## 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.'

Version:	v1 (editing)	
Owner:	Classroomtraining08 $\checkmark$ (i)	On the 'Edit Attributes' screen for
Editors:	(none) V	the document, scroll down to the
Last Modified:	04/08/2020	'Access Control' field and click the drop-down arrow to select how
Creation Date:	04/08/2020	to limit the document's visibility.
Access Control:	(no value) V	iew Details (i)
Is Publish Required:	Ves No	
Use As:	None	
		Save
Use As:	None 🗸	Save Cancel

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.'

Add	to Currently Selected		Currently Selected
Name	e Sea	arch	Name 🕇
	Name 1		No items
	Private to Sourcing Users	(	Check the box next
	Private to SSP Users		o 'Private To
	Private to T&E Users		Team Members' and click 'Done.'
	Private To Team Members		
	To view Supplier/Customer reports		
	To view system usage report		
	View Budget Analysis	~	*
<		>	

- 4. 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.
- 5. 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.
- 6. 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.

Team Members						
Group 1	Members					
Agency Approver	(no value)					
Contract Administrators	Default groups cannot be deleted, but users can <b>'Add more'</b>	Add more				
Deputy State Purchasing Officer - Legal	members to them.	egal 🗸 Add more				
Deputy State Purchasing Officer - Strategic Sourcing	Users can also add custom groups by clicking on ' <b>Add Group.</b> '	Strategic 🗸 🖂 Add more				
Governor's Office Approval Group	Governor's Office Approval Group	Add more /				
Internal Adapta Poviawar	(no voluo)	~				
Delete Add Group						

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

Project Group Details		OK Cancel
Define this Group by entering a	group Title. By changing which Roles are included in this gro	up, you can change the permissions of the More
Members:	(no value)	<ul> <li>Name the new group and click 'OK.'</li> </ul>
Roles:	(select a value) [ select ]	
Project:	Test (i)	
		OK Cancel

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

	Group 1	<	Members			
$\bigcirc$	Contract Administrator	Select the radio button	next to	Iministrator 🗸	Add more	
$\bigcirc$	Deputy State Purchasi	the new group and clic down-arrow in the ' <b>Mer</b>		urchasing Officer - Legal 🛛 🗸	Add more	
$\bigcirc$	Deputy State Purchasi	field to add users to the		urchasing Officer - Strategic 🗸	Add more	
	Entity Users		(no value)	(~	)	
	Governor's Office Appro	oval Group	Governor's O	ffice Approval Group	Add 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.

Choo	ose Values for Member	S		
Add t	e Currently Selected	Search	Type in part of the entity's name and click ' <b>Search</b> ,' then select the group that matches	ail Addre:
	Name 1 ID	Type Phone Email Ade	the entity and click <b>'Done.'</b>	
	AGRI AGRI Financial Financial Approver - Approver - Administration Administration	Group		>
	Department Department of of Administration Administration	Group		
~				Done

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.

Team Members	The new custom group is	Actions 👻	
Group 1	added as a 'Team Member.'	Members	
Agency Approver	Clicking on the ' <b>Members</b> ' link	(no value)	$\sim$
Contract Administrator	will display all users in that group.	NC Contract Administrator	
Deputy State Purchas	0 1	Deputy State Purchasing Officer - Legal	
Deputy State Purchase	ng Officer - Strategic Sourcing	Deputy State Purchasing Officer - Strategic Sourcing	
Entity Users	×c	Department of Administration	
Governor's Office App	roval Group	Governor's Office Approval Group	
Jakamal Arran Barra		(manual calcul)	$\sim$

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.'** 

Access Control:	Private To Team N	tembers Add more	/iew Details (i)	β
Access Control.	Frivate to team w	Add more	iew Detaits	21
Publish Required:	🔿 Yes 🌘 No		_	
Use As:	None	Click on 'View Details' next to the 'Access Control' field to		
		verify the new entity-specific		
		group has been added.	Save	Cancel

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

Permissions: Private To Team Members		
Feam Members with these permissions	5	
Member		
NC Contract Administrator	The new group has been	
State Purchasing Officer	added to the list of 'Team Members' who have	
Department of Administration	exclusive permission to	
P&C Legal	view this document.	
Deputy State Purchasing Officer - Strategic Sourcing	2	
Governor's Office Approval Group		
Classroomtraining08		
Deputy State Purchasing Officer - Legal		

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.

Overview Documents	Tasks Team	Message Board Hist Edit Overview View Details Move	Select 'Edit Overview' from the 'Actions' drop-down (not visible) of the 'Overview' section on the 'Overview' tab.
Contract ID:	CW12865	Create	tract Creation ✓ tract Execution ✓
Contract Status: Draft Version: Original Owner: Classroomtraining08 (		Copy Project Follow-on Project	