knowledge services

Getting Started

AZVRS Vendor Project Guide

Contents

Activate your Account

To activate your account, your company Administrator must first create it

Once created an activation email is sent with a link to activate the account

1. Click the secure **link** provided in the email
2. **Complete the form** entirely and click **Activate**
3. A success message appears. Click **OK**
4. **Login** utilizing the newly created credentials

For additional assistance, contact the Support Team at Knowledge Services

Reset your password

1. From the login screen, click the **Need help signing in?** hyperlink
2. Select the **Forgot Password?** hyperlink
3. Enter your **Username**
4. Select a reset option:
    a. **Reset via SMS**: A text will be sent to the SMS phone number on file
    b. **Reset via Email**: An email is sent with a link
5. **Click the link** in the email or SMS text received
6. **Answer** your security question
7. Click **Reset Password**
8. Type a **New Password**
9. **Type/Repeat password**
10. Click **Reset Password**

For further assistance, contact the Support Team at Knowledge Services

Submit a bid

1. Navigate to **Opportunity Management > View Postings**
2. Open the posting of interest by **double clicking** on it in the data grid
3. Click on **Add Bid** to submit the bid
4. Complete the **Bid Information Form**
5. Verify the information is correct. Click **Submit Bid**
6. Once submitted, a success message will appear. Click **OK**

View a bid

1. Navigate to **Opportunity Management > View Postings**
2. Locate the **Posting** the bid is associated with. If necessary, use the **Date Selection Zone**
3. Having located the desired posting:
    a. **Double Click** on the Posting in the data grid and click the **Bids** button
    b. Or, click on the **View Bid Icon** in the Action bar

View all company bids

1. Navigate to **Opportunity Management > View Bids**
2. View Bids of interest by using the standard data grid **sort and filter features**
3. The **Status** column identifies the stage at which a bid resides

Withdraw a bid

1. Navigate to **Opportunity Management > View Postings**
2. Locate the **Posting** the bid is associated with. If necessary, use the **Date Selection Zone**
3. Having located the desired posting, open it by **double clicking** on it in the data grid
4. Click the **Bids** button
5. Using the various filters and search options, locate the **Bid** for which you wish to withdraw
6. **Double click** to open the bid
7. Click the **Withdraw** button to withdraw the bid

Add a New User

Only the **Vendor Administrator** has the ability to add a new Vendor User to the account. Please reach out to your MSP for assistance, if you are unsure who the Vendor Administrator is for your company.

1. Log in to dotStaff
2. Navigate to **Records Management**
3. Select **View Users**
4. Click the **Add** button
5. Select the correct Account Type of **User**
6. Complete the **Account Information** fields
    a. All fields are required except Username
    b. The **Account Notification Email** is where the account activation email containing the User's activation code will be sent
7. Click the **right orange arrow** to move to the next page
8. Click the **Send Activation Notification** box if desired
    a. If selected, the user will receive an email notification requesting he/she activate their account in dotStaff
    b. If left unselected, the user will receive an email notification requesting he/she activate their account in dotStaff
        i. If unselected, you may re-send the account activation notification later
        ii. See below for instructions on resending the activation notification email
9. Click **Complete**
    a. A pop-up message will appear asking if you want to save
10. Click **OK**

An automated email is generated and send to the user in order to activate their account

Resend the Activation Notification

In order to activate a new account, a user or resource must have an activation code. The activation code is emailed when an account is created or manually resent. Both Vendor

Administrators and Vendor Users can resend the Account Activation Email containing the Activation code.

1. Navigate to **Records Management > View Users**

2. Use the filter to **locate the user**

3. **Check the box** next to the user

4. Click the **Resend** button in the upper right-hand corner

Email Notification Preferences

Posting Notifications

Vendors who wish to receive posting notifications, can turn the notifications **on** and **off**.

1. Navigate to **My Account** > **Personal Account**
2. Click the **Edit** button in the upper right-hand corner
3. Use the dropdown for **Posting Notifications** to select **Yes** or **No**
   a. **Yes** = User will receive posting notifications
   b. **No** = User will not receive posting notifications
4. Once the selection is made, click **Save**

Timesheet Notifications

Vendors who wish to receive Timesheet notifications, can turn the notifications on and off.

1. Navigate to **My Account** > **Notification Preferences**
2. Scroll to the section titled **Timesheet** and **check** or **uncheck** all boxes
   a. **Check** = User will receive timesheet notifications
   b. **Uncheck** = User will not receive timesheet notifications
3. Once all selections are made, click **Save**

Tie out Payment

To determine payment information from a payment sent by Knowledge Services, follow these steps.

1. Log in to dotStaff
2. Navigate to **Time Projects > View Milestones**
3. Use the filter for **Vendor Payment Number** to find the payment. *Set the date range accordingly.*
4. **Double Click** on any line to open the specific details of the Milestone