

Manage Group Members

Navigate to the Administration>ACL link and click on the **Manage Group Members** link to see the Manage Group Members screen.

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Action	Group (G)	Controlled Object (G)	Object ID	Criteria Table	Criteria Result Field
Edit	Users	Company	0		

[Select Column Layouts](#) [Add New](#)

Figure 13: Manage Group Members Screen

For details of the procedure to add or edit a group member, see 2.1 Manage Roles, which follows a similar procedure for a role.

This ACL function gives you the ability add permissions to a group based on a specific field value within a table. For example, if you wanted to limit the view of Companies/Contacts to Vendors only for a group of users in Accounts Payable. When a company type is set to Vendor that company will be viewable with the rights you assign in the group in the Manage Role Permissions function later.

The different fields involved in the procedure to add or edit are:

Group: Choose the group from the drop-down list.

Controlled Object: Choose the controlled object from the drop-down list.

Object ID: Database identifier of the controlled object to add to the group.

Click the **Hide** link if you do not wish to display these columns and associated fields.

Click **Select Column Layouts** to change the onscreen display of fields. For details, see 2.4.

The following screen shots show how we add the records to accomplish the example to limit the AP group to see only Vendors:

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Group Members

Action

Group (G)

Controlled Object (G)

Object ID

Criteria Table

Criteria Result Field

Edit

AP

Company

0

companies

company_id

Select Column Layouts

Add New

Group Members enable you to allow/limit access based on fields within tables. You are able to set permissions to the group in Manage Role Permissions (see documentation for details about setting permissions).

Figure 13a : Manage Group Members

- 1 First, we added a Role called Accounts Payable, then we added a group called AP.
- 2 We then add a group member on the group AP, and select Company as the controlled object.
- 3 We enter on Object ID (integer) to keep track of them – this is an arbitrary number.
- 4 We enter the Criteria Table as companies, and the result field for lookup, which is always the key field in the table – in this case it is company_id.

After you save the record, you can then click the Edit button to see the next window:

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Group Member Criteria

Field	Operator	Value	Action
company_type_id	=	7	Delete
<input type="text"/>	=	<input type="text"/>	Add

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Group Member

Group

AP

Controlled Object

Company

Object ID

0

Table

companies

Result Field

company_id

Update

Delete

Return to List

Figure 13b : Edit Group Member / Add Criteria

You will notice the “Value” column above is set to 7 rather than the word Vendor. You must use the field_id number stored in the Group Member table. To find the Value when setting up this part of ACL, you can view the list in Administration (in the example case see the Company Type view below):

Manage Company Types

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Add New Company Type		Company Types				
Short Name	<input type="text"/>	ID	Short Name	Full Name	Full Plural Name	Display HTML
Full Name	<input type="text"/>	2	BWKS	BudgetWorks	BudgetWorks	BudgetWorks
Full Plural Name	<input type="text"/>	4	COMP	Competitor	Competitors	Competitor
Display HTML	<input type="text"/>	1	MKTG	Marketing	Marketing	Marketing
<input type="button" value="Add"/>		6	OTH	Other	Other	Other
		3	PART	Partner	Partner	Partner
		5	SPEC	Special	Special	Special
		7	VEND	Vendor	Vendor	Vendor

Figure 13c: Company Types table view

In our example we could add another Group Member Criteria to allow access to other Company types by simply adding them.

You may setup access to controlled objects on any of the tables listed in the Administration window as long as the Group Member table contains a corresponding object ID.