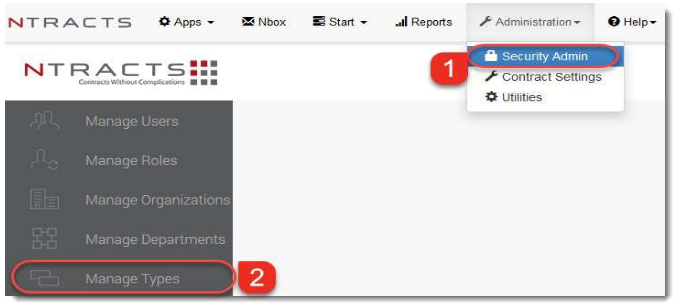
Quick Reference Guide

Administration>Security Admin>Manage Types



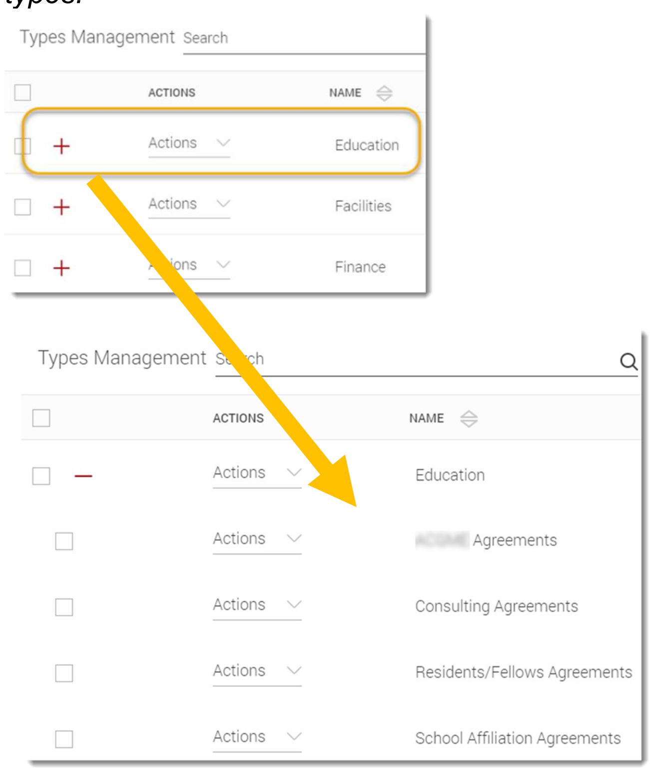
Overview

This guide covers how to:

- Add a new type
- Edit a type's name
- Add a sub type
- View users that have contract access to a type
- Delete a type

<u>Terms defined</u>:
type- a contract category selected in Ntracts used for securing contract records and in turn, granting access to

Note: *In Types Management, a red plus sign signifies there are sub types available for viewing. Click on the plus sign to see the sub types.*



To add a new type:

1. From the **Administration** menu, select **Security Admin**.
2. From the left menu, click **Manage Types.**
3. Click the red **+ADD TYPE** in the upper right.
4. Enter the desired name for the type.
5. In the **Nest Type To**, select a type in the drop down only if you wish to create a parent-child relationship between two types.
6. Click **Save**.

The next step is to add permissions for users and/or security roles to have access to the newly created type. Refer to the ***Manage Users*** or ***Manage Roles Quick Reference Guides*** for assistance.

To edit a type's name:

1. From the **Administration** menu, select **Security Admin**.
2. From the left menu, click **Manage Types.**
3. From the Actions drop down, select **Edit Type**.
4. Edit the **Edit Type** field.
5. Click **Save**.

To add a sub type:

1. From the **Administration** menu, select **Security Admin**.
2. From the left menu, click **Manage Types**.
3. Search for the type you want to add a sub type to.
4. In the Actions drop down, select **Add Sub Type**.
5. Enter the type name.

6. Click **Save**.

The next step is to add permissions for users and/or security roles to have access to the newly created sub type. Refer to the ***Manage Users*** or ***Manage Roles Quick Reference Guides*** for assistance.

To view users that have contract access to a type:

1. From the **Administration** menu, select **Security Admin**.
2. From the left menu, click **Manage Types**.
3. Search for the desired types.
4. From the Actions drop down, select **View Users**. A Users pop-up appears listing the username, email address, full name and how the user received access to that type. You can search for a specific user in the upper left.

To delete a type:

Prior to deleting a type in Ntracts, any contract records assigned to that type would need to be assigned to another type. The system will not allow you to delete a type without doing so.

1. From the **Administration** menu, select **Security Admin**.
2. From the left menu, click **Manage Types**.
3. Search for the type that needs to be deleted.
4. From the Actions drop down, select **Delete Type**.
5. In the pop up, click **Confirm**.

