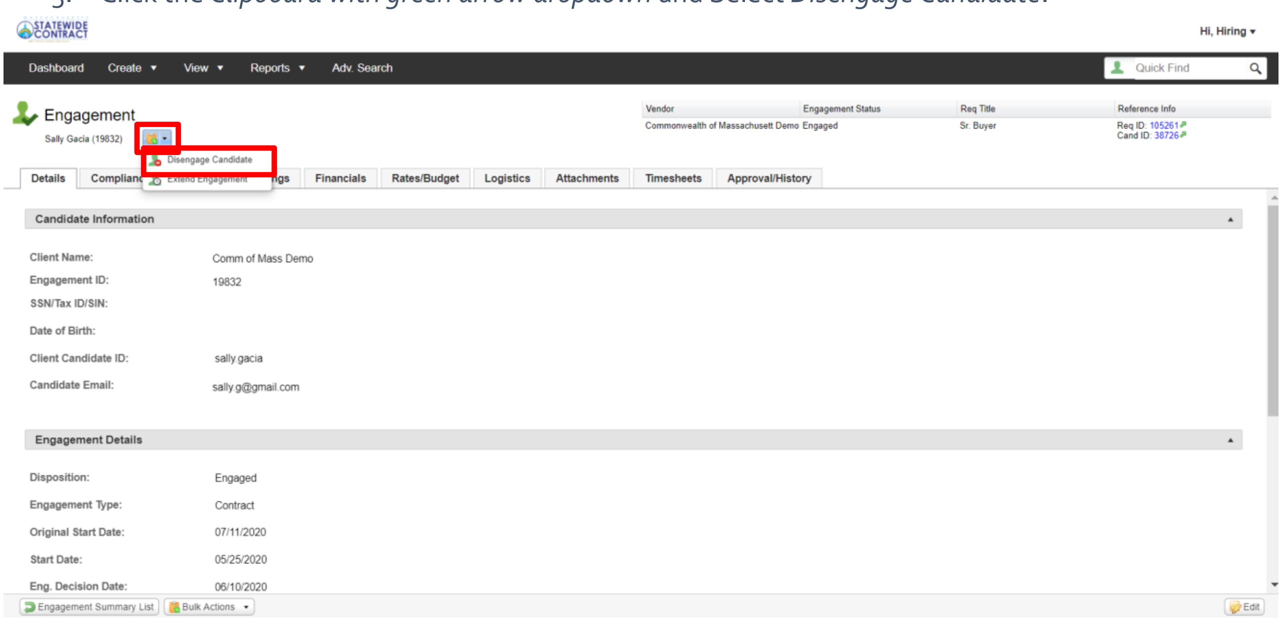
12. Once the approval process is complete, including supplier acceptance, then the change is applied, and timesheets and expenses are eligible for entry up to the new date.

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

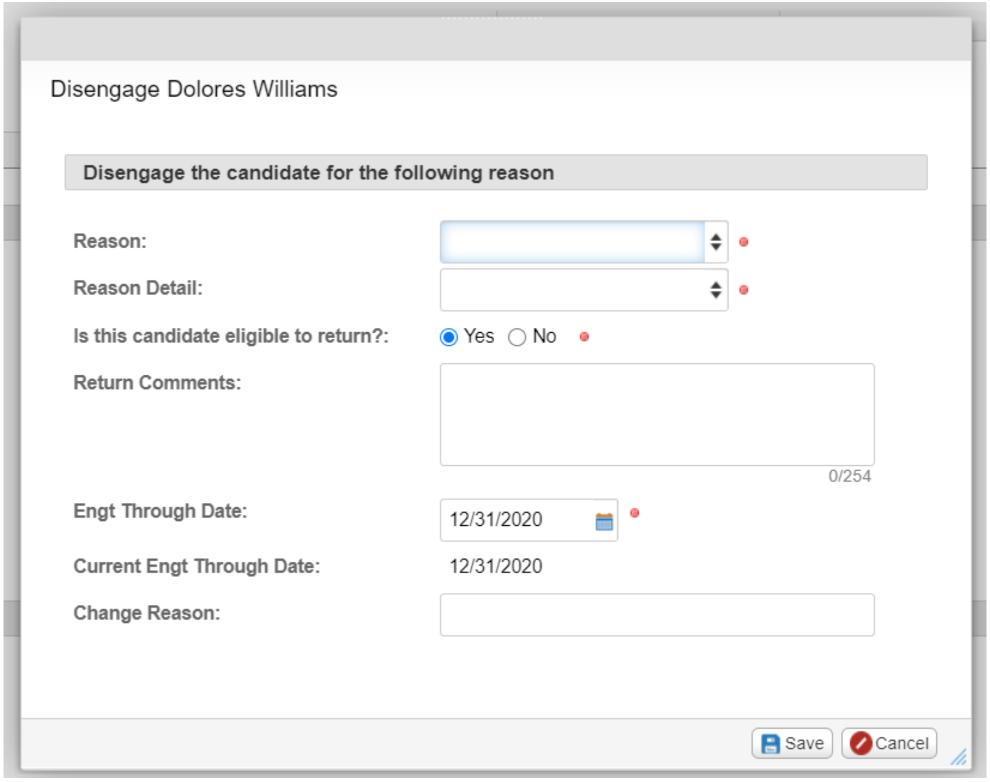
## End (Disengage) Engagement

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

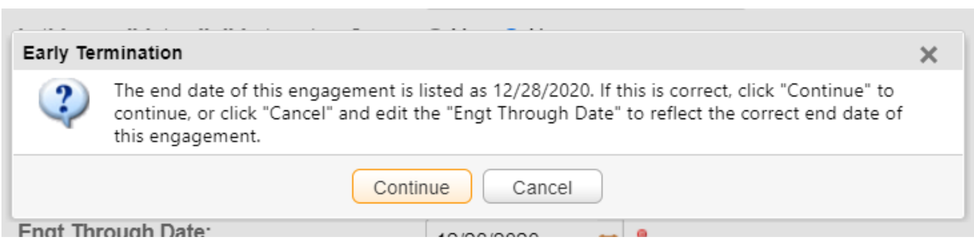

2. Click the *Candidate Name* or Click the *Action dropdown* and Select *View Engagement* for the Candidate you would like to end their engagement. Either way it is going to bring you to the Engagement Screen.
3. Click the *Clipboard with green arrow dropdown* and Select *Disengage Candidate*.




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*




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




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