Understanding Record Access Privileges in User Groups and Team Member Settings

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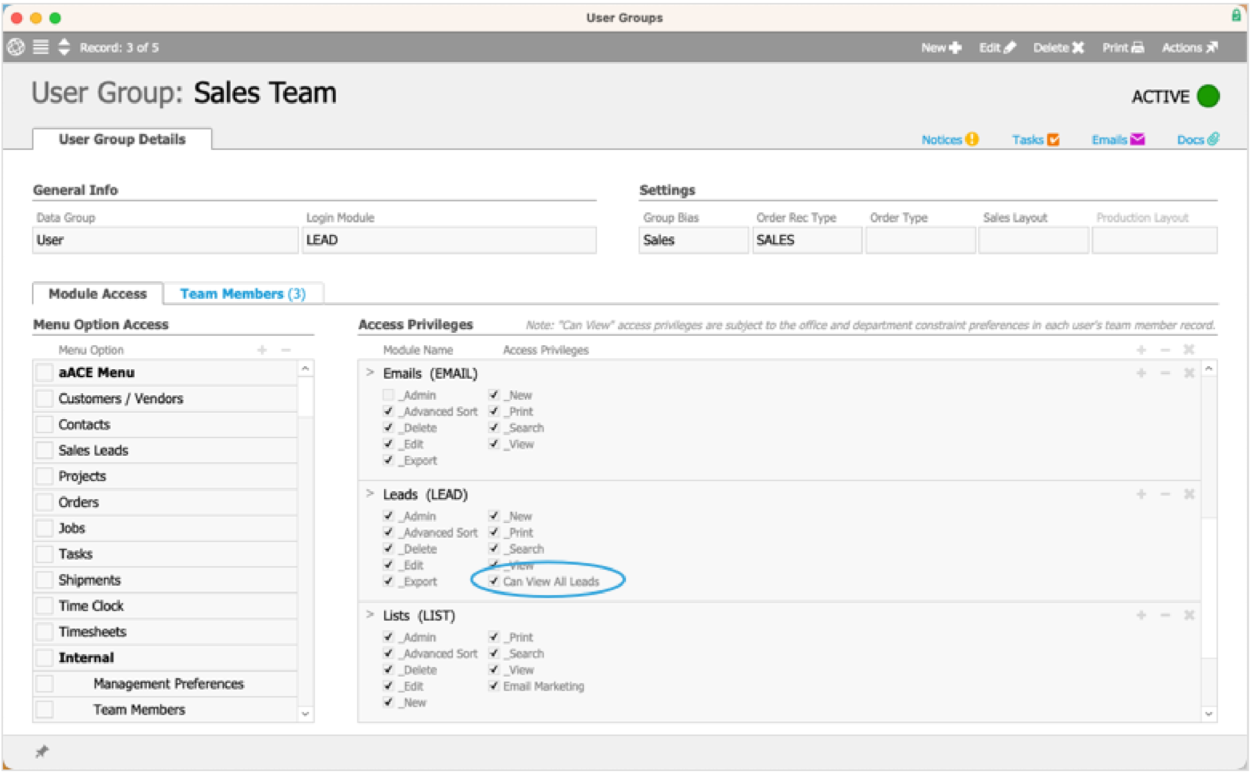
This guide explains how to configure the records that team members have access to. It is intended for system administrators.

Records in aACE are linked to specific offices, departments, and team members. The records that users can view are controlled by settings in their assigned user group as well as their individual team member record. If the correct access privileges and preferences are not flagged, a team member might not be able to view certain records.

User Group Settings

To configure settings that apply to all users in a particular group, navigate from Main Menu > System Admin > User Groups, then display the detail view of the desired user group (https://aace6.knowledgeowl.com/help/overview-of-user-groups#AccessPrivileges).

In the Access Privileges section, scroll to the needed module (e.g. Leads). The 'Can View All <records>' flag enables team members to view all records in that particular module, including records assigned to other team members.



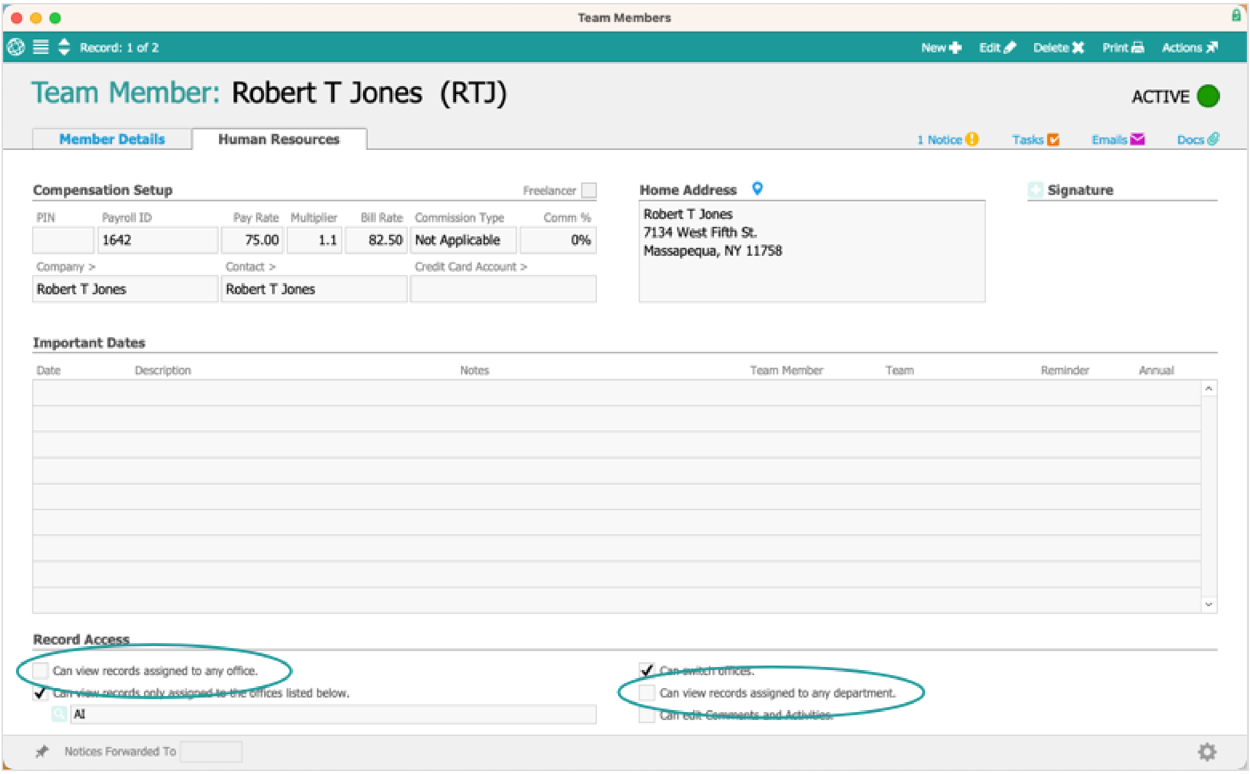
This setting is available in the documents, invoices, jobs, leads, orders, projects, purchase orders, purchases, shipments, and tasks modules. As an example of configuring this feature, you could use this module-specific setting to give your Sales Team access to all leads, but prevent them from accessing any A/P or A/R records.

Team Member Records

Additional access privileges are provided in each user's team member record. Navigate from Main Menu > Internal > Team Members, then locate the user and click the Human Resources tab. (Note: You can also view team member records from the User Group module by clicking a specific user group's Team Members tab.)

In the Record Access section, there are two main access settings:

- Can view records assigned to any office — Enables team members to view records in any office
- Can view records assigned to any department — Enables team members to view records in any department (as constrained by the view-offices settings)



Combining Access Privileges

These three access privileges can be configured so team members can view various records. (Note: This chart assumes that the Can View All <records> flag is marked for all modules.)

View All Offices	View All Depts	View All <records>	Results for a Team Member in the User Group
Y	Y	Y	Can view all records
N	Y	Y	Can view all records for all departments in the assigned office
Y or N	N	Y	Can view all records assigned to their specific department
Y or N	Y	N	Can view records assigned to themselves in all departments
Y or N	N	N	Can only view records assigned to themselves in their own office and department

The records that initially display in a module's list view are usually those assigned to the current team member. Other records can be viewed by using the [Quick Search bar](https://aace6.knowledgeowl.com/help/using-the-quick-search-bar) (https://aace6.knowledgeowl.com/help/using-the-quick-search-bar), the Quick Search links in the footer, or other search features.

Department Assignments for Records

Each transaction record is assigned directly to a department when it is created. This assignment is usually based on the current department of the team member who creates the record (i.e. records created by team members in the Sales Department are identified as Sales Department records). This record-level department assignment can affect which team members can view the record.

For example, suppose a team member in the Sales Department does *not* have the preference marked for 'Can view all departments'. When this team member creates an order, they would be identified as the Assigned By team member on the record. The record itself would also be assigned to the Sales Department. Suppose that this team member was then transferred to the Fulfillment Department. They would no longer be able to view the order record they had created.

Examples of Transaction Record Access

Suppose a fictional company has two offices, East and West. Each office has two departments to manage the warehouse, Shipping and Receiving. Each department includes multiple employees. A company personnel chart might look like this:

East Office				West Office			
Shipping Dept		Receiving Dept		Shipping Dept		Receiving Dept	
Allen, Alex	Allie	Bob	Beth	Carl, Colin	Carla	Dan	Daisy

These employees each belong to the Warehouse Staff user group. Using Allen as an example, various settings in his team member record would have the following results:

- If you marked View All Offices, View All Departments, and View All <Shipments> — Allen could see all shipment records assigned to all ten team members throughout the company.

- If you only marked View All Departments and View All <Shipments> — Allen could see shipment records assigned to all five team members in the East Office shipping and receiving departments.
- If you only marked View All Offices and View All <Shipments> — Allen could see shipment records assigned to himself and Alex.
  Note: This is because departments in aACE are always linked with a specific office. Allen's view would be limited to his current department and the related office.
- If you only marked View All <Shipments> — Allen could see shipment records assigned to himself and Alex.
- If you didn't mark any of these flags — Allen could only see the records in his *current* department that are assigned to himself.