



User Request Form Contract Management System Processes and Procedures



- ▶ **How to request NEW Users be added to CMS, CAS or Both**
 - ▶ **How to UPDATE Existing User information in CMS, CAS or Both**
 - ▶ **How to DEACTIVATE a User in CMS, CAS or Both**
1. The Single Point of Contact (SPC) will complete a User Request Form (URF) for individuals within their own agency or institution of higher education (IHE) and check the appropriate options at the top of the form.
 - a. The URF and instructions for completion, are included as pages 2 and 3 of this process document, and is also available on the Office of State Controller's website: http://www.colorado.gov/dpa/dfp/sco/contracts/Contract_Administration/WebPages/Current_Processes_&_Forms.htm
 2. The SPC will email the completed URF to the OIT Service Desk at: ServiceDesk.Info-Inquiries@state.co.us.
 3. Once the request is processed, the SPC will be notified via email that the account setup is complete.
 4. It is the responsibility of the SPC to contact the end User with their account information and provide training.
 5. These requests will typically be completed with a 24-hour period



User Request Form Instructions for completing the User Management Form



The availability of Colorado's Contract Management System (CMS) and the Colorado ARRA System (CAS) to all Agencies and Institutions of Higher Education, places a higher degree of importance on system access and security. Limiting User permissions to only those absolutely necessary for performance of their job function as related to contract management, has led to the creation of this User Request Form (URF) and the process it accompanies.

When the ContractInsight software was first implemented, each Agency/IHE was asked to identify an individual (or in the case of larger departments, two or three individuals) to act as the Single-Point-of-Contact (SPC) for their department. Assigning a SPC was determined by the Office of the State Controller to be the best method for gathering information *from* Agencies/IHEs and disseminating information *to* the Agencies/IHEs. Trying to communicate with all State employees involved in contract management at any level within all Agencies/IHEs would be impossible and ineffective. Now with the addition of a separate site for ARRA records, relying on the named SPC's becomes even more important.

One of the most important pieces of CMS and CAS is employee access. Access is assigned to an employee as one of three levels each with its own unique set of permissions. The levels are limited to: 1) Program Manager level → Read Only access which allows an individual employee to complete assigned tasks and view contract records contained in CMS and/or CAS. 2) Contract Writer level → Read and Edit access which allows an individual employee to create a contract record, edit only those records they created and to view all contract records contained in CMS and/or CAS. 3) Contract Unit Director level → Read, Edit and Delete access across their own Agency/IHE and to view all contract records contain in CMS and/or CAS.

Only the SPC from an agency/IHE can submit a URF. An employee wanting User access to CMS and/or CAS must contact their agency/IHE SPC and complete the URF. Upon receipt of a URF, the OIT Service Desk will check the SPC master list. If the name provided as the SPC is not on this master list, the request will not be processed and the URF will be returned to the requestor. The SPC list is available on the Office of the State Controller's website.

The URF allows for three types of requests: 1) *Addition* of an employee to CMS and/or CAS for the first time - "New User Information;" 2) *Changing* the information on an employee already in CMS and/or CAS - "Update User Information;" and 3) *Removing* an employee already in the CMS and/or CAS - "Deactivate User."

All fields must be provided on the URF. *Use a separate URF for each request.* This will aid in the accuracy and consistency of any additions and/or changes to the employee tables in CMS and/or CAS. Incomplete or inappropriately completed forms will result in delays in making the requested additions and/or changes.



User Request Form



Request Type: New User Update User Record Deactivate User

Site Access Needed: CMS CAS Both

Single Point of Contact (Name)	
Agency or IHE	
Phone Number	
Email	

NEW User Information

Employee First Name *	
Employee Last Name *	
Title	
Department/IHE *	
Email Address *	
Office Phone *	
Unique User Name *	
Access Level (circle one) *	Program Manager ♦ Contract Writer ♦ Contract Unit Director

UPDATE User Information

	Current	Change To
Employee First Name		
Employee Last Name		
Title		
Department/IHE		
Email Address		
Office Phone		
Unique User Name		
Access Level		

DEACTIVATE User Information

Employee Full Name	
Deactivate Effective Date	

Date Submitted: _____