



Breeze
Lite Bid User Workspace Access
User Guide
Version 1.0
1 July 2019



Business critical documents are at the heart of your success... and so is Qorus.

Overview

In earlier versions of Breeze, Lite Bid users that have been added to a project team do not have access to the project workspace. By extension, they do not have access to the documents within the project unless an allocation, for a specific document has been created for them.

The Lite Bid Workspace Access feature gives Bid Masters and Project Owners the ability to enable or disable access to the workspace of selected projects for Lite Bid users who are project team members.

Once a Lite Bid user had been granted access to a project he/she can see the project primary document in the 'My Documents' tab on the Projects area. The user can navigate to the project workspace and access all documents (project documents as well as supporting documents). Although the Lite Bid user can access the project workspace, access to certain functions are restricted.

*In a future release the Lite Bid users will also be able to access projects from the 'My Projects' tab.



Solution Details

Default Behavior

- After deployment of the feature, Lite Bid users will not have access to projects by default. The Breeze Administrator needs to enable access at a project type level and a Bid Master or Project Owner needs to enable access at a project instance level (both functions are described below).
- Access for Lite Bid users to projects is controlled at a project instance level but the Breeze Administrator can set the default behavior for new projects at a project type level.

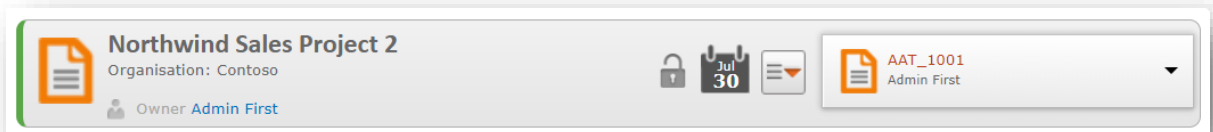
The 'Dynamic Project Types' list contains a 'Lite User Workspace Access' setting. If this setting is blank or 'No' any new project of the corresponding type will not be accessible by Lite Bid users by default. If the setting is 'Yes', by default any new project of the corresponding type will be accessible by Lite Bid users who are team members.

| Title | Lite User Workspace Access |
|------------------------------------|----------------------------|
| Sales Presentation | No |
| RFP Project | Yes |
| Proactive Proposal | |
| Quick Proposal | |

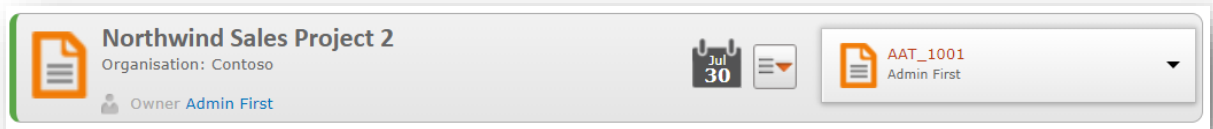
It is important to note that changing the 'Lite User Workspace Access' setting at a Dynamic Project Type level only sets the default behavior for new projects and does not enable or disable access to any existing projects.

Projects

- When a user creates a project, the project's 'Lite User Workspace Access' value will by default be set to the "Lite User Workspace Access" setting of the corresponding project type as configured in the 'Dynamic Project Types' list on the relevant org (sub-site).
- If the 'Sales Presentation' project type 'Lite User Workspace Access' setting is set to 'True', and the user creates a project of the same type, the project will be accessible to all Lite Bid users who are team members. Access for Lite Bid users is denoted with a special icon.



- If the 'Sales Presentation' project type 'Lite User Workspace Access' setting is False, and the user creates such project the project will not be accessible to all Lite Bid users who are team members.



- The Project Owner and any Bid Master can enable or disable access from the project command menu.





Lite Workspace Access - Restrictions

The following table illustrates which functions the Lite Bid user has access to if the Lite Workspace is enabled and the user is a team member of a project.

| Area | Function | Available |
|--------------------|---|-----------------------------------|
| Project Point | Search for Projects | No |
| Dashboard | List documents with allocations assigned | Yes |
| Dashboard | List project primary (starred) document | Yes |
| Project Point Area | Access project workspace from Project Point main page, under "My Projects" | No – included in a future release |
| Project Point Area | Access project workspace from the Project Point main page, under "My Documents" | Yes |
| Project Point Area | View project documents in the Project Point main page, under "My Documents" | Only project primary document |
| Project Point Area | View allocation documents in the Project Point main page, under "My Documents" | Yes |
| Project Workspace | View project documents in the Project Workspace, under "Project Documents" | Yes |
| Project Workspace | Project Documents Tab – Add Folder command | No |
| Project Workspace | Project Documents Tab – Documents menu | Yes, With limited options |
| Project Workspace | Project Documents Tab – Upload Document | Yes |
| Project Workspace | Project Documents Tab – Delete Document | No |
| Project Workspace | Project Documents Tab – Move Document | No |
| Project Workspace | Project Documents Tab – PDF Convert | No |
| Project Workspace | Project Documents Tab – Star Document (set as primary) | No |
| Project Workspace | Project Documents Tab – Create a new Document | Yes |
| Project Workspace | Project Documents Tab – Add Document using Template | No |
| Project Workspace | Tasks Tab – Create Generic Task | No |

The matrix below reflects the functions available to team members (per user role) if Lite Access is enabled on a project.

| Lite Access Enabled | | | | | | | | | | | | | | | |
|---|---------------------------------|-------------|------------|-----------------|----------------|--|-------------------|---------------------|-------------------------|------------|-----------------|----------------|---------------|-------------------|---------------------|
| | Project Team Member | | | | | | | | Not Project Team Member | | | | | | |
| Role | Project Creator | Bid Manager | Bid Master | Content Manager | Content Master | Lite Bid User | Lite Content User | Lite Reporting User | Bid Manager | Bid Master | Content Manager | Content Master | Lite Bid User | Lite Content User | Lite Reporting User |
| Project Point – Search for Projects | Only Bid Managers & Bid Masters | Yes | Yes | No | No | No | No | No | Yes | Yes | No | No | No | No | No |
| Dashboard – list documents with allocations assigned. | ? | Yes | Yes | No | No | Yes | Yes | Yes | No | No | No | No | No | No | No |
| Dashboard – list project primary (starred) documents. | ? | Yes | Yes | No | No | Yes | No | No | Yes | Yes | No | No | No | No | No |
| Access project workspace from Project Point main page, under “My Projects” | Yes | Yes | Yes | No | No | Yes - Only if Lite Bid Enabled on any Project Type | No | No | No | Yes | No | No | No | No | No |
| Access project workspace from the Project Point main page, under “My Documents” | Yes | Yes | Yes | No | No | Yes | No | No | No | Yes | No | No | No | No | No |
| View project documents in the Project Point main page, under “My Documents” | ? | ? | ? | No | No | Only project primary document | No | No | No | No | No | No | No | No | No |



Business critical documents are at the heart of your success... *and so is Qorus.*

| Lite Access Enabled | | | | | | | | | | | | | | | |
|--|---------------------|-----|-----|----|----|-----|-----|-----|-------------------------|-----|----|----|----|----|----|
| | Project Team Member | | | | | | | | Not Project Team Member | | | | | | |
| View allocation documents in the Project Point main page, under "My Documents" | Yes | Yes | Yes | No | No | Yes | Yes | Yes | No | No | No | No | No | No | No |
| View project documents in the Project Workspace, under "Project Documents" | Yes | Yes | Yes | No | No | Yes | No | No | No | Yes | No | No | No | No | No |
| Project Workspace – Project Documents Tab – Add Folder command. | Yes | Yes | Yes | No | No | No | No | No | No | Yes | No | No | No | No | No |



Business critical documents are at the heart of your success... *and so is Qorus.*

| Lite Access Enabled | | | | | | | | | | | | | | | |
|---|---------------------|-------------|------------|-----------------|----------------|---------------------------|-------------------|---------------------|-------------------------|------------|-----------------|----------------|---------------|-------------------|---------------------|
| | Project Team Member | | | | | | | | Not Project Team Member | | | | | | |
| Role | Project Creator | Bid Manager | Bid Master | Content Manager | Content Master | Lite Bid User | Lite Content User | Lite Reporting User | Bid Manager | Bid Master | Content Manager | Content Master | Lite Bid User | Lite Content User | Lite Reporting User |
| Project Workspace – Project Documents Tab – Documents menu. | Yes | Yes | Yes | No | No | Yes, With limited options | No | No | No | No | No | No | No | No | No |
| Project Workspace – Project Documents Tab – Upload Document | Yes | Yes | Yes | No | No | Yes | No | No | No | Yes | No | No | No | No | No |
| Project Workspace – Project Documents Tab – Delete Document | Yes | Yes | Yes | No | No | No | No | No | No | Yes | No | No | No | No | No |
| Project Workspace – Project Documents Tab – Move Document | Yes | Yes | Yes | No | No | No | No | No | No | Yes | No | No | No | No | No |
| Project Workspace – Project Documents Tab – PDF Convert. | Yes | Yes | Yes | No | No | No | No | No | No | No | No | No | No | No | No |
| Project Workspace – Project Documents Tab – Star Document. | Yes | Yes | Yes | No | No | No | No | No | No | No | No | No | No | No | No |
| Project Workspace – Project Documents Tab – Create a new Document. | Yes | Yes | Yes | No | No | Yes | No | No | No | No | No | No | No | No | No |
| Project Workspace – Project Documents Tab – Add Document using Template | Yes | Yes | Yes | No | No | No | No | No | No | No | No | No | No | No | No |



Business critical documents are at the heart of your success... *and so is Qorus.*

| | | | | | | | | | | | | | | | |
|---|-----|-----|-----|----|----|----|----|----|----|----|----|----|----|----|----|
| Project Workspace – Tasks Tab – Create Generic Task | Yes | Yes | Yes | No | No | No | No | No | No | No | No | No | No | No | No |
|---|-----|-----|-----|----|----|----|----|----|----|----|----|----|----|----|----|



Business critical documents are at the heart of your success... *and so is Qorus.*

| Lite Access Enabled | | | | | | | | | | | | | | | |
|--|---------------------|-----|-----|--|--|---------------------------|----|----|-------------------------|----|----|----|----|----|----|
| | Project Team Member | | | | | | | | Not Project Team Member | | | | | | |
| Project Workspace – Tasks Tab – Edit Task | Yes | Yes | Yes | Yes (Own Task Only) | Yes (Own Task Only) | Yes | No | No | No | No | No | No | No | No | No |
| Project Workspace – Supporting Docs – Add Doc | Yes | Yes | Yes | No | No | Yes | No | No | No | No | No | No | No | No | No |
| Project Workspace – Supporting Docs – Document menu | Yes | Yes | Yes | No | No | Yes, with Limited Options | No | No | No | No | No | No | No | No | No |
| Project Workspace – Project Carts Tab | Yes | Yes | Yes | No | No | No | No | No | No | No | No | No | No | No | No |
| Project Workspace – Team Members Tab – Add/Delete Team Members | Yes | Yes | Yes | No | No | No | No | No | No | No | No | No | No | No | No |
| Project Workspace – Team Members Tab – Create/Save/Open teams. | Yes | Yes | Yes | No | No | No | No | No | No | No | No | No | No | No | No |
| Project Workspace – Project Action Menu | Yes | Yes | Yes | No | No | Yes, with Limited Options | No | No | No | No | No | No | No | No | No |
| Project Workspace – Project Documents – Preview Document – Commands on Preview window. | Yes | Yes | Yes | Yes (From allocation task and limited content) | Yes (From allocation task and limited content) | No | No | No | No | No | No | No | No | No | No |

Other

- If a project 'Lite Access' is disabled, the Lite Bid User does not have any access to the workspace. In such case, if an allocation is assigned the user will only gain access to the specific document.
- The Lite Workspace Access feature does impact custom tabs. If a project custom tab is configured to be visible to Lite Bid users, they will be visible to Lite Bid Users who have access to the project workspace.
- Currently, project types may be set to allow Lite Bid users to create projects (of a certain type). The Lite Workspace Access feature does not alter this functionality. If a Lite Bid user created a project, he/she will see all the menus because of being the project creator.
- If a Lite Bid user is a project owner, the rights of a project owner apply and not the limitations imposed by this feature.
- Lite Bid users cannot search for projects. This will be resolved in a future release.