User Rights Setup

An extra Navision feature for easier handling
of roles and permissions on database logins.

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Published by Microsoft Business Solutions ApS, Denmark.

Published in Denmark 2003.

DocID: NA-370-DVG-010-v01.00-W1W1

User Rights Setup

This document provides short descriptions of the central forms and functions of the User Rights Setup feature and some procedures for effective use. It includes the following sections:

- Introduction
- User/Role Combinations form
- User Rights Setup form
- Give Permissions wizard

INTRODUCTION

The User Rights Setup feature is aimed at administrators who work with the setup and maintenance of roles and permissions in a Navision database.

It is essentially a redesign and expansion of the standard **Permissions** form that makes the tasks of security management a lot easier.

Note

In the current version, the feature only applies to database logins.

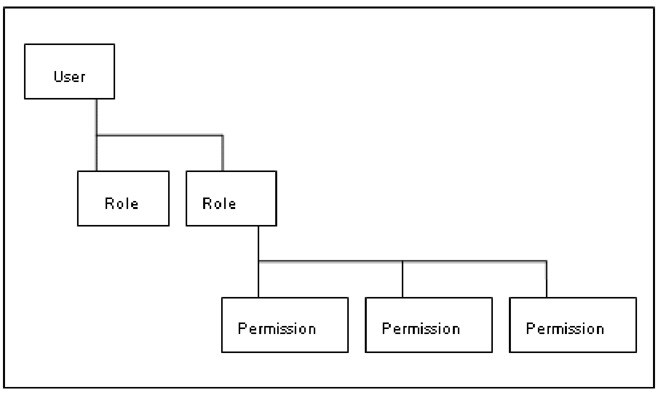
General information about security within Navision can be found in Chapter 4.3 of the "Installation and System Management" manual.

Security administration may be performed by different user profiles, e.g. an external consultant or an internal super user, depending on the task complexity. Therefore, the user interface of the User Rights Setup feature is divided into two layers addressing different administrator tasks:

User/Role Combination form– overview and easy role assignment.

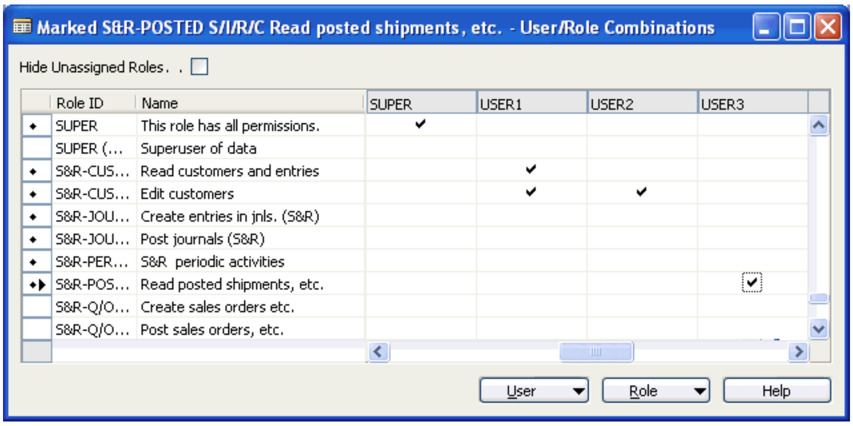
User Rights Setup form – advanced overview and permissions setup.

The relationship between components of the database security system:



USER/ROLE COMBINATIONS FORM

This form is mainly directed at super users who maintain existing roles and permissions.



This layer provides:

- an overview of the role status of all users
- easy role assignment – manually or with multiple copy functions
- wizard to give permissions to a role by recording Navision activities
- link to the advanced layer – the **User Rights Setup** form.

Note

If you open the form in a database with no users then a SUPER user will be created automatically.

Central Fields and Functions

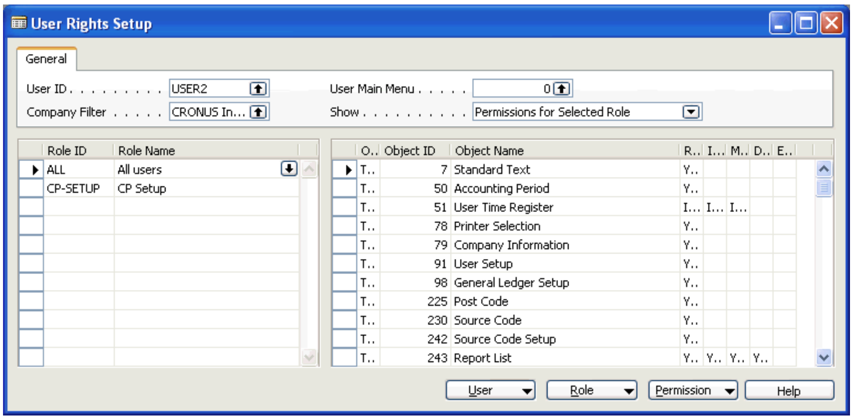
The **User/Role Combination** form is designed for optimal overview of roles per users.

Below are short descriptions of its most important features.

Hide Unassigned Roles field	Only roles that are selected for one or more users will be shown.
Assigning a role manually	Place check mark under the user. Or use the copy functions. (See below)
Copy Roles from User function	1. Select the user (at top of column) to which you want to copy roles from another user. 2. Open the request form and select which user to copy from.
Copy Roles to User function	1. Select the user (at top of column) from which you want to copy roles to one or more users. 2. Open the request form and select which user(s) to copy to.

USER RIGHTS SETUP FORM

This form is targeted at security administrators who create and manage permissions. It provides multiple overview options and functions for permission management and quick trouble shooting.



This advanced layer provides:

- multiple view filters in the form header
- functions to view and manage security for multiple companies
- a report showing all users/roles/permissions
- a tool to quickly find all users with a particular permission
- the Give Permissions wizard for new role.

Note

If you open the form in a database with no users then a SUPER user will be created automatically.

Central Fields and Functions

The **User Rights Setup** form is “user-centered” in that it presents the complete database security setup of the user ID selected in the header.

The lines are parted into a roles section, listing the user’s roles, and a permission section, listing the permissions (or users) that apply to the selected role.

Below are short descriptions of its most important features.

User ID field	The user to whom the form applies. A user ID must be selected.
Company Filter field	Filters on one of multiple companies. BLANK = all companies (Not blank company)
User Main Menu field	Filters on a special main menu set up for the user. BLANK/Zero = standard main menu
Show:	
Permissions for Selected Role	Shows all permissions given to the role selected in the left-hand section.
Users with Selected Role	Shows all users to whom the selected role is assigned.
Copy Roles to Company	Copies the entire security setup of one company to another.
Show Roles with Selected Permission	An effective way to overview the security status of a particular object. For example when trouble shooting missing user access. See procedure below.
Copy from Role	Copies all permissions of another role to the selected role.
Give Permissions to New Role	Link to the Give Permission wizard with the option to define a new role.

Trouble-Shoot Procedure

End users regularly contact the security administrator with this problem:

“I can’t access object XX”

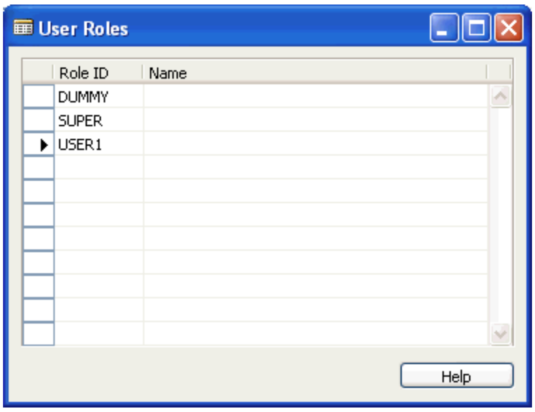
To resolve this, the administrator must find an existing role that gives permission to the object in question. In the **User Rights Setup** form this can be quickly achieved with the following steps:

1 Create a new (dummy) role.

2 Set the view to Show: Permissions for Selected Role.

3 Enter the requested object ID in the new permission line.

4 Click Permission, Show roles with Selected Permission.



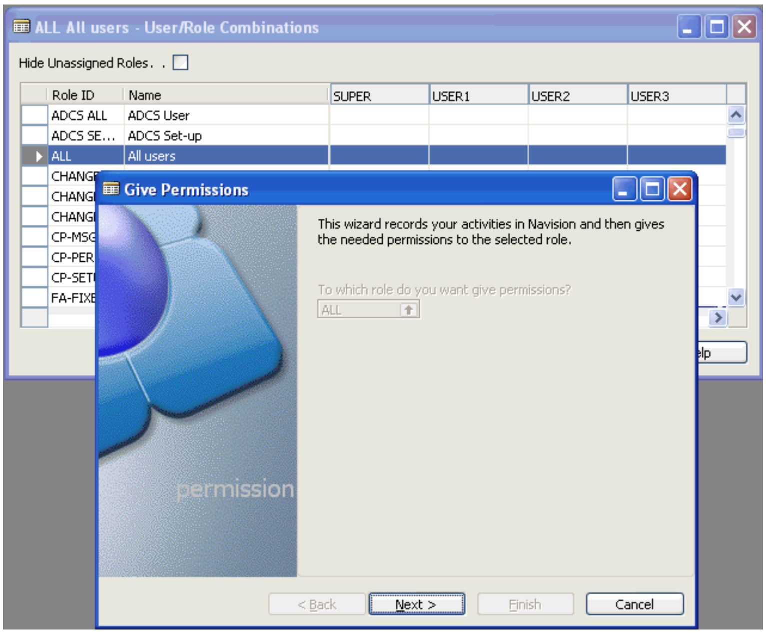
The **User Roles** window shows all the roles that give access to the requested object. The administrator can now go back to the **User Rights Setup** form and assign the role to the user or analyze further.

Note

Only roles with exactly the entered permission profile will be shown.

GIVE PERMISSIONS WIZARD

This wizard helps you to compile permissions for roles in a smart way, which will greatly speed this work up compared to the manual process.



It uses the Client Monitor to record database activities while you perform the Navision tasks of a given role. The wizard then gives the role all the permissions needed for the performed tasks.

Note

The Client Monitor must be started manually. In a future version it will be run automatically by a function.

Giving Permissions with the Wizard

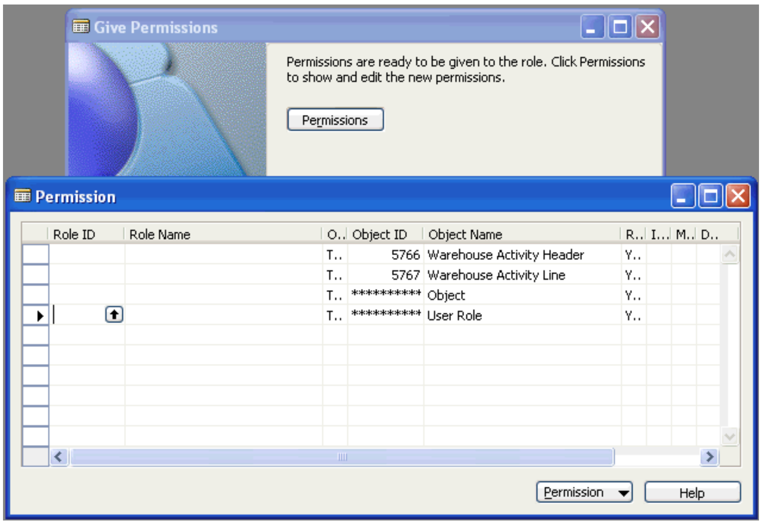
When using the wizard from the **Role/User Combination** form, you must first select a role to which new or additional permissions should be given. To give permissions to a new role, you can press F3 in the **Role ID** column and then select the new role before you start the wizard.

Alternatively, you can run the wizard from the **User Rights Setup** form, where a new role may be defined in the first step of the wizard.

The wizard has embedded help, but below is a detailed procedure.

1. Select the line of the desired role and click Role, Give permissions.
2. On the wizard screen click Next.
3. Click Tools, Client Monitor and then click Start in the **Client Monitor** window.
4. Minimize the **Client Monitor** window – it is now ready to record.
5. Go back to the wizard screen and click Next, Start.
6. Leave the Wizard screen open in the background.
7. Proceed to perform the Navision activities that the role should do. (Performance is reduced slightly during recording.)
8. After the last Navision activity, go to the wizard and click Stop.

The last wizard screen includes a **Permission** button that links to a window listing the permissions required for the recorded activities.



In the **Permission** window you can review or adjust the compiled permissions before they are given to the role.

Note

Do not enter data in the **Role Id** and **Role Name** columns. The last wizard step will give the listed permissions to the selected role.

9 Go back to the wizard screen and click Finish to give the permissions to the role.

10 Call up the **Client Monitor** window and click Stop.