

Sample Contract Management Roles

Note: Contract Guardian allows the creation of unlimited roles, groups and even organizations. A role can be given a series of permissions like add contract, change contract, etc. A group can have one or more roles. A user can be a member of one or more groups. Therefore, a user gains the permissions based on the groups that they are a member. The following are suggestions for your contract management role permissions and names. ***The role descriptions shown below are just examples. You can create an infinite number of roles and associated permission to match your organizations needs and naming conventions.***

1. Administrator

Total contract management system control is typically provided to only a couple of individuals that need to support/control the system. In addition to having the ability to perform every contract related task, this role also provides the ability to maintain supporting information like security, creation of roles, assignment to groups etc. ***This would be the highest level of access.***

2. Contract Manager

The Contract Manager role is recommended for very active contract management users. The Contract Manager role allows the user to view contract files and information the user has been granted permissions to see. Contract Managers can also, add to and edit information within the contract repository, create custom fields, define new contract types, and create new contract items. This includes replacement of contracts and any supporting attachments. This role enables the editing of the metadata associated with a contract, creation of tasks, linking agreements etc. The Contract Manager role can do everything except corporate security. ***This would be for high level users that create/delete/edit contracts.***

3. Contract Author

The Contract Author role allows users to view contract files and information the user has been granted permissions to see, as well as, the ability to “add to” a new contract. A user with the Contract Author role has the ability to add attachments and notes, critical dates and other information related to a contract. Authors can view all associated information related to a Contract. This same role would typically be appropriate for the contract originator, contract reviewer and contract approver. They would not be able to define new contract types, define security, etc. ***This would be the most common level of access for users that actively participate in the contract/document management process.***

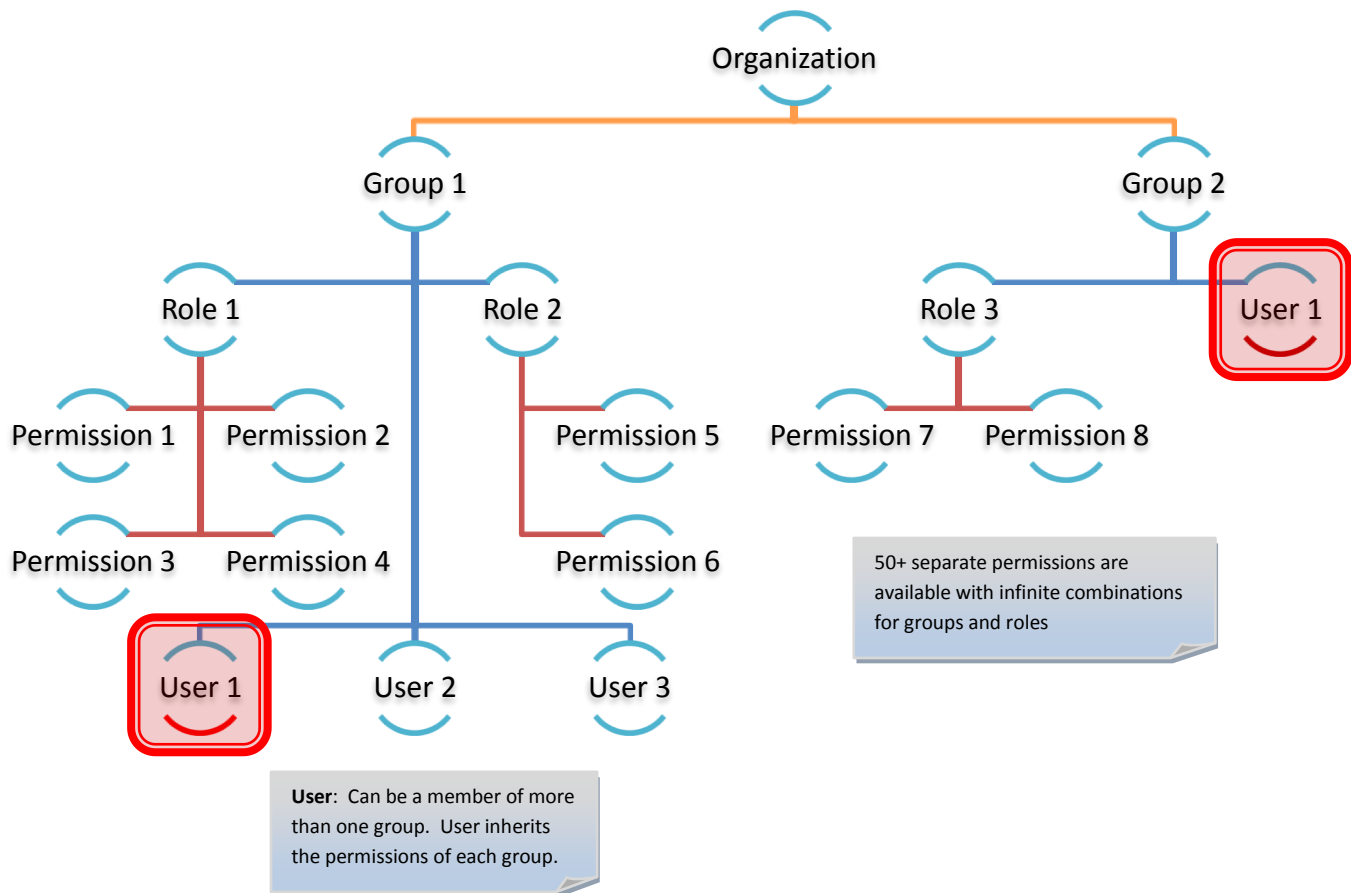
4. Contract Reader

The Contract Reader role includes the permissions to read only access to all information for contracts they are authorized to view. This normally would include the reporting options. ***This role is for the occasional user or a user that you do not wish to have any editing capabilities.***

User Access Audit Reporting

A complete detailing of permissions and access is available directly from the User Profile. In addition, one can perform filters from the Contracts Grid queries and generate Reports to identify the specific documents (contracts).

Contract Management Role Relationship Illustration



User 1 is a member of Group 1 and Group 2. Since a user inherits all of the permissions of group they are a member; User 1 has permissions 1-8.

Users 2 & 3 are members of Group 1 and have permissions 1-6.

Note: Roles can be assigned for a single or multiple organizations. Therefore, you can establish a group that crosses all or some of your organizations and define access/security with one assignment of a user to a group.