Consultant Information and Role Management Module (CIRM)

Training Manual

Table of Contents

Introduction to the CIRM Module	Page 1
Part 1 – Managing your Consultant Profile	Page 2
Part 2 – Managing Location Information (*necessary for Prequalification Application*)	Page 3
Part 3 – Managing Personnel	Page 5
Part 4 – Managing Personnel Roles	Page 6
Part 5 – Managing Phone Information	Page 10
Part 6 – Managing Web and E-mail Information	Page 11
Part 7 – Manage Roles	Page 13

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.

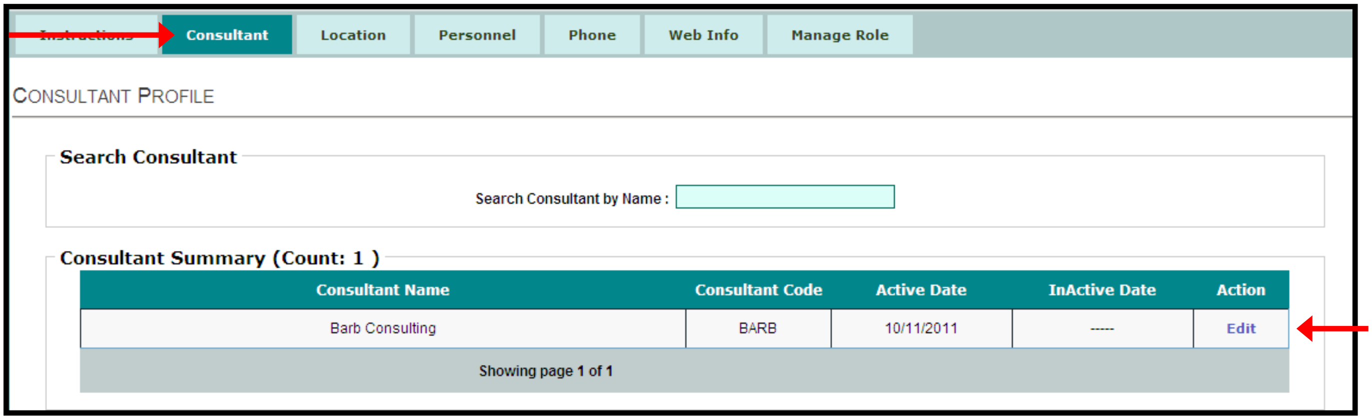


Figure 1 – Consultant Profile with a single-parent firm. If you have more than one firm, both will be displayed here.

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.

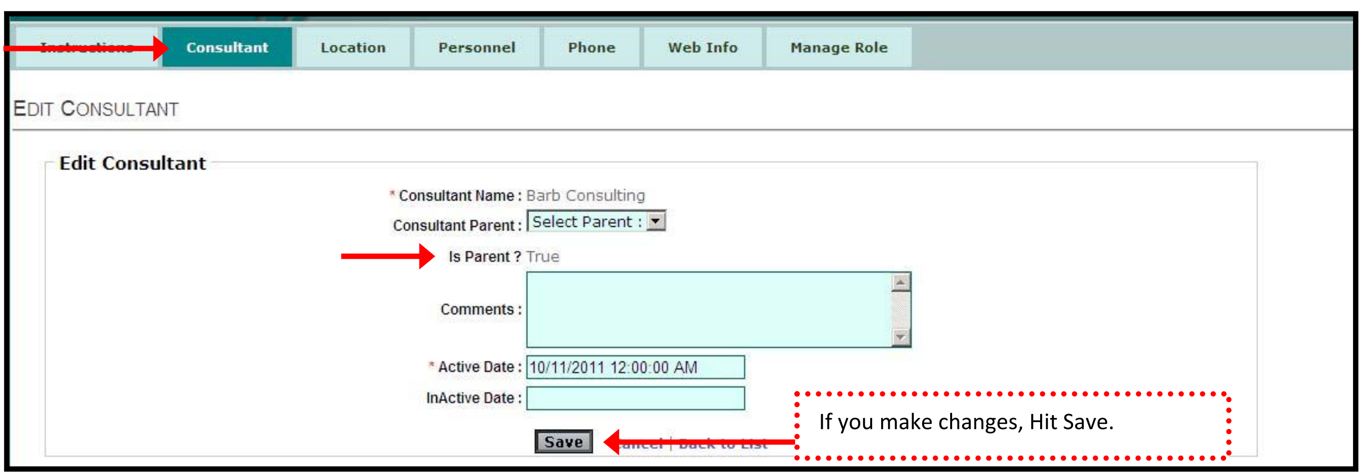


Figure 2 – Edit Consultant page with "Is Parent?" set to "True" – demonstrating a Parent Company

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.

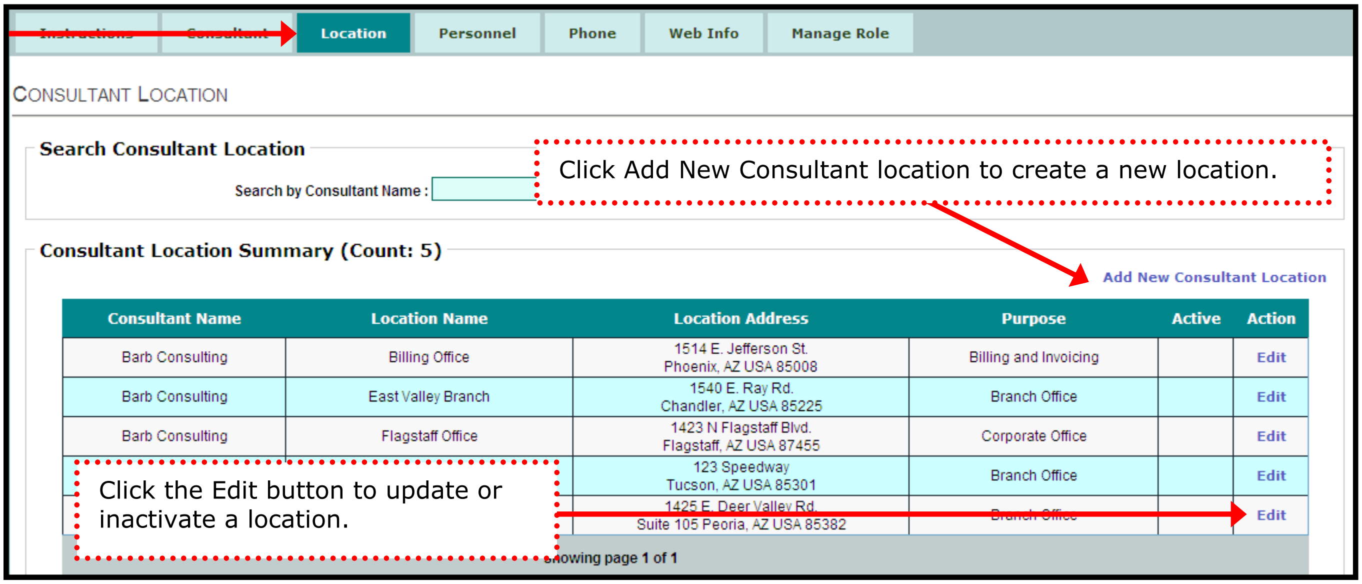


Figure 3 – Consultant Location Summary page with 5 Locations

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.

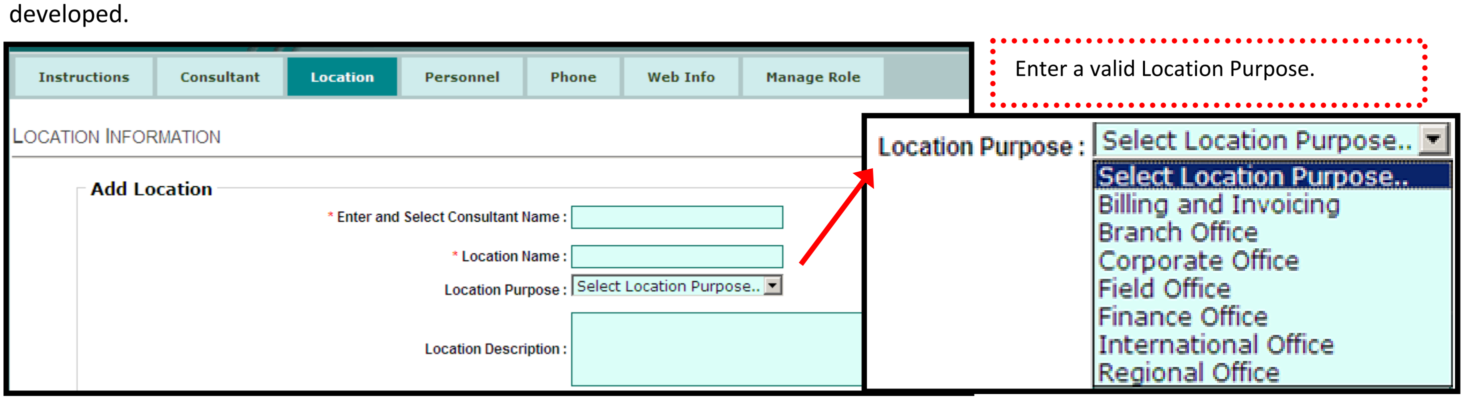


Figure 4 – Top portion of the Add Location form

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.

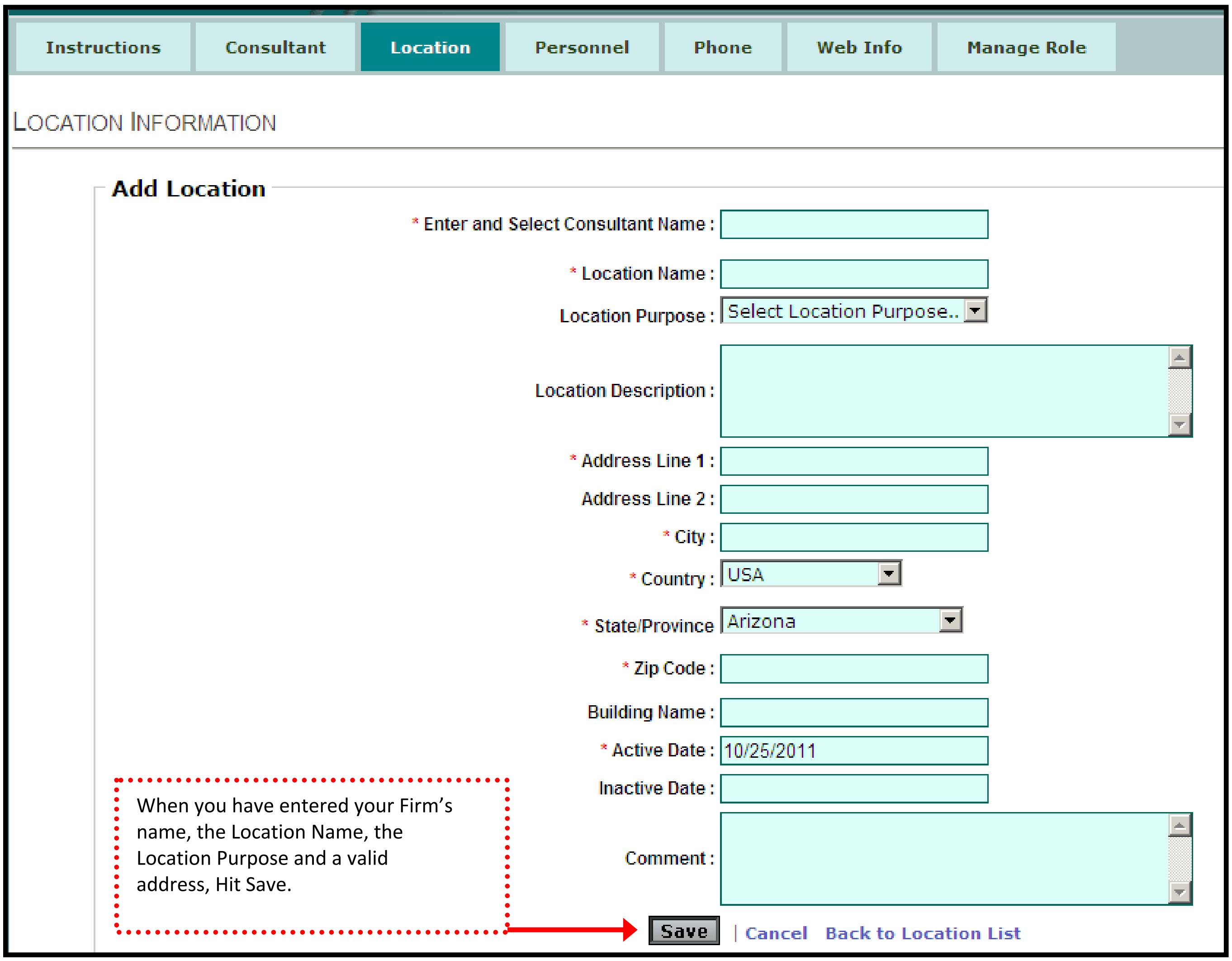


Figure 5 – Add a Location form. Click "Save" when you have finished adding a location.

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 form your firm who have ADOT Mobile Pass .For this reason , you will not be able to add employyes 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.

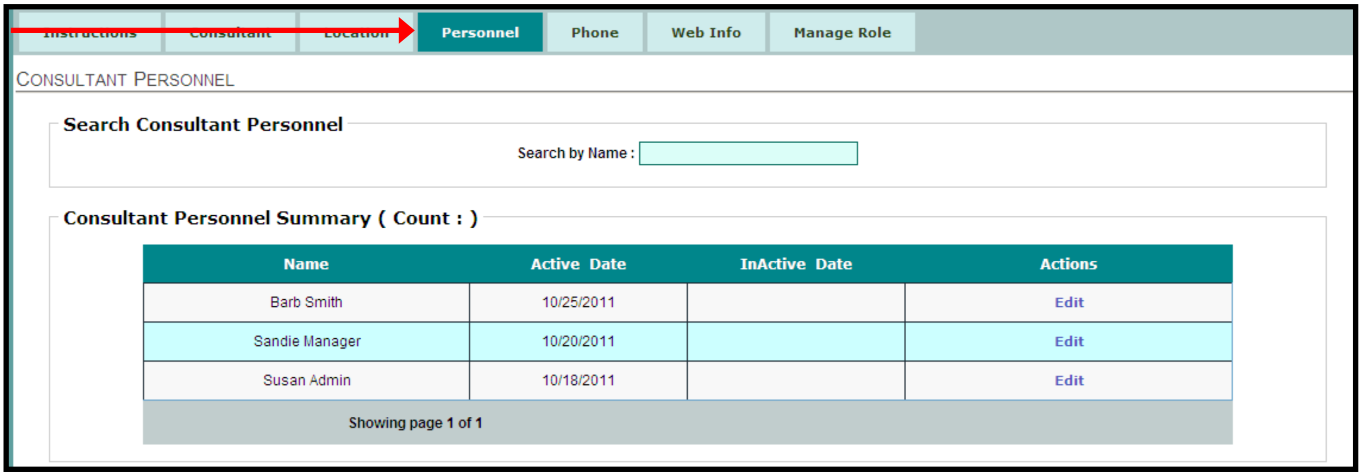


Figure 6 – Personnel Summary Tab which lists all employees with ADOT Network

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.

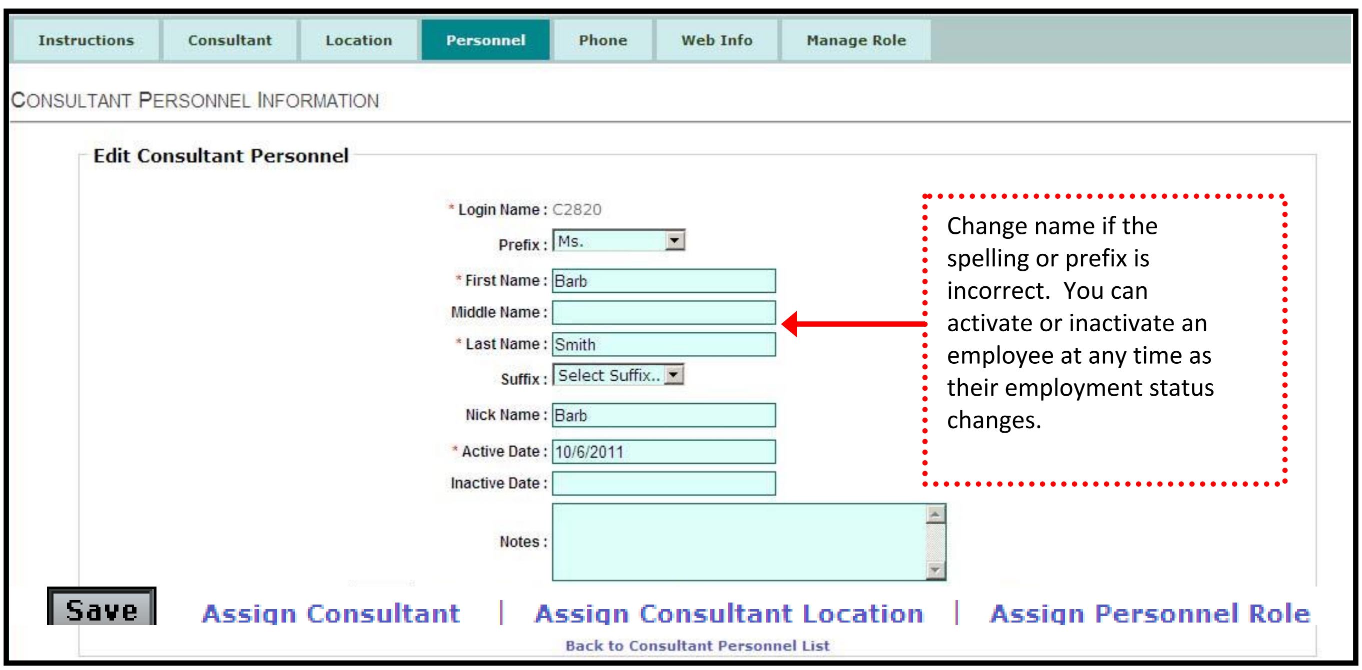


Figure 7 – Edit Personnel page for changing names, activating or deactivating employees and setting permissions: access to assign permissions, firms, and locations.

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.

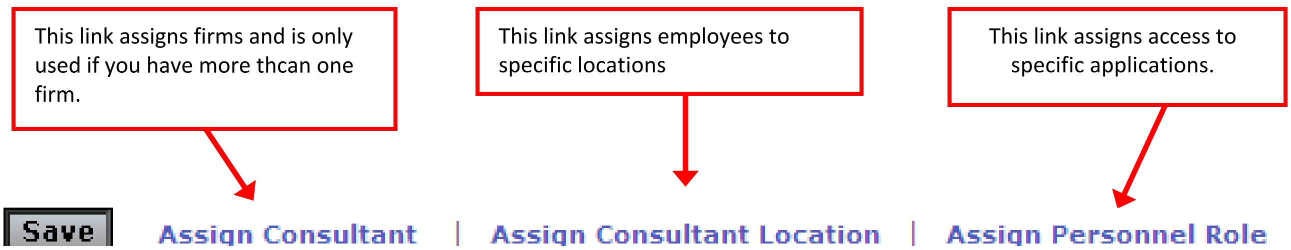


Figure 8 – The bottom of the Edit Personnel page has three links allowing the setting of an employee's permission to Firms, Locations, and access to specific applications.

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.

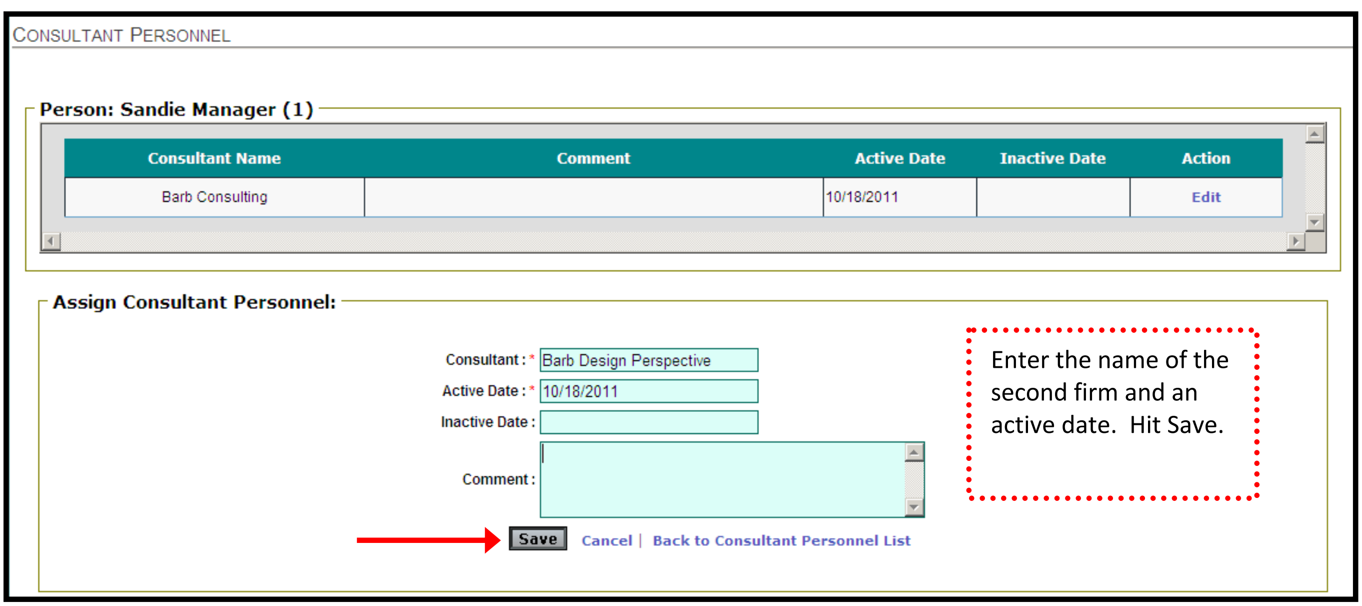


Figure 9 – How to Assign Consultant Personnel to Multiple Firms

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.

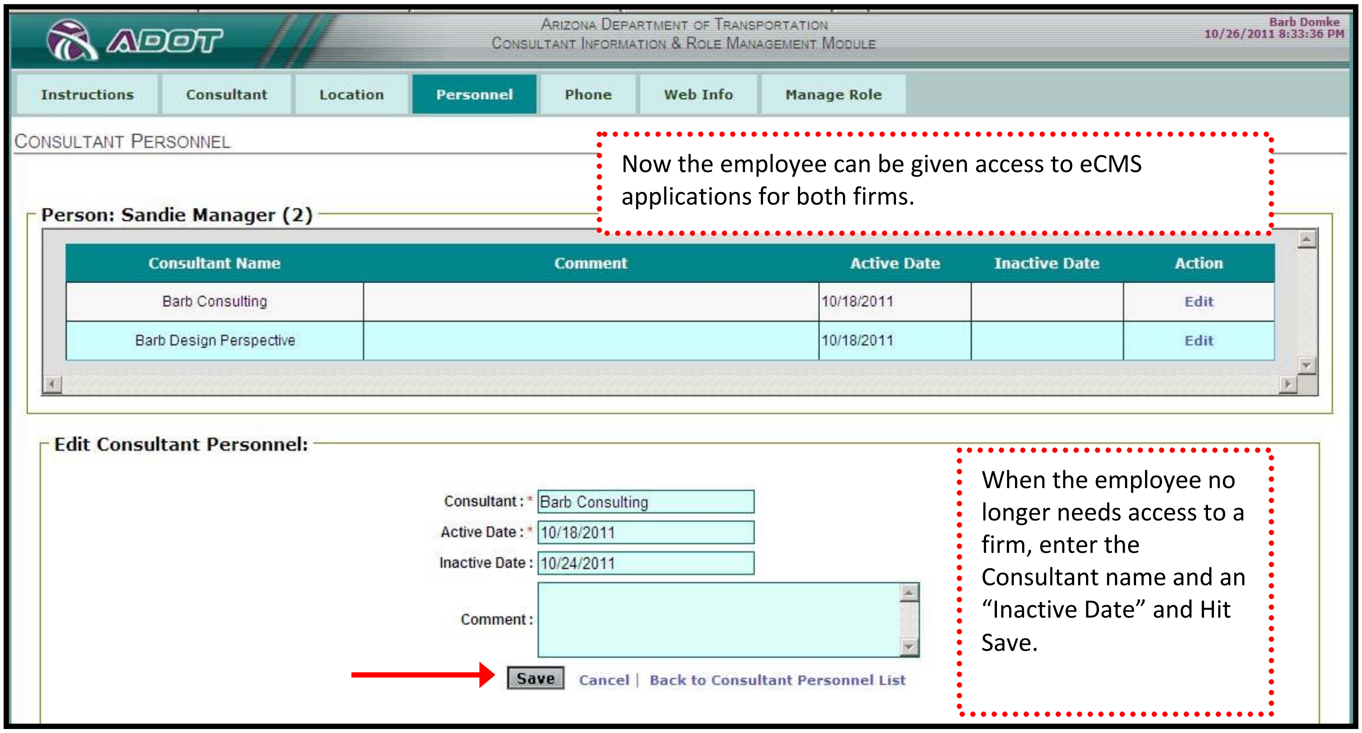


Figure 10 – Assign Consultant Personnel to Multiple Firms

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**

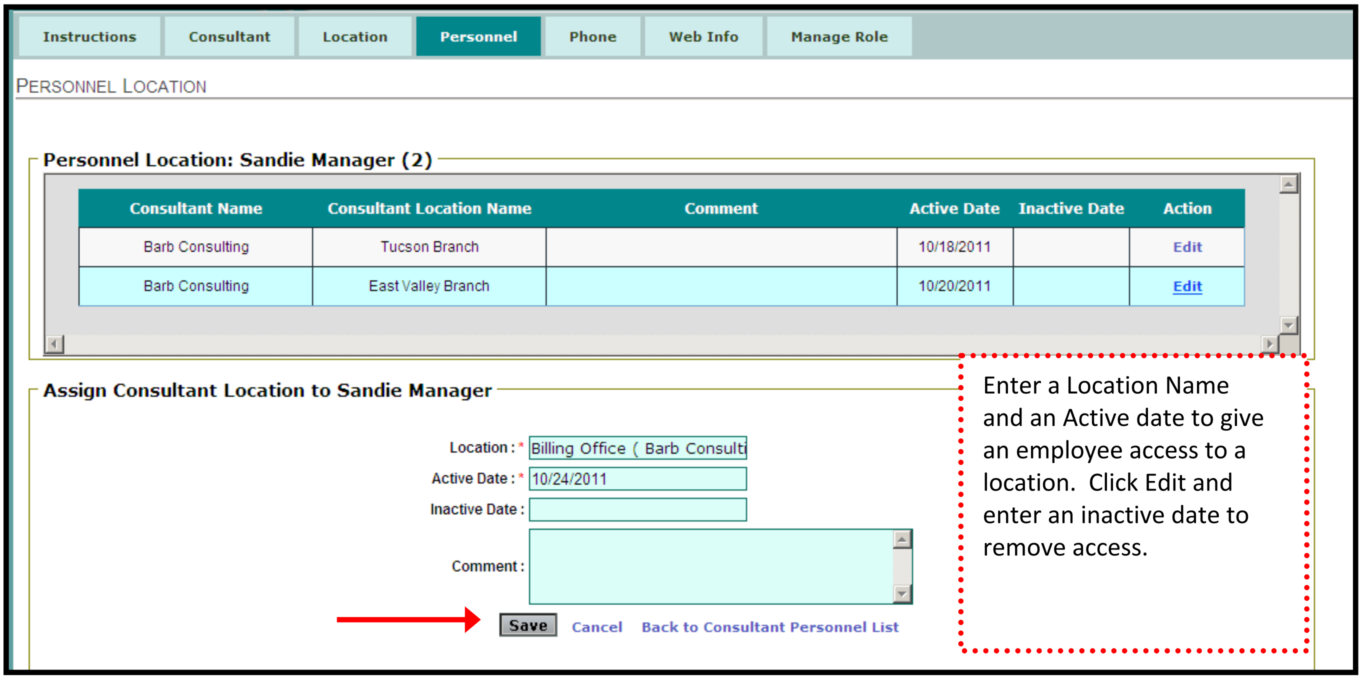


Figure 11 – Personnel Location screen displays location access and allows location information to be added or removed.

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.

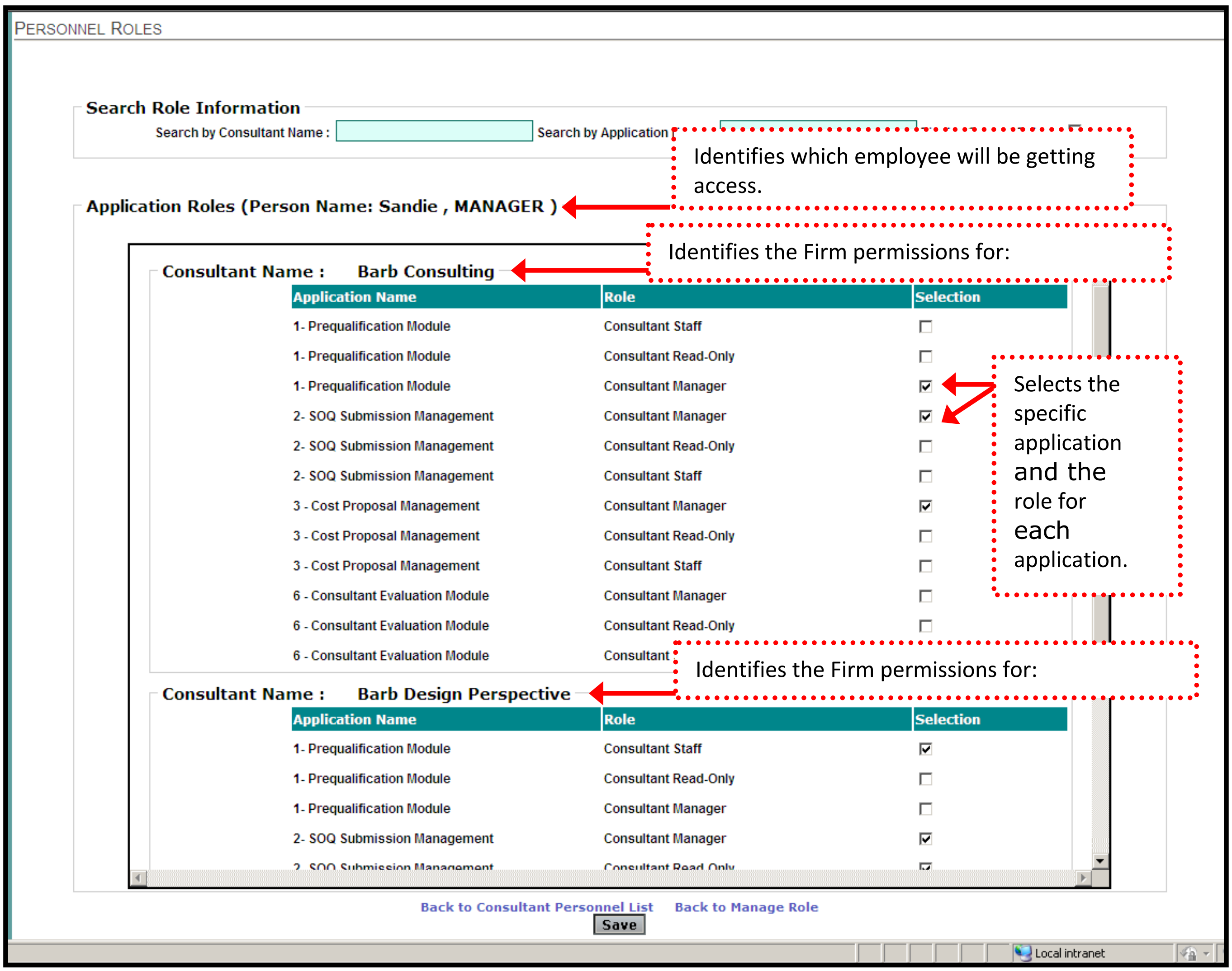


Figure 12 –Personnel Roles where Consultant Administrator sets permissions for an employee.

Step 10:

Consultant Phone –

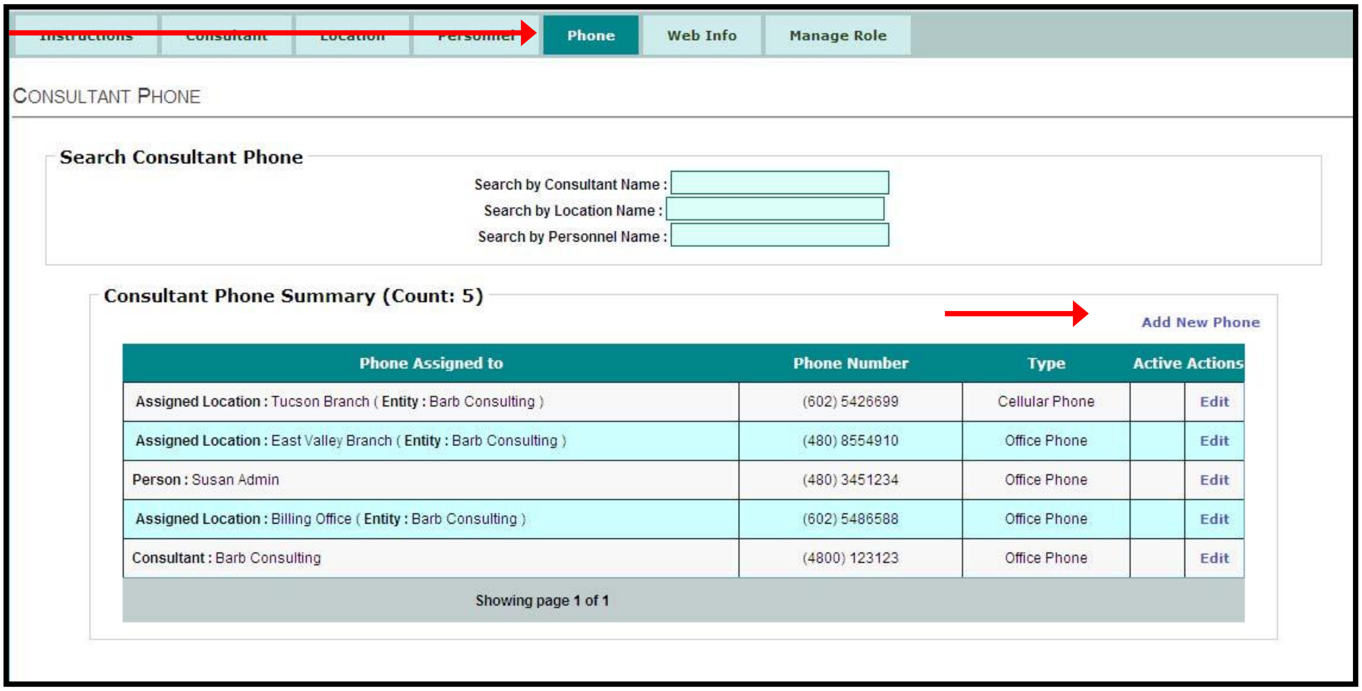
Review and Add Phone Numbers for the Firm, the Firm's Locations, and the Employees

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.



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

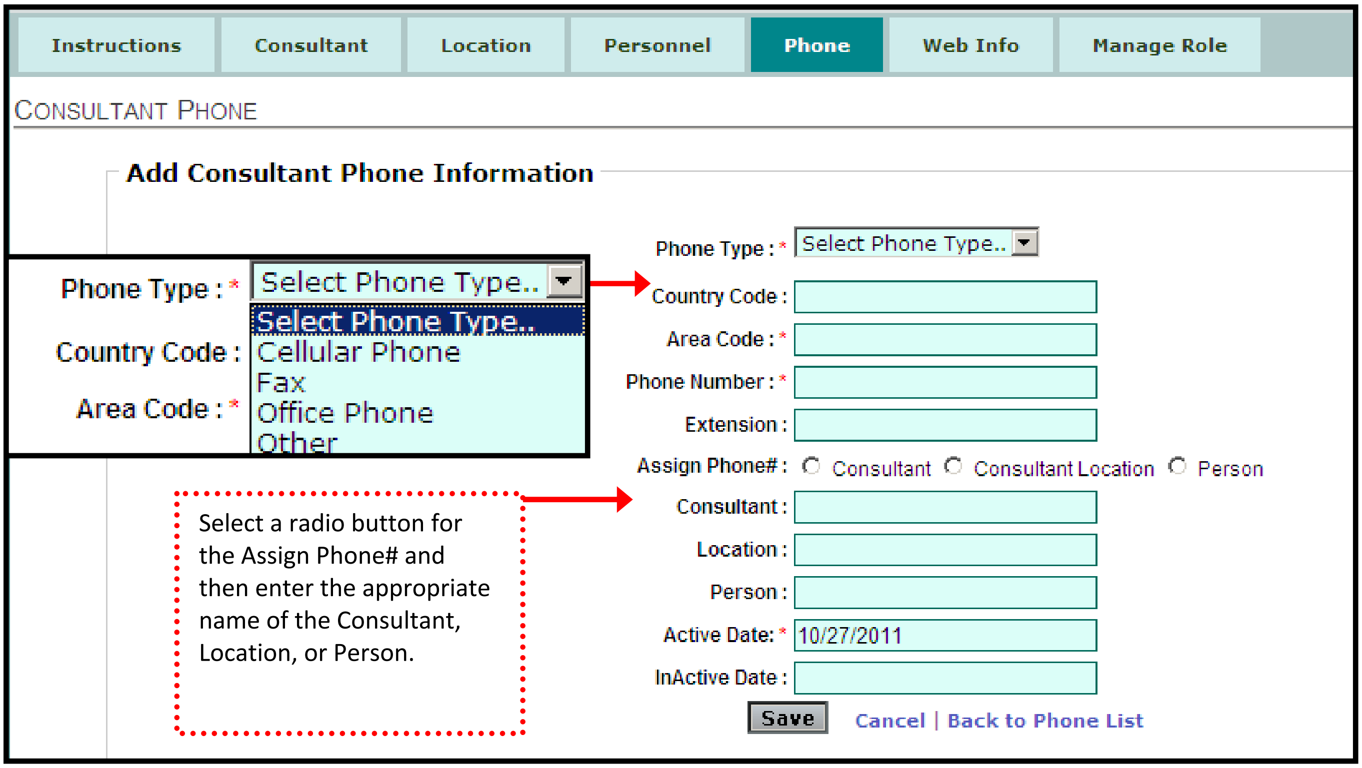


Figure 14 – Add Consultant Phone Information with Phone Types

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 (continuecd)

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

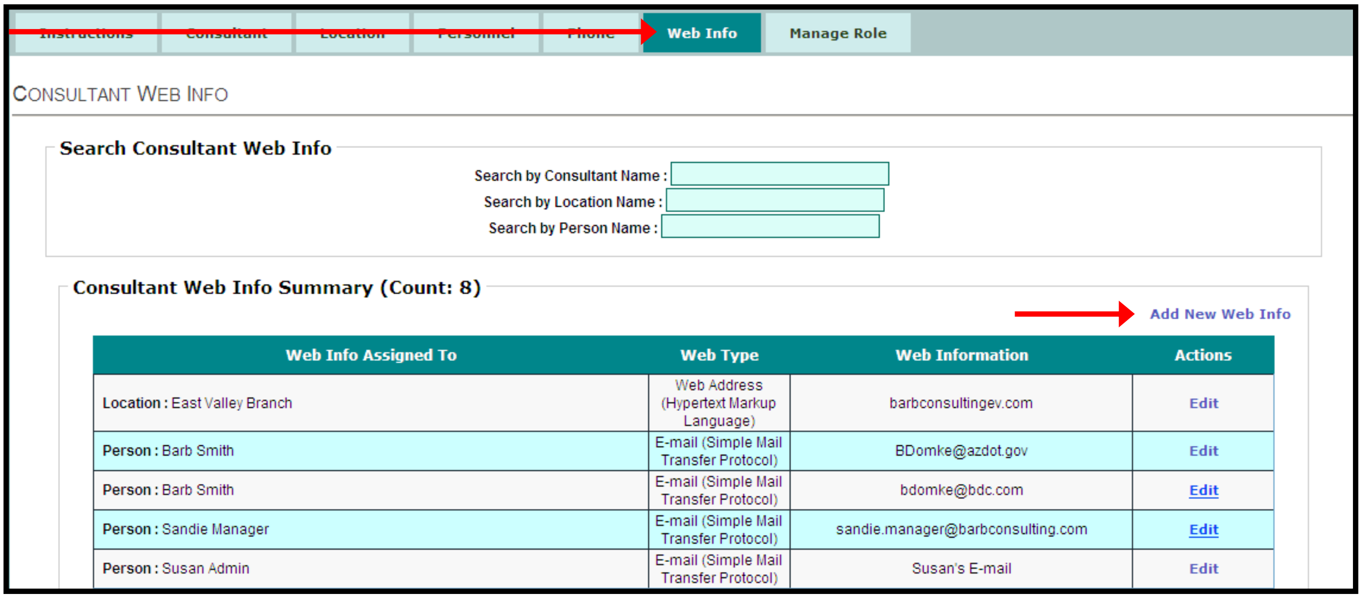


Figure 15 – The Web Info summary page

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

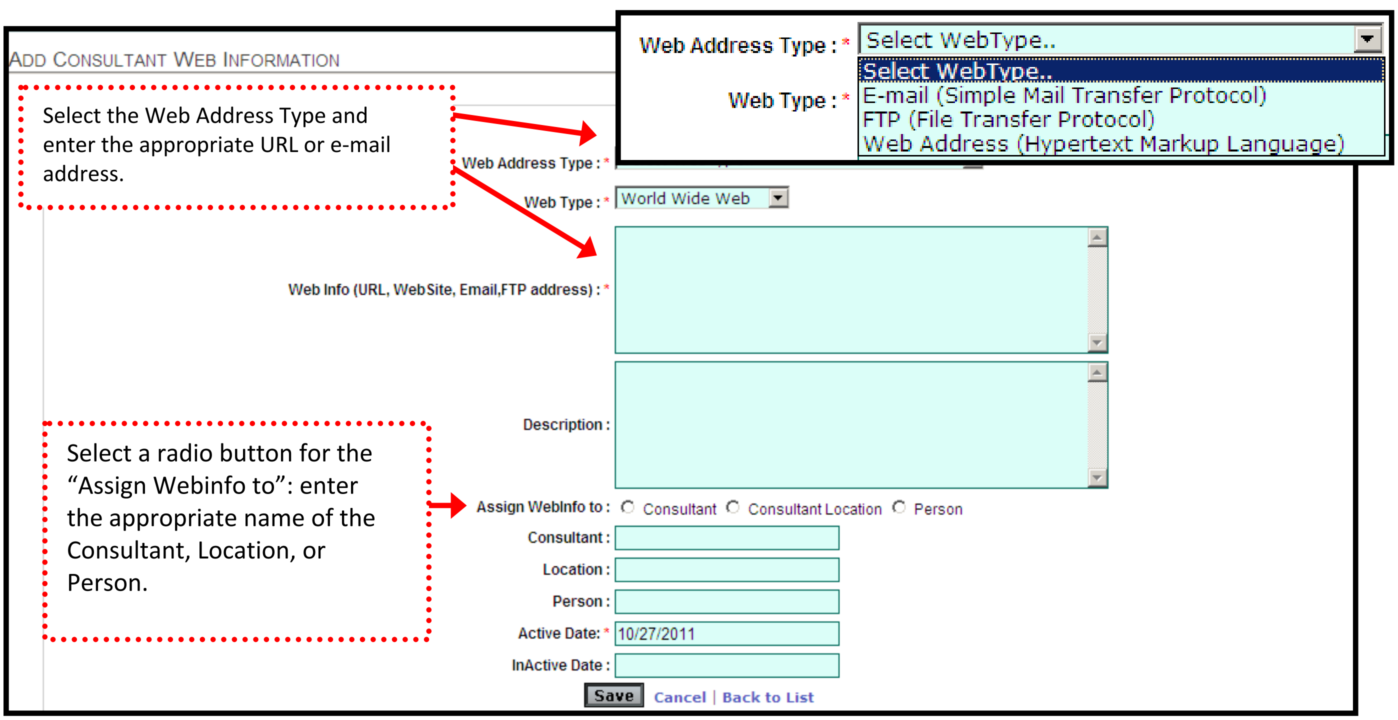


Figure 16 – Add Web Information Form for entering e-mail or web addresses Step 12:

Manage Role –

Search for Employee by name and Manage Permissions

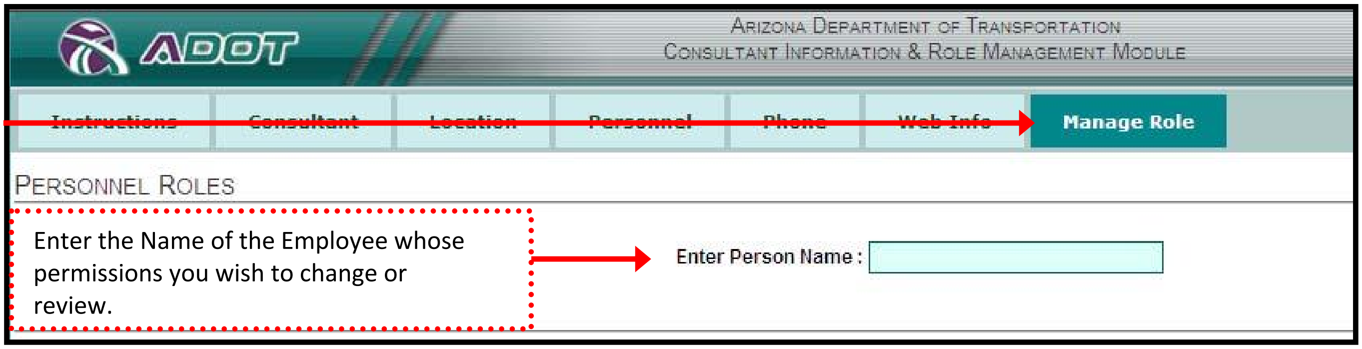
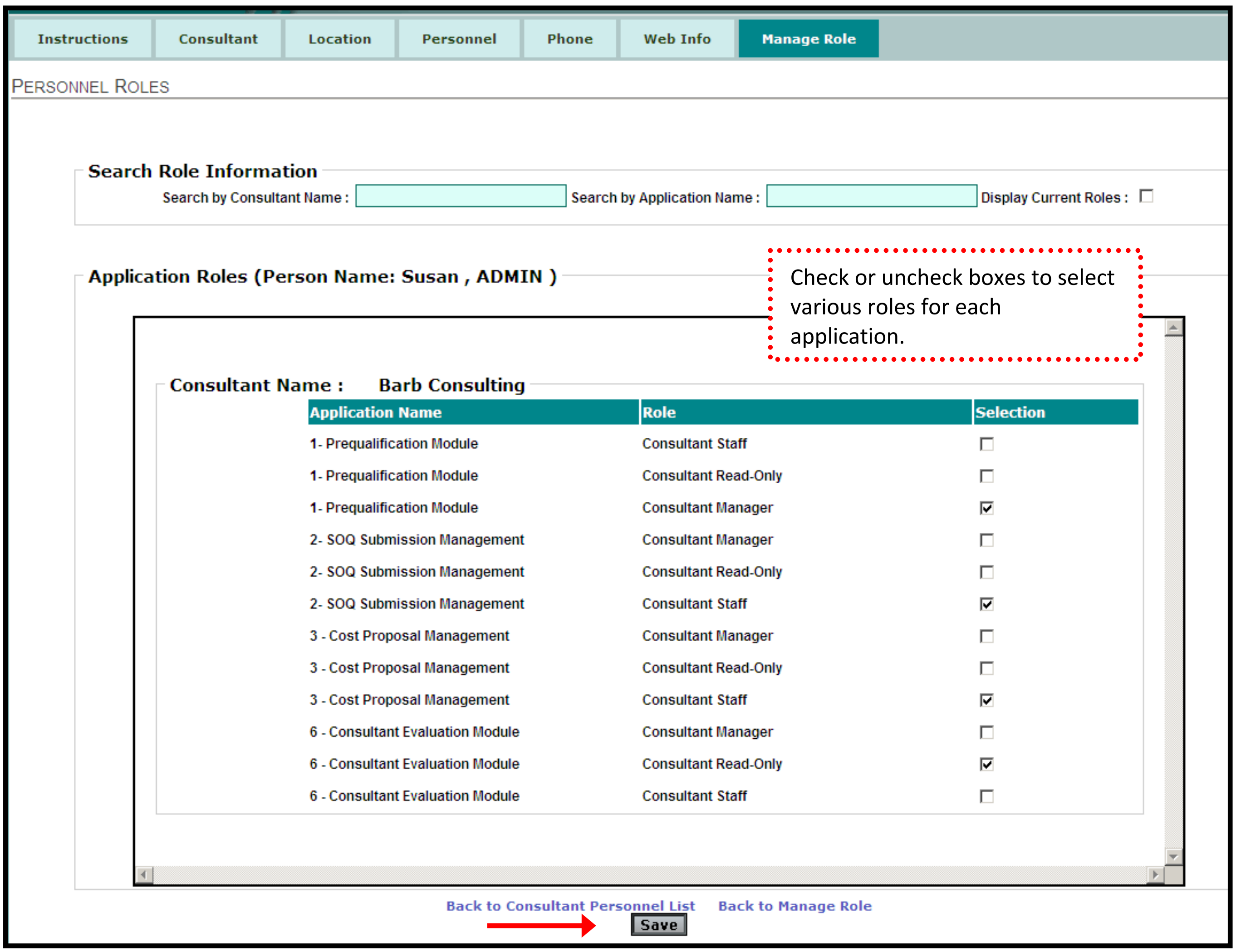


Figure 17 – Manage Personnel Roles

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.



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.