

Consultant Information and Role Management Module (CIRM) Training Manual

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Introduction

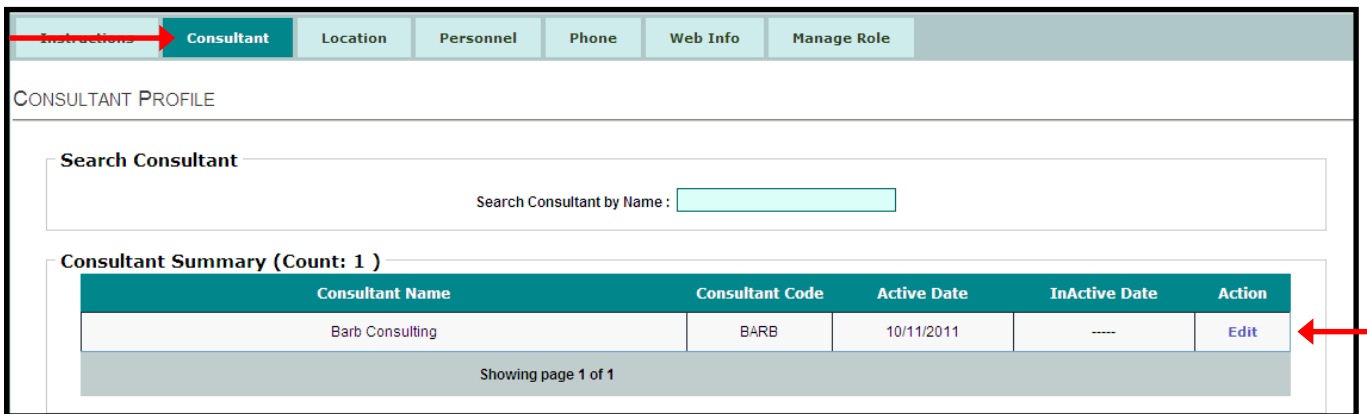
The Consultant Information and Role Management (CIRM) Module is an application that allows ADOT to store and manage your firm's data for the ECS electronic Contract Management System (eCMS). The CIRM module's first purpose is to manage your firm's contact information for employees who have requested access to ADOT's network . It houses general information about your firm and any other firms you are directly affiliated with through mergers, buyouts, or acquisitions. For each firm, the application stores location addresses and phone numbers, as well as your firm's web addresses. The module is designed so you can enter and update data and provides your firm and easy way to keep your company information accurate in ADOT's proprietary applications. The CIRM Module is also intended to maintain phone numbers and e-mail addresses for your employees who currently have access to eCMS modules and applications through ADOT Network. (*Note: It is not intended as a repository for all employee information – only to store information for your personnel with access to our applications.*) The best feature of the CIRM Module is that it allows a designated person from your company, referred to as the CIRM Consultant Administrator to grant and manage permissions for your personnel who have ADOT Network access, enabling your firm to control which eCMS modules each employee has access to and to change this access whenever your needs change.

The easiest way to use this application is to use the top menu tabs as a cue for navigating through the CIRM Module to ensure you have completed all information required. This application provides location data for the Prequalification application, so it is imperative that someone reviews and enters data in this module before you attempt to complete the Prequalification Application Module. This application also provides you a way to give someone access to the Prequalification Application Module, so you must review the roles before you attempt to start your Prequalification Application online.

Step 1:

Accessing the Consultant Tab - Review your Consultant Profile

Your consultant profile should list the names of each Firm that you plan to prequalify for and/or anticipate having potential contracts with ECS in the future. If your firm has more than one firm, you will see both displayed here. If a firm that you should be able to access is missing, contact ADOT so we can update your profile.



CONSULTANT PROFILE

Search Consultant

Search Consultant by Name :

Consultant Summary (Count: 1)

Consultant Name	Consultant Code	Active Date	InActive Date	Action
Barb Consulting	BARB	10/11/2011	----	Edit

Showing page 1 of 1

Figure 1 – Consultant Profile with a single-parent firm. If you have more than one firm, both will be displayed here.

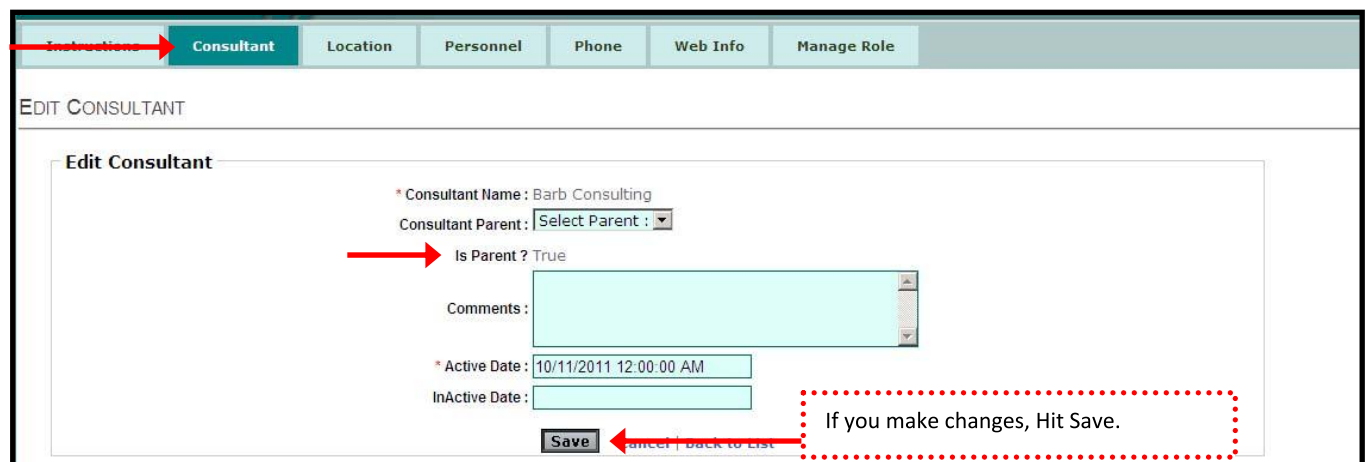
Step 2:

Click Edit from the Consultant Summary section

If only one firm is displayed, click the edit button and make sure the “Is Parent” field says “True”. You may add comments here if you need to clarify anything about this parent company. You will not be able to change the spelling of the name of your firm.

If a different name should be used, contact ADOT, so we can help you complete the necessary paperwork and make corrections to the company name. Remember: all other eCMS modules will use this firm name, so we want to ensure it is correct. If at any time, this firm is no longer active, an inactive date can be entered.

If you have more than one firm, you can edit either firm; however, the name of a parent firm cannot be edited except by ADOT.



EDIT CONSULTANT

Edit Consultant

* Consultant Name : Barb Consulting

Consultant Parent :

Is Parent ? True

Comments :

* Active Date :

InActive Date :

If you make changes, Hit Save.

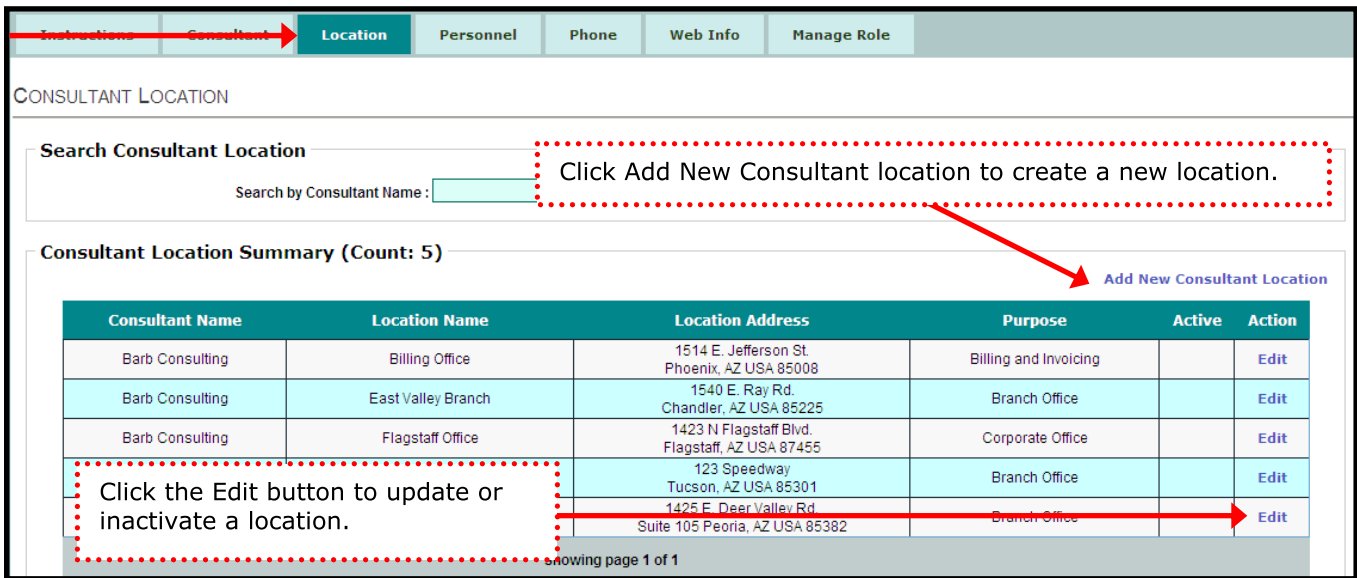
Figure 2 – Edit Consultant page with “Is Parent?” set to “True” – demonstrating a Parent Company

Step 3:

Accessing the Location Tab – Review your Firm’s locations

When you first arrive at the Location screen, you will not see any locations. You will need to add locations by clicking the “Add New Consultant Location” link. **Your locations will transfer to your Prequalification Application, so make sure you include all pertinent locations.**

You can name the location whatever name makes sense to your organization, and you can identify the location purpose if you choose. You will also need to provide a current address for each location. Should this address change in the future, you will be able to use the “Edit” button to update the information. You can also deactivate a location, if it closes sometime in the future.



CONSULTANT LOCATION

Search Consultant Location

Search by Consultant Name :

Click Add New Consultant location to create a new location.

Consultant Location Summary (Count: 5)

[Add New Consultant Location](#)

Consultant Name	Location Name	Location Address	Purpose	Active	Action
Barb Consulting	Billing Office	1514 E. Jefferson St. Phoenix, AZ USA 85008	Billing and Invoicing		Edit
Barb Consulting	East Valley Branch	1540 E. Ray Rd. Chandler, AZ USA 85225	Branch Office		Edit
Barb Consulting	Flagstaff Office	1423 N Flagstaff Blvd. Flagstaff, AZ USA 87455	Corporate Office		Edit
		123 Speedway Tucson, AZ USA 85301	Branch Office		Edit
		1425 E. Deer Valley Rd. Suite 105 Peoria, AZ USA 85382	Branch Office		Edit

Showing page 1 of 1

Click the Edit button to update or inactivate a location.

Figure 3 – Consultant Location Summary page with 5 Locations

Step 4:

Add Locations

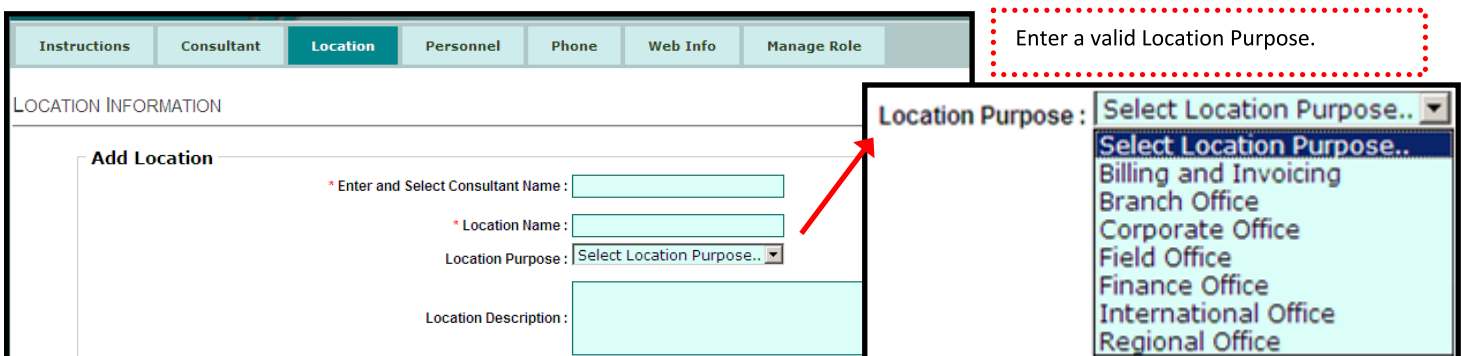
When you click the “Add New Consultant Location”, an “Add Location” screen will open. **Enter the following information:**

Name of the Firm (the name will pop up as you begin typing.)

The Location Name (use whatever name your company uses.)

The Location Purpose

Note: Branch offices are considered permanent locations, while a Field Office is a temporary office or trailer established during a specific project. The Billing and Invoicing Office may be used to direct payments when future applications are developed.



LOCATION INFORMATION

Add Location

* Enter and Select Consultant Name :

* Location Name :

Location Purpose :

Location Description :

Enter a valid Location Purpose.

Location Purpose :

Select Location Purpose..

Select Location Purpose..

Billing and Invoicing

Branch Office

Corporate Office

Field Office

Finance Office

International Office

Regional Office

Figure 4 – Top portion of the Add Location form

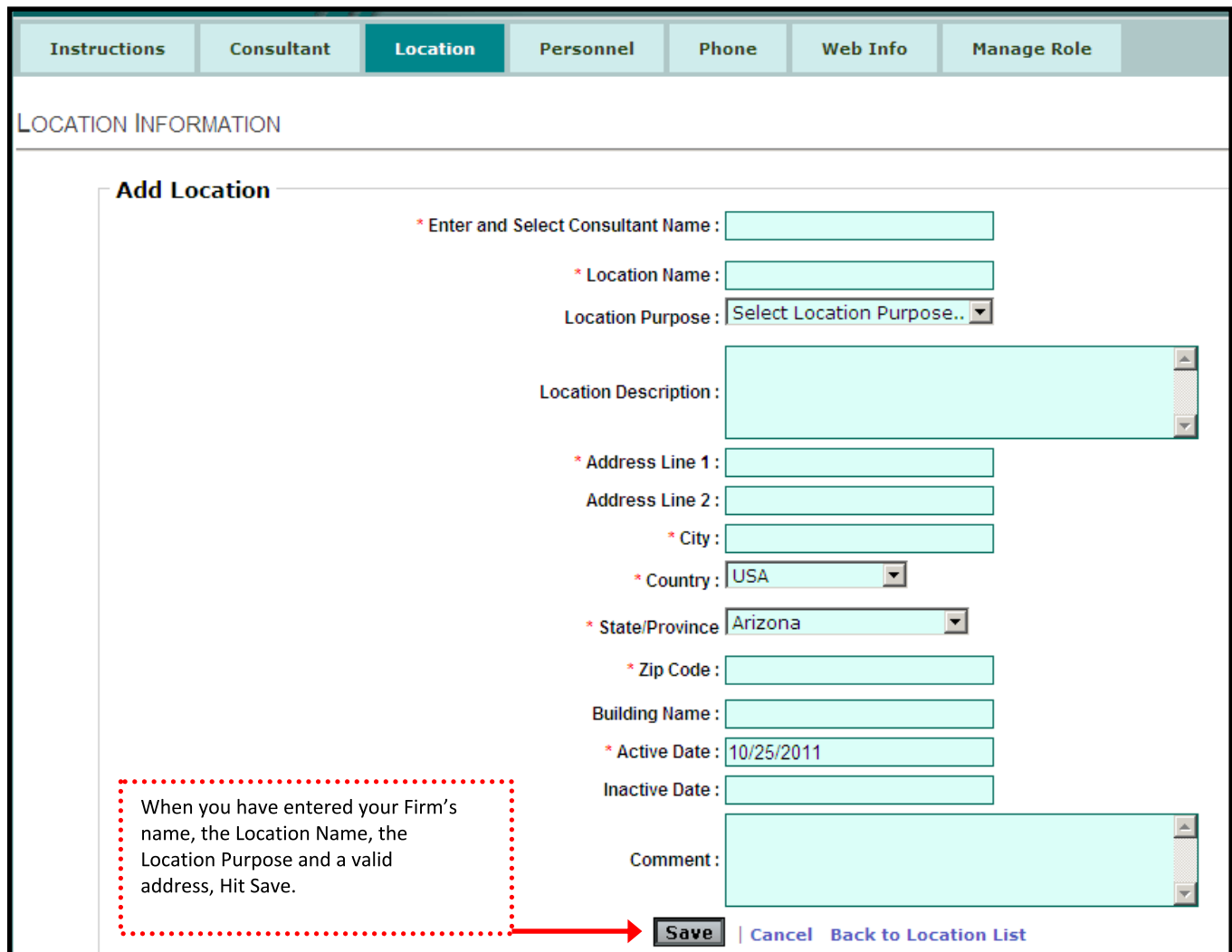
Step 4:

Add Locations (continued)

Add the Address: Once you have identified the Location purpose, add the address and an active date, then hit the "Save" button. You will be taken back to the Location Summary page to review your results.

If you have several Branch offices and each will be submitting their own contracts, be sure to include all of them when setting up locations. We will not accept a contract with an address that isn't in this system, so plan accordingly when you enter this information.

If addresses change or a location closes, you will be able to edit the address or even deactivate a location as your firm's situation changes.



Instructions **Consultant** **Location** **Personnel** **Phone** **Web Info** **Manage Role**

LOCATION INFORMATION

Add Location

* Enter and Select Consultant Name :

* Location Name :

Location Purpose :

Location Description :

* Address Line 1 :

Address Line 2 :

* City :

* Country :

* State/Province :

* Zip Code :

Building Name :

* Active Date :

Inactive Date :

Comment :

When you have entered your Firm's name, the Location Name, the Location Purpose and a valid address, Hit Save.

Save | **Cancel** **Back to Location List**

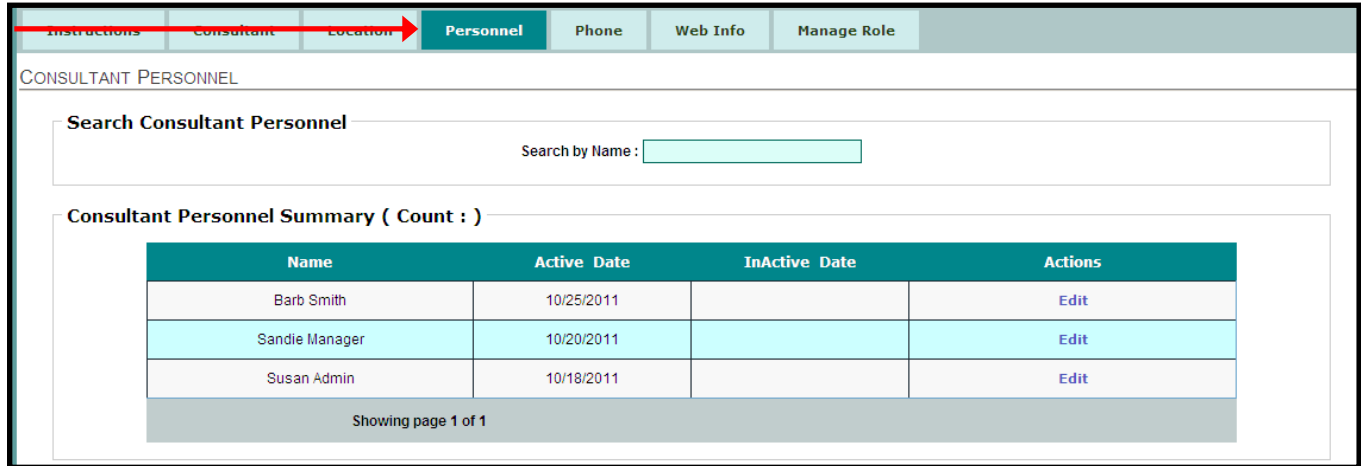
Figure 5 – Add a Location form. Click "Save" when you have finished adding a location.

Step 5:

Accessing the Personnel Tab – review your Firm’s Personnel

Your personnel list is not intended to represent all contacts for your firm. This section will list every employee from your firm who have ADOT Mobile Pass .For this reason , you will not be able to add employees to this section.

For any employee in the future, ADOT will add your employee to this module for you.You will need to select the “Edit” button for each employee in order to properly assign permissions for the employee to provide them access to the various eCMS Modules.



The screenshot shows the 'Personnel' tab selected in the top navigation bar. Below the navigation bar, there is a search bar labeled 'Search Consultant Personnel' with a 'Search by Name' input field. Below the search bar is a table titled 'Consultant Personnel Summary (Count :)'. The table has four columns: Name, Active Date, InActive Date, and Actions. The table lists three employees: Barb Smith, Sandie Manager, and Susan Admin. Each employee has an 'Edit' button in the Actions column. Below the table, it says 'Showing page 1 of 1'.

Name	Active Date	InActive Date	Actions
Barb Smith	10/25/2011		Edit
Sandie Manager	10/20/2011		Edit
Susan Admin	10/18/2011		Edit

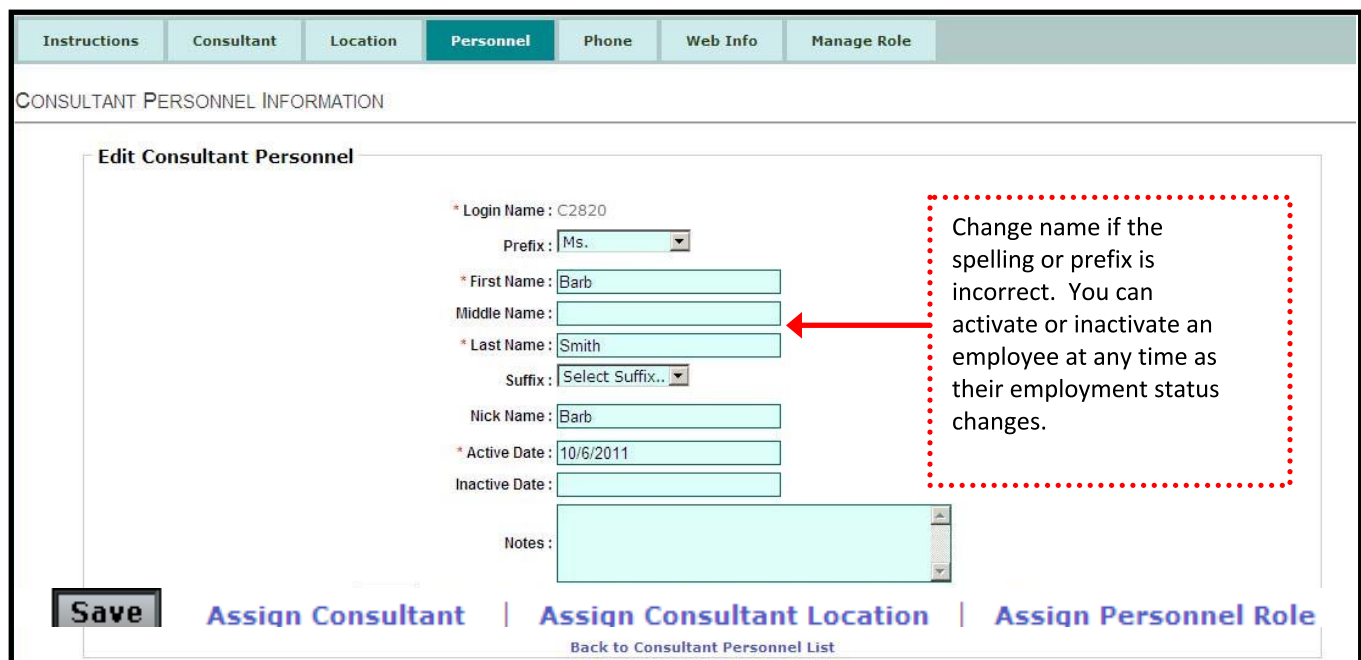
Figure 6 – Personnel Summary Tab which lists all employees with ADOT Network

Step 6:

Edit Consultant Personnel –

Edit Employee Name or Change Employee Status

Allows you to edit the name of an employee and provides a way to inactivate an employee if their employment status changes in the future. After making name changes, hit Save.



The screenshot shows the 'Edit Consultant Personnel' page. The top navigation bar has 'Personnel' selected. Below the navigation bar, there is a section titled 'Edit Consultant Personnel'. It contains several form fields: Login Name (C2820), Prefix (Ms.), First Name (Barb), Middle Name, Last Name (Smith), Suffix (Select Suffix...), Nick Name (Barb), Active Date (10/6/2011), Inactive Date, and Notes. A red arrow points from a text box to the 'Last Name' field. The text box says: 'Change name if the spelling or prefix is incorrect. You can activate or inactivate an employee at any time as their employment status changes.' At the bottom of the page, there is a 'Save' button and three links: 'Assign Consultant', 'Assign Consultant Location', and 'Assign Personnel Role'. Below these links is a link to 'Back to Consultant Personnel List'.

Figure 7 – Edit Personnel page for changing names, activating or deactivating employees and setting permissions: access to assign permissions, firms, and locations.

Step 6:

Edit Consultant Personnel (continued)
Edit Employee Name or Change Employee Status

The Edit Consultant Personnel page also gives you several options for setting an Employee's access to eCMS applications. The bottom of the page has three links for establishing this access.

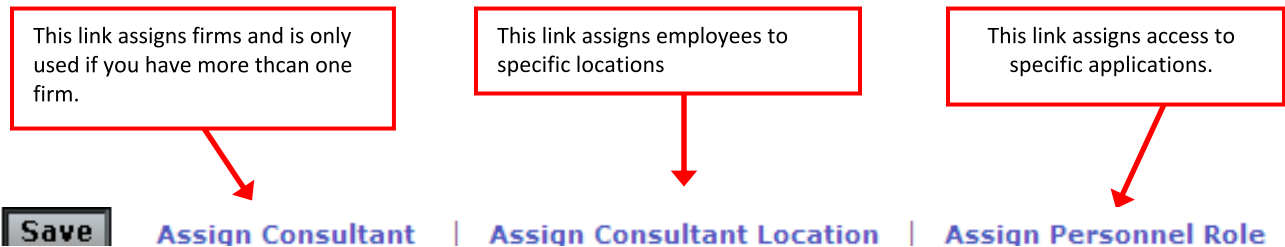


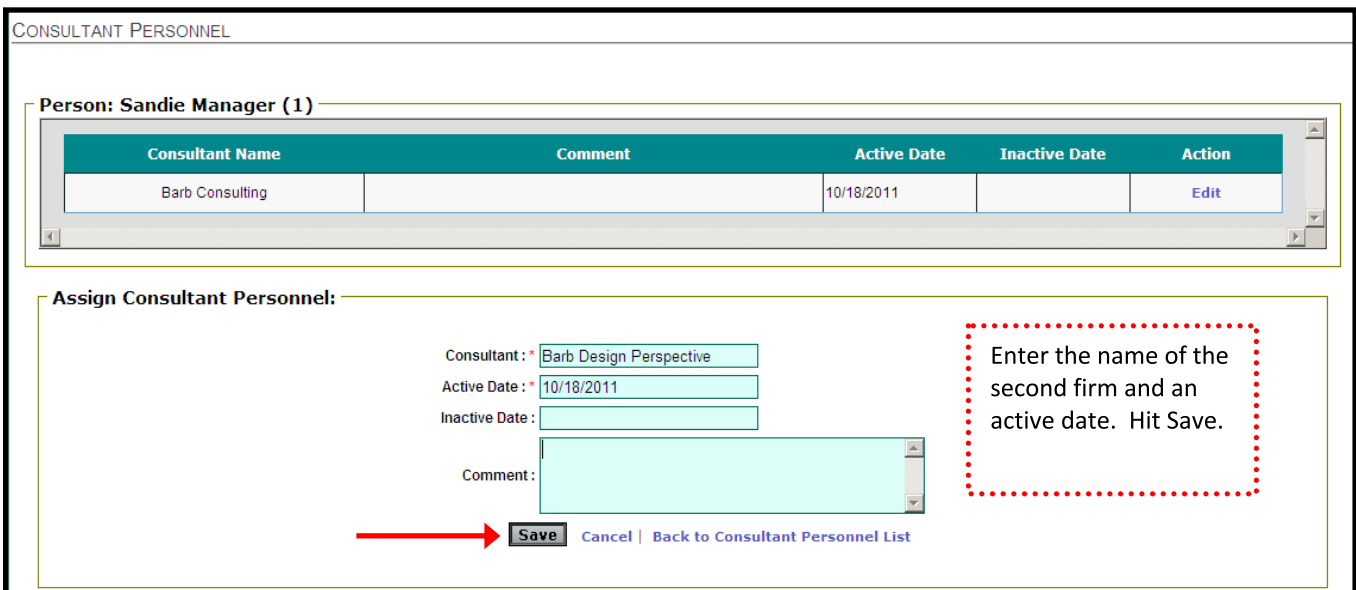
Figure 8 – The bottom of the Edit Personnel page has three links allowing the setting of an employee's permission to Firms, Locations, and access to specific applications.

Step 7: (If you only have one firm, you may skip this step)

Edit Consultant Personnel –
Assign Consultant (used if your company has two firms in same profile)

If Company A (Barb Consulting) is merging with Company B (Barb Design Perspective), and both companies temporarily have active contracts with ECS, employees can be given access to both firms during the transition.

In the "Assign Consultant Personnel" area, type the name of the Consultant and enter an Active date and hit Save.



The screenshot shows the **CONSULTANT PERSONNEL** page. Under the heading **Person: Sandie Manager (1)**, there is a table with the following data:

Consultant Name	Comment	Active Date	Inactive Date	Action
Barb Consulting		10/18/2011		Edit

Below the table is the **Assign Consultant Personnel:** section. It contains the following fields:

- Consultant:
- Active Date:
- Inactive Date:
- Comment:

At the bottom of this section are the buttons: **Save**, [Cancel](#), and [Back to Consultant Personnel List](#). A red arrow points to the **Save** button. A red dotted box contains the text: "Enter the name of the second firm and an active date. Hit Save."

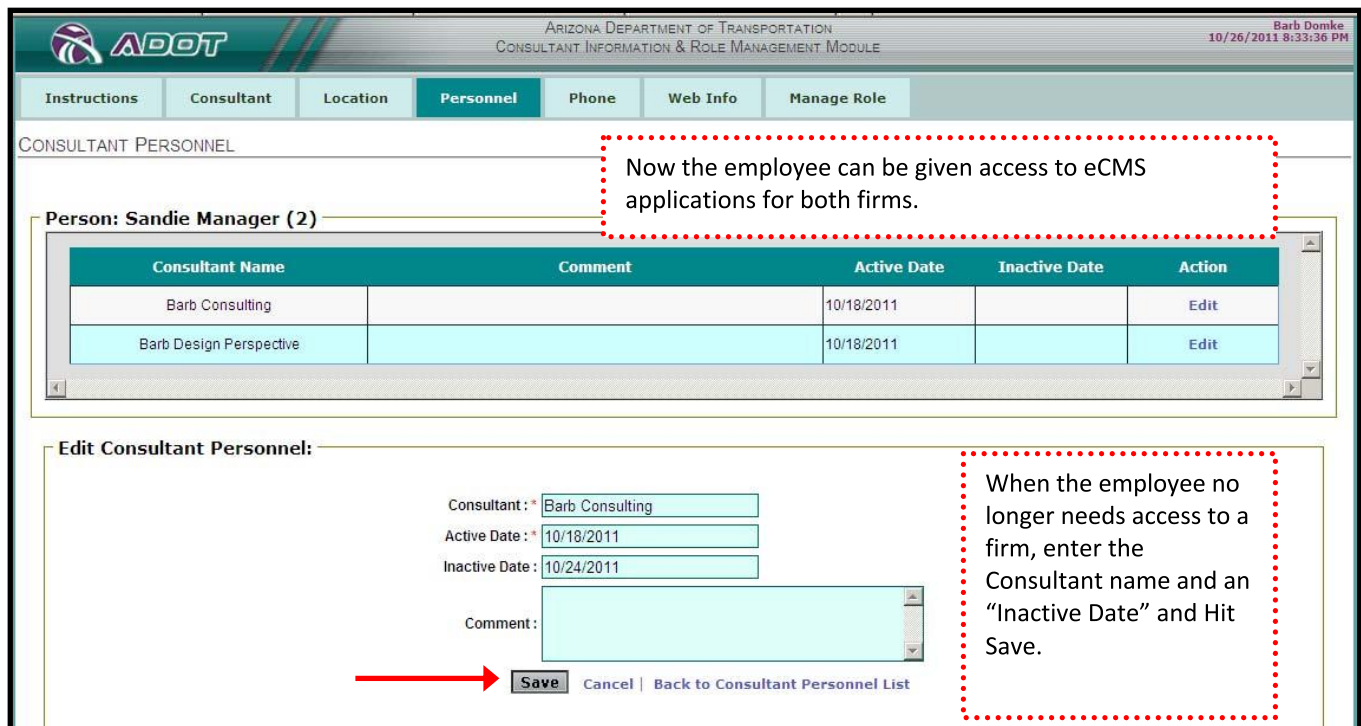
Figure 9 – How to Assign Consultant Personnel to Multiple Firms

Step 7: (If you only have one firm, you may skip this step) **Edit Consultant Personnel (continued)**

Assign Consultant

Once a second firm is added, both Firms show on the Employee's profile, and the employee can be given access to applications for both firms.

An Inactive date can be entered when the employee no longer needs access.



Now the employee can be given access to eCMS applications for both firms.

Consultant Name	Comment	Active Date	Inactive Date	Action
Barb Consulting		10/18/2011		Edit
Barb Design Perspective		10/18/2011		Edit

When the employee no longer needs access to a firm, enter the Consultant name and an "Inactive Date" and Hit Save.

Figure 10 – Assign Consultant Personnel to Multiple Firms

Step 8:

Edit Consultant Personnel – Assign Consultant Location

Employees may be given access to only certain locations which will allow them to see content for one location, but not another.

To give an employee access, enter a location (based on the location names previously created) and then enter an Active date.

The access to a certain location may be removed at any time by clicking edit and entering an Inactive date.

Access to a new location may be added by entering the location name, an active date, and hitting Save.

If an employee isn't given access to a location, they will not have access to any information.

Step 8:

Edit Consultant Personnel (continued) Assign Consultant Location

PERSONNEL LOCATION

Personnel Location: Sandie Manager (2)

Consultant Name	Consultant Location Name	Comment	Active Date	Inactive Date	Action
Barb Consulting	Tucson Branch		10/18/2011		Edit
Barb Consulting	East Valley Branch		10/20/2011		Edit

Assign Consultant Location to Sandie Manager

Location : *

Active Date : *

Inactive Date :

Comment :

[Save](#) [Cancel](#) [Back to Consultant Personnel List](#)

Enter a Location Name and an Active date to give an employee access to a location. Click Edit and enter an inactive date to remove access.

Figure 11 – Personnel Location screen displays location access and allows location information to be added or removed.

Step 9:

Edit Consultant Personnel –

Assign Permissions Roles for eCMS Applications

Employees may be given access to various eCMS applications on this screen. In the initial launch of the CIRM Module, the only application that will be available to add permissions for will be for the Prequalification Application Module.

Only ADOT can assign the Consultant Administrator role and each firm can only have a maximum of two. The CIRM Consultant Administrator can assign the roles of Consultant Manager, Consultant Staff or set the default role of READ-Only.

The Role Definitions are as follows:

Role	Access/Permissions
Consultant Administrator	Read and Edit all data created by anyone in the firm. Can provide access to eCMS modules for other Mobile Pass users.
Consultant Manager	Read and Edit all data created by anyone in the firm.
Consultant Staff	Read and Edit all data they created. READ-Only access for data created by others in the firm.
Consultant READ Only	READ-Only access for all data created by anyone in the firm.

Figure 11 – Chart displaying role definitions

Step 9:

Edit Consultant Personnel (continued)

Assign Permissions Roles for eCMS Applications

To give permissions, select the check box for each desired application.

During the initial launch the Prequalification Application Module will be the only Module that roles can be assigned for.

In the near future, we will have all four existing eCMS Modules for which permissions can be managed; the Prequalification Module, the SOQ Submittal Module, the Cost Proposal Module and the Consultant Evaluations Module.

As future modules are launched, your firm's CIRM Consultant Administrator will be able to quickly add permissions to these modules for the appropriate employees.

PERSONNEL ROLES

Search Role Information
 Search by Consultant Name : Search by Application :

Application Roles (Person Name: Sandie , MANAGER) ← Identifies which employee will be getting access.

Consultant Name : Barb Consulting ← Identifies the Firm permissions for:

Application Name	Role	Selection
1- Prequalification Module	Consultant Staff	☐
1- Prequalification Module	Consultant Read-Only	☐
1- Prequalification Module	Consultant Manager	☒
2- SOQ Submission Management	Consultant Manager	☒
2- SOQ Submission Management	Consultant Read-Only	☐
2- SOQ Submission Management	Consultant Staff	☐
3- Cost Proposal Management	Consultant Manager	☒
3- Cost Proposal Management	Consultant Read-Only	☐
3- Cost Proposal Management	Consultant Staff	☐
6- Consultant Evaluation Module	Consultant Manager	☐
6- Consultant Evaluation Module	Consultant Read-Only	☐
6- Consultant Evaluation Module	Consultant Staff	☐

← Selects the specific application and the role for each application.

Consultant Name : Barb Design Perspective ← Identifies the Firm permissions for:

Application Name	Role	Selection
1- Prequalification Module	Consultant Staff	☒
1- Prequalification Module	Consultant Read-Only	☐
1- Prequalification Module	Consultant Manager	☐
2- SOQ Submission Management	Consultant Manager	☒
2- SOQ Submission Management	Consultant Read-Only	☐

Back to Consultant Personnel List Back to Manage Role

Save

Local intranet

Figure 12 –Personnel Roles where Consultant Administrator sets permissions for an employee.

Step 10:

Consultant Phone –

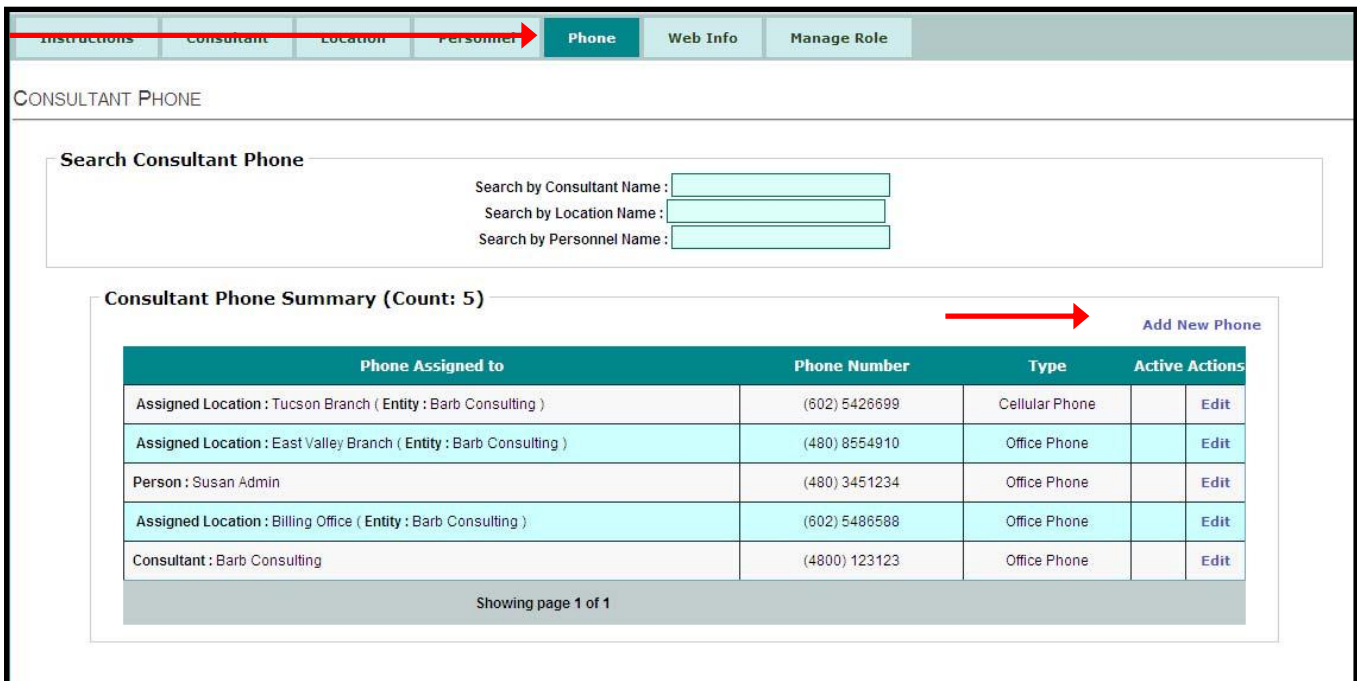
Review and Add Phone Numbers for the Firm, the Firm's Locations, and the Employees

The Consultant Phone Summary page will show every number on file for your Firm.

When you first access the Consultant Phone Summary page, you will not have any phone numbers.

You should enter a general phone number for your firm, a general phone number for each location, and a minimum of one phone number for each employee.

It is recommended you have at least one number for each firm, each location, and each person.



CONSULTANT PHONE

Search Consultant Phone

Search by Consultant Name :

Search by Location Name :

Search by Personnel Name :

Consultant Phone Summary (Count: 5)

[Add New Phone](#)

Phone Assigned to	Phone Number	Type	Active Actions
Assigned Location : Tucson Branch (Entity : Barb Consulting)	(602) 5426699	Cellular Phone	Edit
Assigned Location : East Valley Branch (Entity : Barb Consulting)	(480) 8554910	Office Phone	Edit
Person : Susan Admin	(480) 3451234	Office Phone	Edit
Assigned Location : Billing Office (Entity : Barb Consulting)	(602) 5486588	Office Phone	Edit
Consultant : Barb Consulting	(4800) 123123	Office Phone	Edit

Showing page 1 of 1

Figure 13 Consultant Phone Summary showing all numbers on file for Firm

The Phone Types you may enter include:

- Cell
- Work
- Fax
- Other

Step 10:

Consultant Phone (continued)

Review and Add Phone Numbers for the Firm, the Firm's Locations, and the Employees

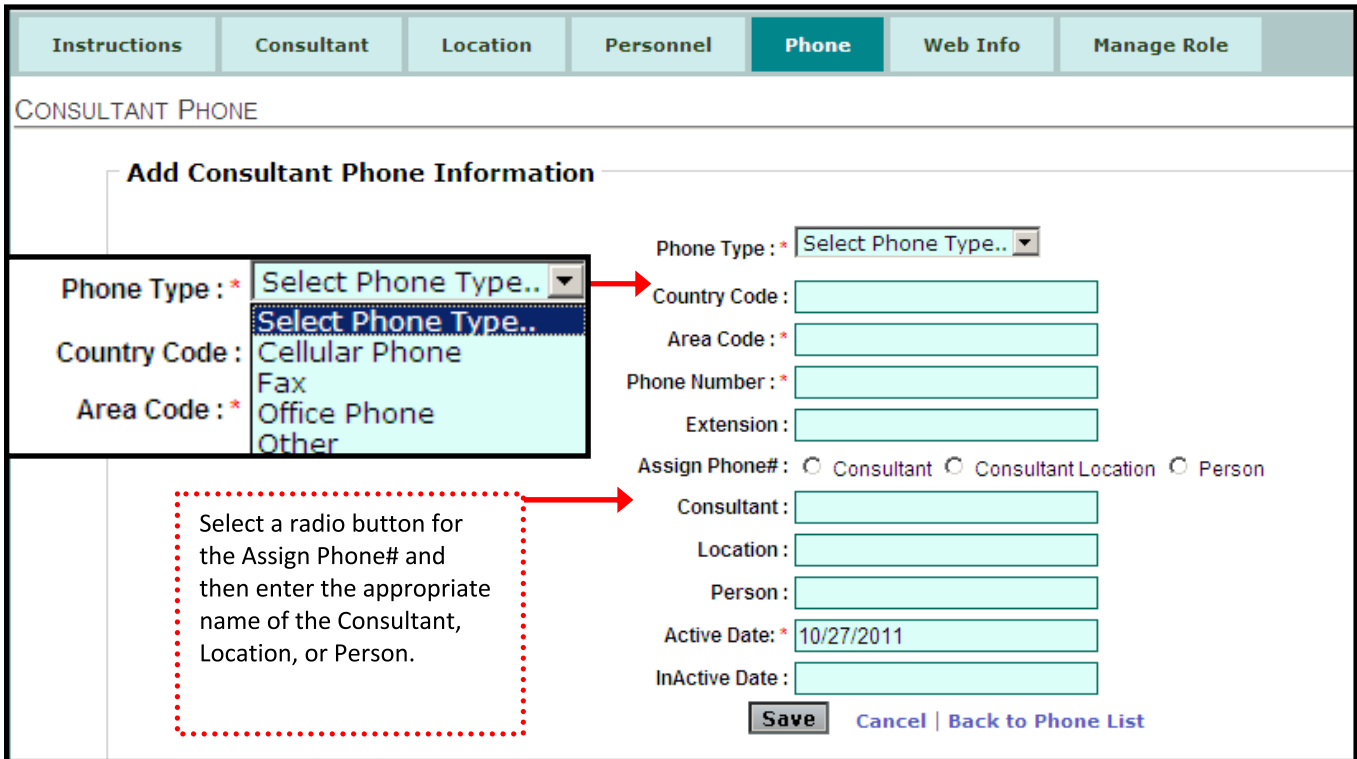


Figure 14 – Add Consultant Phone Information with Phone Types

Enter the Phone Type: Cell, Work, Fax, or Other.

Enter the proper phone number and area code.

Select the appropriate Assign Phone# Radio Button (Consultant, Consultant Location or Person). Enter the name of the person, location, or firm.

Hit the Save button.

Step 11:

Consultant Web Info –

Review and Add Employee E-mail address and the Firm's website address

The Consultant Web Info Summary page will show every e-mail or web address on file for your Firm.

When you first access the Consultant Web Info Summary page, you will not have any e-mails or website addresses.

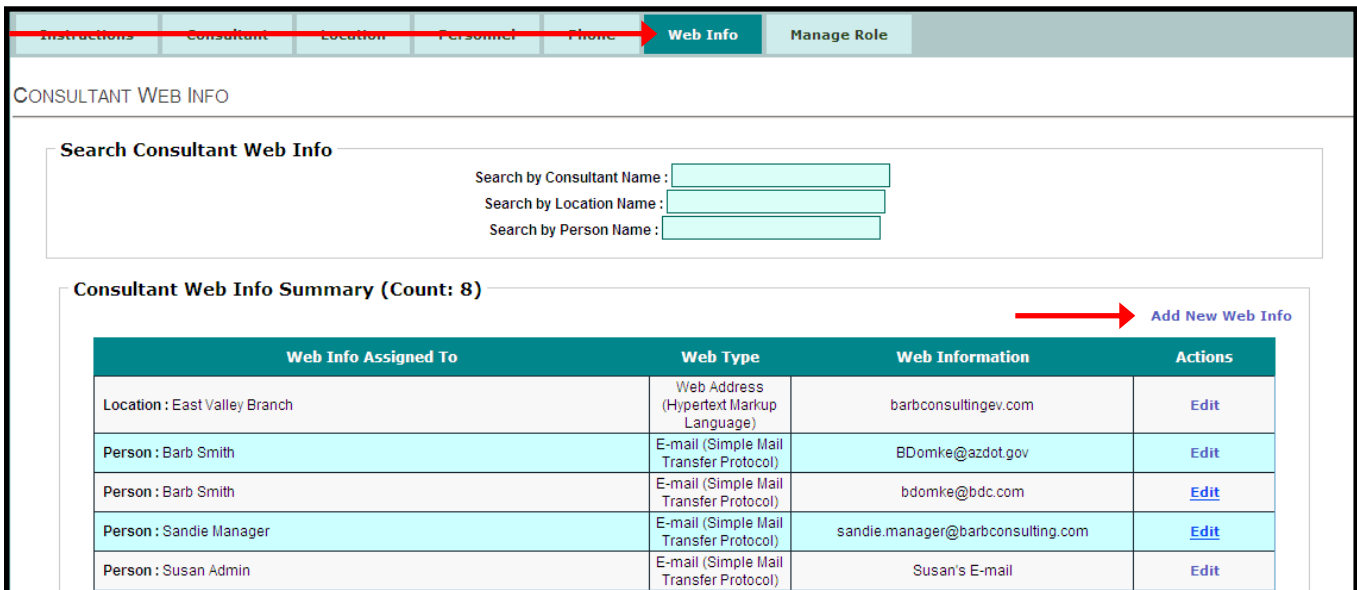
You should enter a web address for your firm and each location if appropriate and enter an e-mail for each employee.

It is recommended you have at least one e-mail for each location and each person.

You can update this information whenever employees get new e-mails or when the company adds or changes a website.

Step 11:

Consultant Web Info (continued)

Review and Add Employee E-mail address and the Firm's website address


CONSULTANT WEB INFO

Search Consultant Web Info

Search by Consultant Name :

Search by Location Name :

Search by Person Name :

Consultant Web Info Summary (Count: 8)

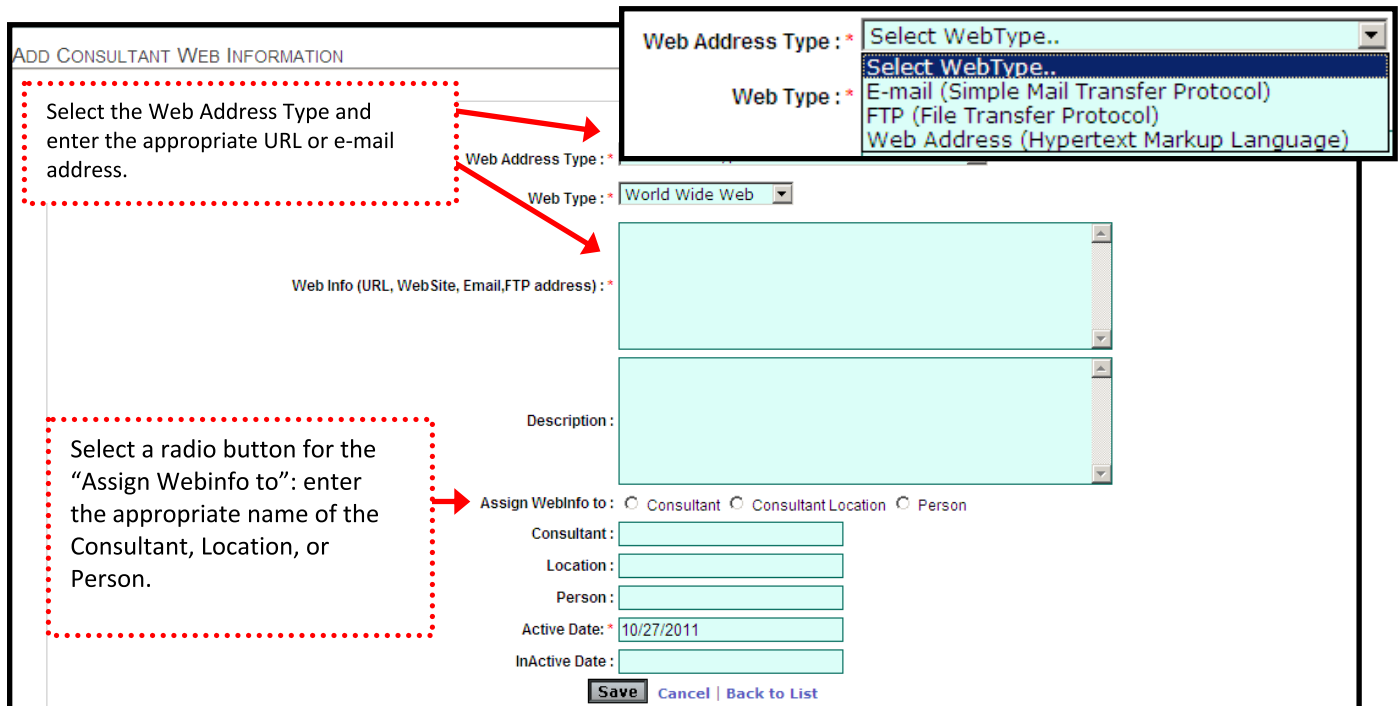
[Add New Web Info](#)

Web Info Assigned To	Web Type	Web Information	Actions
Location : East Valley Branch	Web Address (Hypertext Markup Language)	barbconsultingev.com	Edit
Person : Barb Smith	E-mail (Simple Mail Transfer Protocol)	BDomke@azdot.gov	Edit
Person : Barb Smith	E-mail (Simple Mail Transfer Protocol)	bdomke@bdc.com	Edit
Person : Sandie Manager	E-mail (Simple Mail Transfer Protocol)	sandie.manager@barbconsulting.com	Edit
Person : Susan Admin	E-mail (Simple Mail Transfer Protocol)	Susan's E-mail	Edit

Figure 15 – The Web Info summary page

To add a new e-mail or web address, click the Add New Web Info button

Enter the Web Address Type, the e-mail or web address and select the Assign Webinfo to Radio Button and indicate who the information is for. (employee or Consultant Location, or Consultant Firm)



ADD CONSULTANT WEB INFORMATION

Select the Web Address Type and enter the appropriate URL or e-mail address.

Web Address Type : *

Web Type : *

Web Type :

Web Info (URL, Web Site, Email,FTP address) : *

Description :

Assign Webinfo to : ☐ Consultant ☐ Consultant Location ☐ Person

Consultant :

Location :

Person :

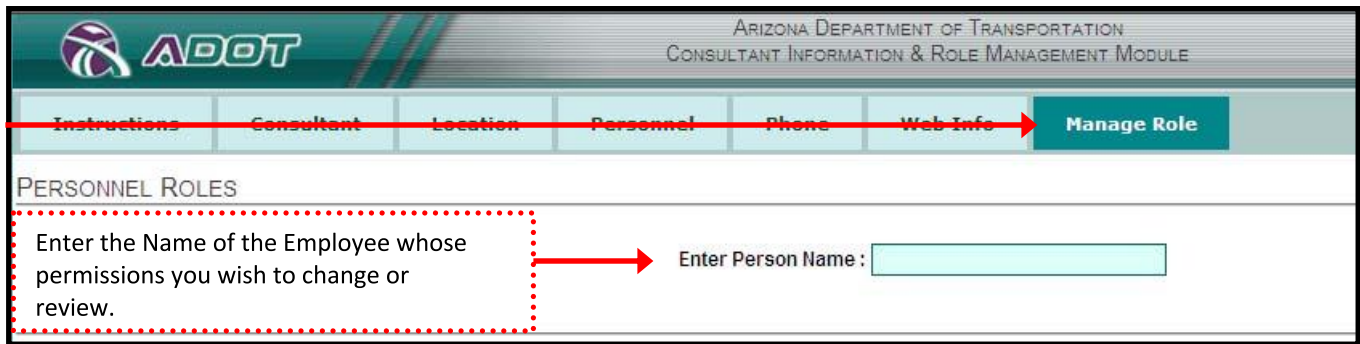
Active Date : *

InActive Date :

[Save](#) [Cancel](#) [Back to List](#)

Figure 16 – Add Web Information Form for entering e-mail or web addresses Step 12:

Manage Role –

Search for Employee by name and Manage Permissions


ARIZONA DEPARTMENT OF TRANSPORTATION
CONSULTANT INFORMATION & ROLE MANAGEMENT MODULE

Instructions Consultant Location Personnel Phone Web Info **Manage Role**

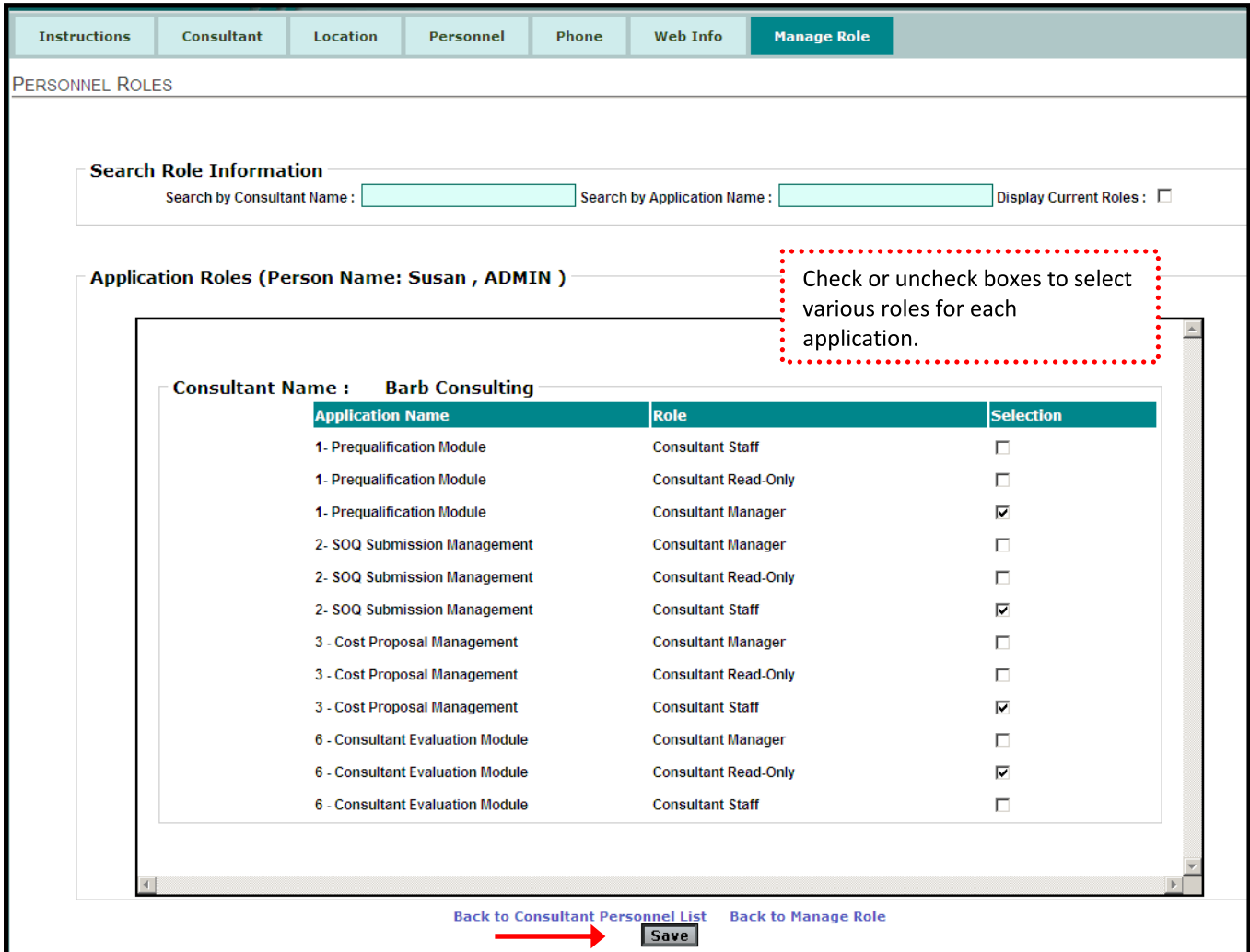
PERSONNEL ROLES

Enter the Name of the Employee whose permissions you wish to change or review.

Enter Person Name :

Figure 17 – Manage Personnel Roles

The Manage Role is an additional way to quickly review or change the roles for an employee's access to the various eCMS applications. Enter the Employee's name in the Search box and the Employee's current permissions will be displayed. Check or uncheck access and Hit Save to make changes.



Instructions Consultant Location Personnel Phone Web Info **Manage Role**

PERSONNEL ROLES

Search Role Information

Search by Consultant Name : Search by Application Name : Display Current Roles : ☐

Application Roles (Person Name: Susan , ADMIN)

Check or uncheck boxes to select various roles for each application.

Consultant Name : **Barb Consulting**

Application Name	Role	Selection
1- Prequalification Module	Consultant Staff	☐
1- Prequalification Module	Consultant Read-Only	☐
1- Prequalification Module	Consultant Manager	☒
2- SOQ Submission Management	Consultant Manager	☐
2- SOQ Submission Management	Consultant Read-Only	☐
2- SOQ Submission Management	Consultant Staff	☒
3 - Cost Proposal Management	Consultant Manager	☐
3 - Cost Proposal Management	Consultant Read-Only	☐
3 - Cost Proposal Management	Consultant Staff	☒
6 - Consultant Evaluation Module	Consultant Manager	☐
6 - Consultant Evaluation Module	Consultant Read-Only	☒
6 - Consultant Evaluation Module	Consultant Staff	☐

Back to Consultant Personnel List Back to Manage Role

Save

If you have questions about the Consultant Information and Role Management Module (CIRM) or need changes made to your profile, contact:

ADOT Help Desk
602-712-7249

For questions related to ECS processes utilizing eCMS, please contact ECS at 602-712-7525.