

NC eProcurement

Setting Access Control

By default, an entity's Contract Workspaces (CW) are visible to all users in that entity, specific State Purchasing representatives, and to all users within other State entities who have access to the Contracts tool. If an entity would like to enact stricter visibility controls of their information from those in the latter group, 'Access Control' can be applied at either the document level or to the entire CW.

I. Access Control

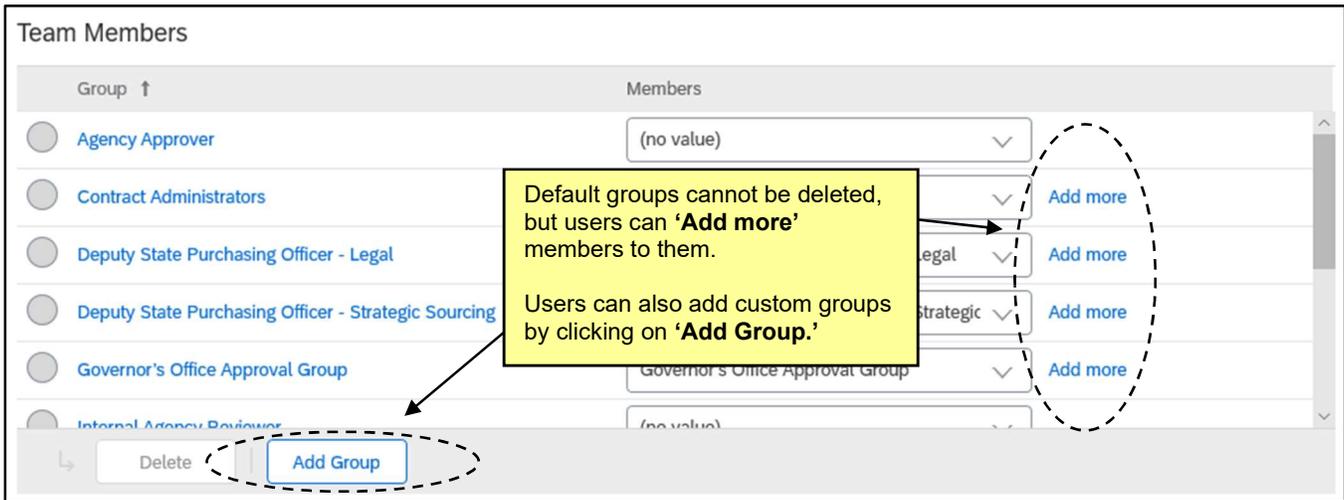
1. Click the drop-down arrow to the right of the document to which the user wishes to apply 'Access Control.' Select 'Edit Attributes' from the drop-down menu beneath 'Action.'
2. On the subsequent screen, scroll down to the 'Access Control' field, then click the drop-down arrow and select 'Search more.'

3. The 'Choose Values for Access Control' menu will appear. The menu has several options, but the suggested selection is the 'Private To Team Members' option. Click that checkbox and click 'Done.'

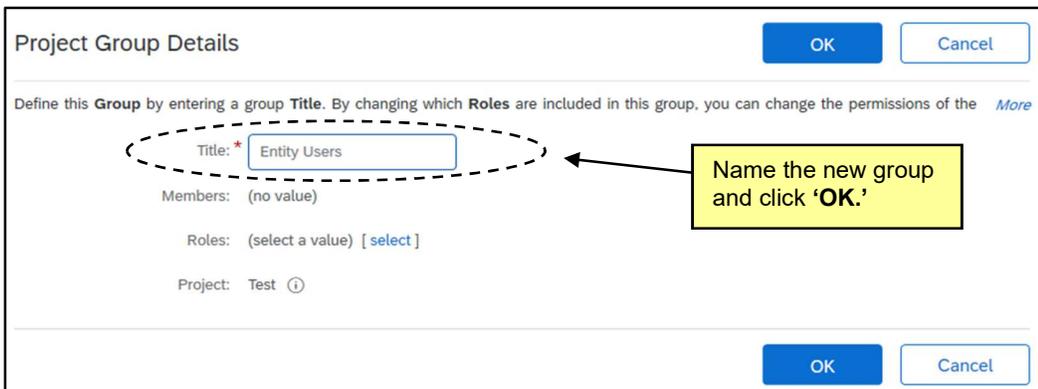
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- Now, only **'Team Members'** will have access to view this document. Navigate to the **'Team'** tab to review who are currently listed as **'Team Members'** and to add others to that list.
- The groups listed on the **'Team'** tab by default cannot be deleted, but other users or groups can be added. It is suggested that users add a new custom group to this tab and add the specific members they feel need access to the document. In particular, a group can be added that will automatically include every user loaded into a specific entity, so if an entity wants to limit access to only P&C and their own entity, this would be the most efficient way.
- Click on **'Actions'** in the top-right of the **'Team'** tab and select **'Edit'** from the drop-down, then click **'Add Group'** on the subsequent **'Team'** screen.



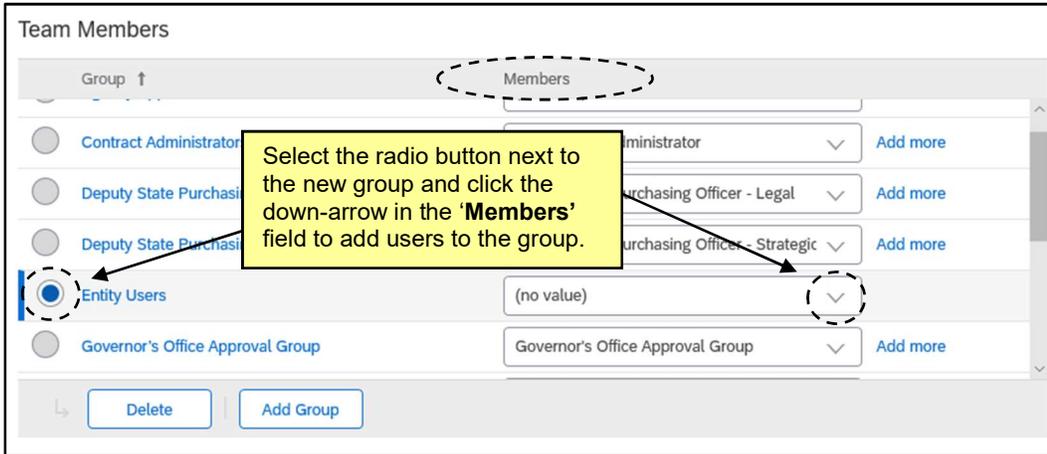
- After selecting **'Add Group,'** the **'Project Group Details'** screen will display. Give the new group a **'Title'** and click **'OK.'**



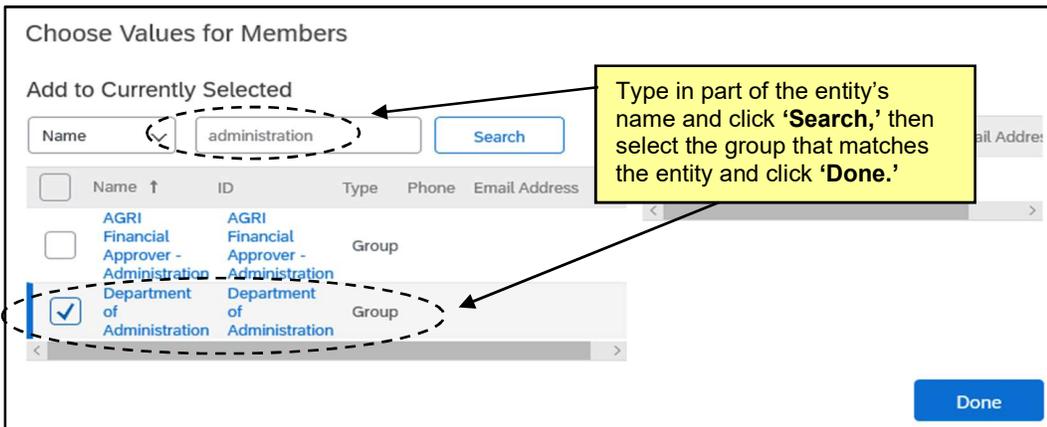
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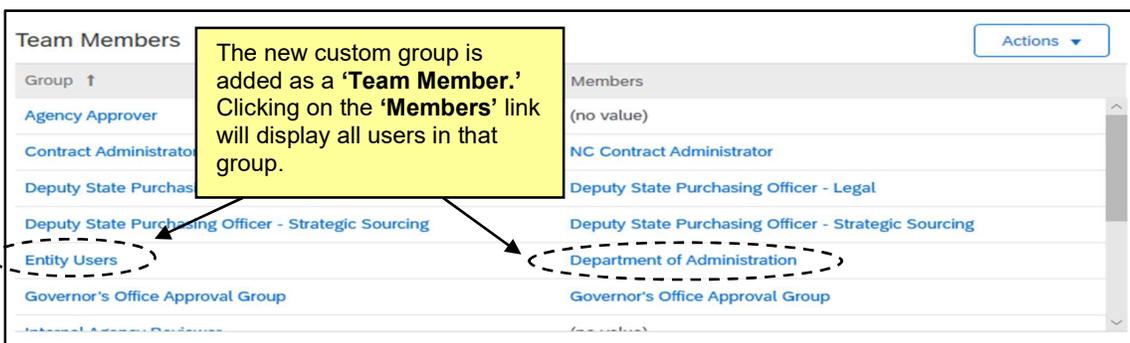
8. Select the radio button next to the new group and click the drop-down arrow in the **'Members'** field, then select **'Search more.'**



9. On the subsequent **'Choose Values for Members'** screen, type in part of the entity's name (for example, "Administration" for the "Department of Administration") and check the box next to the returned entity name to add all users from that entity to the **'Team Members'** for this specific Contract Workspace.



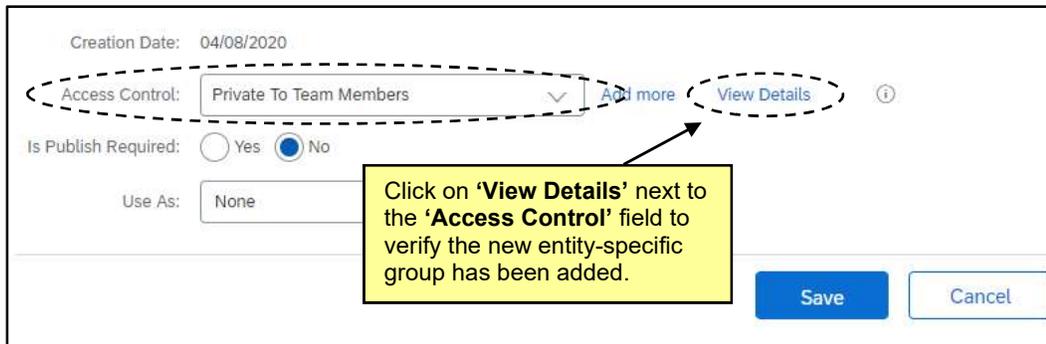
10. **'Team Members'** will now include a custom group that includes all users from the selected entity. Clicking on the link in the **'Members'** field will list all users within that group. Now the **'Access Control'** setting of **'Private To Team Members'** includes all users within the entity.



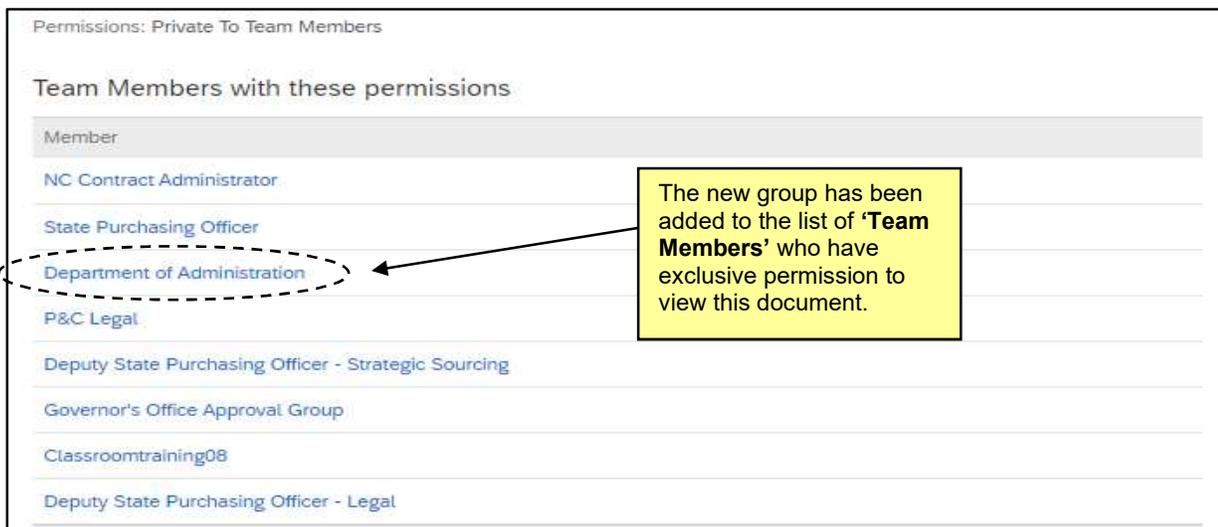
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11. Users can verify the update to the **'Team Members'** was applied correctly by going back to the document and clicking **'Edit Attributes.'** On the subsequent page, click **'View Details'** next to **'Access Control.'**



12. The subsequent **'Access Control details'** page will show the new group added to those who have permission to view the document.



13. To manage **'Access Control'** for the entire Contract Workspace and not just a document, follow the same process, but instead of initiating the actions on the document, click the **'Actions'** drop-down of the **'Overview'** section on the **'Overview'** tab and select **'Edit Overview.'** The **'Access Control'** field for the CW will appear at the bottom of the subsequent screen.

