

Understanding the 'Can Switch Offices' User Group Preference

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The User Group preference 'Can switch offices' enables users to change their office assignment for their current session. When they log in again, their office assignment reverts to the office specified on their team member record. This feature is useful for personnel that travel between offices or who must review records in various offices at different times.

Note: If users need to view multiple offices at the same time, use the [User Group preference for viewing all offices](https://aace5.knowledgeowl.com/help/controlling-access-to-transactions-with-user-groups) (<https://aace5.knowledgeowl.com/help/controlling-access-to-transactions-with-user-groups>).

Your system administrator can update this preference: navigate to Menu > System Admin > User Groups.

The screenshot displays the 'User Group: System Admin' configuration page. The page is divided into several sections:

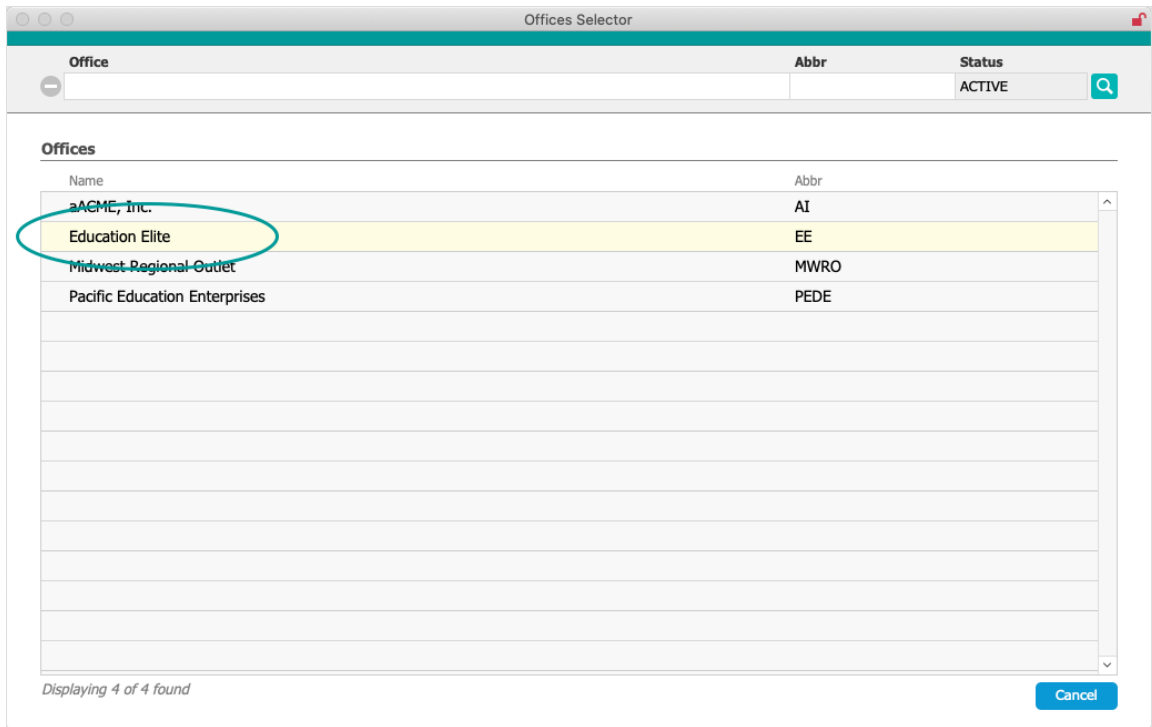
- General Info:** Includes fields for 'Data Group' (Management) and 'Login Module'.
- Settings:** Includes fields for 'Group Bias', 'Order Rec Type', 'Order Type', 'Sales Layout', and 'Production Layout'.
- Module Access:** Includes a 'Team Members' tab.
- Menu Option Access:** A list of menu options with checkboxes, including 'aACE Menu', 'Customers / Vendors', 'Contacts', 'Sales Leads', 'Projects', 'Orders', 'Jobs', 'Tasks', 'Shipments', and 'Time Clock'.
- Access Privileges:** A table listing module names and their access privileges, including 'Accounting Preferences (ACTPREF)', 'Activities (ACT)', and 'Bank Reconciliation (RANK)'. The 'Activities (ACT)' section shows privileges like '_Admin', '_Print', '_Delete', '_View', '_Edit', '_Export', and '_New'.
- Preferences:** A list of preferences with checkboxes and descriptions:
 - Can edit logs.** Allows users to edit and delete comments.
 - Can switch offices.** Allows users to switch from one office to another. (This preference is circled in red in the screenshot.)
 - Can view all offices.** Allows users to see records assigned to offices other than their own office.
 - Can view all departments.** Allows users to see records assigned to departments other than their own department.

Switching to Another Office

Users enabled with this preference can switch offices using the [Main Menu footer](http://aace5.knowledgeowl.com/help/the-aace-main-menu) (<http://aace5.knowledgeowl.com/help/the-aace-main-menu>). This footer shows a user's current office assignment. Clicking the footer link displays the Offices Selector. Selecting a different office changes the records displayed in various modules.

For example, suppose the aACME, Inc. account manager, Mara Harvey, logs in. Her menu footer would read, "Logged In: MH @ AI". If Mara's user group included the 'Can switch

offices' preferences, she could click her menu footer and select a different office. Selecting the Education Elite office would change Mara's menu footer to "MH @ EE" and she could work with those records.



When a user switches to a different office, any currently open modules are closed. Only the aACE Main Menu remains displayed.

aACE cannot predict which department the user should be assigned to for the selected office. Therefore, the user is assigned to whichever department has been configured with the "OFFICE" Type. Your system administrator can [configure the department Type](https://aace5.knowledgeowl.com/help/setting-up-departments) (<https://aace5.knowledgeowl.com/help/setting-up-departments>) to support your workflows.

At the list view of the selected office's modules, a user will initially see only the records assigned to him. Other records can be viewed using the Quick Search bar, the Quick Search links in the footer, or other search features.

Interactions with Other User Group Preferences

Other [preferences for user groups](https://aace5.knowledgeowl.com/help/controlling-access-to-transactions-with-user-groups) (<https://aace5.knowledgeowl.com/help/controlling-access-to-transactions-with-user-groups>) include the options 'Can view all offices' and 'Can view all departments'. These preferences affect what records can be seen when a user switches to view another office:

View All	View All	Results when Switching Offices
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Offices	Depts	
Y	Y	Can see all records
N	Y	Can see records for all departments for the selected office
Y or N	N	Can only see records for the "OFFICE" Type department for the selected office

Note: If the user group does *not* also have the [No my Constraint privileges](https://aace5.knowledgeowl.com/help/controlling-access-to-transactions-with-user-groups) (<https://aace5.knowledgeowl.com/help/controlling-access-to-transactions-with-user-groups>), marked, team members will only be able to view records assigned to themselves.
