

# Setting Access Control

## Introduction

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 to the entire CW.



## Learning Objectives

At the end of this job aid, **you will be able to:**



Edit the Access Control field.



Set the Access Control to 'Private to Team Members'.

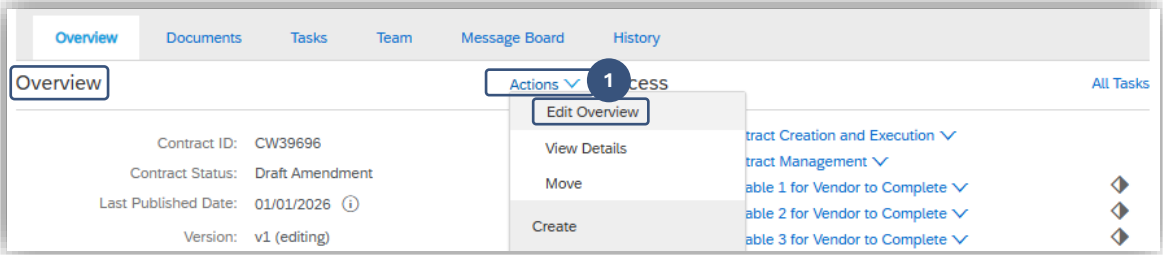


Add a new group to the Team tab.

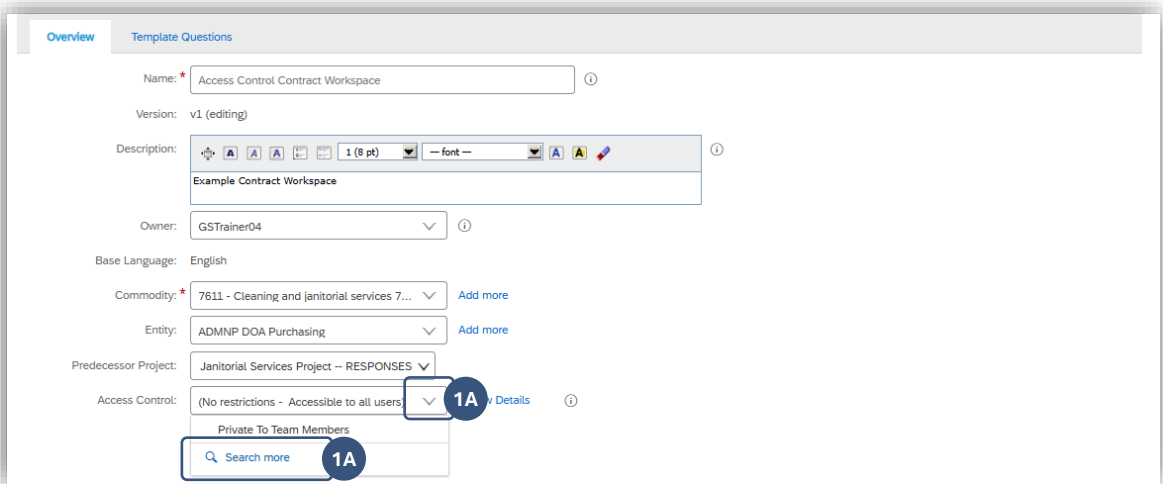
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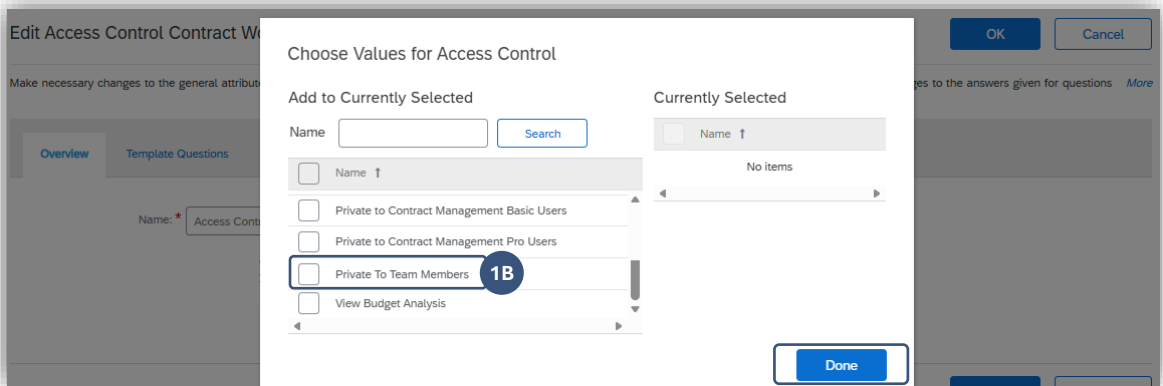
1 Click the **Actions** drop-down of the **Overview** section on the **Overview** tab and select **Edit Overview**.



A. On the subsequent screen, scroll down to the **Access Control** field, then click the drop-down arrow and select **Search more**.



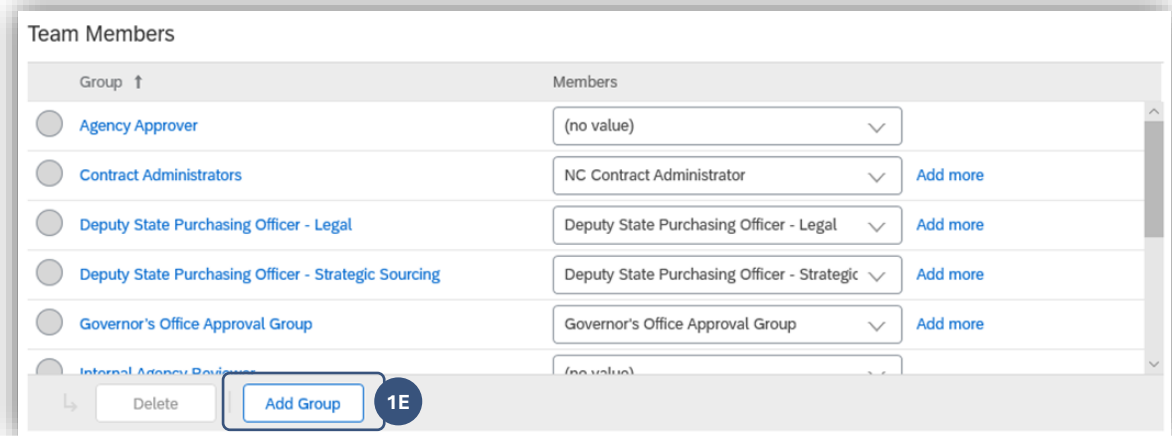
B. The **Choose Values for Access Control** menu will appear. The menu has several options, but the suggested selection is the **Private To Team Members** option. Click that checkbox and click **Done**.



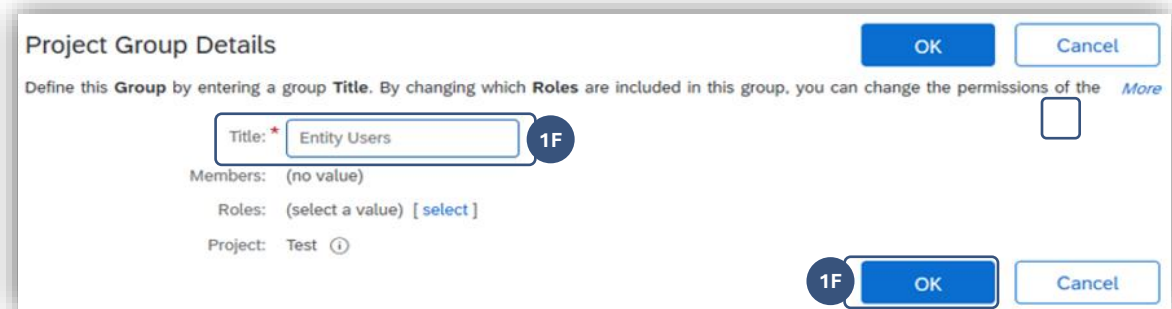
C. Now, only **Team Members** will have access to view this document. Navigate to the **Team** tab to review who is currently listed as **Team Members** and to add others to that list.

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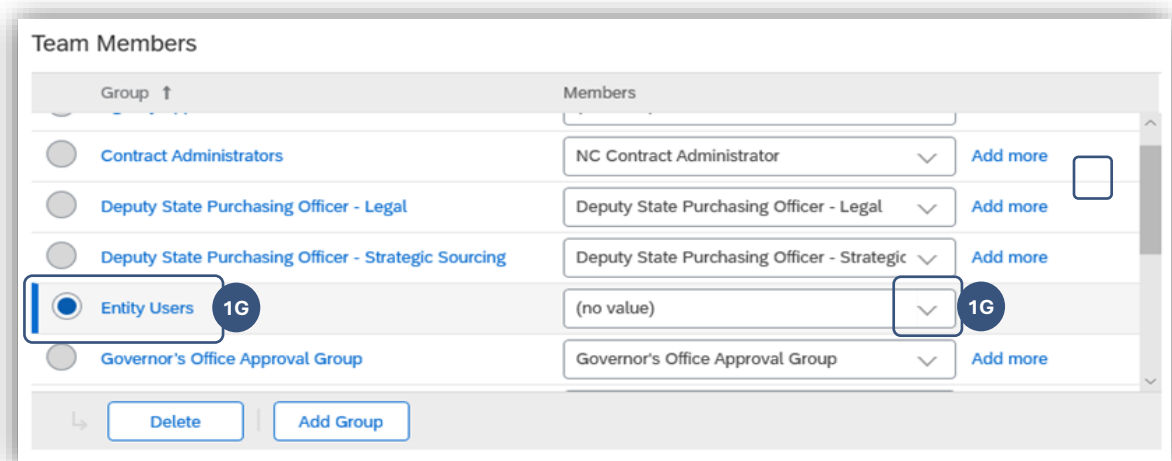
- D. The groups listed on the **Team** tab by default cannot be deleted, but other users or groups can be added. It is suggested that users add a new custom group to this tab and add the specific members they feel need access to the document. In particular, a group can be added that will automatically include every user loaded into a specific entity, so if an entity wants to limit access to only P&C or NCDIT and their own entity, this would be the most efficient way.
- E. 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.



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



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



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H. 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, then click **Done** and **OK**.

The screenshot shows the 'Choose Values for Members' interface. On the left, under 'Add to Currently Selected', there is a search bar with 'administration' entered and a 'Search' button. Below the search bar is a table with columns: Name, ID, Type, Phone, and Email Address. The table lists several groups, with 'Department of Administration' selected (checked box) and circled with a '1H' callout. On the right, under 'Currently Selected', there is a table with columns: Name, ID, Type, Phone, and Email Address. This table is currently empty, showing 'No items'. A 'Done' button is located at the bottom right of the screen.

I. **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.

The screenshot shows the 'Team Members' screen. It features a table with two columns: 'Group' and 'Members'. The 'Entity Users' group is highlighted with a blue border and a '1I' callout. The members of this group are listed as 'Department of Administration'. Other groups listed include 'Agency Approver', 'Contract Administrators', 'Deputy State Purchasing Officer - Legal', 'Deputy State Purchasing Officer - Strategic Sourcing', and 'Governor's Office Approval Group'. An 'Actions' dropdown menu is visible in the top right corner.

Group	Members
Agency Approver	(no value)
Contract Administrators	NC Contract Administrator
Deputy State Purchasing Officer - Legal	Deputy State Purchasing Officer - Legal
Deputy State Purchasing Officer - Strategic Sourcing	Deputy State Purchasing Officer - Strategic Sourcing
Entity Users	Department of Administration
Governor's Office Approval Group	Governor's Office Approval Group