



Creating Reports Performing Custom Searches

The Contract Management System (CMS) allows for creation of custom reports based on ad-hoc queries/searches. The term ad hoc is generally used to imply that something is intended for a particular situation or purpose. Hence, an ad hoc committee is one that is formed to handle a particular issue. Something that is ad hoc or that is done on an ad hoc basis happens or is done only when the situation makes it necessary or desirable, rather than being arranged in advance or being part of a general plan. Ad hoc has several specific applications in the world of Information Technology. Ad hoc reporting – also called ad hoc querying – refers to a system that permits users to customize a data query from a database instead of limiting them to preset, "canned" options. Since the results of the query are dependent on the specific query submitted, they are created for the specific moment, ad hoc.

The first part of this document provides general information for performing searches in CMS while the second part gives specific examples – complete with screen shots – of a few typical searches. Between the two parts, users should be able to create their own reports, conduct their own searches and/or have enough information to seek out further assistance.

Part I: General Steps and Common Entries



- 1) From the Main Menu bar, in the Reports menu item, select the “Create A Custom Search” under the “Custom Searches” link.
- 2) In the **Step 1** field, select *CMS Contract Reporting Data and click **Continue**.
- 3) This will show the Available Fields box and Selected Fields box.
 - ** See Pages 14 – 16 for description of each listed Available Field.
 - a) Each field is used in one or more of the contract types in CMS.
 - b) Select each field of interest from the Available Fields box then click the **blue** arrow to the right of the box. This will move the desired field to the Selected Fields box.
 - c) Repeat step 3b for each field of interest.
- 4) As each field is selected, a new area will appear with 3 columns: “Field Name,” “Condition,” and “Criteria.”
 - a) This is the area that allows for filtering of data. Use of very few filters (if any) is recommended to ensure the search captures as much information as possible based on the fields of interest.
 - b) The “Condition” column tells the system *where* to look for data. For example: If *equals* is selected, the system will only focus on *where* the field has information *equal to* the criteria placed in the “Criteria” column. In other words, everything else will be filtered out and not be reported as part of the search.
 - c) The default in the “Conditions” column is *contains*. If the default *where* Condition option, *contains*, is not changed, this will cast the largest net for data.
 - d) Multiple *where* “Condition” options are available. Each “Condition” option is described below along with tips for entering associated “Criteria.”
 - *contains*: Select this *where* “Condition” option to find words or phrases in variable character lists or text fields. For example, if you were looking to find all contracts that have the word “natural” in

the Agency/IHE (Department) “Field Name,” the “Condition” column would be set to *contains* and “natural” typed into the “Criteria” column. Do not use quote marks (“ ”) in the “Criteria” column.

- *equals*: Select this *where* “Condition” option for making exact searches or for entering items in a list using the comma (,) as a list separator.
 - *not equal to*: Select this *where* “Condition” option for making exact searches or entering items that do not match the “Criteria” that is entered. Use the comma (,) as a list separator.
 - *greater than*: Select this *where* “Condition” option for making exact searches that are greater than the value entered in the “Criteria” column. For example: To find all contracts with an amount greater than \$100,000, select the *greater than* “Condition” option and enter “100000” in the “Criteria” column. Do not use quote marks (“ ”) in the “Criteria” column.
 - Only a single “Criteria” value will be considered as part of any given search.
 - The *greater than* “Condition” option can be use for money values, dates and numbers.
 - *less than*: Select this *where* “Condition” option for making exact searches that are less than the value entered in the “Criteria” column. For example: To find all contracts with an amount less than \$100,000, select the *less than* “Condition” option and enter “100000” in the “Criteria” column. Do not use quote marks (“ ”) in the “Criteria” column.
 - *between*: Select this *where* “Condition” option for finding values that fall between (and including) two values. For example: To find all contracts having an Expiration Date between 5/1/2010 and 6/30/2010, select the *between* “Condition” option and type “5/1/2010 and 6/30/2010” in the “Criteria” column. Do not use quote marks (“ ”) in the “Criteria” column.
 - Be sure to have the word “and” between the starting and end values.
 - The *between* ”Condition” option can be use for money values, dates, and numbers.
- 5) Skip the “Sort by” option and go to **Step 2** and click **Continue**.
- 6) The search results should now appear at the bottom of the screen. If the expected results do not appear, review the “Condition” options and “Criteria” and edit as necessary.
- 7) The search results can now either be saved *within CMS* or exported *outside CMS*.
- a) If the search will be needed/useful in the future, give the search a name and click save report. This will save the search *within CMS* and each time the report is selected in the future, the system will re-run the Search with current information. (To re-run a search saved by the user *within CMS*, in the Reports menu item, select the “My Custom Searches” under the “Custom Searches” link and select the name given to the search.
 - b) If the search is a one time search, click the **Export** icon and follow the prompts to export the data to Excel – *outside CMS*. From there, the data can be sorted etc., as needed.
- 8) A Few Advanced Ad-hoc Searches
- a) Below are some more advanced reporting and querying tips. Remember, use of very few filters (if any) is recommended to ensure the Search captures as much information as possible based on the fields of interest.
 - Dates: If searching dates, the keyword "getDate()" (without quote marks or spaces) can be used in the “Criteria” column to indicate the current date.
 - Dates: The “getDate()” keyword can be used in the “Criteria” column along with adding or subtracting days. For example, selecting “Expiration_Date” as the “Field Name,” select *greater than* as the “Condition” option, and enter "getDate() + 60" (without quote marks) in the “Criteria” column to find all contracts expiring over 60 days from the current system date.

Department Level Searches

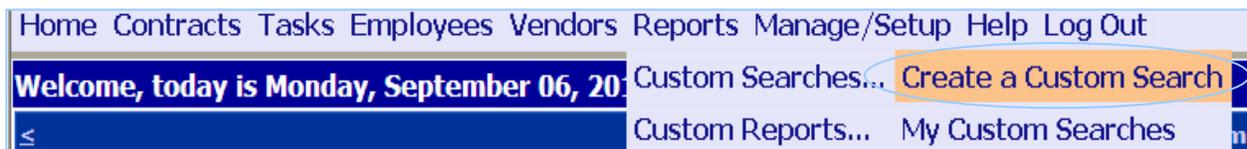
The following are examples of how to create a custom “search” that will extract data at an agency and/or IHE level. These can be created and saved as a Custom Search. When a user runs a search, the data can then be exported to Excel where the data can be manipulated and sorted as desired/needed. The results returned from the Custom Search will only display data the user has access to see.

➤ **Example #1:** A user is interested in knowing what Purchase Orders their department currently has in CMS. The user wants to know the following information:

- Contract ID (CMS ID #)
- Effective Date
- Contractor/ Vendor
- Maximum Dollar Amount of the contract
- Contract Purpose
- Contract Type

➤ These are the steps the user would take:

STEP 1: Go to: **Reports – Custom Searches – Create a Custom Search.**



STEP 2: Select ***CMS Contract Reporting Data** and click **Continue.**



STEP 3:

Select the fields to include in the search by highlighting the desired field from the “Available Fields” column and clicking the **blue** arrow to the right of the box to move it to the “Selected Fields” column. Multiple fields can be selected at one time by holding down the Control key (Ctrl) and clicking on each field. Please note that the order in which fields are selected is the same order in which they will appear on the screen from left to right.

To remove fields from the “Selected Fields” area, simply reverse the process by highlighting the field(s) and clicking the **red** arrow.

NOTE: The “Available Fields” are presented in alphabetical order and are abbreviated versions of each and every field available in CMS across all contract types. A complete list of these “Short Names” and their corresponding actual “Field Names” is provided at the end of this document for easy reference.

Custom Report View Creator

Step 1: select reporting data: * CMS Contract Reporting Data [CONTINUE] (start over)

Available Fields	Selected Fields
CUMULATIVE_Max	
Date_Rating_sent	
Description	
Details	
DISPUTE_of_Evaluation	
DISPUTE_of_Report	
Doc_Status	
Dollar_Savings	
Duration_of_State_Jobs	
Effective_Date	
Entered_By	
Entered_on	

Highlight a field and click the blue arrow to move it to the "Selected Fields" area.

STEP 4:

Once all of the desired fields have been selected, choose any needed filter criteria. Be aware that it is the criteria that determines what information the system filters out of the search results. As such, it is recommended that very few, if any, filter criteria are used. Filter criteria can only be set ONCE. They cannot be changed once the search is saved. Each time the search is subsequently run, the same criteria will be applied. Be sure that the criteria selected will be valid each time the search is run.

This example search is for *Purchase Orders only*. Given this, it is appropriate to set the "Contract Group Type" to "Purchase Order." From the drop down list, set the "Condition" option for "Contract_Group_Type" to *contains* and type "Purchase Order" in the "Criteria" column – spelling matters so check your work. NOTE: Had the *equals* "Condition" option been selected instead, then the *entire* "Contract Group Type" name, *exactly* as it appears, would have to be typed into the "Criteria" column. It is much more difficult to get a name typed in exactly correct, so it is recommended to use *contains* whenever possible.

To check the results of the search, click **Continue** in **Step 2** next to "preview results."

Custom Report View Creator

Step 1: select reporting data: * CMS Contract Reporting Data [CONTINUE] (start over)

Available Fields	Selected Fields
Contract_Title	CMS_ID#
Contract_Type_ID	Effective_Date
Contractor_Vendor	Contractor_Vendor
CUMULATIVE_Max	Contract_Group_Type
Date_Rating_sent	Contract_Purpose
Description	Max_Amt
Details	
DISPUTE_of_Evaluation	
DISPUTE_of_Report	
Doc_Status	
Dollar_Savings	
Duration_of_State_Jobs	

Field Name	Condition	Criteria
CMS_ID#	contains	
Effective_Date	contains	
Contractor_Vendor	contains	
Contract_Group_Type	contains	Purchase Order
Contract_Purpose	contains	
Max_Amt	contains	

Sort by: CMS_ID# [Ascending]

Step 2: preview results [CONTINUE]

STEP 5:

The search results should now appear at the bottom of the screen. If the expected results do not appear, review the “Condition” options and “Criteria” and edit as necessary. Repeat the search until the results are accurate.

The screenshot shows the 'Custom Report View Creator' window. At the top, it says 'Step 1: select reporting data: CMS Contract Reporting Data'. Below this are two columns: 'Available Fields' and 'Selected Fields'. The 'Selected Fields' column contains: CMS_ID#, Effective_Date, Contractor_Vendor, Contract_Group_Type, Contract_Purpose, and Max_Amt. A blue callout box labeled 'Search Results' points to the table below. The table has the following data:

CMS_ID#	Effective_Date	Contractor_Vendor	Contract_Group_Type	Contract_Purpose	Max_Amt
1018	7/8/2009 12:00:00 AM	DRURY DEVELOPMENT CORPORATION	Purchase Order (Services <\$100K, Goods or Approved Exceptions)		10000.0000
1019	7/8/2009 12:00:00 AM	HPT TRS.IHG 1 INC	Purchase Order (Services <\$100K, Goods or Approved Exceptions)		10000.0000
1022	7/14/2009 12:00:00 AM	BERRY TRUCKING & EXCAVATING, INC.	Purchase Order (Services <\$100K, Goods or Approved Exceptions)	Safeguard hazardous mine openings.	72010.0000
1079	7/2/2009 12:00:00 AM	DAVE'S ENTERPRISES INC	Purchase Order (Services <\$100K, Goods or Approved Exceptions)	To pay Contractor to safeguard hazardous mine openings.	27250.0000
1094	7/2/2009 12:00:00 AM	RAKESTRAW, CHARLES F	Purchase Order (Services <\$100K, Goods or Approved	Services to investigate sheep kill from bear and mountain lions	4999.9900

STEP 6:

If this search will be needed/useful in the future, give the search a name and click **save report**. If this is a one-time search, click the **Export** icon and follow the prompts to export the data to Excel where the data can be sorted etc., as needed.

This close-up shows the 'Step 3: save report:' section. It includes a text input field for 'report name:' containing 'OIT Purchase Orders'. Below it is a dropdown menu for 'email every:' set to '0' and 'Day(s)'. To the right is a date field for 'starting on' set to '9/6/2010'. A blue arrow points to the 'report name' field. A green circle highlights the 'save report' button. An 'export' icon is also visible.

STEP 7:

If the above search was saved and the user wants to run it again, go to: **Reports – Custom Searches – My Custom Searches**.

The screenshot shows the top navigation bar of the 'contract insight' application. The menu items are: Home, Contracts, Tasks, Employees, Vendors, Reports, Manage/Setup, Help, Log Out. Below the navigation bar, there is a welcome message: 'Welcome, today is Monday, September 06, 2010'. To the right of the welcome message are two buttons: 'Custom Searches...' and 'Create a Custom Search'. Below these buttons are two more buttons: 'Custom Reports...' and 'My Custom Searches'. The 'My Custom Searches' button is circled in red.

STEP 8:

Locate the search in the list of reports and click on the desired search.

Nunes_090210	9/2/2010 1:59:59 PM	edit
OIT Purchase Orders	9/6/2010 2:15:12 PM	edit
OIT Task Report by Kennedy	11/19/2009 2:11:48 PM	edit
operating lease	7/17/2009 3:11:51 PM	edit

STEP 9:

The data within this search can now be exported *outside CMS* by clicking on the **Export to Excel**, **Export to Word**, or **Export to PDF** links on the far right side of the screen.

My Custom Reports

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CMS_ID#	Effective_Date	Contractor_Vendor	Contract_Group_Type	Contract_Purpose	Max_Amt
1018	7/8/2009 12:00:00 AM	DRURY DEVELOPMENT CORPORATION	Purchase Order (Services <\$100K, Goods or Approved Exceptions)		10000.0000
1019	7/8/2009 12:00:00 AM	HPT TRS IHG 1 INC	Purchase Order (Services <\$100K, Goods or Approved Exceptions)		10000.0000
1022	7/14/2009 12:00:00 AM	BERRY TRUCKING & EXCAVATING, INC.	Purchase Order (Services <\$100K, Goods or Approved Exceptions)	Safeguard hazardous mine openings.	72010.0000
1079	7/2/2009 12:00:00 AM	DAVE'S ENTERPRISES INC	Purchase Order (Services <\$100K, Goods or Approved Exceptions)	To pay Contractor to safeguard hazardous mine openings.	27250.0000
1094	7/2/2009 12:00:00 AM	RAKESTRAW, CHARLES F	Purchase Order (Services <\$100K, Goods or Approved Exceptions)	Services to investigate sheep kill from bear and mountain lions	4999.9900
1108	7/14/2009 12:00:00 AM	CRESTED BUTTE MOUNTAIN RESORT	Purchase Order (Services <\$100K, Goods or Approved Exceptions)		9000.0000

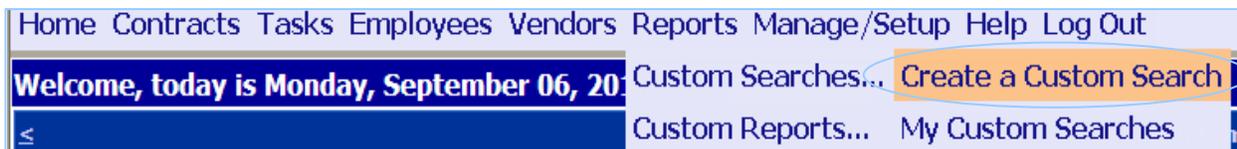
[Export to Excel](#)
[Export to Word](#)
[Export to PDF](#)

➤ **Example #2:** A user is interested in knowing when their contracts expire. The user wants to know the following information:

- Contract ID (CMS ID #)
- Agency/Department or IHE Name
- Expiration Date of the Original Contract
- Contractor/Vendor Name
- CUMULATIVE Maximum Contract Dollar Amount
- Contract Administrator

➤ These are the steps the user would take:

STEP 1: Go to: **Reports – Custom Searches – Create a Custom Search.**



STEP 2: Select ***CMS Contract Reporting Data** and click **Continue.**

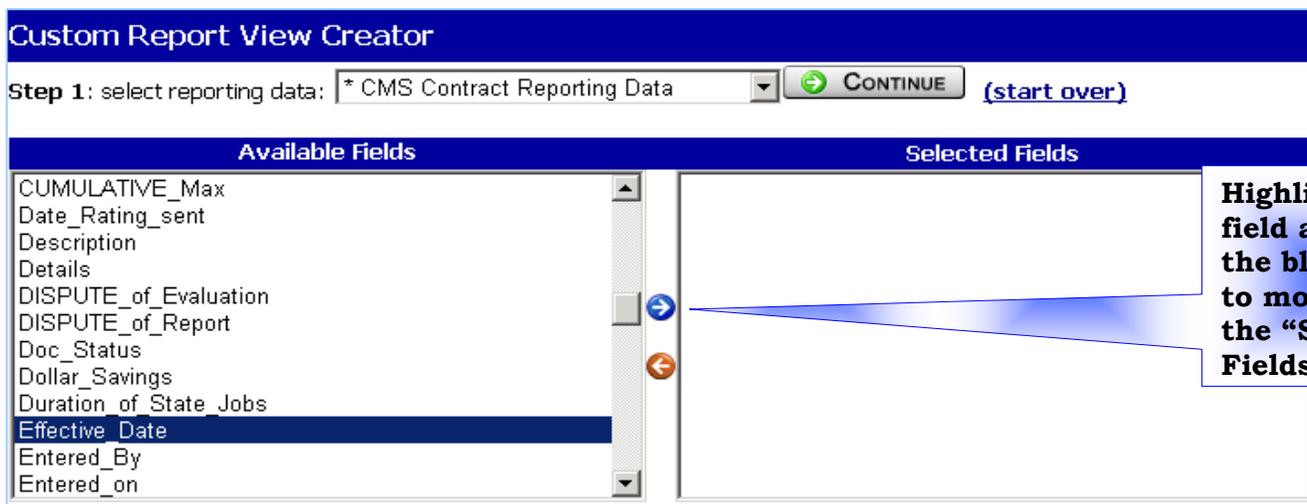


STEP 3:

Select the fields to include in the search by highlighting the desired field from the “Available Fields” column and clicking the **blue** arrow to the right of the box to move it to the “Selected Fields” column. Multiple fields can be selected at one time by holding down the Control key (Ctrl) and clicking on each field. Please note that the order in which fields are selected is the same order in which they will appear on the screen from left to right.

To remove fields from the “Selected Fields” area, simply reverse the process by highlighting the field(s) and clicking the **red** arrow.

NOTE: The “Available Fields” are presented in alphabetical order and are abbreviated versions of each and every field available in CMS across all contract types. A complete list of these “Short Names” and their corresponding actual “Field Names” is provided at the end of this document for easy reference.



STEP 4:

Defining search criteria - For this report, NO search criteria is needed.

To check the results of the search, click **Continue** in **Step 2** next to “preview results.”

Custom Report View Creator

Step 1: select reporting data: * CMS Contract Reporting Data [CONTINUE] (start over)

Available Fields	Selected Fields
\$_Amt_of_MOD %_ACTUAL_work_CO %_ACTUAL_work_US Agency_IHE_Code Agency_IHE_Name ANTICIPATED_outside_CO ANTICIPATED_outside_US Approval_Signature_Date Budget Amount Cert_on_File C-Field_1 C-Field_2	CMS_ID# Agency_IHE_Name Contract_Admin CUMULATIVE_Max Contractor_Vendor Expiration_Date

Field Name	Condition	Criteria
CMS_ID#	contains	
Agency_IHE_Name	contains	
Contract_Admin	contains	
CUMULATIVE_Max	contains	
Contractor_Vendor	contains	
Expiration_Date	contains	

Sort by: CMS_ID# Ascending

Step 2: preview results [CONTINUE]

No criteria is needed for this custom search. All Conditions should remain as “contains.”

STEP 5:

The search results should now appear at the bottom of the screen. If the expected results do not appear, review the “Condition” options and “Criteria” and edit as necessary. Repeat the search until the results are accurate.

Custom Report View Creator

Step 1: select reporting data: * CMS Contract Reporting Data [CONTINUE] (start over)

Available Fields	Selected Fields
\$_Amt_of_MOD %_ACTUAL_work_CO %_ACTUAL_work_US Agency_IHE_Code Agency_IHE_Name ANTICIPATED_outside_CO ANTICIPATED_outside_US Approval_Signature_Date Budget Amount Cert_on_File C-Field_1 C-Field_2	CMS_ID# Agency_IHE_Name Contract_Admin CUMULATIVE_Max Contractor_Vendor Expiration_Date

Step 3: save report: [report name:] [email every: 0 Day(s)] starting on 8/6/2010 times [save report]

CMS_ID#	Agency_IHE_Name	Contract_Admin	CUMULATIVE_Max	Contractor_Vendor	Expiration_Date
1015	Department of Labor & Employment	Thomas, Sandra	632601.4000	GOVERNOR'S OFFICE OF INFORMATION TECHNOLOGY	5/7/2012 12:00:00 AM
1016	Department of Corrections	Fay, Tina	691464.0200	WASTE CONNECTIONS OF COLORADO INC	10/31/2011 12:00:00 AM
1017	Department of Natural Resources	Wildlife, Personal Services	0.0000	ROCKY MOUNTAIN BIRD OBSERVATORY	
1018	Department of Local Affairs	Garcia, Kim	10000.0000	DRURY DEVELOPMENT CORPORATION	6/30/2010 12:00:00 AM
1019	Department of Local Affairs	Garcia, Kim	10000.0000	HPT TRS IHG 1 INC	6/30/2010 12:00:00 AM
1020	Department of Revenue	Heese, Kathy	314976.0000	INDUSTRIAL LABORATORIES COMPANY INC	6/30/2012 12:00:00 AM

Search Results

STEP 6:

If this search will be needed/useful in the future, give the search a name and click **save report**. If this is a one-time search, click the **Export** icon and follow the prompts to export the data to Excel where the data can be sorted etc., as needed.

For this report, the user should export this data to Excel and sort the results within Excel by Expiration Date to identify which contracts are expiring for a given period.

Step 3: save report:

report name:

email every: starting on times [save report](#)

 export

STEP 7:

If the above search was saved and the user wants to run it again, go to: **Reports – Custom Searches – My Custom Searches**.

contract insight

Home Contracts Tasks Employees Vendors Reports Manage/Setup Help Log Out

Welcome, today is Monday, September 06, 2010. Custom Searches... Create a Custom Search

Custom Reports... **My Custom Searches**

STEP 8:

Locate the search in the list of reports and click on the desired search.

OIT Expiring Contracts	9/6/2010 2:49:01 PM	edit
OIT Purchase Orders	9/6/2010 2:15:12 PM	edit
OIT Task Report by Kennedy	11/19/2009 2:11:48 PM	edit
operating lease	7/17/2009 3:11:51 PM	edit

STEP 9:

The data within this search can now be exported **outside CMS** by clicking on the **Export to Excel**, **Export to Word** or **Export to PDF** links on the far right side of the screen.

My Custom Reports

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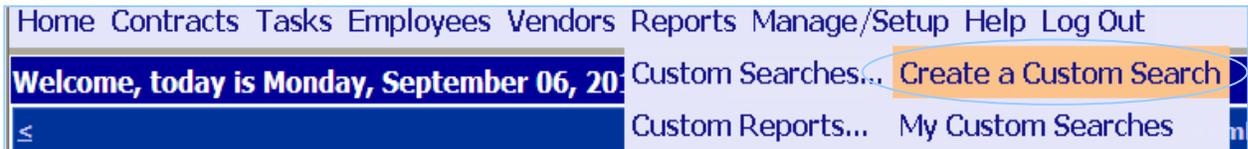
CMS_ID#	Agency_IHE_Name	Contract_Admin	CUMULATIVE_Max	Contractor_Vendor	Expiration_Date	
1015	Department of Labor & Employment	Thomas, Sandra	832601.4000	GOVERNOR'S OFFICE OF INFORMATION TECHNOLOGY	5/7/2012 12:00:00 AM	Export to Excel Export to Word Export to PDF
1016	Department of Corrections	Fay, Tina	691464.0200	WASTE CONNECTIONS OF COLORADO INC	10/31/2011 12:00:00 AM	
1017	Department of Natural Resources	Wildlife, Personal Services	0.0000	ROCKY MOUNTAIN BIRD OBSERVATORY		
1018	Department of Local Affairs	Garcia, Kim	10000.0000	DRURY DEVELOPMENT CORPORATION	6/30/2010 12:00:00 AM	
1019	Department of Local Affairs	Garcia, Kim	10000.0000	HPT TRS IHG 1 INC	6/30/2010 12:00:00 AM	
1020	Department of Revenue	Heese, Kathy	214976.0000	INDUSTRIAL LABORATORIES COMPANY INC	6/30/2012 12:00:00 AM	

Example #3: A user is interested in knowing how many Sole Source contracts their department has. The user wants to know the following information:

- Contract ID (CMS ID #)
- Agency/Department or IHE Name
- Solicitation Method
- Contractor/Vendor Name
- Contract Administrator

➤ These are the steps the user would take:

STEP 1: Go to: **Reports – Custom Searches – Create a Custom Search.**



STEP 2: Select ***CMS Contract Reporting Data** and click **Continue.**

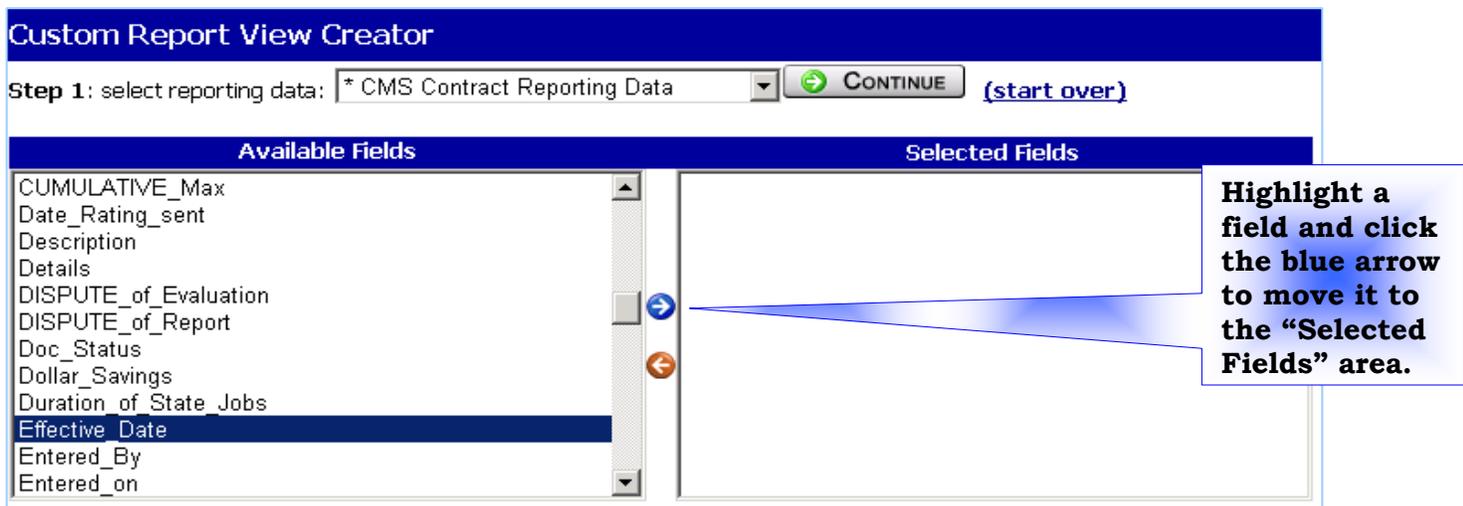


STEP 3:

Select the fields to include in the search by highlighting the desired field from the “Available Fields” column and clicking the **blue** arrow to the right of the box to move it to the “Selected Fields” column. Multiple fields can be selected at one time by holding down the Control key (Ctrl) and clicking on each field. Please note that the order in which fields are selected is the same order in which they will appear on the screen from left to right.

To remove fields from the “Selected Fields” area, simply reverse the process by highlighting the field(s) and clicking the **red** arrow.

NOTE: The “Available Fields” are presented in alphabetical order and are abbreviated versions of each and every field available in CMS across all contract types. A complete list of these “Short Names” and their corresponding actual “Field Names” is provided at the end of this document for easy reference



STEP 4:

Once all of the desired fields have been selected, choose any needed filter criteria. Be aware that it is the criteria that determines what information the system filters out of the search results. As such, it is recommended that very few, if any, filter criteria are used. Filter criteria can only be set ONCE. They cannot be changed once the search is saved. Each time the search is subsequently run, the same criteria will be applied. Be sure that the criteria selected will be valid each time the search is run.

This example search is to find all **Sole Source Solicitations only**. Given this, it is appropriate to set the “Solicitation Method” to “Sole Source.” From the drop down list, set the “Condition” option for “Solicitation_Method” to **contains** and type “Sole Source” in the “Criteria” column – spelling matters so check your work.

To check the results of the search, click **Continue** in **Step 2** next to “preview results.”

Custom Report View Creator

Step 1: select reporting data: * CMS Contract Reporting Data [CONTINUE] (start over)

Available Fields	Selected Fields
\$ Amt_of_MOD % ACTUAL_work_CO % ACTUAL_work_US Agency_IHE_Code Agency_IHE_Name ANTICIPATED_outside_CO ANTICIPATED_outside_US Approval_Signature_Date Budget_Amount Cert_on_File C-Field_1 C-Field_2	CMS_ID# Agency_IHE_Name Contract_Admin Contractor_Vendor Solicitation_Method

Field Name	Condition	Criteria
CMS_ID#	contains	
Agency_IHE_Name	contains	
Contract_Admin	contains	
Contractor_Vendor	contains	
Solicitation_Method	contains	Sole Source

Sort by: CMS_ID# Ascending

Step 2: preview results [CONTINUE]

STEP 5:

The search results should now appear at the bottom of the screen. If the expected results do **not** appear, review the “Condition” options and “Criteria” and edit as necessary. Repeat the search until the results are accurate.

Custom Report View Creator 95 95 95 95

Step 1: select reporting data: * CMS Contract Reporting Data [CONTINUE] (start over)

Available Fields	Selected Fields
\$ Amt_of_MOD % ACTUAL_work_CO % ACTUAL_work_US Agency_IHE_Code Agency_IHE_Name ANTICIPATED_outside_CO ANTICIPATED_outside_US Approval_Signature_Date Budget_Amount Cert_on_File C-Field_1 C-Field_2	CMS_ID# Agency_IHE_Name Contract_Admin Contractor_Vendor Solicitation_Method

Step 3: save report: [export]

report name: []
email every: 0 Day(s) starting on 9/6/2010 times [save report]

CMS_ID#	Agency_IHE_Name	Contract_Admin	Contractor_Vendor	Solicitation_Method
14758	Governor's Office Of Information Technology	CONTRACTS, OIT	INTERNATIONAL BUSINESS MACHINE CORP	SS - Sole Source
14788	Governor's Office Of Information Technology	CONTRACTS, OIT	INTERNATIONAL BUSINESS MACHINE CORP	SS - Sole Source
3209	Governor's Office Of Information Technology	CONTRACTS, OIT	INFORMATION BUILDERS INC	SS - Sole Source
6192	Governor's Office Of Information Technology	CONTRACTS, OIT	INFORMATION BUILDERS INC	SS - Sole Source
19702	Governor's Office Of Information Technology	CONTRACTS, OIT	MOTOROLA INC	SS - Sole Source
3554	Governor's Office Of Information Technology	CONTRACTS, OIT	EAGLE COUNTY RANCH ACQUISITION	SS - Sole Source

Search Results

STEP 6:

If this search will be needed/useful in the future, give the search a name and click **save report**. If this is a one-time search, click the **Export** icon and follow the prompts to export the data to Excel where the data can be sorted etc., as needed.

Step 3: save report:

report name: OIT Sole Source Contract

email every: 0 Day(s) starting on 9/6/2010 times [save report](#)

STEP 7:

If the above search was saved and the user wants to run it again, go to: **Reports – Custom Searches – My Custom Searches**.

contract insight

Home Contracts Tasks Employees Vendors Reports Manage/Setup Help Log Out

Welcome, today is Monday, September 06, 2010 Custom Searches... Create a Custom Search

Custom Reports... [My Custom Searches](#)

STEP 8:

Locate the search in the list of reports and click on the desired search.

OIT Expiring Contracts	9/6/2010 2:49:01 PM	edit
OIT Purchase Orders	9/6/2010 2:15:12 PM	edit
OIT Sole Source Contracts	9/6/2010 3:26:14 PM	edit
OIT Task Report by Kennedy	11/19/2009 2:11:48 PM	edit
operating lease	7/17/2009 3:11:51 PM	edit

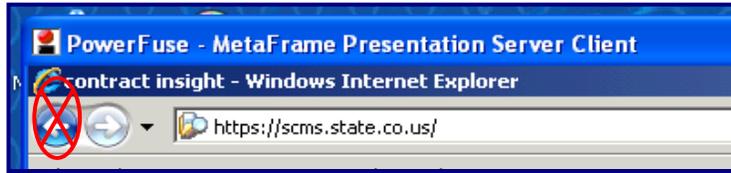
STEP 9:

The data within this search can now be exported *outside CMS* by clicking on the **Export to Excel**, **Export to Word** or **Export to PDF** links on the far right side of the screen.

CMS_ID#	Agency_OIG_Name	Contract_Admin	Contractor_Vendor	Solicitation_Method	
4035	Governor's Office	Brisson, Norm	COLORADO HEALTH FOUNDATION	SS - Sole Source	Export to Excel Export to Word Export to PDF
11023	Governor's Office of Homeland Security	Siu, Philip	COLORADO DEPT OF PUBLIC HEALTH & ENVIRONMENT	SS - Sole Source	
14758	Governor's Office Of Information Technology	CONTRACTS, OIT	INTERNATIONAL BUSINESS MACHINE CORP	SS - Sole Source	
14788	Governor's Office Of Information Technology	CONTRACTS, OIT	INTERNATIONAL BUSINESS MACHINE CORP	SS - Sole Source	
3209	Governor's Office Of Information Technology	CONTRACTS, OIT	INFORMATION BUILDERS INC	SS - Sole Source	
5192	Governor's Office Of Information Technology	CONTRACTS, OIT	INFORMATION BUILDERS INC	SS - Sole Source	
19702	Governor's Office Of Information Technology	CONTRACTS, OIT	MOTOROLA INC	SS - Sole Source	
3554	Governor's Office Of Information Technology	CONTRACTS, OIT	EAGLE COUNTY RANCH ACQUISITION	SS - Sole Source	

Tips and Quirks

- Know your selection criteria ahead of time. For example: Know the “Department Name” or “Contract Group Type” as it appears in the drop down list in the contract record.
- Once you preview your search results, do NOT click the browser Back button or you will have to start over.



Instead, add and/or remove a field to show the criteria section of the search definition.

- All shared reports names will begin with “Dept Rpt” and will end in “**DO NOT DELETE.**” It is important for users to not delete these reports. If a report is deleted, it is deleted for ALL users of CMS.

Yet to Come:

- 1) How to use the filters on any search results. Or “What do those upside down megaphones do?” and “What do I type in the boxes?”



- 2) More Search Examples
- 3) Sorting and Exporting
- 4) Using the Financials functionality to track payments made.

AVAILABLE FIELD LABELS AS SHOWN IN CMS RECORDS	SHORT NAMES USED IN SEARCH DATABASE
CMS Identification #	CMS_ID#
Contract Title	Contract_Title
Contract Purpose	Contract_Purpose
Fiscal Year	FY
Contractor/Vendor	Contractor/Vendor
FEIN	FEIN
Contract Administrator	Contract_Admin
Unique Department Contract Number	Unique_Contract_#
Original Contract CLIN Number or CMS Number	Original_CLIN_CMS_#
Purchase Order or Encumbrance Number	PO_Encumbrance_#
Agency/IHE (Department) Name	Agency_IHE_Name
Agency/IHE (Department) Code	Agency_IHE_Code
Effective Date	Effective_Date
Expiration Date	Expiration_Date
Notify Days	Notify_Days
Contract Group/Type	Contract_Group_Type
Contract Sub-Type	Contract_Sub-Type_Personal_Services
Contract Sub-Type	Contract_Sub-Type_Construction
Contract Sub-Type	Contract_Sub-Type_Real_Property
Contract Sub-Type	Contract_Sub-Type_Comm_Goods
Contract Sub-Type	Contract_Sub-Type_Multi_Party
Is this an IT contract?	IT_Contract
Number of renewal periods	Renewal_Periods
Maximum Amount	Max_Amt
CUMULATIVE Maximum Contract Dollar Amount (For Master Task Orders read Help text for instruction)	CUMULATIVE_Max
Solicitation Method Used	Solicitation_Method
If selected OTHER, enter the Method used.	OTHER_Solicitation
Solicitation Number	Solicitation_#
If this is a Sole Source, was a "Sole Source Justification and Certification" form completed, and placed in contract file, that includes the mandatory determination steps?	SS_form_completed?
Sole Source Justification.	SS_Justification
If selected OTHER, enter the justification for the Source.	OTHER_Justification
Select ALL steps taken in making the Sole Source determination.	SS_Steps
Is this a Statutory Violation?	Statutory_Violation
Is this a High Risk or Low Risk Contract?	High_Low_Risk
Are Services ANTICIPATED to occur outside of Colorado?	ANTICIPATED_outside_CO
Are Services ANTICIPATED to occur outside of the United States?	ANTICIPATED_outside_US
Is the Contractor/Vendor performing work previously performed by State Employee(s)?	Work_previously_by_State
How many positions (FTE) is the Contractor/Vendor filling that were previously performed by State Employees?	Positions_filled
For work previously performed by State Employees, how long did the Contractor perform the work? (# of months)	How_long_work_performed
How many positions were ELIMINATED by the Contractor/Vendor performing this Work?	Positions_ELIMINATED
Number of State Jobs Created	State_Jobs_Created

Duration of State Jobs Created	Duration_of_State_Jobs
What Quality Improvements did the State gain by having Contractor/Vendor do the Work previously performed by State Employees?	Quality_improvements
What Dollar (\$) Savings did the State gain by having Contractor/Vendor do the Work previously performed by State Employees?	Dollar_Savings
Percentage of work ACTUALLY performed outside of Colorado.	%_ACTUAL_work_CO
Percentage of work ACTUALLY performed outside of the United States.	%_ACTUAL_work_US
Performance Period Start Date	Performance_Start
LATEST Performance Period End Date	LATEST_Performance_End
Program Manager	Program_Manager
Has this contract been Certified as including: Performance Measures and Standards, Methods for Resolution, and Types of Monitoring Processes?	Contract_Certified
Has this Contract been Recertified for additional Year if applicable?	Contract_Recertified
Enter date of Recertification	Recertification_Date
Contractor/Vendor Rating	Rating
When was the Rating sent to the Contractor/Vendor?	Date_Rating_sent
Did the Contractor/Vendor submit responses to its Evaluation?	Responses_to_Evaluation
Did the Contractor/Vendor submit Comments as to the State's performance under the Contract?	Comments_on_State_performance
Did the Contractor/Vendor DISPUTE the Evaluation?	DISPUTE_of_Evaluation
Contractor/Vendor Comments/Responses	Comments_Responses_Recd
Notes	Notes
Custom Field 1	C-Field_1
Custom Field 2	C-Field_2
Custom Field 3	C-Field_3
Entered By	Entered_By
Entered on Date	Entered_on
Updated By	Updated_By
Updated on Date	Updated_on
Document Status	Doc_Status
Approval Date or Final Signature Date	Approval_Signature_Date
Certification On File affirming Contractor met all performance measures of Original Contract	Cert_on_File
Has the contract been RECERTIFIED and the Master Record been updated?	Recertified_and_Master_updated
Does this Modification CHANGE the DOLLAR amount of the Contract?	MOD_change_\$_Amt?
If the Modification Adds or Subtracts money, what is the dollar amount of the change?	\$_Amt_of_MOD
Does this Modification change the length of the Contract?	MOD_change_length?
If the Modification changes the length of the Contract, what is the new Performance End Date?	New_MODified_End_Date
If the Modification is not for money or time, describe the purpose for the modification.	Purpose_of_MOD
Construction Project Number	Construction_Proj_#
If the Contract is for Construction, when was an Evaluation Performance Report prepared?	Construction_Report_Date
Did the Contractor/Vendor DISPUTE the Construction Report?	DISPUTE_of_Report
Budget Amount	Budget Amount
City	City
Description	Description
Details	Details
Is the License Perpetual?	License_Perpetual?
Lease Expenses	Lease_Expenses
Lease Size	Lease_Size
Location	Location
Renewed	Renewed

Signed By	Signed_By
Size Type	Size_Type
Software License Type	Software_License_Type
Yearly Rent	Yearly_Rent
Second Agency/IHE (Department) Name	Second_Department_Name
Second Contractor/Vendor	Second_Contractor/Vendor