## Controlling Access to aACE Modules with User Groups

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This guide explains how to update the modules that a user group can access. It is intended for system administrators.

System administrators control user access to aACE modules at the group level.

aACE uses a security model where team members are assigned to groups and those <u>groups</u> <u>are granted privileges (https://aace6.knowledgeowl.com/help/overview-of-user-groups)</u>. You can control access to each module, then also fine-tune the editing privileges on each module (e.g. granting ability to view and print records, but restricting the ability to add or delete records). You can also control the visibility of records across offices.

Note: Changes you make to group access and privileges take effect *after* users log out of aACE and log back in.

## **Controlling Access**

- 1. Navigate from Main Menu > System Admin > User Groups.
- 2. Select the group you want to update and at the details view click **Edit**.
- 3. At the **Menu Option Access** section, mark the flags for modules this user group *can* access.
- 4. In the Access Privileges section, customize the privileges for the group:
  - Add new modules Click the Search ( ) icon to display the Modules Selector.
     Search or browse the module list, then click the desired modules to move them to the Selected Modules. Click Save.

Module Name	Abb	r	Data Type	Status	
				ACTIVE	
dules		/	Selected Modules		
Name	Abbr	1	Name		
aACE Report Preferences	RPTPREF	( <u>^</u>	Campaigns		
Accounting Preferences	ACCTPREF		Commission Statement I	ítems	
Activities	ACT		Commission Statements		
Bank Reconciliation	BANK				
Bank Statement Items	BANKLI				
Calendar Events	CALEVNT				
Check Register	CR				
Companies	СОМ				
Company Addresses	COMADDR				
Company Linked Companies	COMCOM				
Company Linked Contacts	COMCON				
Company Payment Accounts	COMPAY				
Contact Types	CONTYPE				
Contacts	CON				
Customer Sales History	SALES	~			

• Update privileges on current modules – On the Access Privileges listing, mark flags to specify what actions this user group *can* take.

Module Name	Access Privileges				+	-	ж	
Orders (ORD)					+	-	×	^
Admin	New	Can Edit Open Orders with Revisions	Can View Margin	Order Oversight				
Advanced Sort	Print	Can Open Orders	Can View Profit Reports	Production Orders				
Delete	Search	Can Switch Lists	Can Void Orders	Progress Billing				
Edit	View	Can View All Orders	Management	Sales				
Export	Can Edit Open Orders	Can View Cost Reports	Operations					
Order Procureme	ent (ORDPROC)				+	-	х	
Admin	New							
Advanced Sort	Print							
Export								
Postal Codes (P	OSTCODE)				+	-	ж	
Admin	New							
Advanced Sort	Print							
Delete	Search							
Edit	View							
Export								
	Orders (ORD) Admin Advanced Sort Edit Edit Advanced Sort Admin Advanced Sort Edit Export Order Procureme Admin Advanced Sort Edit Export Postal Codes (P Advanced Sort Delete Edit Edit Edit Edit Edit Edit Edit Edit	Orders (ORD)         _Admin       _New         _Advanced Sort       _Print         _Delete       _Search         _Edit       _View         _Export       Can Edit Open Orders         Order Procurement (ORDPROC)       _Admin         _Advanced Sort       _Print         _Delete       _Search         _Edit       _View         Postal Codes (POSTCODE)         _Admin       _New         _Advanced Sort       _Print         _Delete       _Search         _Edit       _View	Orders (ORD)         _Admin       _New         _Advanced Sort       _Print         _Delete       _Search         _Edit       _View         _Edit       _View         _Export       Can Edit Open Orders         Can Switch Lists         _Edit       _View         _Admin       _New         _Advanced Sort       _Print         _Delete       _Search         _Edit       _View         _Admin       _New         _Advanced Sort       _Print         _Delete       _Search         _Export       Export	Orders (ORD)         _Admin       _New         _Advanced Sort       _Print         _Delete       _Search         _Edit       _View         _Edit       _View         _Can Edit Open Orders       Can View Margin         _Advanced Sort       _Print         _Delete       _Search         _Edit       _View         _Export       Can Edit Open Orders         Can Edit Open Orders       Can View All Orders         _Admin       _New         _Advanced Sort       _Print         _Delete       _Search         _Edit       _View	Orders (ORD)         _Admin       _New         _Advanced Sort       Print         _Advanced Sort       Print         _Belete       _Search         _Edit       _View         _Can View All Orders       Operations         Order Procurement (ORDPROC)         _Advanced Sort       Print         _Delete       _Search         _Bitt       _View         _Admin       _New         _Advanced Sort       Print         _Delete       _Search         _Admin       _New         _Admin       _New         _Advanced Sort       Print         _Delete       _Search         _Export       Canset	Orders (ORD)       +         _Admin       _New       Can Edit Open Orders with Revisions       Can View Margin       Order Oversight         _Advanced Sort       _Print       Can Open Orders       Can View Profit Reports       Production Orders         _Delete       _Search       Can Switch Lists       Can Void Orders       Progress Billing         _Edit       _View       Can View All Orders       Operations       Progress Billing         _Export       Can Edit Open Orders       Can View Cost Reports       Operations       +         _Admin       _New       _Admin Operations       +       +         _Admin       _New	Orders (ORD)       +       -         _Admin       _New       Can Edit Open Orders with Revisions       Can View Margin       Order Oversight         _Advanced Sort       _Print       Can Open Orders       Can View Profit Reports       Production Orders         _Delete       _Search       Can Switch Lists       Can View All Orders       Progress Billing       -         _Edit       _View       Can View All Orders       Operations       -       -         Order Procurement (ORDPROC)	Orders (ORD)       + - *         _Admin       _New       Can Edit Open Orders with Revisions       Can View Margin       Order Oversight         _Advanced Sort       _Print       Can Open Orders       Can View Profit Reports       Production Orders         _Delete       _Search       Can View All Orders       Progress Billing       - *         _Edit       _View       Can View All Orders       Operations       - *         Order Procurement (ORDPROC)       + - *       + - *         _Admin       _New       _AdminNew       _Advanced Sort       _Print         _Delete       _Search       _Search       _       *         _Addmin       _New       _       _       *       - *         _Addmin       _New       _       _       _       *       - *         _Addmin       _New       _       _       _       *       - *         _Addmin       _New       _       _       *       - *       *        Addmin       _New       _       _       *       - *       *        Advanced Sort       _Print       _       _       *       - *       *        Advanced Sort       _Print <td< td=""></td<>

5. Click Save.

## **Related Team Member Settings**

Settings on a user's <u>team member record</u> (https://aace6.knowledgeowl.com/help/understanding-record-access-privileges-inuser-groups-and-team-member-settings) can refine settings on the user group record. At the User Group module, click the Go-to arrow (>) beside the team member's name. At the team member record, click the Human Resources tab, click Edit, then mark the desired Record Access preferences.

## **Granting Access for New Team Members**

If you are setting up a new team member, be sure to provide them with the required resources for <u>accessing aACE on their computer (http://aace6.knowledgeowl.com/help/accessing-aace-on-your-computer</u>).