Limited Access functionality is introduced as an add-on in top of the access rights, enabling access to specific records of a particular register.

Functionality

The purpose of the functionality is sales oriented, although it can be extended also to purchase and other workflows.

The problem was that using access rights allows defining for each user group access to a particular register - for example, employee can create new quotations, can view sales orders and can not access sales invoices at all. At the same time there are companies which operate in a way that employee role in the sales process is full responsibility from beginning till the end of the sales case, but at the same time other sales cases, handled by other sales departments or persons, are confidential.

To solve this, Limited Access functionality allows:

- Creating Sales Groups and assigning employees (Persons) to those Sales Groups

- Defining for each employee (Person) his access level to the registers:
    a) No Limitation
    b) Group Only
    c) User Only

In the system there are multiple registers, such as Contacts, Sales Invoices, Sales Orders, Quotations, Purchase Orders, Purchase Invoices and others, where in the register browse window Limited Access icons are displayed.

On Mac clients 1 person / 2 persons / 3 persons, on Windows computers 1 dot, 3 dots and circle of dots.

Mac   *Windows*

This icons identify the Limited Access level for the register, where:

- 3 persons / circle of dots means No Limitation and will display All records of the register

- 2 persons / 3 dots means Group Only and will display only records, belonging to the Sales Group to which the employee (Person) is assigned to (The record displayed has to have same Sales Group as the Person has)

- 1 person / 1 dot means User Only and will display only records, where Salesman is the same as the Person browsing the register.

If the Person has Limited Access set to "No Limitation", it means that the Person can see all records of the register, if he chooses to, but can use these icons to filter records and switch the view, displaying only records belonging to his Sales Group or his Person.

If the Person has Limited Access set to "Group Only", the Person won't be able to see records belonging to other Sales Groups than his, but the Person will be able to switch the view between his Sales Group and his Person, filtering records accordingly.

If the Person has Limited Access set to "User Only", the Person will be able to see only records where he is specified as a Salesman.

This way the functionality allows handling different scenarios of more complex access to the system documents, such as:

- Allowing easily filtering out relevant records

- Restricting e.g. employees of one sales team accessing other sales team data

- Restricting particular employees from accessing other employee data.

This functionality works in parallel to Access Rights and doesn't affect in any way the limitations set by them.