Welcome to the Contractor Performance Assessment Reporting System, or CPARS, Access Authorization Tutorial. This tutorial is designed for CPARS Focal Points and Alternate Focal Points. We will learn how to manage CPARS access by contract including how to authorize a user’s access to a contract, how to remove a user’s access to a contract, and how to clone contract access to save us time. We will also learn how to manage CPARS access by user. We’ll learn how to update a user’s profile, and how to delete a user. In addition, we’ll learn how to transfer a user’s access to another user, how to change a user’s role on a contract, and how to clone a user’s access to quickly duplicate their access for another user. We’ll also learn how to manage CPARS access by user role, including how to remove a user’s access to a contract. We’ll go over how to download a spreadsheet of our users and contracts, then take a look at how to manage user access in the Federal Awardee Performance and Integrity Information System, or FAPIIS. Finally, primary Focal Points will learn how to manage Alternate Focal Points by assigning and removing Alternate Focal Point access.

Here we are at the Home Screen in CPARS. While we are logged in as a primary Focal Point for purposes of demonstration, the information we’re going to cover applies to Alternate Focal Points, too. Let’s click on User Administration. Here we can see our User Administration options. Our options are Manage CPARS Access, Manage FAPIIS Access and Manage Alternate Focal Point(s). Let’s click on Manage CPARS Access. Here we can see the Manage CPARS Access screen. Notice that we have the ability to manage by Contract, User, or User Role.

Let’s start by learning how to manage access by contract. To manage by Contract, we’ll be sure that the Contract radio button is selected. Next, we’ll assign access for a new user to a new contract number. We’ll select, “Add New Contract” in the Contract dropdown. We’ll enter the new contract number and click Confirm. We’ll note that the bottom of the screen says that there were no records found for this contract. If we had already assigned users to this contract, they would have been displayed at the bottom of the screen. Now, we’ll add our new user. We’ll go down to the User dropdown and select “Create New User”. Let’s enter the name and email address for our new user, William Baker. We’ll say that we want to assign William Baker as the Assessing Official Rep, so now we’ll select “Assessing Official Rep” in the User Role dropdown. Note that the Assessing Official Rep role is limited to Government employees. Finally, we’ll click Add Access to User. We’ll note that CPARS has created a user account for William Baker and notified him that he’s been assigned access.

Now, let’s assign access to one of our existing users to one of our existing contracts. We’ll go back up to the Contract dropdown and select our contract from the list. Let’s say that we want to assign our existing user Allen Anderson as the Assessing Official on this contract. We’ll select Allen Anderson from the User dropdown, select Assessing Official in the User Role dropdown, and click Add Access to User.

Now, let’s say that we want to add another existing user to our contract. In this case, we want to add George Edwards as our Contractor Rep. We know that George Edwards has an existing CPARS account because he has commented on evaluations for other Focal Points. However, George is not in our User dropdown list because we’ve never assigned him to any of our contracts before. This is an instance where we can use the Search feature to assign George to our contract. It is important to remember that, whenever we use the Search feature, we must select the User Role first. We’ll select a User Role of Contractor Rep, click the Search button, and enter Edwards, which is George’s last name. We’ll click Search then select George Edwards from the list. We’ll next click Add Access to User to assign the access.

Now, let’s say that we want to add a user to this contract that used the self-register feature. We know that Penelope Quint has used the self-register feature to register for a CPARS account. This is also an instance where we can use the Search feature to locate the account. We’ll remember that, whenever we use the Search feature, we must select the User Role first. We’ll select a User Role of Assessing Official, click the Search button, and enter Quint. We’ll click Search then select Penelope Quints name from the list. We’ll next, click Add Access to User to assign the access. Penelope will receive an email letting her know she has been granted access to the system.

Next, let’s learn how to remove a user from a contract. We’ll start by selecting the contract number from the Contract dropdown. In this case, user Helen Smith is no longer going to be the Reviewing Official on this contract. However, Helen will still be a Reviewing Official on other contracts, so we need to remove her access to just this contract without deleting her account. We can do this by checking the box next to Helen’s name and clicking the remove button. We’ll review the confirmation screen to be sure that we’re removing the correct user from the correct contract and click Confirm. Here is our results screen which shows that we have removed Helen’s access to the contract. Let’s click Return to Manage User Access. Notice that if we needed to remove multiple users from the contract at the same time, we could have checked off several and removed them all at once. If we needed to remove all users on this contract, we could use the All User checkbox to select them all at the same time.

Now, let’s say we have a contract to which we’ve already assigned a number of users. We need to assign that exact same group of users to another contract number. We can use the Clone contract feature to do this quickly and easily. We’ll start by going to the Contract dropdown and selecting the contract whose access we want to clone. We’ll see the list of everyone who has access to our contract displayed. We can use the Clone feature to assign all of the users on our contract to the new contract, or we can select specific users to assign by using the checkboxes. Let’s select All Users. Now we’ll click the Clone button. We must now indicate if we are cloning, or assigning, all of these users to a new contract or an existing contract. When cloning to a new contract, we should select “Add New Contract” from the Clone to Contract dropdown. When we’re cloning to an existing contract, we simply select the existing contract number from the list. In this case, let’s clone to a new contract. We’ll select Add New Contract, enter our contract number, and click Confirm. Here we see the Clone Contract Access Results screen. This screen shows us that each of the users was assigned to the new contract and that each user has been notified that access has been assigned. Let’s say we need to assign this group of users to another contract as well. We can click Clone Again then enter a new contract number or choose an existing contract to clone the access to. We’ll select an existing contract and click Confirm. Now that we have finished cloning our contract, we’ll return to the Manage User Access screen.

Next let’s take a look at how to manage access by user. We’ll get started by selecting the User radio button. Remember that we just created user William Baker. Let’s say that we want to update the phone number in William’s profile. We’ll select William Baker from the User dropdown and click the User Profile button. We’ll enter William’s phone number and click Confirm. Now, let’s say that William Baker is leaving the organization and we need to delete his CPARS account. We can do this by clicking Delete User, we'll click Confirm. In this case, William’s access was deleted and none of his contracts were transferred to another CPARS user.

Now, let’s say that we have a user who is leaving the organization and who does need to transfer their contracts to someone else when they leave. We’ll select the user, Helen Smith, from the User dropdown. Next, we’ll select the contracts that we want to transfer. Since Helen is leaving the organization, we’ll use the All Contracts checkbox to transfer all of her contracts. Now, we'll click Transfer. Next we will choose the user to whom we want to transfer Helen’s contracts. We can either create a New User, select one of our existing users, or use the Search feature to select an existing CPARS user who belongs to another Focal Point or who has self-registered for an account. In this case, we’ll select Create New User and enter the user’s Name and Email Address. We’ll notice that, since we are transferring the Reviewing Official role, CPARS has reminded us that this role may be assigned to a Government employee only.

Next, we must decide whether to delete the account for Helen Smith, the user from whom we are transferring the contracts, once the transfer is complete. Since Helen is leaving the organization, we’ll select ‘Yes’, and click Confirm. Here at the results screen, we can see that our new user, Linda West, was assigned to the contracts and that Helen Smith’s account was deleted. Let’s return to the Manage User Access screen.

Now, let’s say that we have user Allen Anderson who no longer needs access to one of his contracts. Leaving the User button selected we'll select Allen from the User dropdown then check off the contract that he no longer needs. We’ll click the Remove button and click Confirm. Let’s return to the Manage User Access screen. We’ll note, that Allen Anderson’s account is still displayed along with the contracts to which he still has access. This is because we used the Remove button and not the Delete User button. The Remove button removes a user’s access to a specific contract or contracts, while the Delete User button removes a user’s access to all their contracts and deletes their CPARS account entirely.

Now, let’s say that we need to change Allen Anderson from an Assessing Official to a Reviewing Official on two of his contracts. We’ll check off those contracts and click Change Role. We’ll select the New Role of Reviewing Official and click Confirm. The results screen tells us that Allen Anderson has been changed to a Reviewing Official on these two contracts and that he’s been notified of his new access assignment via email. Let’s return to the Manage User Access screen.

Next, let’s take a look at the access for user Simone Sanders. We’ll select Simone from the User dropdown. We can see that Simone is the Assessing Official on four contracts. Let’s say that we need to assign user Tina Marshall as a back-up Assessing Official on Simone’s contracts. We can do this quickly and easily using the Clone user function. We’ll select all of Simone’s contracts using the All Contracts checkbox then click the Clone button. The Clone user feature enables us to assign access to these contracts to a new user or one of our existing users. In addition, we can use the Search feature to assign access to an existing user who belongs to another Focal Point or to a user who has used the self-register feature. In this case, we want to assign access to Tina Marshall, who is one of our existing users. We’ll select Tina from the Clone to User dropdown and click Confirm. Here at the results page, we can see that Tina has been assigned as the Assessing Official on Simone’s four contracts and that Tina has been notified of the access assignment. Let’s return to the Manage User Access screen.

Now, let’s learn how to manage access by user role. We’ll start by selecting the User Role radio button. The User Role dropdown gives us options for Assessing Official Rep, Assessing Official, Contractor Rep, and Reviewing Official. Let’s select Reviewing Official to view a list of all our Reviewing Officials and their contracts. Suppose we need to remove Reviewing Official Linda West from one of her contracts. We’ll check off her name next to the contract we want to remove and click Remove, then Confirm. The results screen tells us that Linda has been removed from the contract. We’ll return to the Manage User Access screen. Let’s say that we would like a spreadsheet which shows all of our Reviewing Officials and their contracts. We can click on the Spreadsheet link. We can also use the spreadsheet function to display a list of all the users for a specific contract or to display the list of all contracts assigned to a specific user.

Now, let’s learn how to manage user access in FAPIIS. Once again, while we're logged in as a primary Focal Point for purposes of demonstration, the information we’re going to cover applies to Alternate Focal Points, too. Let’s click on Manage FAPIIS Access. Let’s say that we need to create a FAPIIS Data Entry account for a new user. We can do this by selecting “Create New User” in the User dropdown. Now, we'll enter the Name and Email Address for the new user. We’ll note that the FAPIIS Data Entry user must be a Government employee. Now, we'll click Add Access to User. FAPIIS has now created a user account for Brandon Banks, our new user, and notified him of his access via email.

Now, let’s say that we need to assign FAPIIS Data Entry access to Tina Marshall. We’ll remember that Tina is one of our existing users who already has access to the CPARS module. Therefore, we’ll use the Search function to locate her account. We’ll click on the Search button, and search for Marshall, which is Tina’s last name. We’ll click on Tina’s name to select her from the list and click Add Access to User. We’ll notice that Tina has received a notification of her FAPIIS access assignment.

Let’s say that we need to change the email address for existing FAPIIS user Rosa Martinez. We’ll select Rosa from the User dropdown and click the User Profile button. The user profile screen in FAPIIS works the same way as it does in CPARS. We’ll make our change and Confirm.

We’ll notice that Rosa has several documents in FAPIIS. Let’s say that Rosa is moving to a different position in the organization. She still needs to retain her FAPIIS account, but she needs to transfer these documents to another FAPIIS user, Tina Marshall. We can do this by checking the All Document box and clicking Transfer. We can transfer Rosa’s documents to a new user or one of our existing FAPIIS users. We can also use the Search button to transfer access to one of our existing CPARS users, to a user who belongs to another Focal Point, or, to a user who has self-registered. In this case, we want to transfer the documents to Tina Marshall, who is one of our existing FAPIIS users. So we’ll select Tina’s name from the Transfer To User dropdown. Next we must indicate whether to delete the account for Rosa Martinez, the user being transferred from, following the transfer. Since Rosa will still be working for our organization and still needs to keep her FAPIIS account, we’ll leave “no” selected and click Confirm. Here on the results screen, we can see that the documents have been transferred to Tina and that she’s been notified of the access assignment. We’ll return to Manage User Access.

Now, let’s say that we have user Allen Anderson, who has access to both CPARS and FAPIIS. While Allen still needs CPARS access, he no longer requires access to FAPIIS. Let’s select Allen from the User dropdown. We want to remove Allen’s FAPIIS access but we don’t want to delete his account. Therefore, we’ll use the Remove Access button. We’ll note that any FAPIIS records that belong to Allen will be labeled as unassigned to a user if we do not transfer them first. While we may not have someone to assign those records to now when we remove Allen’s access, we’ll remember that we can always go back and assign them to another FAPIIS Data Entry user later on. We’ll click Confirm and note that Allen’s access to FAPIIS has been removed.

Now, let’s say that we need to delete FAPIIS user David Tyson’s account entirely. We’ll select David Tyson from the User dropdown. We'll click Delete User, and click Confirm.

If you are an Alternate Focal Point, you’ve just learned everything you need to know about managing user access in CPARS and FAPIIS. Congratulations! You’re all set and can exit the tutorial now. If you’re a primary Focal Point, stay tuned as we learn about managing Alternate Focal Point access.

We’ll select Manage Alternate Focal Point(s). We’ll remember that we can use Alternate Focal Points to assist us in managing CPARS. Our alternates share our contracts and users and can perform all the functions that we can, with the exception of assigning their own alternates. We can see that we do not have any alternates assigned yet.

Let’s say that we need to assign Alternate Focal Point access to someone who does not currently have a CPARS or FAPIIS account. We’ll select Create New User in the User dropdown and enter the user’s Name and Email Address. We’ll note that the Alternate Focal Point must be a Government employee. Next, we'll click the Assign Alternate Focal Point button. We can see that CPARS has created a user account for new Alternate Focal Point Justin Lee and notified him of the access assignment.

Now, let’s say we want to assign one of our existing government users as an alternate. We can select one of our existing users, Stephanie Smith, from the User dropdown and click Assign Alternate Focal Point. We’ll notice that Stephanie was notified that she’s been assigned as our alternate.

Sometimes, there is a user who belongs to another Focal Point that we need to assign as our alternate, as is the case with user Juan Martinez. In that case, we can click on the Search button, search for Juan’s last name, Martinez, then select Juan from the list by clicking on his name. We’ll click Assign Alternate Focal Point to assign Juan as our alternate. We can assign up to five Alternate Focal Points if we choose.

Now, let’s say that we need to edit Alternate Justin Lee’s user profile. We can do this by clicking on his Email Address entering his information, and clicking Confirm. Now, let’s say that Justin will no longer be our Alternate Focal Point and we need to delete his account. We can do this by clicking Delete and Confirm. It’s important to remember that, if the Alternate Focal Point we’re deleting has CPARS or FAPIIS access, too, using the delete function only removes their Alternate Focal Point access. It does not delete their CPARS or FAPIIS access. Therefore, if we need to delete their account entirely, we must be sure to pull up their account from the Manage User Access screen in CPARS or FAPIIS and delete it. Since we are done managing access we can log out but clicking Log Out.

This concludes the CPARS Access Authorization Tutorial. Congratulations on completing the tutorial and thank you for participating!