

## VectorVMS User Guide for Suppliers

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).

## Logging In / Dashboard Overview

1. Login [here](#).
2. Type in your username, 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 could look like upon logging in (may vary slightly based on your configurations). NOTE: You can change your dashboard view.

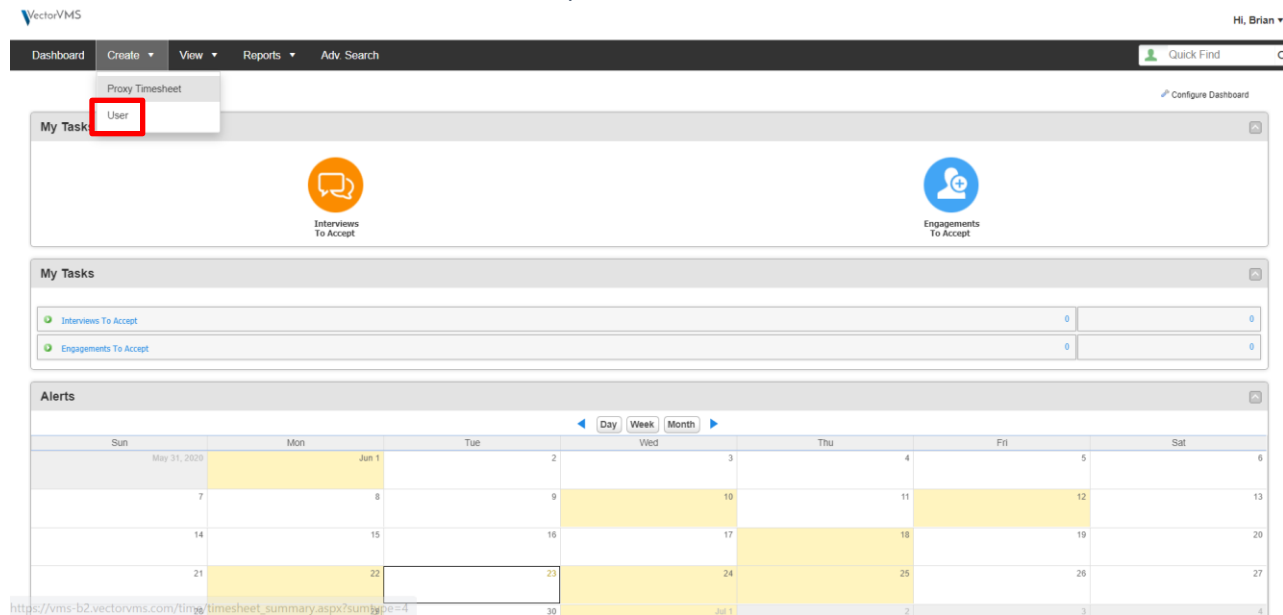
- If you have any tasks to complete, such as interviews to accept or engagements to accept, you will see a number to the right of the task under *My Tasks*.
- Under *Current Activity*, you can see active requisitions, active candidates, interviews accepted, and engagements. If you click the green + icon, it will expand to show you the actual requisitions, candidates, interviews and engagements.
- The *Alerts* (or calendar) will show you any of your candidates start/end dates, as well as interviews.

# SEVENSTEP

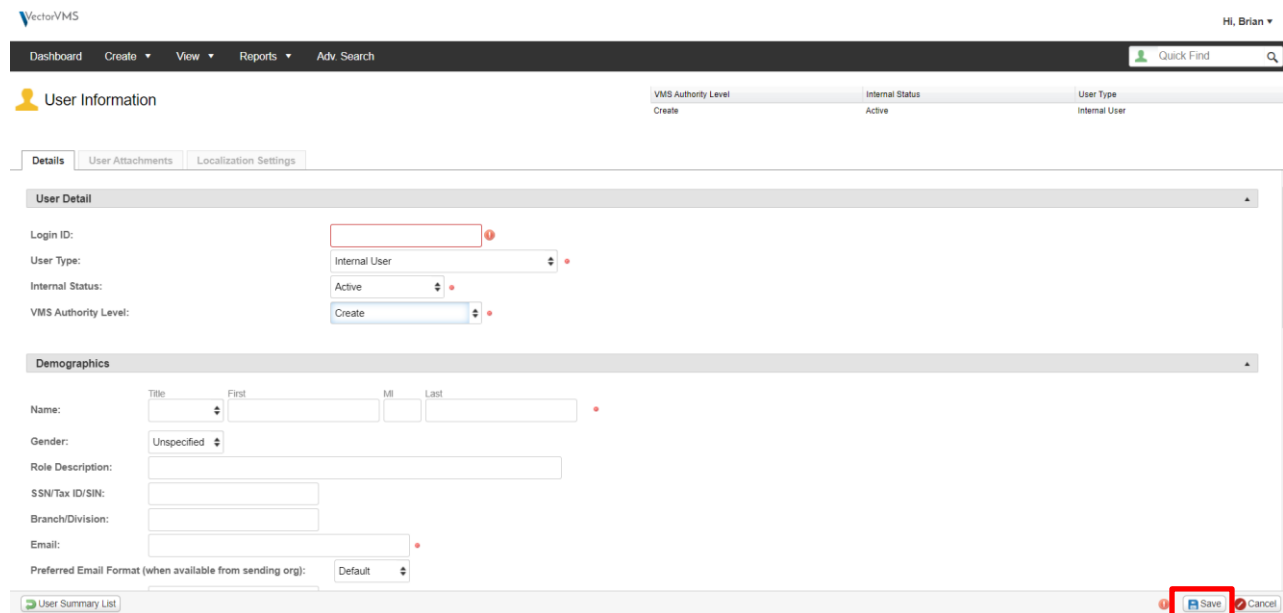
- The black toolbar has additional options to select, as well as dropdowns with further options.

## Creating Users

1. Click *Create* from the black toolbar on your dashboard and select *User*.



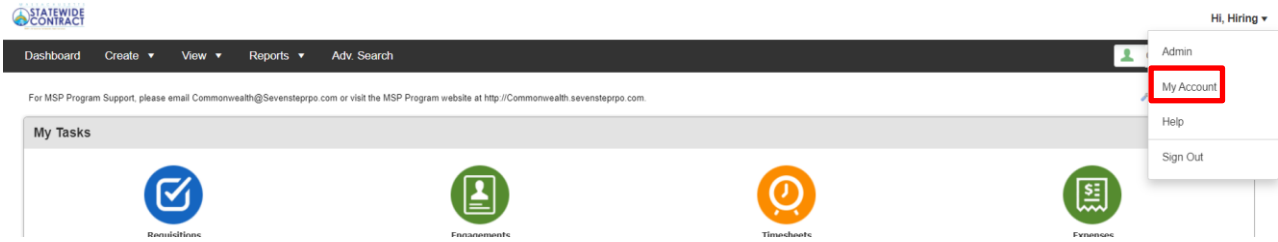
2. Fill in the fields (required field(s) will have a red circle next to them). Click *Save*.



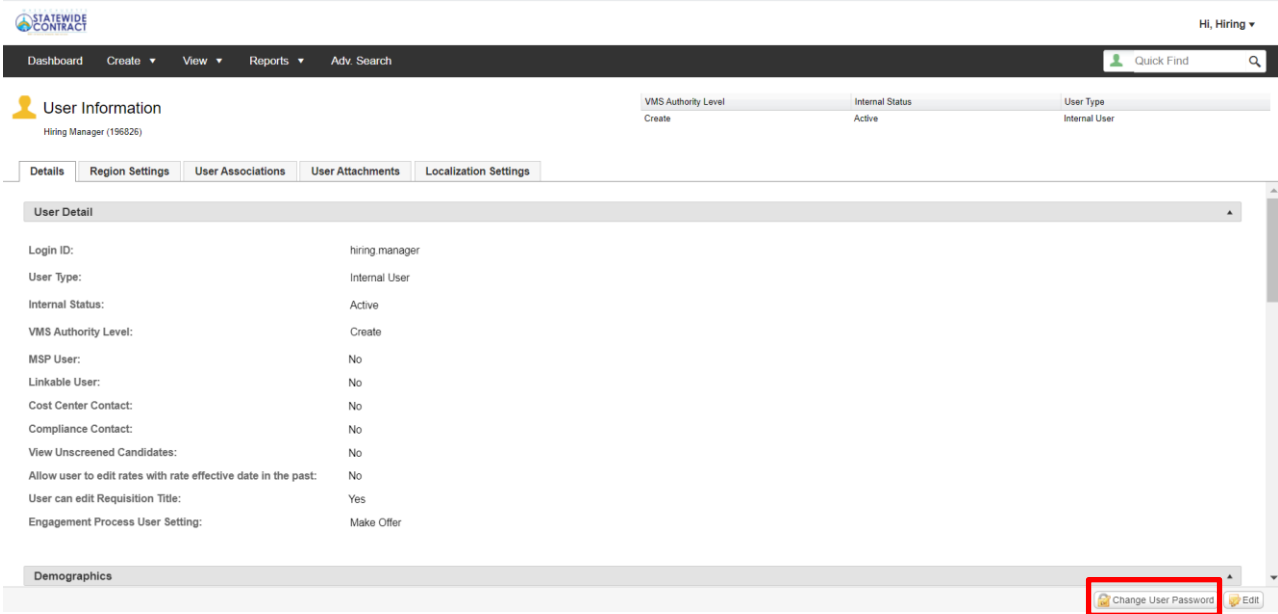
3. The supplier will then need to notify the new user of their username and password.

## How to Change Your Password

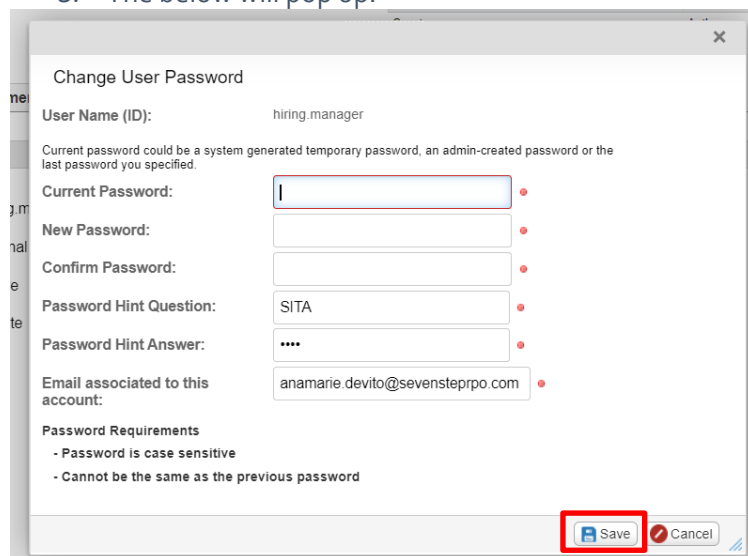
1. Click *My Account* under your name dropdown on your dashboard.



2. Click *Change User Password*.



3. 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*.

## Submitting Candidates

1. There are two ways to view active requisitions from your dashboard (by clicking *Active Requisitions* under Current Activity or by clicking *View > Contingent Requisitions* from the black toolbar on your dashboard). It will bring you to the requisition summary page.
2. Find the requisition you'd like to submit a candidate(s) to and either click the requisition name or the clipboard with green arrow icon and select *Submit Candidate*.

VectorVMS Hi, Brian

Dashboard Create View Reports Adv. Search Quick Find

Requisition Summary All Active Requisitions

Reset View Save View Show Filters Export

Action	Requisition Title	Req. ID	Req. Status	# Openings	Active Candidates	Req. Created	Client
Test Requisition		105303	Open	1	0	06/19/2020 02:31 pm	Comm of Mass Demo
Candidate Summary	rt Specialist	105292	Interviews occurring	3	0	06/16/2020 02:38 pm	Comm of Mass Demo
Submit Candidate	rt - Backfile Project	105291	Open	1	3	06/16/2020 01:29 pm	Comm of Mass Demo
Call Center Representative		105290	Open	3	2	06/15/2020 11:13 pm	Comm of Mass Demo
paralegal for oer		105288	Open	1	0	06/15/2020 10:32 pm	Comm of Mass Demo

- a. If you click the requisition name instead of selecting *Submit Candidate* from the action dropdown – you will need to select *Submit Candidate* from the clipboard with green arrow icon once you are in the requisition.

VectorVMS Hi, Brian

Dashboard Create View Reports Adv. Search Quick Find

Requisition Test Requisition (105303)

Req. Status: Open Start Date: 06/29/2020 End Date: 07/31/2020

Job Selection Details **Submit Candidate** Decline Participation Candidates Reference Approval/History

Requisition Details

Requisition Class: July 2020 - Accountant Region Name: Commonwealth of Massachusetts Demo

Title/Role: Test Requisition Region Description: Commonwealth of Massachusetts

Req. Status: Open

No. of Openings: 1 No. Filled: 0

Start Date: 06/29/2020 End Date: 07/31/2020

No New Submittals After: 06/23/2020

Max Submittals by Vendor: 3 Per Opening

Work Days:

3. Fill in the candidate submission fields and click *Next*.

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Dashboard Create View Reports Adv. Search Quick Find

Submit Candidate Vendor Candidate Status Req Title Reference Info

Submit Details Skills Compliance Employment Info Rate Info Reference

Candidate Submission User Confirmation

First Name:

Middle Initial:

Last Name:

Vendor Candidate ID:

Next Cancel

4. Complete the candidate information fields (anything with a red circle is a required field) and Click *Next*.

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

### Submit Candidate

Vendor: Sevenstep\_Demo Candidate Status: Incomplete Req Title: Test Requisition Reference Info: Req ID: 105303

Submit (✓) Details (📍) Skills Compliance Employment Info Rate Info Reference

**Candidate Information**

First Name: Test  
Middle Initial:   
Last Name: Test1  
Username: TestTest1  
Email Address: test@gmail.com  
Client Region: Commonwealth of Massachusetts  
Candidate Status: Incomplete  
SSN/Tax ID/SIN:(e.g. 333224444):   
Vendor Name: Sevenstep\_Demo  
Vendor ID: 2335  
Vendor Candidate ID: Test123  
Vendor Candidate Status: Available  
Engagement Type: Contract

Previous Save as Draft **Next** Cancel

a. If there are skills built into the requisition, you will be able to score the candidate you are submitting based on the requirements in the requisition. Click *Next*.

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

### Candidate

Test1, Test (38771)

Vendor: Sevenstep\_Demo Candidate Status: Incomplete Req Title: Test Requisition Reference Info: Req ID: 105303

Submit (✓) Details (✓) Skills (📍) Compliance Employment Info Rate Info Reference

**Requisition Details And Candidate Match**

Skill	Required / Desired	Amount	of Experience	Response	Amount of Candidate's Experience
No specific requirements found.					

Previous Save as Draft **Next**

## 5. Review Compliance Requirements and Click *Next*.

VectorVMS Hi, Brian ▾

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

### Candidate

Test1, Test (38771)

Vendor: Sevenstep\_Demo Candidate Status: Incomplete Req Title: Test Requisition Reference Info: Req ID: 105303

Submit (✓) Details (✓) Skills (✓) Compliance (📍) Employment Info Rate Info Reference

**Compliance Items**

This section contains tasks that will need to be completed as part of the Candidate Submittal and/or Engagement process.

Item	Due	Owner	Status	Attachments	Response Attachments	Details
<b>Background Checks</b>						
CORI Check - Before Engagement	Before Engagement	Vendor	Not Started			
CORI Check - Can Start Before Complete	Engagement Through Date	Vendor	Not Started			
<b>Candidate References</b>						
1st Reference	Optional	Vendor	Not Started			
2nd Reference	Optional	Vendor	Not Started			
<b>Finger Print Check</b>						
Finger Print Check	Before Engagement	Vendor	Not Started			

Page 1 of 1 | Displaying 1 - 5 of 5

Previous Save as Draft **Next**

## 6. Complete Candidate Employment Status Fields and ensure the Candidate Vendor Contact Information fields are correct and Click Next.

Hi, Brian

Dashboard Create View Reports Adv. Search Quick Find

Candidate  
Test1\_Test (38771)

Vendor: Sevenstep\_Demo | Candidate Status: Incomplete | Req Title: Test Requisition | Reference Info: Req ID: 105301-P

Submit Details Skills Compliance Employment Info Rate Info Reference

**Candidate Employment Status**

Is Candidate currently employed by Vendor:  Yes  No

Is/Will be Paid-Employee/W2 to Vendor:  Yes  No

If not, list candidate employer if subcontracted to vendor:

Independent Contractor:  Yes  No

If yes, incorporated or 1099/Self-Employed:

Citizen Status:

If other, then explain:

**Candidate Vendor Contact Information**

Vendor Contact: Knapp, Brian

Vendor Email: brian.knapp@sevensteppro.com

Vendor Contact Phone: 0

Vendor Client Status: Active

Vendor Rep.: Knapp, Brian

Previous Save as Draft **Next**

## 7. Update Candidate Rate Settings (Payment Basis and Pay Rate) and Click Next.

Hi, Brian

Dashboard Create View Reports Adv. Search Quick Find

Candidate  
Test1\_Test (38771)

Vendor: Sevenstep\_Demo | Candidate Status: Incomplete | Req Title: Test Requisition | Reference Info: Req ID: 105301-P

Submit Details Skills Compliance Employment Info Rate Info Reference

**Rate Information**

Candidate Rate Settings:

Rate Structure: Standard Hourly

Vendor Charge %: 0

Payment Basis: **Per Hour**

Candidate Rates:

Rule Name	Client Rate	Vendor Rate	Pay Rate
Standard Hourly	\$15.07 USD	\$14.62 USD	

Previous Save as Draft Submit **Next**

## 8. Add the candidate resume (references, if applicable, and any other attachments) by clicking *Add New Attachment*.

VectorVMS Hi, Brian

Dashboard Create View Reports Adv Search Quick Find

Candidate Doe, Jane (38821)

Vendor: Sevenstep\_Demo Candidate Status: Incomplete Req Title: Call Center Representative Reference Info: Req ID: 105290

Submit Details Skills Compliance Employment Info Rate Info Reference

Candidate Comments

Add Comment

User Name	Org. Short Name	Date/Time	Comment	Sys. ID
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Page 1 of 1

There are currently no comments

Attachments

Add New Attachment

Action	Attachment Type	Description	File Name	Created By	Created Date
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Page 1 of 1

No data to display

Previous Save as Draft Submit

9. After you click *Add New Attachment*, the below pops up. You can select what document you are attaching, a brief description, and select the file to attach. Click *Save* afterwards.

Fill the fields, then click the paper clip icon to browse for a file to upload.

Add Attachment

Attachment Type Description File Name

Agreement  
Compliance  
Contract  
Cover letter  
Expense  
Guideline

Select File

Save Cancel

10. You will then see the attachments in the candidate's profile.

VectorVMS Hi, Brian

Dashboard Create View Reports Adv Search Quick Find

Candidate Doe, Jane (38821)

Vendor: Sevenstep\_Demo Candidate Status: Incomplete Req Title: Call Center Representative Reference Info: Req ID: 105290

Submit Details Skills Compliance Employment Info Rate Info Reference

Candidate Comments

Add Comment

User Name	Org. Short Name	Date/Time	Comment	Sys. ID
-----------	-----------------	-----------	---------	---------

Page 1 of 1

There are currently no comments

Attachments

Add New Attachment

Action	Attachment Type	Description	File Name	Created By	Created Date
	Expense	expense receipt	No receipt.pdf	Brian Knapp	07/02/2020 4:48 PM

Page 1 of 1

Displaying 1 - 1 of 1

Previous Save as Draft Submit

11. Click *Submit* to submit the candidate for the open position.

VectorVMS Hi, Brian

Dashboard Create View Reports Adv Search Quick Find

**Candidate**  
Doe, Jane (38821)

Vendor: Sevenstep\_Demo | Candidate Status: Incomplete | Req Title: Call Center Representative | Reference Info: Req ID: 105300

Submit Details Skills Compliance Employment Info Rate Info Reference

**Candidate Comments**

Add Comment

User Name	Org. Short Name	Date/Time	Comment	Sys. ID
There are currently no comments				

**Attachments**

Add New Attachment

Action	Attachment Type	Description	File Name	Created By	Created Date
	Expense	expense receipt	No receipt.pdf	Brian Knapp	07/02/2020 4:48 PM

Previous Save as Draft **Submit**

12. You will now see the candidate(s) you submitted to the requisition.

VectorVMS Hi, Brian

Dashboard Create View Reports Adv Search Quick Find

**Requisition**  
Test Requisition (105303)

Req. Status: Open | Start Date: 06/28/2020 | End Date: 07/31/2020

Job Selection Details Skills Compliance Candidates Reference ApprovalHistory

Reset View Save View Show Filters Export

Action	Candidate	Cand. Status	Req. Title	Req. ID	Req. Status	Rate	Client	Submitted Date
	Test1, Test	New	Test Requisition	105303	Open	\$15.07 USD	Comm of Mass Demo	06/22/2020 06:28 pm

## Accepting or Rejecting Interview(s)

1. When you have interviews to accept (or reject), you will see it on your dashboard (potentially in two different ways depending on your dashboard view).
2. Click either option to accept (or reject the interview).

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Dashboard Create View Reports Adv Search Quick Find Configure Dashboard

**My Tasks**

Interviews To Accept Engagements To Accept

Task	Count
Interviews To Accept	1
Engagements To Accept	0

3. Click the candidate's name and it will bring you to their profile.



VectorVMS Hi, Brian

Dashboard Create View Reports Adv Search Quick Find

Candidate Summary All Schedule Interview Candidates - With My User ID

Reset View Save View Show Filters Export

Action	Candidate	Cand. Status	Req. Title	Req. ID	Req. Status	Rate	Client	Submitted Date
	Springsteen, Bruce	Schedule Interview	Call Center Representative	105290	Interviews occurring	\$18.29 USD	Comm of Mass Demo	06/16/2020 08:46 pm

Page 1 of 1 Displaying 1 - 1 of 1

- Click the interview tab, click the clipboard with the green arrow icon and either *Accept* or *Reject* the proposed interview.

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Dashboard Create View Reports Adv Search Quick Find

Candidate Springsteen, Bruce (38753)

Vendor: Sevenstep\_Demo Candidate Status: Schedule interview Req Title: Call Center Representative Reference Info: Req ID: 105290-P

Details Skills Compliance Employment Info Rate Info Reference Interview History

Current Interview

Interview ID: 3816 Interview Status: Schedule Interview

Scheduled Interview Option(s)

Please indicate the date / time that will be acceptable for your candidate. The client will be notified of your selection and expect the interview to occur on selected date / time and location.

Actions	Scheduled Interview Option(s)
Clipboard with green arrow icon	Date/Time: 06/23/2020 12:00 PM Phone: Home Location: Home
Time Zone: (GMT-05:00) Eastern Time (US & Canada)	Interviewer: Kasey Canto

History

Interview ID	Status	Interviewer	Updated Date	Updated User	Details
3816	Schedule Interview		06/22/2020 6:45 PM	Kasey Canto	

- If you accept the interview, the below box will pop-up and you can add comments, such as confirmed interview time with candidate. Click *Submit* after adding your comments (required field).

Accept Interview

Comment

0/1000

Submit Cancel

- After Clicking *Submit*, you will see this screen with the interview details.

VectorVMS Hi, Brian

Dashboard Create View Reports Adv Search Quick Find

**Candidate** Springsteen, Bruce (38753)

Vendor: Sevenstep\_Demo Candidate Status: Interview Accepted Req Title: Call Center Representative Reference Info: Req ID: 106290-P

Details Skills Compliance Employment Info Rate Info Reference Interview History

**Current Interview**

Interview ID: 3816 Interview Status: Interview Accepted

**Actions Interview Information**

Date/Time	06/23/2020 12:00 PM	Time Zone	(GMT-05:00) Eastern Time (US & Canada)
Interview Type	Phone	Interviewer	Kasey Canto
Location	Home	Phone	
Details			
Vendor Comment	Test		

**Candidate Interview History**

Interview ID	Status	Interviewer	Updated Date	Updated User	Details
3816	Schedule Interview		06/22/2020 6:45 PM	Kasey Canto	

Candidate Summary List Cancel Interview

- c. You can add the interview to your calendar by clicking the clipboard with green arrow icon and selecting *Add to Calendar*.

VectorVMS Hi, Brian

Dashboard Create View Reports Adv Search Quick Find

**Candidate** Springsteen, Bruce (38753)

Vendor: Sevenstep\_Demo Candidate Status: Interview Accepted Req Title: Call Center Representative Reference Info: Req ID: 106290-P

Details Skills Compliance Employment Info Rate Info Reference Interview History

**Current Interview**

Interview ID: 3816 Interview Status: Interview Accepted

**Actions Interview Information**

Date/Time	06/23/2020 12:00 PM	Time Zone	(GMT-05:00) Eastern Time (US & Canada)
Interview Type	Phone	Interviewer	Kasey Canto
Location	Home	Phone	
Details			
Vendor Comment	Test		

**Candidate Interview History**

Interview ID	Status	Interviewer	Updated Date	Updated User	Details
3816	Schedule Interview		06/22/2020 6:45 PM	Kasey Canto	

Candidate Summary List Cancel Interview

- d. If you reject the proposed interview time(s), the below box will pop-up and you can add comments, such as reason why you are rejecting the interview and/or propose new interview time(s). Click *Submit* after adding your comments (required field).

Phone :

**Reject All Interview Option(s)**

Comment

Propose different time

23/1000

Submit Cancel

## Accepting (or Rejecting) Engagements

1. When you have an engagement to accept (or reject), you will see it on your dashboard (potentially in two different ways depending on your dashboard view).
2. Click either option to accept (or reject the engagement).

The screenshot shows the VectorVMS dashboard. In the 'My Tasks' section, there are two icons: 'Interviews To Accept' and 'Engagements To Accept'. The 'Engagements To Accept' icon is highlighted with a red box. Below this, the 'Alerts' section displays a calendar view with a red box highlighting the 'Engagements To Accept' row.

3. Click the clipboard with the green arrow icon under Action and Select *View Engagement*.

The screenshot shows the 'Engagement Summary' page. A table lists engagement details. The 'Action' column has a dropdown menu with 'View Engagement' highlighted by a red box.

Action	Candidate	Engt. ID	Cand. Status	Req. Title	Req. ID	Rate	Client	Engt. Created Date
View Engagement	Test1, Test	19849	Engaged - Pending Vend Accept	Test Requisition	105303		Comm of Mass Demo	06/22/2020 08:06 pm

4. Select either *Accept* or *Do Not Accept*.

The screenshot shows the 'Engagement' detail page. The 'Vendor Decision' section is highlighted with a red box, showing 'Accept' selected.

**Engagement**  
Test Test1 (19849)

Vendor: Sevenstep\_Demo | Client Candidate Status: Engaged - Pending Vend Accept | Req Title: Test Requisition | Reference Info: Req ID: 105303, Cand ID: 36771

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

**Vendor Acceptance**

Justification: make offer  
Vendor Decision:  Accept  Do not accept

Location Details:  
Location Name: Sevenstep-One Center Plaza  
Address: One Center Plaza  
City: Boston  
State: MA  
Zip code: 2108  
Country: US

**Engagement History**

Transact... #	Change User	Change Date	Reports To	Client Contact	Engaged By	Bill Rate	Vendor Rate	Pay Rate	Rate Effective Date	Type	Engagem... Through Date
Current	Brian Knapp	06/22/2020 08:12 pm	Knapp, Brian	Knapp, Brian	Knapp, Brian	\$15.07	\$14.62	\$11.00	06/29/2020	Contract	07/31/2020

- a. If you *Accept* the Engagement, it will bring you to below screen and you can see the

candidate is Engaged.

The screenshot shows the VectorVMS interface for an engagement. The 'Engagement' section is active, displaying details for 'Test Test (19849)'. The 'Client Candidate Status' is highlighted as 'Engaged' in a red box. Other details include Client Name (Comm of Mass Demo), Engagement ID (19849), and various dates.

Client Candidate Status	Engaged
Engagement Type:	Contract
Original Start Date:	06/29/2020
Start Date:	06/29/2020
Eng. Decision Date:	06/23/2020
Engaged Through:	07/31/2020
Contract To Hire Duration:	Not Applicable
Change Reason:	
Change Requested By:	Client

- If you do not accept the Engagement, you will be able to add a comment as to why you do not accept the Engagement.

## Proxy Timesheet

- To enter time on behalf of the contractor, Select *Proxy Timesheet* under the *Create* dropdown via your black toolbar on your dashboard.

The screenshot shows the VectorVMS dashboard with the 'Create' dropdown menu open. The 'Proxy Timesheet' option is highlighted with a red box. Below the dropdown, there is a search bar for 'Missing Timesheets - All' and a date range filter for 'Period End Date' from 06/10/2020 to 06/23/2020.

Action	Candidate	Period End Date	Proxy Allowed	Existing Tmsht	Client	Reports To	Cand. ID	Req. Class	Email
	Henry, William	06/20/2020	✓		Commonwealth of Ma...	Duarte, Kathy	38756	Administrative Support	brian.knapp@sevenst...

- Click the clipboard with the green arrow icon dropdown and select *Enter Time*.

The screenshot shows the 'Timesheet Summary' page for 'Missing Timesheets - All'. The 'Enter Time' option is highlighted in a red box in the action dropdown menu for the first row of the table.

Action	Candidate	Period End Date	Proxy Allowed	Existing Tmsht	Client	Reports To	Cand. ID	Req. Class	Email
Enter Time	Henry, William	06/20/2020	✓		Commonwealth of Ma...	Duarte, Kathy	38756	Administrative Support	brian.knapp@sevenst...

- Input time and Click *Submit*.

VectorVMS Hi, Brian ▾

Dashboard Create View Reports Adv. Search Quick Find 🔍

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**Timesheet** Reports To: Duarte, Kathy | Requestion Title: Administrative Support for Child Support / Commonwealth of Massachusetts Demo | Client: | Reference Info: |

Henry, William (38756) Previous | Back to Summary | Next | Item 1 of 1

Period (Begin - End): Sunday, June 14, 2020 - Saturday, June 20, 2020

**Timesheet**

Turn on automatic calculation of hours based on Start time/End time  
\*All time can be entered either with an am/pm designator or in a 24 hour clock format. (05:00 pm or 17:00)

	14 Sun	15 Mon	16 Tue	17 Wed	18 Thu	19 Fri	20 Sat	Total
Start time of Day *								
End time of Day *								
Non-billable hours								
Project: Administration & Finance / Dept of Revenue / Child Support Enforc...   Cost Center: Default Cost Center								
Standard Hourly								
Total Billable Hours (Day)								

[Add New Line](#)

**Attachments**

[Add New Attachment](#)

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

Page 1 of 1

[Save As Draft](#) [Submit](#) [Cancel](#)

4. Timesheet has been successfully submitted.

