CobbleStone Systems

# ContractInsight

**The Ultimate Web-based Contract Management Solution**

# Training & User Guide

**Prepared for: State of Colorado**

**Last Revised: May 26, 2009**

# CobbleStone Systems Corp.
# Leaders in Contract Management!

# Contents



# About this Manual

**This manual is intended to be used as a testing guide for Contract Insight, training materials for Contract Insight, help materials for Contract Insight, and demonstration purposes.**

**Please note that some screen shots shown in this document may not match exactly to the State of Colorado's Contract Insight implementation.**

# Overview

### *A Message From CobbleStone Inc.*

Contract Insight, Contract Management Software offers contract managers, administrators, and professionals the ability to easily track, renew, manage, and report on their contracts and other committals. Oftentimes, organizations have to engage in many contracts, such as, elevator maintenance, software license, telephone service, or sub-contractor contracts. Overtime it may be difficult to keep track of the renewal, review, or cancellation dates that make up the individual contracts. Moreover, a loss of productivity and increase expenses may arise from an inefficient contract administration process. Contract administrators may find that they are overwhelmed with the number of contracts they must track, report on, renew and cancel. They may find that it is inefficient to use a standard filing system via filing cabinets and spreadsheets. CobbleStone's Contract Management Software provides a simple solution to solve these problems.

CobbleStone Systems' Contract Insight, contract management software provides a web-based, enterprise solution to the contract management process. It is installed on a network server and can be accessed by an Internet browser (like Microsoft Internet Explorer), and be used on a Local Area Network (LAN) and Wide Area Network (WAN) in a multi-user environment.

Contract Insight is a highly robust and scalable contract management tool developed to industry standards utilizing advanced web and database technologies. It is based on years of market research, industry experts, and client input. It is an enterprise solution that offers unprecedented flexibility and functionality. It offers common functions such as; user name and password security, the ability to track key dates of contracts, notes, track sub-tasks and milestones, it provides advanced notification, and it enables scanned images and files to be attached to each contract. It offers advanced functionality such as the ability to add user-defined fields and a custom ad-hoc query tool.

Contract Insight enables organizations to effectively manage contracts, reduce contract management costs, and streamline workflow--all to save you and your organization money. Our proven system can save you thousands, even millions of dollars by automating the contract management process. Also, Contract Insight reduces your computer costs by utilizing our state-of-the-art web-based technologies.

Contract Insight is a complete tool for web-based contract management. It is an Internet-based software that enables users to access their contracts via a web-browser with no client PC installation. With anytime, anywhere access, you can work from the office, home or on the road with easy access to contract information, your remote workforce can access contract and diary information with the ability to enter new contracts, run reports, perform text-based searches.

### *A Message From the Office of Contract Administration*

CobbleStone's contract management system (CMS) – Contract Insight, was selected to fulfill the requirements of Senate Bill 07-228 now codified as C.R.S. §§ 24-102-205, 24-102-206, 24-103.5-101, and 24-105-102. Contract Insight was also, however, selected because of its functionality beyond that of a contract tracking tool. It is the hope of this office that Colorado State Agencies and Institutions of Higher Education, will elect to utilize some of the other contract management functionality such as writing a contract using model contracts developed by the Office of the State Controller (OSC) and loaded into Contract Insight, running reports on department specific information, and tracking all contractual agreements and not just those mandated by statute.

Regardless of each specific Department's needs, it is anticipated that Contract Insight will assist the State in improving current contract monitoring and vendor oversight, leading to better performance, dollar savings and citizen confidence.

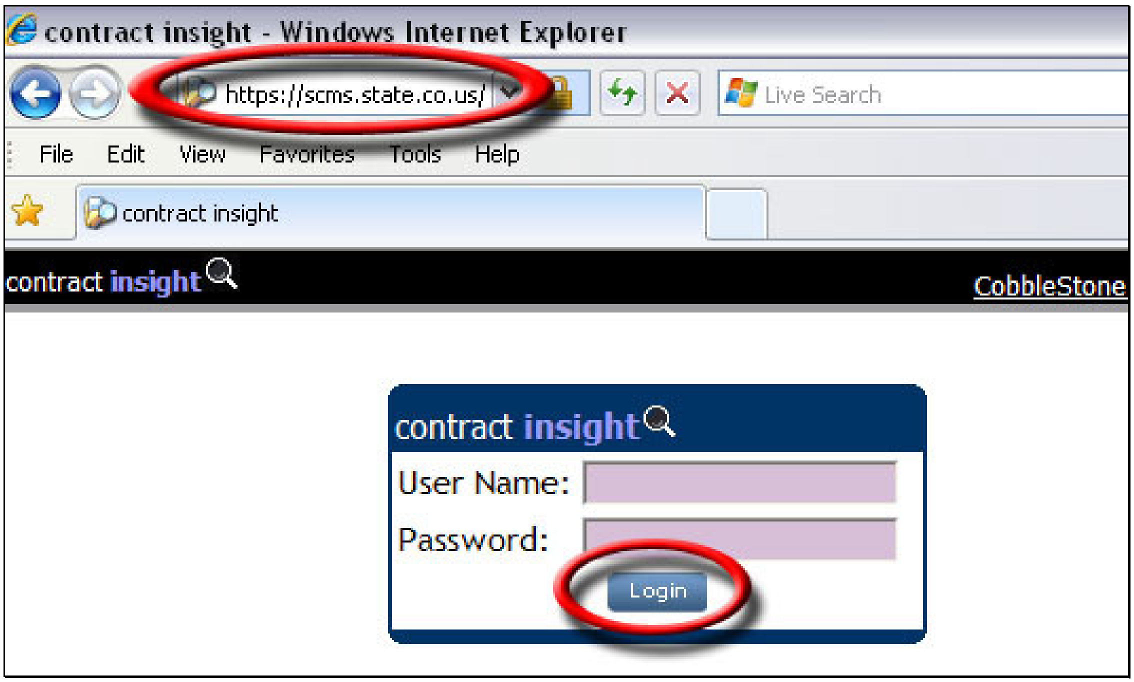
# How to Use the System

## Log In Screen

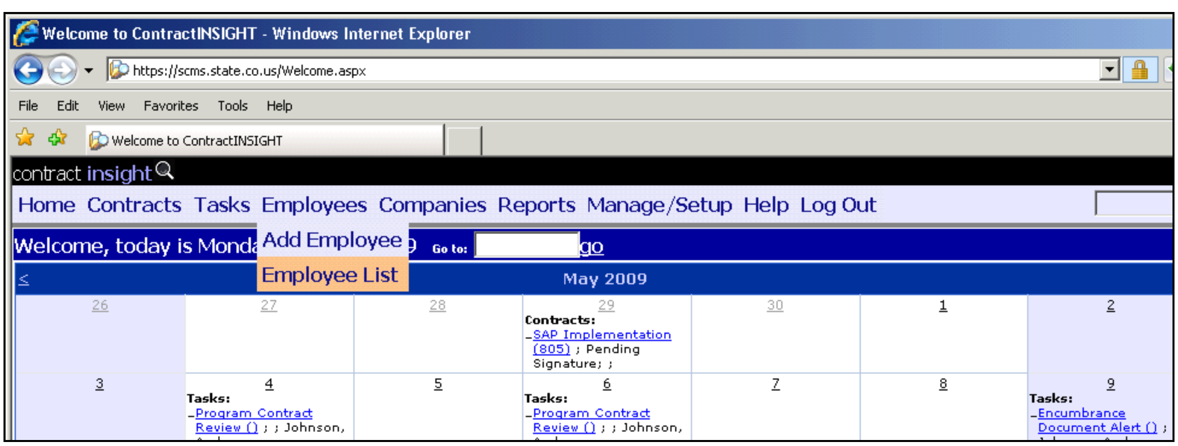
To log into Contract Insight open your web browser, connect to the Internet, and go to the URL web address site obtained from your system administrator.

https://scms.state.co.us

The log in screen will appear as seen below. Enter the user name and password assigned to you by the contract administrator.

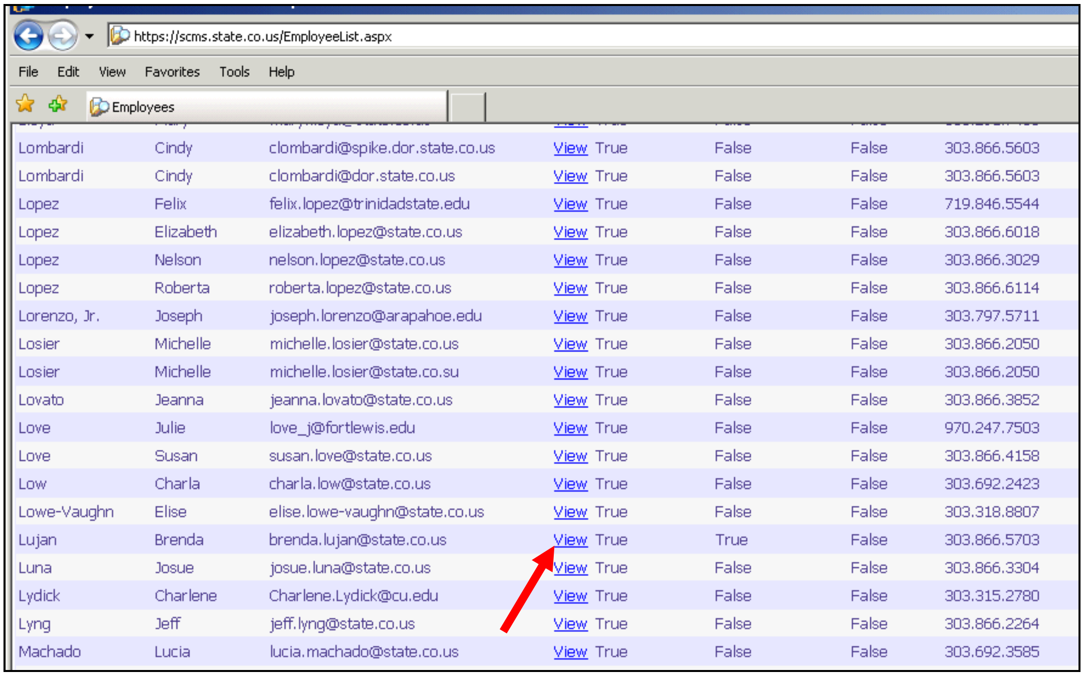



After logging on for the first time, you may want to change your password. To do so, select Employee List from the "Employees" menu.




 CobbleStone Systems Corp. 

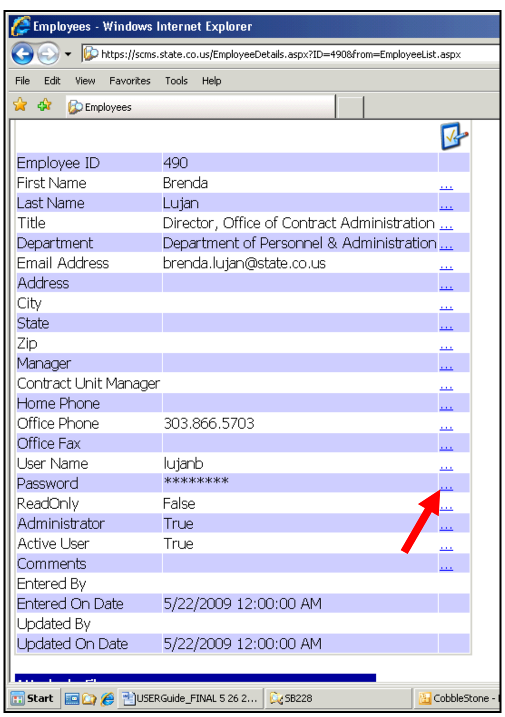
Next, find your name and click on “View” next to your name.



https://scms.state.co.us/EmployeeList.aspx

| | | | | | | | |
|---|---|---|---|---|---|---|---|
| Lombardi | Cindy | clombardi@spike.dor.state.co.us | View | True | False | False | 303.866.5603 |
| Lombardi | Cindy | clombardi@dor.state.co.us | View | True | False | False | 303.866.5603 |
| Lopez | Felix | felix.lopez@trinidadstate.edu | View | True | False | False | 719.846.5544 |
| Lopez | Elizabeth | elizabeth.lopez@state.co.us | View | True | False | False | 303.866.6018 |
| Lopez | Nelson | nelson.lopez@state.co.us | View | True | False | False | 303.866.3029 |
| Lopez | Roberta | roberta.lopez@state.co.us | View | True | False | False | 303.866.6114 |
| Lorenzo, Jr. | Joseph | joseph.lorenzo@arapahoe.edu | View | True | False | False | 303.797.5711 |
| Losier | Michelle | michelle.losier@state.co.us | View | True | False | False | 303.866.2050 |
| Losier | Michelle | michelle.losier@state.co.su | View | True | False | False | 303.866.2050 |
| Lovato | Jeanna | jeanna.lovato@state.co.us | View | True | False | False | 303.866.3852 |
| Love | Julie | love_j@fortlewis.edu | View | True | False | False | 970.247.7503 |
| Love | Susan | susan.love@state.co.us | View | True | False | False | 303.866.4158 |
| Low | Charla | charla.low@state.co.us | View | True | False | False | 303.692.2423 |
| Lowe-Vaughn | Elise | elise.lowe-vaughn@state.co.us | View | True | False | False | 303.318.8807 |
| Lujan | Brenda | brenda.lujan@state.co.us | View | True | True | False | 303.866.5703 |
| Luna | Josue | josue.luna@state.co.us | View | True | False | False | 303.866.3304 |
| Lydick | Charlene | Charlene.Lydick@cu.edu | View | True | False | False | 303.315.2780 |
| Lyng | Jeff | jeff.lyng@state.co.us | View | True | False | False | 303.866.2264 |
| Machado | Lucia | lucia.machado@state.co.us | View | True | False | False | 303.692.3585 |

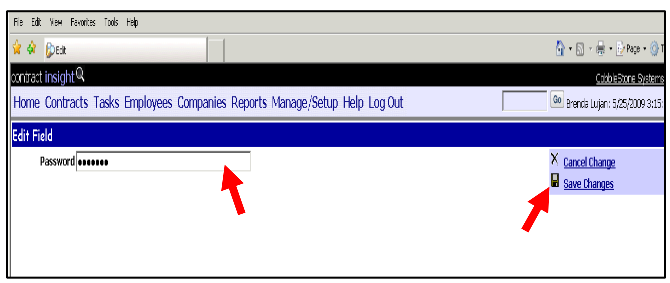
Upon selecting your name, the details form will appear. Click on the ellipses “. . .” next to Password. Select Change Password. Once you have entered a new password, click Save Password and then select “Home.”



Employees - Windows Internet Explorer

https://scms.state.co.us/EmployeeDetails.aspx?ID=490&from=EmployeeList.aspx

| | |
|---|---|
| Employee ID | 490 |
| First Name | Brenda |
| Last Name | Lujan |
| Title | Director, Office of Contract Administration |
| Department | Department of Personnel & Administration |
| Email Address | brenda.lujan@state.co.us |
| Address | |
| City | |
| State | |
| Zip | |
| Manager | |
| Contract Unit Manager | |
| Home Phone | |
| Office Phone | 303.866.5703 |
| Office Fax | |
| User Name | lujanb |
| Password | ******** |
| ReadOnly | False |
| Administrator | True |
| Active User | True |
| Comments | |
| Entered By | |
| Entered On Date | 5/22/2009 12:00:00 AM |
| Updated By | |
| Updated On Date | 5/22/2009 12:00:00 AM |




Passwords can be changed at anytime by the User. The system will not force changes at pre-set intervals. It is recommended, however, that User’s change their passwords at least once every 180 days.

# Navigation through the Interface

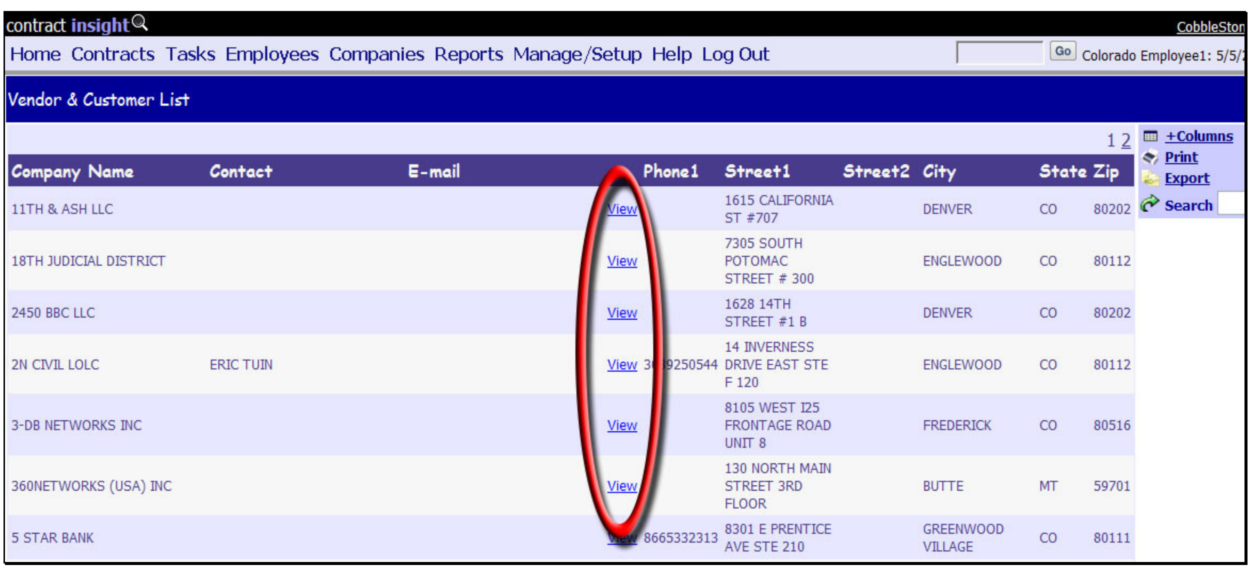
## Navigating through the Interface

The top menu is the best way to navigate through the Contract Management interface. It features links (similar to a website) that correspond to each topic and function of Contract Management. For example, the Company link will allow the user to view the Company* information.

*NOTE: Contract Insight uses the term "Company" as a generic reference to the entity providing goods and/or services – in other words, the entity a State Agency or Institution of Higher Education is entering into a contract with. Most familiar to State employees is use of the terms: Vendor, Contractor, Consultant and/or Customer.


## View Companies

To view or edit Company information select "Company List" from the "Companies" Menu. Each Company entered in the system will be displayed as follows.

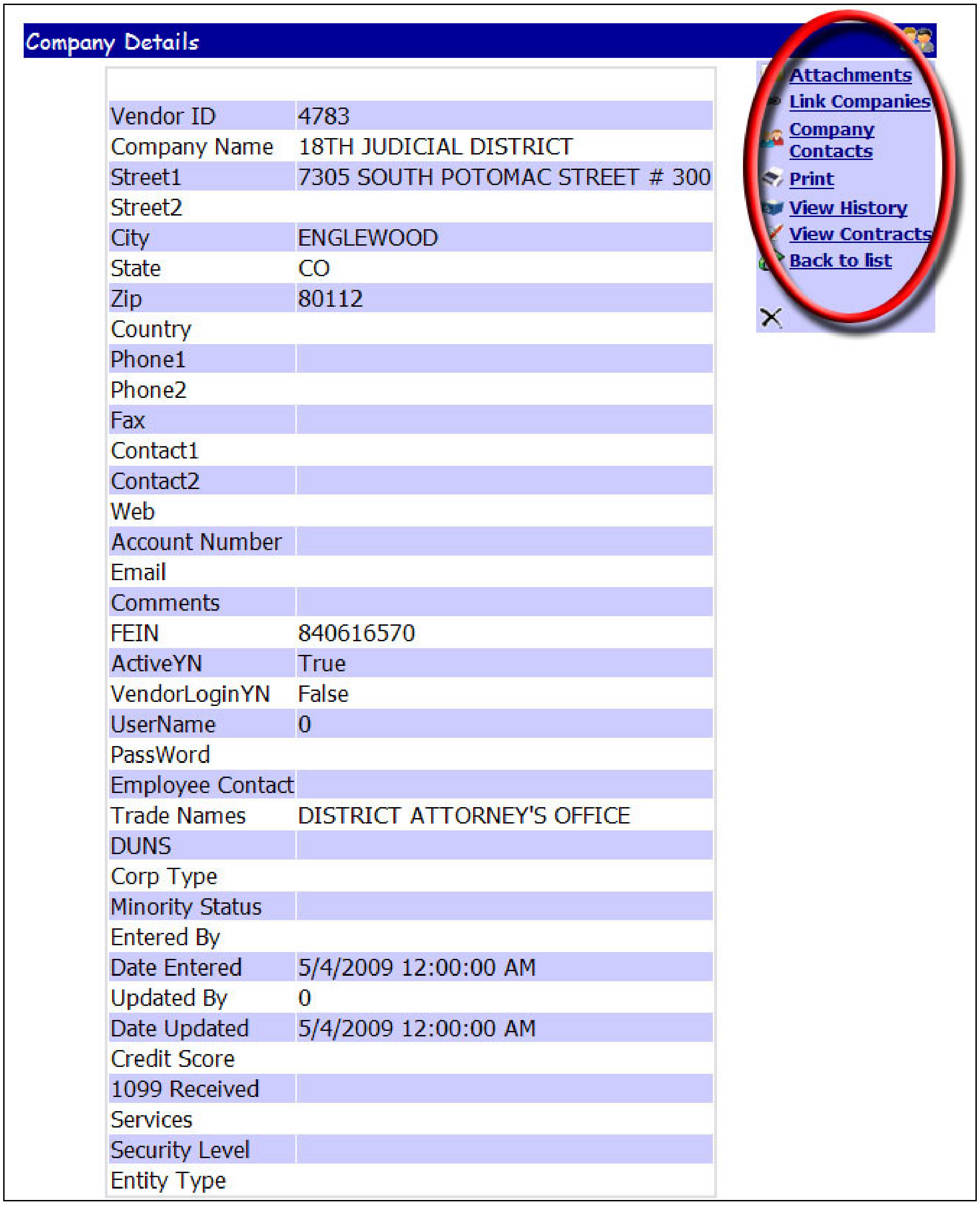



Included in this Company list is an entry for every State Agency or Institution of Higher Education. These entries are identical to those displayed in the Department List (discussed later in this Guide), and were included here to allow for creation of

Interagency/Intergovernmental type agreements in which one State Agency or Institution of Higher Education is performing for another State Agency or Institution of Higher Education – in effect, a pseudo vendor for purposes of this CMS.

Upon selecting ‘view’ for a name from the list, the details form will appear.



Company Details

| | |
|---|---|
| Vendor ID | 4783 |
| Company Name | 18TH JUDICIAL DISTRICT |
| Street1 | 7305 SOUTH POTOMAC STREET # 300 |
| Street2 | |
| City | ENGLEWOOD |
| State | CO |
| Zip | 80112 |
| Country | |
| Phone1 | |
| Phone2 | |
| Fax | |
| Contact1 | |
| Contact2 | |
| Web | |
| Account Number | |
| Email | |
| Comments | |
| FEIN | 840616570 |
| ActiveYN | True |
| VendorLoginYN | False |
| UserName | 0 |
| PassWord | |
| Employee Contact | |
| Trade Names | DISTRICT ATTORNEY'S OFFICE |
| DUNS | |
| Corp Type | |
| Minority Status | |
| Entered By | |
| Date Entered | 5/4/2009 12:00:00 AM |
| Updated By | 0 |
| Date Updated | 5/4/2009 12:00:00 AM |
| Credit Score | |
| 1099 Received | |
| Services | |
| Security Level | |
| Entity Type | |

Attachments
Link Companies
Company Contacts
Print
View History
View Contracts
Back to list

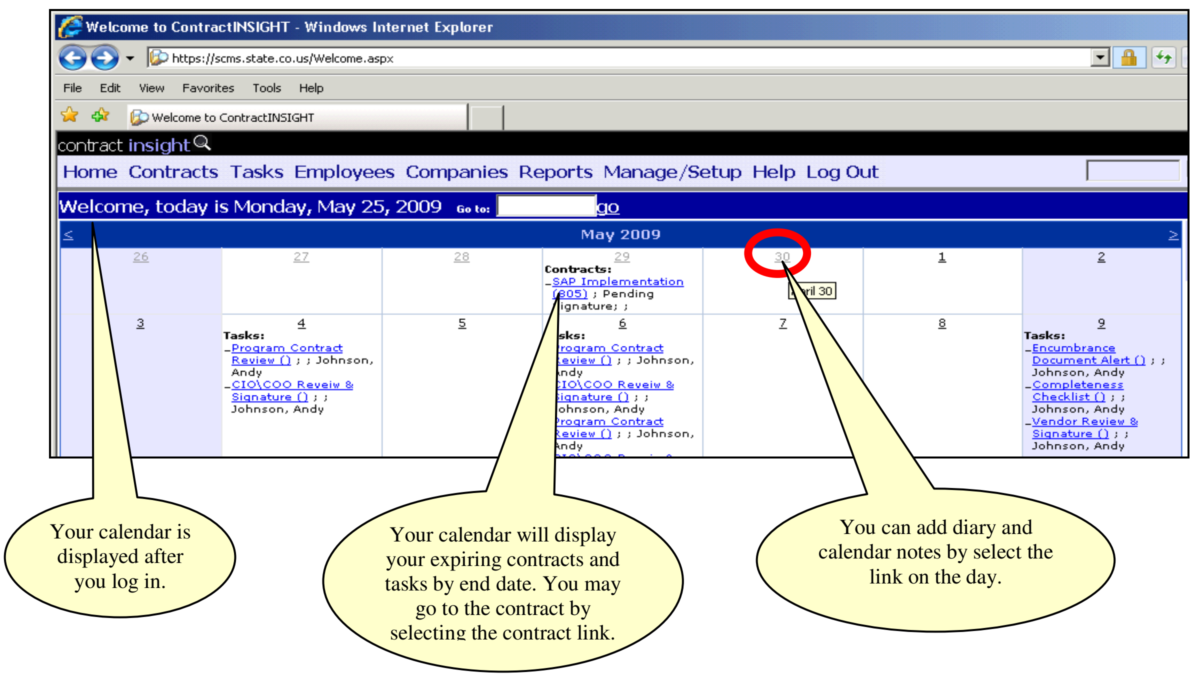
Only the primary address will appear in Contract Insight. Remit addresses and/or secondary addresses, used for making payment under a specific contract with a vendor, should remain part of the State’s COFRS system or any other currently used financial system. Changes to the primary address should be brought to the attention of the Office of Contract Administration for modification within Contract Insight by the appropriate system administrator.

## My Diary and Calendaring

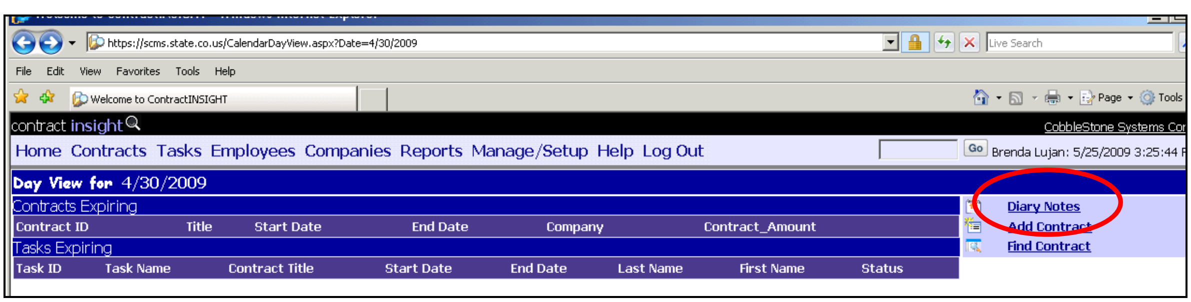
Contract Insight includes a web-based calendar and notes diary features. The calendar displays expiring contracts and contract tasks based on end-dates. The calendar can be used to keep notes and track appointments.

To navigate to various months you can use the arrow ">" buttons at the top of the calendar or enter a date in the date input field at the top.

To add notes or view the "day view" of the calendar, select the number of the day for a particular month on the calendar.

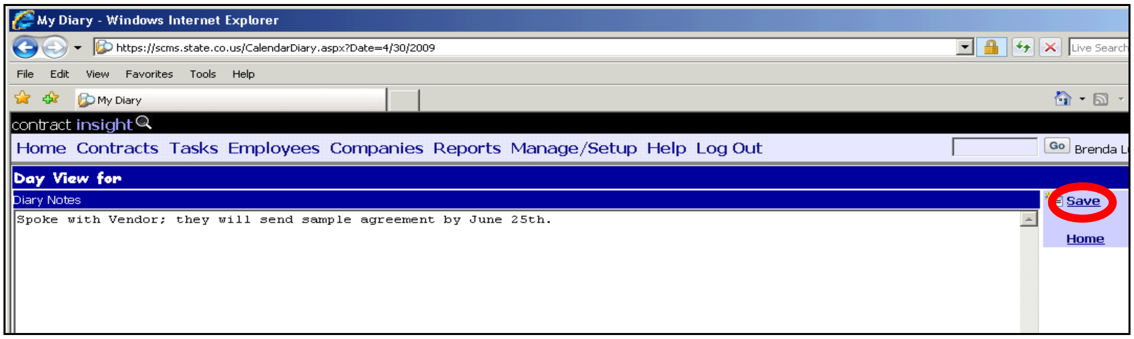



The day view will appear as seen below. Here, in addition to viewing, notes can be added and saved.

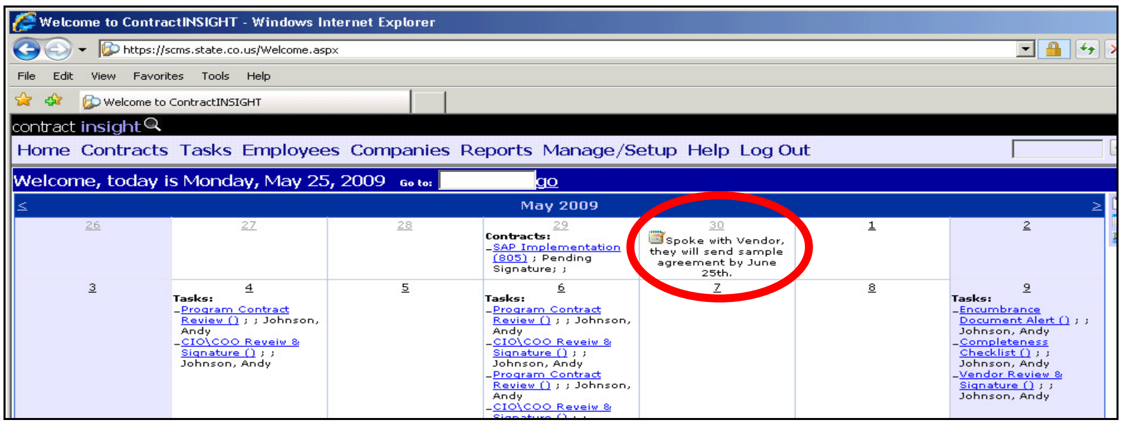


To add a diary note, select the Diary Notes link (see above) then click Save..




The notes will be saved and displayed on the calendar view. You may edit your notes from the Calendar by selection the notes icon that appears on the calendar day after saving the note

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# Adding a Contract

## Contract Entry & Edit Form

To add contracts into the system select "Add Contract" from the "Contracts" menu. The contract entry form will appear.


Next, select the Type of contract you would like to enter from the drop down box and select 'Continue."


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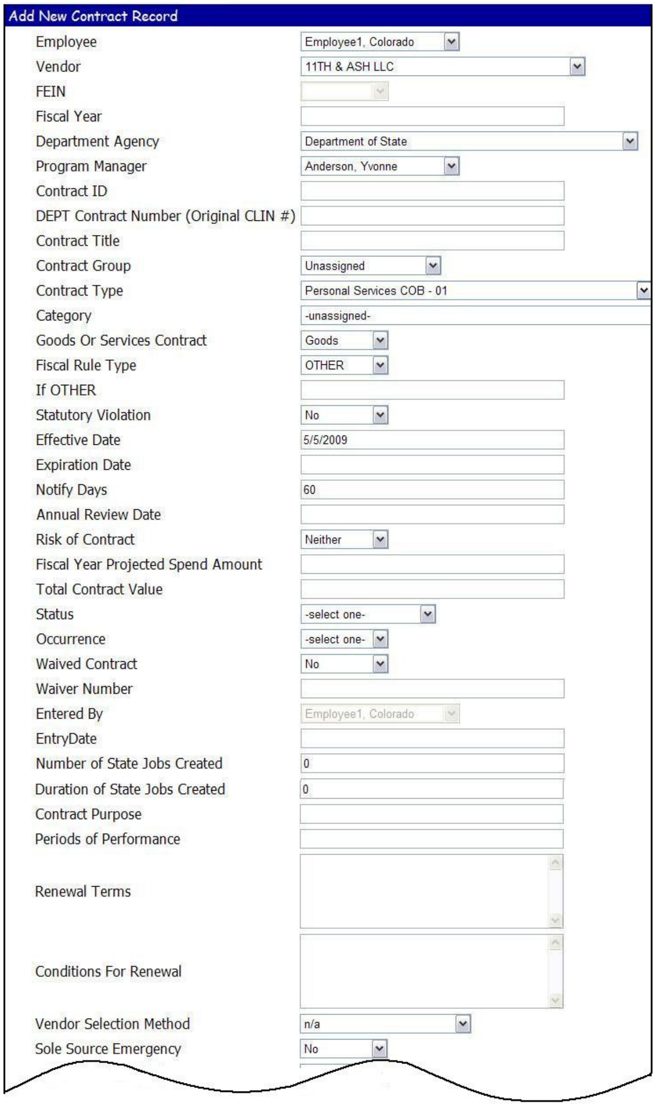
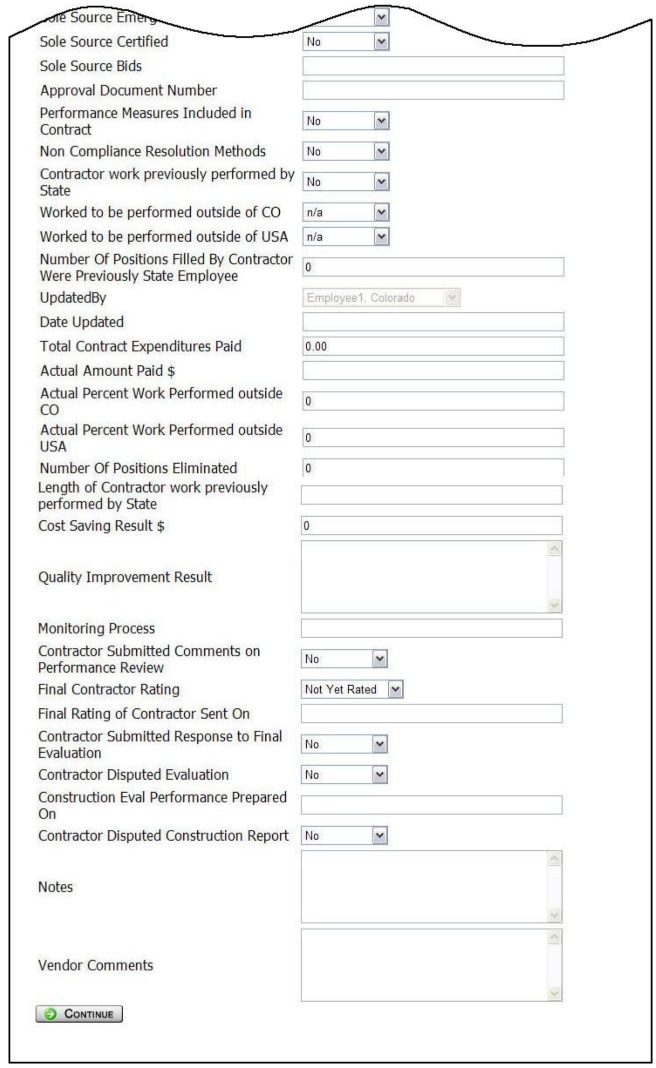
The Contract Entry screen will appear.




<u>Some of the information the user can enter includes the following</u>:

- The Contract Title
- Company (select from drop-down list of all vendors contained in COFRS as of May 2009, as well as IHE supplied vendors and all State Agencies and IHEs)
- Department (selection from drop-down list of State Agencies and IHEs)
- Vendor Selection Method (select from drop-down list)
- The Contract Start and End Date (4 digit entry)
- Contract Dollar amount
- Program Manager (the State employee responsible for working with the contracted vendor. <u>Not</u> the contract writer who completes the above Contract Entry screen)
- Notify Days*

*The "Notify Days" field informs the database of when to notify you that the contract is expiring based on the "Contract End Date." For example, if the contract ends on 12/1/09 and the notify days are set to 30 days, then you will be notified on 11/1/09 that the contract is soon to expire.

To save your new contract record, select the 'Continue' button at the bottom left of the Contract Entry screen. The system will next display the detailed contract record screen. On the contract details screen, you may perform various actions, such as adding attachments, tasks/email alerts, templates and notes, and/or printing and exporting documents and information.


| Contract Details | |
|---|---|
| Employee | Lujan,Brenda |
| Vendor | ADECCO USA INC |
| FEIN | |
| Fiscal Year | 2010 |
| Department Agency | Department of Personnel & Administration |
| Program Manager | |
| Contract ID | 805 |
| DEPT Contract Number (Original CLIN #) | 12345DPA |
| Contract Title | SAP Implementation |
| Contract Group | Personal Services |
| Contract Type | Personal Services COB - 01 |
| Category | Building Maintenance Supplies & Equipment |
| Goods Or Services Contract | Services |
| Fiscal Rule Type | Expenditure |
| If OTHER | |
| Statutory Violation | |
| Effective Date | 7/1/2009 |
| Expiration Date | 6/30/2010 |
| Notify Days | 60 |
| Annual Review Date | 4/15/2010 |
| Risk of Contract | |
| Fiscal Year Projected Spend Amount | |
| Total Contract Value | 1,000,000.00 |
| Status | Pending Signature |
| Occurrence | |
| Waived Contract | |
| Waiver Number | |
| Entered By | |
| EntryDate | 4/15/2009 |

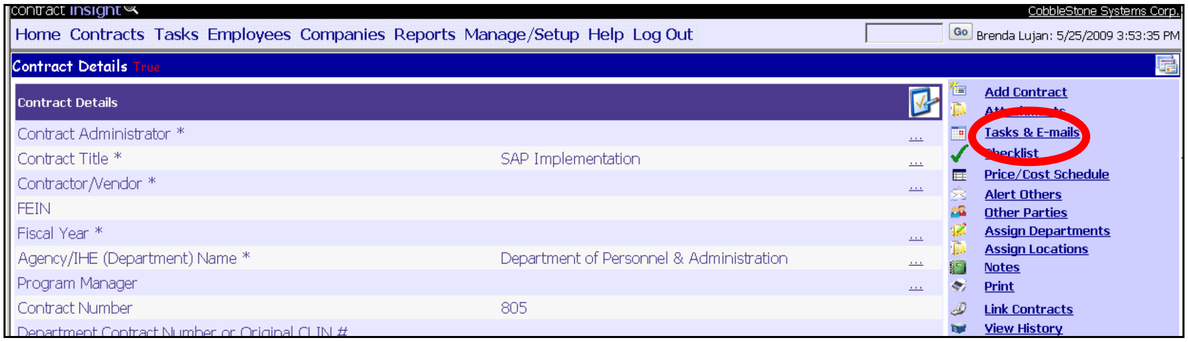
## Adding a Contract Sub-Tasks or Milestones

Contract Insight supports the ability to add tasks or milestones to a contract. The tasks are displayed on the calendar as an alert and can generate an email alerts as well. Alerts can be used to track tasks or workflow for a contract and, the task will be e-mailed to the employee it is assigned to, based on the notification days entered before the end date.

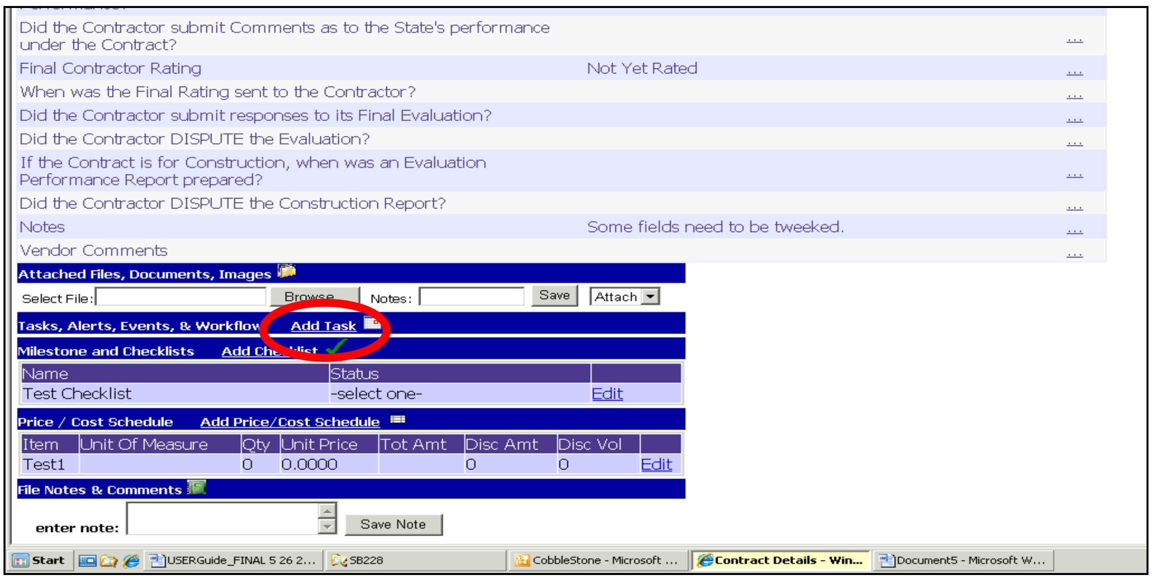
- To add a task, select the "Tasks" menu item.
- Next, select "Add Task" from the contract screen (as seen below).

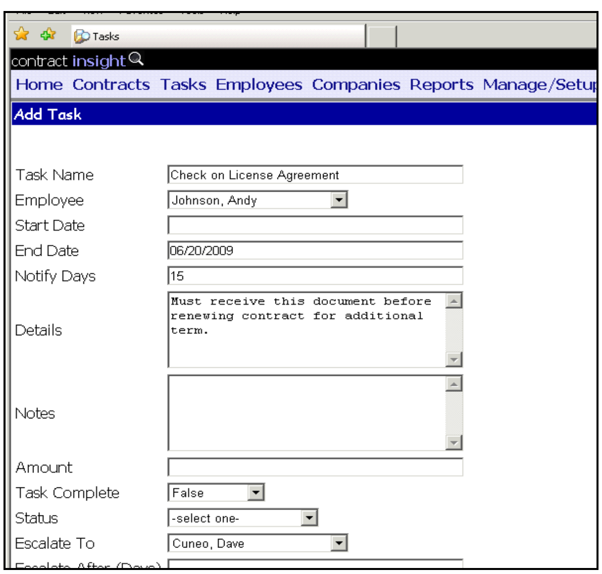
- Add your task data such as name, dates, values, and assign it to an employee.
- Your tasks will appear on the Contract Details form as seen below.




Next, select the 'Add Task' link.




The task entry screen will appear.

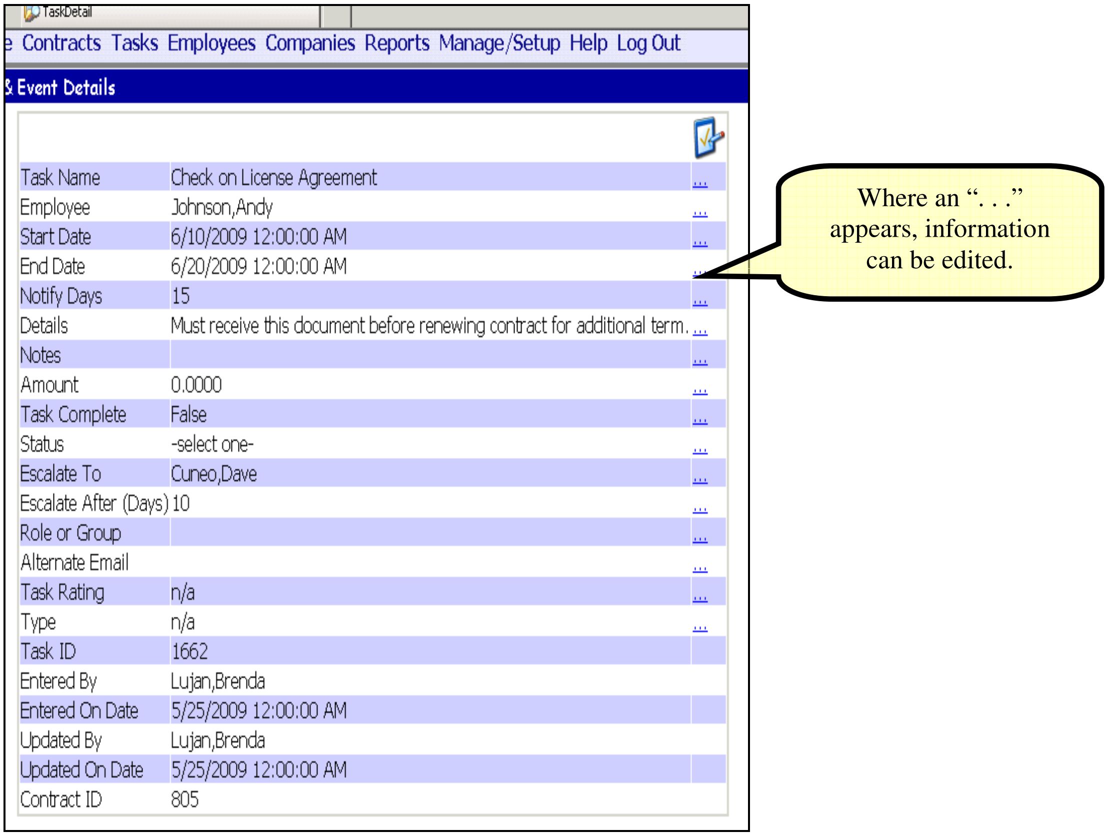


Be sure to enter a task name, description, start date, end date, and notify days. Doing so will ensure the system will display the task based on the end date and the notify days.

Select the ‘Save’ button at the bottom left of the Task Entry screen.

The Task Details screen will appear.



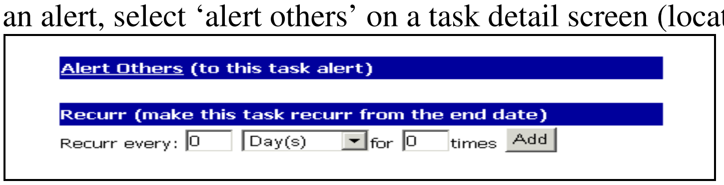

### Recurring Contract Tasks

<u>Steps to make a Contract Task recur (recurring tasks)</u>:

- Add a Contract Task (refer to the Contract Tasks section of this manual for more information)
- Change the ‘Recur every’ entry box to a number (to indicate how often the task should recur) in the box next to the ‘Recur every’ text located at the bottom of the Task & Event Details screen..
- Select the recurring interval in Months, Days, Weeks, and Years.
- Enter the number of intervals the task should recur.
- Select the ‘Add’ button.

### Contract Tasks: Alerting others

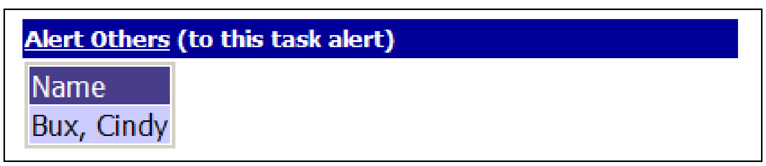
A task can be assigned to other users and they can be copied on the task alert.
To set an alert, select ‘alert others’ on a task detail screen (located above the Recur box).



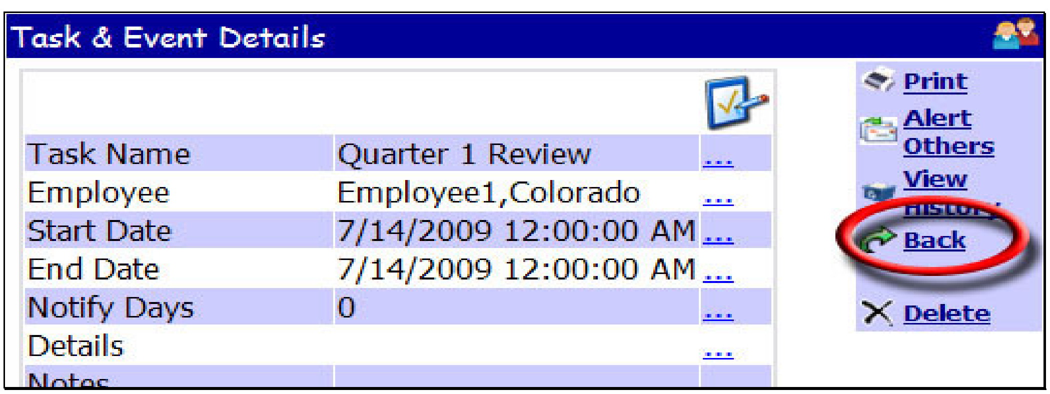

 

Next, select the names of additional employees you want to have an alert sent to from the "Available Employees" list, and then clicking the blue arrow button to assign user (or the red arrow to remove users).


Select the 'Back' menu item to return to the task details screen. This will save your selections and place them in the box on the Task Details screen.

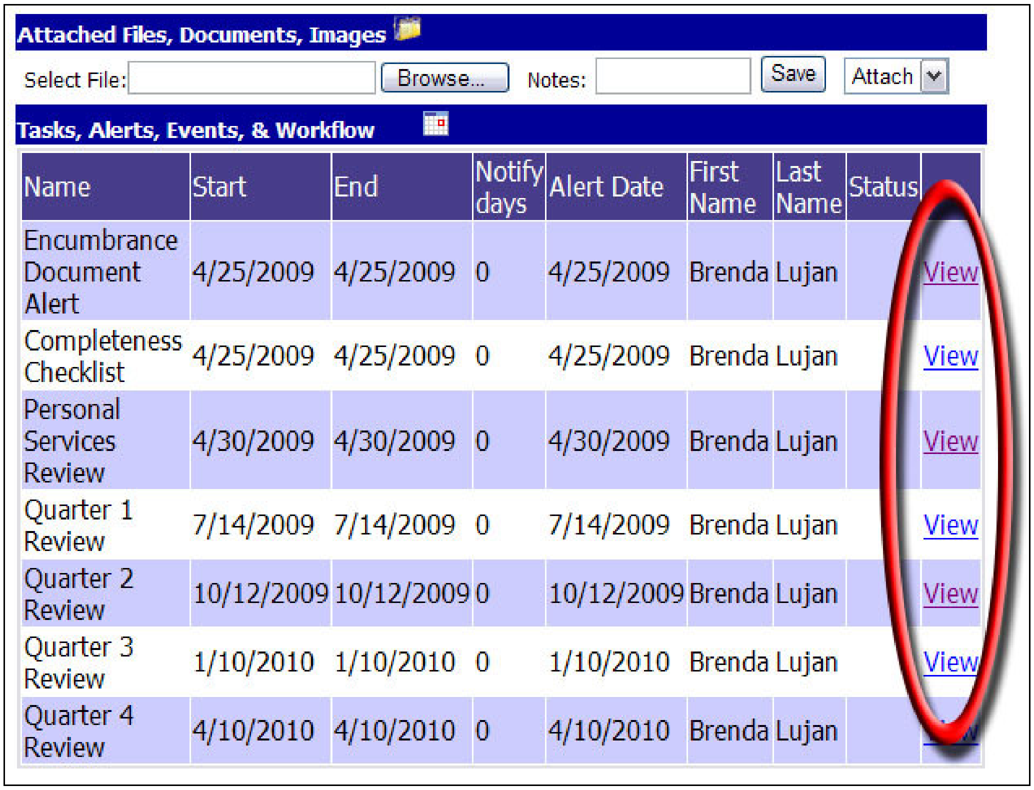



To return to the contract details page, select the 'Back' menu item once more.



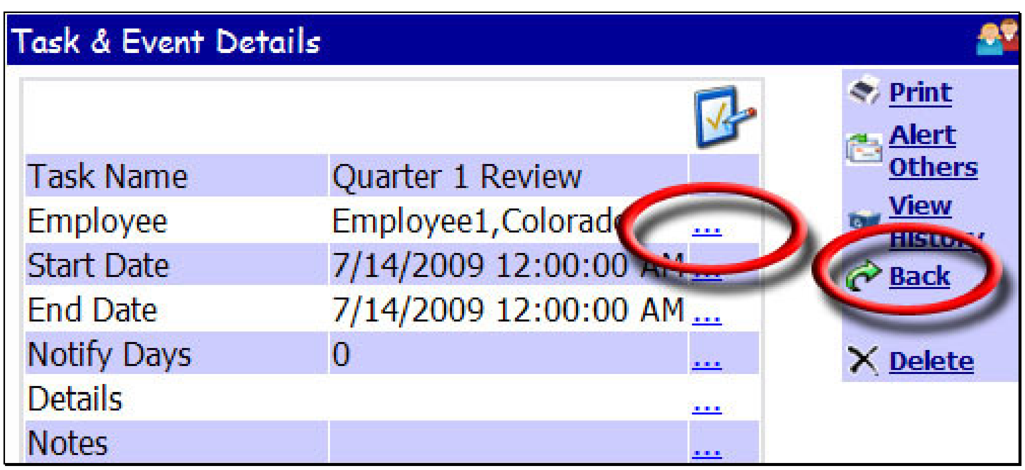
To edit a task, select the ‘View’ link on the appropriate contract details screen for the specific task you want to edit.




| Name | Start | End | Notify days | Alert Date | First Name | Last Name | Status | |
|---|---|---|---|---|---|---|---|---|
| Encumbrance Document Alert | 4/25/2009 | 4/25/2009 | 0 | 4/25/2009 | Brenda | Lujan | | View |
| Completeness Checklist | 4/25/2009 | 4/25/2009 | 0 | 4/25/2009 | Brenda | Lujan | | View |
| Personal Services Review | 4/30/2009 | 4/30/2009 | 0 | 4/30/2009 | Brenda | Lujan | | View |
| Quarter 1 Review | 7/14/2009 | 7/14/2009 | 0 | 7/14/2009 | Brenda | Lujan | | View |
| Quarter 2 Review | 10/12/2009 | 10/12/2009 | 0 | 10/12/2009 | Brenda | Lujan | | View |
| Quarter 3 Review | 1/10/2010 | 1/10/2010 | 0 | 1/10/2010 | Brenda | Lujan | | View |
| Quarter 4 Review | 4/10/2010 | 4/10/2010 | 0 | 4/10/2010 | Brenda | Lujan | | |

**View of bottom of Contract Details screen.**

To edit a task field value, select the ‘…’ link next to the appropriate field.



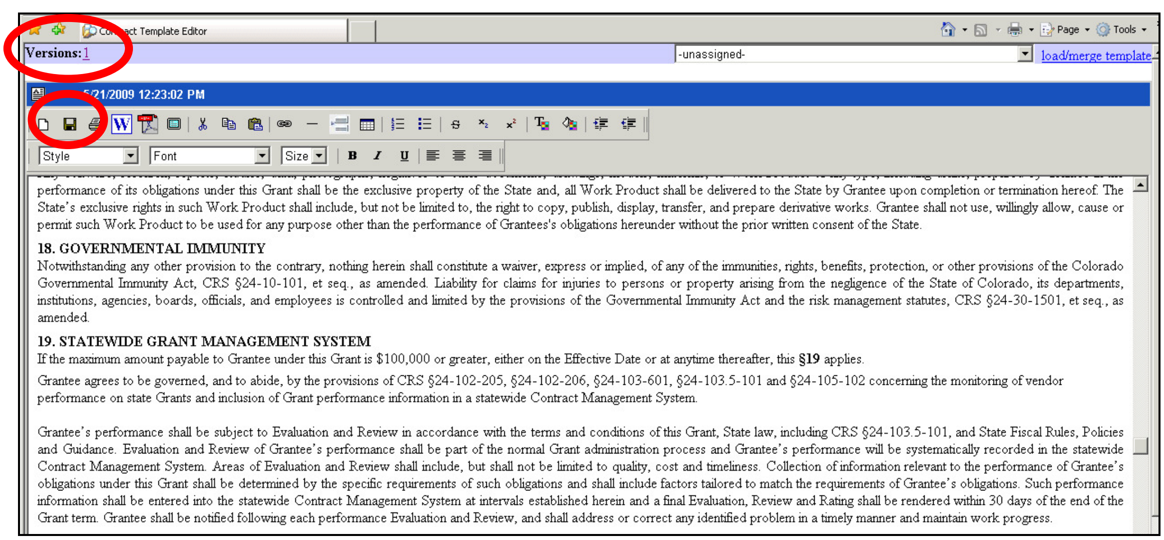
## Using Contract Templates

Contract Insight supports the ability to use Contract Templates in association with contracts entered into the system. Templates are created and maintained by the Office of Contract Administration using model contracts provided by the Office of the State Controller. Agencies and Institutions of Higher Education are not required to use Contract Insight to write their contracts, however, using the Templates loaded into the system is strongly recommended. To ensure consistency between the contracts written using the Model's posted on the OSC website, and those loaded into Contract Insight, the OSC and the Office of Contract Administration will work to coordinate updates. Any updates/changes made to Model contracts, will be made in Contract Insight at the same time. This will allow State employees to be confident that whichever method they use (a Model or Template) the same document is being selected and reflects the most current document.

To use a template, select 'Templates' on the right menu.

The system will copy the template, merge it with data entered into the contract record and display the document on your screen.

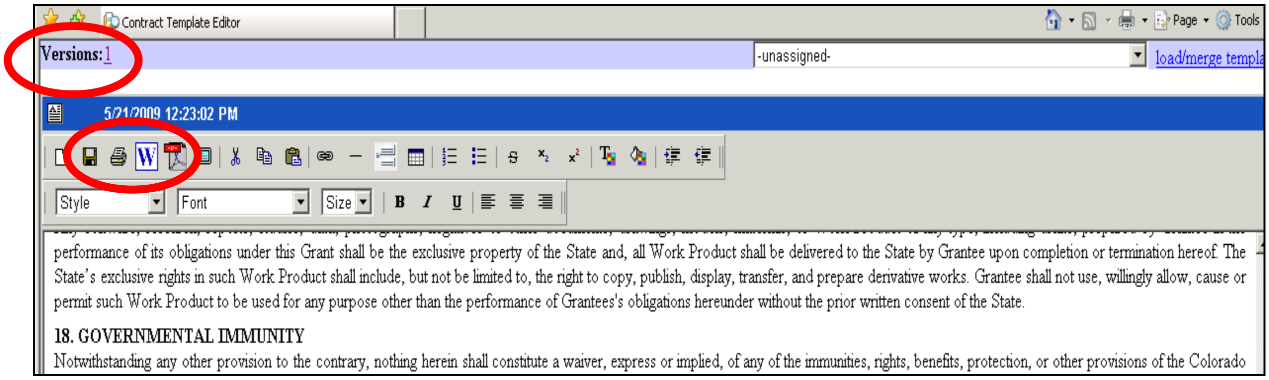

Now the document selected can be tailored for the specific project.



To save your changes ***in*** Contract Insight, select the save icon (top left).  The system will track the various versions of the contract in the Versions menu at the top of the screen. This will assist in the drafting process by allowing the writer to go back to a previous version for comparison purposes.

To view the finalized contract, select the printer icon (top left)  or export to MS Word by selecting the MS Word icon (top right) .

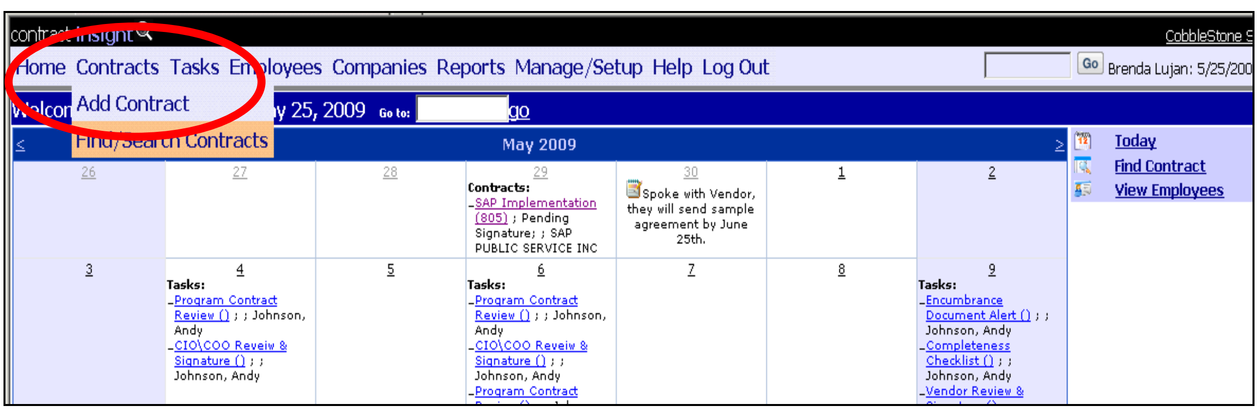



Selecting the  icon will open a Word document on you desktop – ***outside*** of Contract Insight. This document can then be modified, saved etc. . . just like any other document created outside of Contract Insight.

## Link Contracts

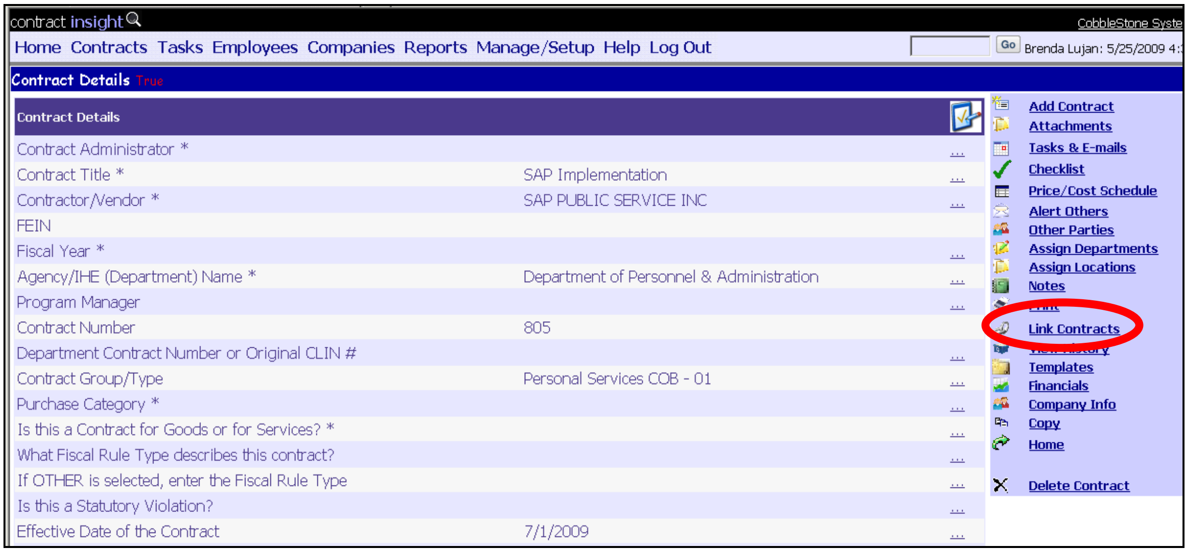
Contract Insight supports the ability to link one contract to another for improved tracking.

To link one contract to another, choose the first contract you want to link by selecting "Find/Search Contracts" from the Contracts menu.

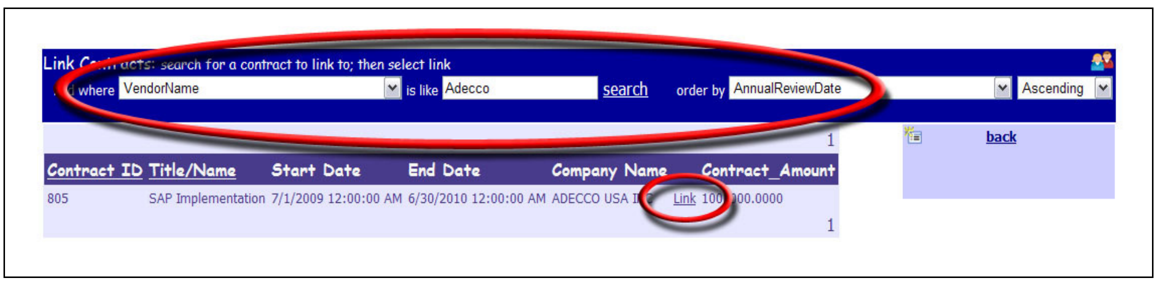



 **CobbleStone Systems Corp.** 

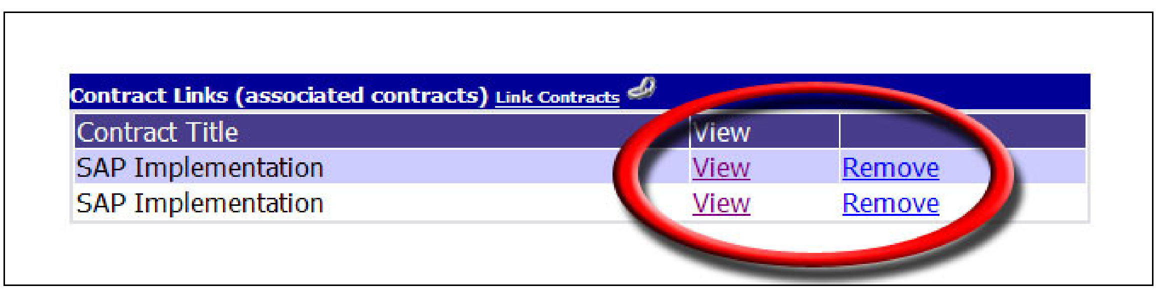
Select the contract name from the drop down list and then select ‘Link Contracts’ from the Contract Details Form.




Search for the second contract you want to link to the first, and click on the link button.




The linked contract will now be listed as an “associate contract” and can be viewed by selecting ‘View.’ Linked contracts can be removed by selecting ‘Remove.’



## Uploading Images and Attaching Files and Scanned Images

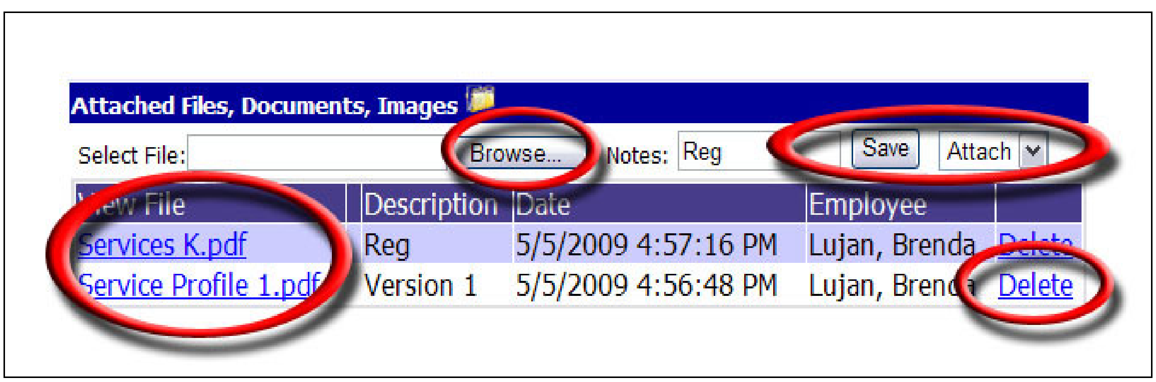
Contract Insight supports the ability to attach and upload files of any file type, including scanned images.

<u>To upload files to a Contract Record</u>:

Open a Contract Record and select the 'Attachments' button from the Contract Details screen – on the right hand menu.


Select 'Browse' to locate the files or scanned images on your computer (similar to a standard web upload process). Select 'Save File.'

Additionally, you have the option to add notes to a Contract Record which will appear in the "Description" column next to the added file.




Uploaded images and files will appear at the bottom of the Contract Details screen. Added files can be opened by clicking on the filename.

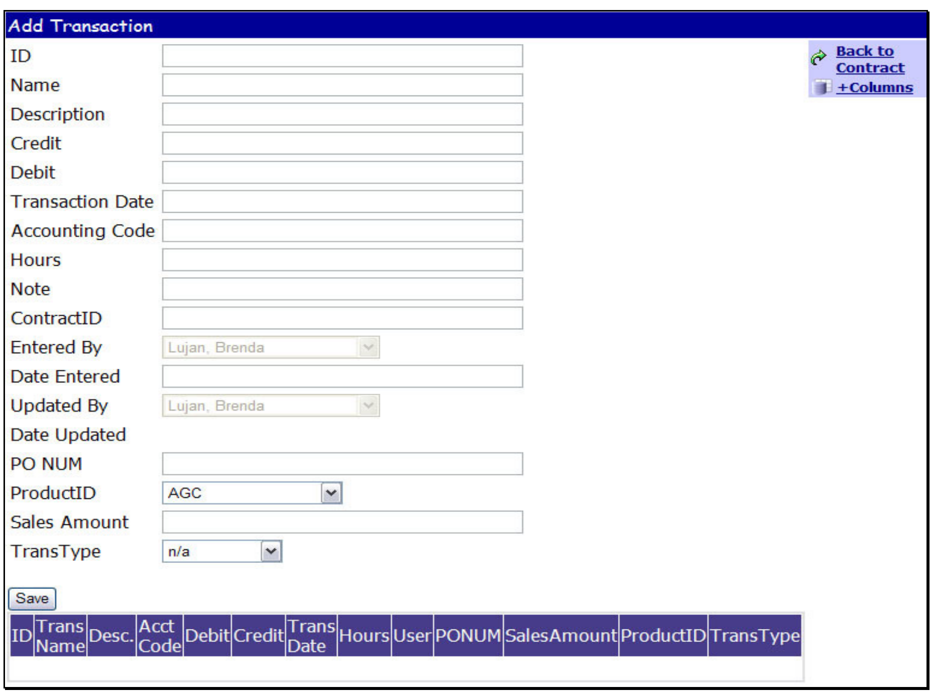
# Adding and Tracking Financial Information

Contract Insight supports the ability to track financial information about your contracts. For example, you can track income, expenses, and payments for your contracts.

To add financial transactions to your contract:

Open a Contract Record and select the 'Financials' button from the Contract Details screen – on the right hand menu.


Enter in the transaction details in the displayed fields. Click Save in the bottom left corner. After saving, your transactions will be displayed in a "spreadsheet" format.

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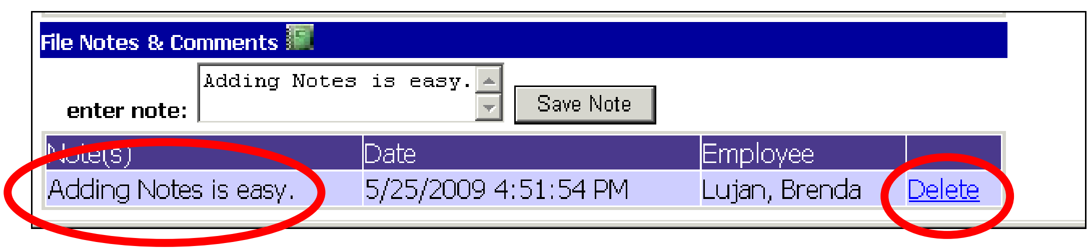
# Adding Notes

Contract Insight supports the ability to add unlimited notes to individual contracts. This can be used to document events or other related information.

To add Notes:

Open a Contract Record and select the ‘Notes’ button from the Contract Details screen – on the right hand menu.


Enter your notes in the ‘enter note’ box and select the ‘Save Note’ button. The notes will be displayed below the ‘entry notes’ box in the “Note(s)” column. To delete a note, select the ‘Delete’ link next to the note line you want to remove.

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# Finding Contracts

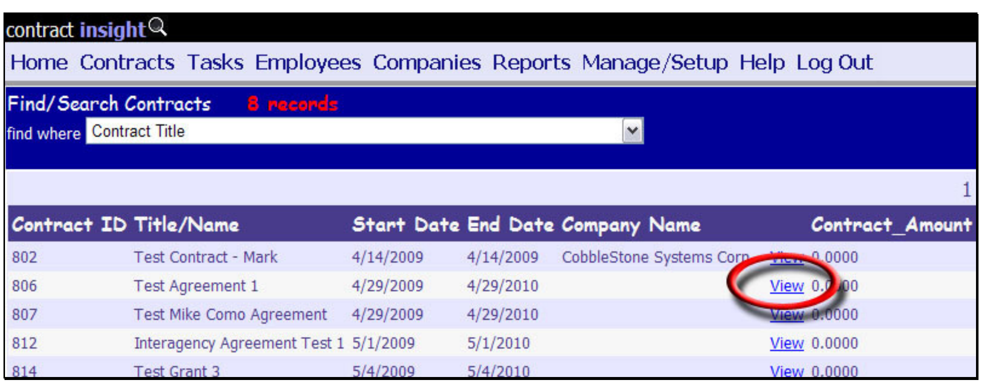
You can find contracts in the system in many ways. The easiest way to find a contract is via the “Quick Search” option on the top menu.


Type in your search criteria and select ‘go.’ The system will display any contract matching the text you entered based on the information contained in the contract fields.

To obtain more control over your search, select the ‘Find/Search Contracts’ from the Contracts menu.


Next, select the field and the criteria to be searched in the ‘Contract Find’ screen and click search.


Your search results will be displayed as seen below.



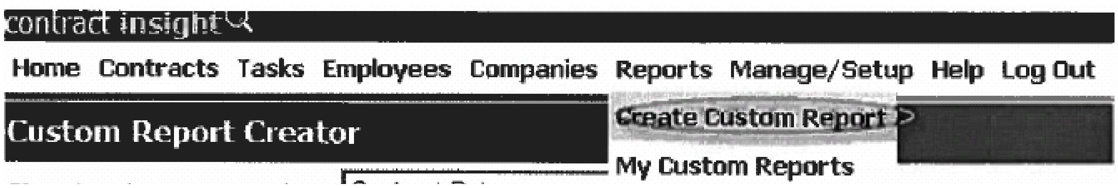
To view or edit a particular contract, select the ‘View’ link from the listed results. The results list can also be exported to your desktop as an Excel file by selecting the ‘Export’ menu item on the right menu.

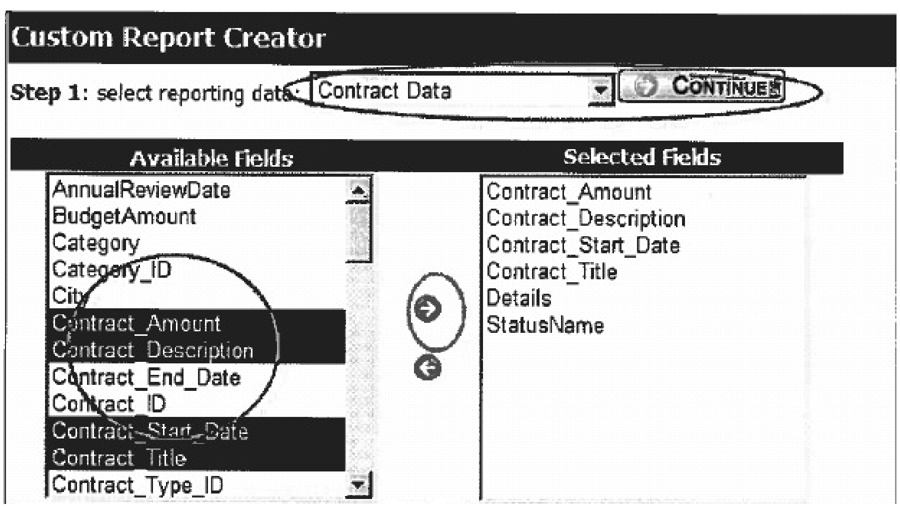

# Custom Report Writer – A Brief Overview

Users can create custom reports or conduct an ad-hoc query resulting in a report.

Steps to create a custom report:

1. Select “create Custom Report” from the “Reports” menu.
2. Select the table you would like to report on.
3. Then select the fields you are interested in reporting on by clicking on them in the Available Fields table and clicking on the blue arrow to add them to the Selected Fields box.

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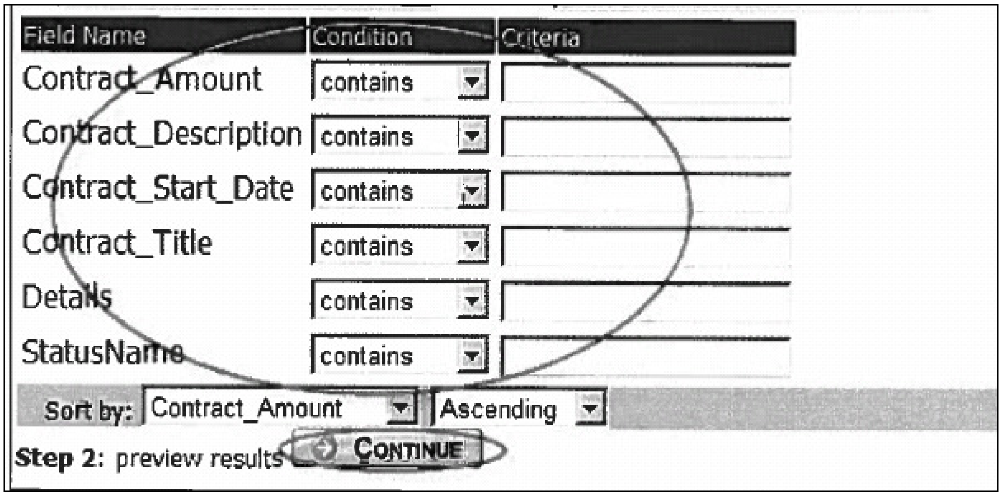
The Selected Fields will then appear with Conditions and Criteria to help you build a table.




When finished, select "Continue" button at the bottom. This will allow you to preview the results of your report. To save, enter a name for your report and click "Save Report." The report will now appear in a list when the "My Custom Reports" option is selected from the Reports menu.

<u>**Note**</u>**:** Additional Report Builder training will be available through the Office of Contract Administration following initial End User Training. At that time, an additional User Manual for use in creating reports, will be provided. Until then, report building questions can be directed as specified on the next page.

## Logging Out

To log out of the system select 'Logout' from the left menu.

# Where to find Additional Information / Assistance

Websites:

CobbleStone Systems, Inc:
http://www.cobblestonesystems.com/

The Office of the State Controller:
http://www.colorado.gov/dpa/dfp/sco/contracts.htm

State Personnel:

Andy Johnson, IT Technical Lead:
andrew.johnson@state.co.us 303.764.7873

Brenda Lujan, Director of the Office of Contract Administration:
brenda.lujan@state.co.us 303.866.5703