

User Request Form

Contract Management System

Processes and Procedures

How to request NEW Users be added to CMS

How to UPDATE Existing User information in CMS

How to DEACTIVATE a User in CMS

1. The Single Point of Contact (SPC) completes a User Request Form (URF) for individuals within their own agency or institution of higher education (IHE), checking the appropriate options at the top of the form.
2. The SPC emails the completed URF to the OIT Service Desk at:
OIT_ServiceDesk_HQ@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

Instructions for completing the User Management Form

The availability of Colorado's Contract Management System (CMS) to all Agencies and IHEs places a higher degree of importance on system access and security. The need to limit 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.

One of the most important functions of CMS is employee access. Access is assigned to an employee as one of three levels each with its own unique set of permissions. These levels are

- 1) Program Manager (PM): Read Only access. Complete assigned tasks. View all CMS records.
- 2) Contract Writer (KW): Read and Edit access. Create contract records. Edit those records created under that User credential. View all CMS records.
- 3) Contract Unit Director (KD): Read, Edit and Delete access. Edit and delete all records created within their Agency/IHE. View all CMS records.

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. Likewise, only an SPC can request changes to a User's permissions or delete a user from their Agency. NOTE: when deleting a User, please determine to whom those User's records should to be transferred. Contact the CMS Liaison (found on the State Controller's website) with questions regarding the most efficient way to transfer those records.

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