This document is intended to provide guidance in how to control access to CCInvoice in a Post-FRS world. As has now become common knowledge, the FRS system is being replaced by PeopleSoft Financials.

With this change, the existing FRS access rules either vanish or become irrelevant.

The CCInvoice system used to rely on the FRS access rules to determine who could see which invoices. Changes were made so that access is now controlled by the Primary Billing Contact for each account.

In general, a Primary Billing Contact may see all invoices associated with all those accounts for which they are the Primary Billing Contact. Moreover, they can Grant and Revoke access to any of those accounts for as many or as few persons as they wish.

Anyone wanting to see invoices for an account must go to the Primary Billing Contact of that account and request access. It is up to the Primary Billing Contact to grant that access, or not. This document does not proscribe the mechanism by which that request is made, nor does it dictate the process by which the Grant decision is made. Further, the Primary Billing Contact may at any time decide to revoke access granted earlier. Accordingly, this document does not proscribe how that decision process shall be made.

However, once the decision has been made to grant or revoke access, this document will guide the Primary Billing Contact through the steps associated with granting or revoking access.

**Step 1 – Log Into CCInvoice**
The Primary Billing Contact should log into the CCInvoice system as they would normally do during their regular checking of invoices. The URL is:

https://itsapps.unc.edu/CCInvoice/userLogin.jsp

This URL will be provided within the email sent during the normal monthly billing emails.

**Step 2 – Select Month to View**
When one first enters CCInvoice, one is presented with an opportunity to change one’s contact information. This choice remains. So, pick a month (or several months) and click Submit.

A page will be returned containing invoices from the month(s) selected. These invoices are those associated with the accounts to which the Primary Billing Contact is assigned.
Step 3 – Click Manage Access
The Primary Billing Contact will be provided a section at the bottom of the result screen from which they may grant or revoke access. That portion of the page looks like the following:

You are designated as the billing contact for one or more accounts. As such, you may allow other persons to see some, or all, of these invoices. To grant a person access to all of the invoices for an account, you must know the PID of the person to whom you wish to grant access.

To access the access control functions, click the “Manage Access” button.

Step 4 – Grant or Remove Access
Once at the access control page, all accounts for which one is Primary Billing Contact are displayed with associated options to Grant/Add access or Revoke/Delete access. The page looks similar to the following:

If one wished to grant access to PID 720031344 so that they could see invoices associated with Account #11, type that PID into the field to the left of the “Add PID” button so that it looks like:
Then click the “Add PID” button. Access will be granted to that PID and the page will be returned with that PID appearing in the list of PIDs from which one may choose to revoke/delete access. The returned page looks like:

Of course, as described, one may choose to revoke access. To revoke/delete access, select the PID(s) one wishes to remove. The selection will look much like the following:

Then click the “Delete PIDs” button. The PID(s) will be denied access to that account and the page will be re-displayed showing the revised list of PIDs granted access. The list will look similar to the following:
It is important to note that the “Delete PIDs” button is gray and inactive when there are no PIDs associated with the account. So, one should expect to see that when the Primary Billing Contact has not granted access to anyone.

**Step Last – Logout**

When you are complete with your work, click the “Logout” button so that the CCInvoice application will no longer be available to anyone else gaining access to your computer.