

Controlling Access to Transactions with User Groups

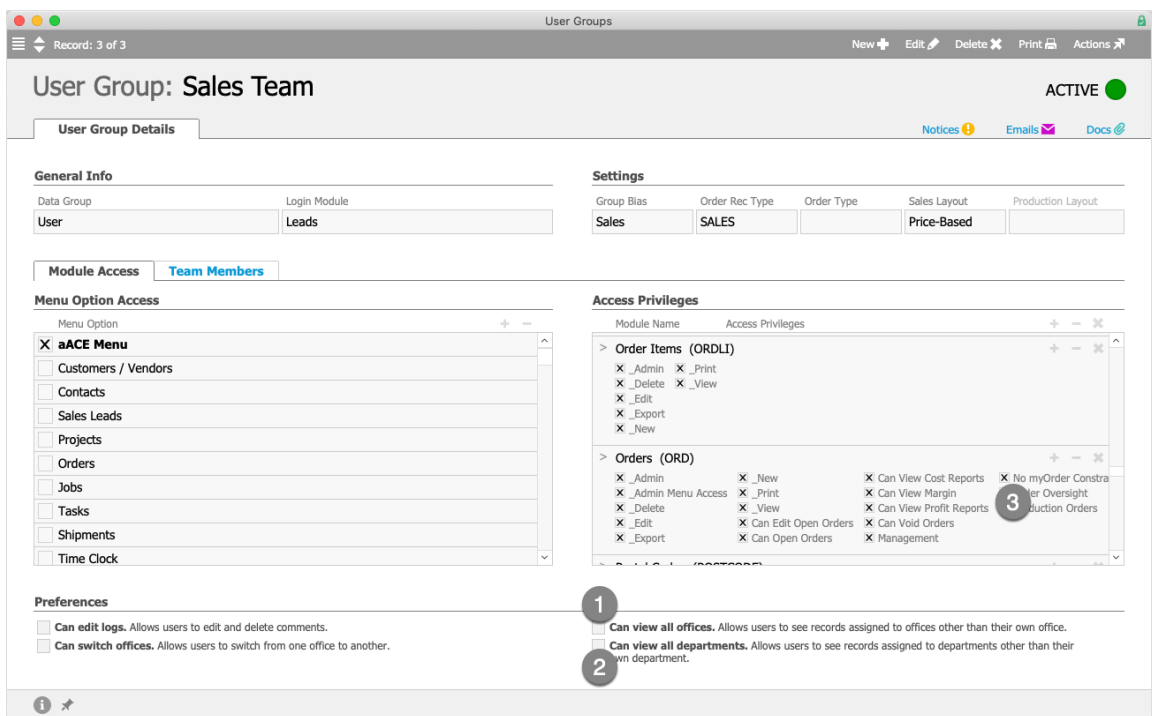
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This guide explains how to configure the transaction records that team members can see. It is intended for system administrators.

Transaction records in aACE are linked to specific offices, departments, and team members. The records that a particular team member can view are controlled by settings in their respective [user group](https://aace5.knowledgeowl.com/help/overview-of-user-groups). If the correct access privileges and preferences are not flagged, a team member may not be able to view certain records.

Access to transactions is handled the same across most types of records. This help guide focuses on orders for demonstration.

Your system administrator can configure these settings: Menu > System Admin > User Groups.



1. Can view all offices:
 - o Marked – Team members can view records assigned to any office.
 - o Cleared – Team members can only view records assigned to their office.
2. Can view all departments:

- Marked – Team members can view records assigned to any department.
- Cleared – Team members can only view records assigned to their department.
Note: The departments that team members can view are limited by the 'Can view all offices' preference described above.

3. No my Constraint:

- Marked – Team members can view records assigned to other team members.
- Cleared – Team members can view records *only* where they are assigned as the Sales Rep, the Assigned By team member, or the Assigned To team member. This privilege must be applied separately for each type of transaction record. For more details, see [Overview of User Groups](https://aace5.knowledgeowl.com/help/overview-of-user-groups#AccessPrivileges) (https://aace5.knowledgeowl.com/help/overview-of-user-groups#AccessPrivileges).

These three settings can be configured so team members can view various records:

View All Offices	View All Depts	No my Constraint	Results for Each Team Member in the User Group
Y	Y	Y	Can see all records
N	Y	Y	Can see records for all departments in the assigned office
Y	N	Y	Can see records for their assigned department and office
N	N	Y	Can see records for other team members in the same office and department
Y or N	Y or N	N	Can only see records assigned to themselves

Note: 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, 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 also affects which

team members can view the record.

For example, suppose a team member in the Sales Department belongs to a user group that does *not* have the preference marked for 'Can view all departments'. When this team member creates an order, she 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 later this team member was transferred to the Fulfillment Department. She would no longer be able to view the order record she 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 for this user group would have the following results:

- If you marked View all offices, View all departments, and No myShipment constraint — Allen could see all shipment records assigned to all ten team members throughout the company.
- If you marked View all departments and No myShipment constraint — Allen could see shipment records assigned to all five team members in the East Office shipping and receiving departments.
- If you marked View all offices and No myShipment constraint — Allen could see shipment records assigned to himself and Alex.
Note: This is because departments in aACE are always associated with a specific office. Allen's view would be limited to his current department and the related office.
- If you marked only No myShipment constraint — 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.

