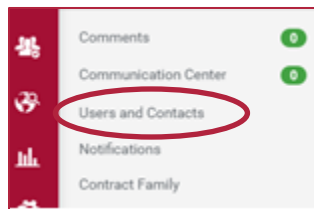


Contract Record Visibility

Contract Managers control access to their contract records, who can update and who can view; and if they can view, what they can see. This guide provides instruction on where and how visibility is controlled. Visibility controls are set on the contract record.

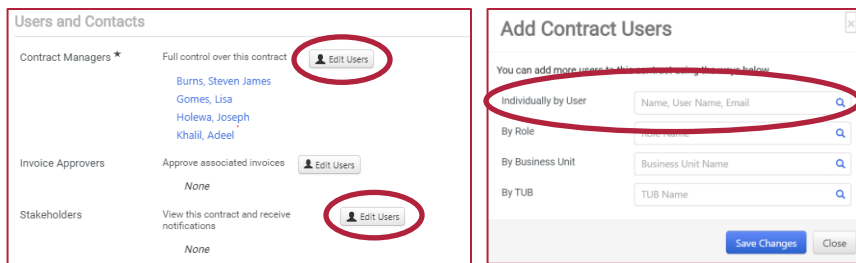
Most of the visibility control settings are found in **Users and Contacts**.



1. To give someone full access to the contract record, including the ability to update, add them as a **Contract Manager**. They must be assigned the b2p-tcm-contractmgr Role to be able to be selected as a Contract Manager. The user who created the contract record is automatically added as a Contract Manager.

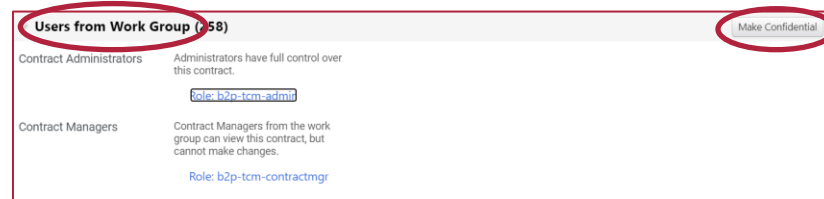
To allow someone to view the entire contract record, add them as a **Stakeholder**. Any B2P user can be selected as a Stakeholder.

To add one or more Contract Managers or Stakeholders, click **Edit Users** and only use the **Individually by User** option; then click **Save Changes**. The use of Invoice Approvers is not currently supported.



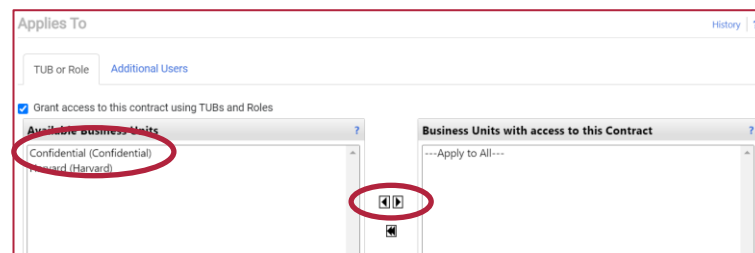
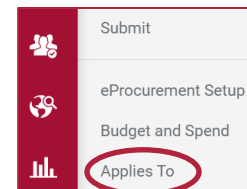
Both Contract Managers and Stakeholders can receive notifications, refer to the **Contract Notifications** Quick Reference Guide for additional information. Other helpful Resources, the **Contract Manager Designation Notice** and the **Stakeholder Designation Notice**.

2. In the **Users from Work Group** section, you can see what other Roles or individual users have access based on the Work Group the contract ties to. Contract Managers that appear in this section are only able to view the Contract Summary, not the full contract record.



3. To limit access to the contract record to just the Contract Managers and Stakeholders entered in step 1, click **Make Confidential** (see above) and Save Changes.

Then navigate to **Applies To**, make sure **Grant access to this contract using TUBs and Roles** is checked. Then select **Confidential (Confidential)**, move it to **Business Units with access to the Contract** (see below), and Save Changes. Doing so will prevent other B2P users from having any visibility to this contract record.



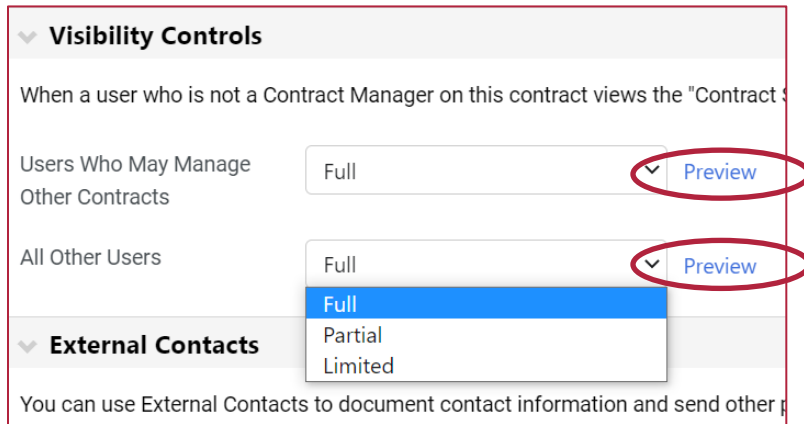
Even if a contract record is made confidential, a few users with select B2P admin Roles may have access to the record in order to support TCM.

Contract Record Visibility

4. If the contract record has not been made confidential; under **Visibility Controls** within **Users and Contracts**, set what B2P users not identified in steps 1 and 2 can view.

Select the appropriate level of view access for other Contract Managers and for all other B2P users. The options are Full (includes access to Attachments that aren't restricted), Partial, or Limited view.

If you're unsure which option is appropriate, select it and click **Preview** to see what those users will see.



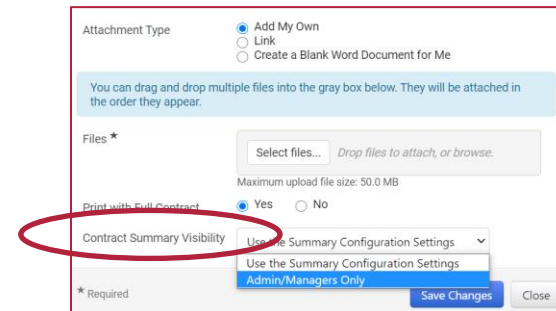
The use of External Contacts is not currently supported.

Other features within TCM that can impact visibility are:

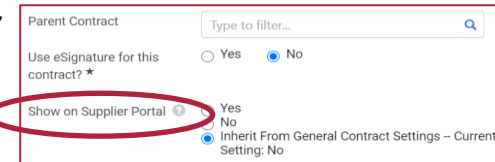
- Visibility within eProcurement/AP. **Active for Shopping** within **eProcurement Setup** is automatically set to Yes when a contract becomes Executed: In Effect; a Contract Manager can change it to No.

If Active for Shopping is set to Yes and the contract record has not been made confidential or access to individual users has been granted via **Additional Users** within **Applies To**, the contract may be linked to a requisition, purchase order, or invoice. Refer to the **How to Link a Contract to a Requisition** Quick Reference Guide for additional information.

- Visibility to a specific document. When uploading a **Main Document** or an **Attachment**, access can be restricted via **Contract Summary Visibility to Admin/Managers Only**; meaning only Contract Managers and Stakeholders listed on the contract record and users with the Admin or Contract Manager Role will have access to the document. Even if other users have Full visibility to the Contract Summary, they won't be able to see the restricted document.



- Visibility within the Supplier Portal. If **Show on Supplier Portal** on the **Header** is set to Yes, the supplier will be able to view some information (e.g. Contract Number, Contract Name, Start and End Dates) about the contract when it is Executed: In Effect. The default is No. If set to Yes, you have the option to let the supplier view a document by setting **Show on Supplier Portal** to Yes when you Add Attachment or Upload Main Document. The default is No.



Show on Supplier Portal ☒ Yes ☐ No