Data Level Security

Installation and deployment guide
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Executive Summary

Microsoft Dynamics is a full suite of integrated business management solutions and Enterprise Resource Planning (ERP) applications owned and offered by Microsoft. This line of solutions supports business management and help companies make important business decisions with confidence. Microsoft Dynamics GP, being one of the ERP products in this suite, is an integrated set of software tools and utilities that helps small and mid-sized organizations streamline their highly specialized business processes and rapidly adapt to the unique way they do business.

Dynamics Innovations is a leading IT solution provider in the domain of Microsoft Dynamics ERP business solutions and services. Our proven methodology is based on listening carefully to our customers, adopting a milestone-driven schedule and the appropriate and early management of risks to ensure on-time, on-budget and on-spec delivery.

With the value-added analytical tools available in the product; you can gain more business insight, achieve better streamlined and automated operations, and capture new market shares.

Thank you in advance for considering Dynamics Innovations IT Solutions as your Microsoft Dynamics solutions provider. We look forward to serving you in this and future IT projects.

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Have you seen the Dynamics GP Excel Paste and data level security yet? If not you are missing allot! Click on the below:

http://di.jo/Products.aspx
Contents

Executive Summary .............................................................................................................. 3
Introduction .......................................................................................................................... 5
What is DLS (Data Level Security)? ...................................................................................... 5
What’s in this Manual? .......................................................................................................... 7
Installation Overview: .......................................................................................................... 7
How to install and deploy Data Level Security: ................................................................. 12
How to Setup Data Level Security (DLS) ........................................................................... 12
  1. SQL Preparation: ........................................................................................................... 12
  2. Dynamics GP Preparation: .......................................................................................... 13
     a. Security Tasks: ......................................................................................................... 13
     b. Security Roles: ........................................................................................................ 15
     c. User Security Setup: ............................................................................................... 16
Lookup Screens .................................................................................................................... 19
Uninstall ................................................................................................................................ 19
How to get support? ............................................................................................................ 20

Figures

Figure 1: SQL View Sample ............................................................................................... 5
Figure 2: Lookup Form Fully Loaded ................................................................................ 6
Figure 3: Forms Validations ............................................................................................... 6
Figure 4: SQL Server Management Studio Steps ............................................................... 12
Figure 5: Dynamics GP Security Tasks ............................................................................ 14
Figure 6: Data Level Security Task .................................................................................. 14
Figure 7: Dynamics GP Security Roles ........................................................................... 15
Figure 8: Data Level Security Roles ................................................................................. 16
Figure 9: Data Level Security User Security Setup ......................................................... 18
Introduction

Data Level Security is a data protection tool for MS Dynamics GP adding protection for unauthorized disclosure and data modifications. The goal of this tool is to introduce a new method of data security for IT professionals seeking to add a new level of security to MS Dynamics GP.

What is DLS (Data Level Security)?

The add-on is basically works on creating new Dynamic lookup that replaces traditional Dynamics GP lookups, the same lookup is used for all kind of data inside Dynamics GP and the rows are filter dynamically at runtime based on user privileges which to be setup by creating a specific view for each user/role per each business entity and the system will display only data from the linked view.

By achieving this, the system administrator will be able to customize columns names and columns to be displayed by using SQL views or direct SQL queries and rows to be displayed, and the lookup will automatically filter rows using "like/contains" operator based on the user selection and based on the clicked column:

The data load were enhanced to load data into .Net data grid that pulls rows from database directly into the user interface, 250,000 records were pulled within less than 7 seconds for sure this highly depends on your query and how did you write the syntax:
In addition to the lookup functionality we have developed a routine that validates user inputs inside GP texts and will make sure that the user selected data is a part of the user query:
What’s in this Manual?

This manual is designed to help you set up Data Level security for each company. All features described in the documentation are optional and can be purchased.

The manual is divided into the following parts:

- **Part 1**, Installation and Deployment overview, contains information to help you installing Data Level Security Tool.
- **Part 2**, Setup overview, contains information to help you start setting up Data Level Security Tool.
- **Part 3**, Lookup Screen, contains information to help you start using the new lookup screens.

How to buy?

You can purchase the product by following the steps below:

2. Click on Buy Now.
3. Fill your information in the below fields:

   ![Select Products](image)

   *Tool registration keys will be based on your site name, make sure that you fill in the correct site name.*
Please notice the warning about “Site Name” of your registration keys, as this will be used when generating your key.

4. Once finalizing validating your data, you need to click on Process to get the buy now button:

5. If you have PayPal account, you will just need to login, otherwise you can simply click on the second link and fill in your credit card information:

6. Validate your information and then click on “Pay Now”: 
7. You will be getting the confirmation page below and then you will be redirected automatically to Dynamics Innovations site to complete the registration, you must not close the browser at this point and proceed with working on Dynamics Innovations website to activate your registration:

8. Once redirecting back to Dynamics Innovations site, you will be getting the below page:
9. You will need to click on “Proceed with Registration” to activate your keys, and you will be ready to go:

10. Once you finalize website operations, you will still have a small step to follow in your Dynamics GP:

The tools is fully functional on Fabrikam, you can setup your tasks and be able to use it in all application forms, however to be able to use this for your company, you will need to purchase the product from www.di.jo as you did the previous steps and specify the Site Name of your registration keys to get activated, then you will need to follow steps below to start using the product:

1. Go to Tools>> Setup>> Company >> Company and locate “Excel Paste Registration” link under Additional menu:
2. A new form will be shown with a single button that connects to vendor website and load your registration keys, keep in mind that this requires and active internet connection:

![Product Registration]

Figure 5: Registration

3. Once clicking on the “Register Product Now” you will be ready to start using the product, note that this will connect to SQL database at our host, therefore you must need to have port 1433 accessible for outbound traffic.
Installation Overview:

This part of the documentation contains information regarding the implementation and installation of Data Level Security. Use this information to help starting Data Level Security.

How to install and deploy Data Level Security:

In order to simply installing DLS, Add-ins methodology was used, installation can be completed by following the below steps:

- Copy Lookup.dll file and paste into MS Dynamics GP AddIns folder, usually can be found at the following path: "C:\Program Files\Microsoft Dynamics\GP2010\AddIns".

Note: This applies for all server/s and clients machines.

How to Setup Data Level Security (DLS)

1. **SQL Preparation:**

   First this you need to do is to create all your filtered views; we will do a view as a sample in this document to simplify the operation.

   ![Figure 6: SQL Server Management Studio Steps](image)

   a. Go to your SQL Server Management Studio
b. Expand your database and click on “Views” folder.
c. Right click and select “New View” as marked in Figure 4 – Mark 1.
d. You will be prompt to select a table, select PM00200 as a test which contains all your vendors.
e. Select what columns you would like to show for the end user as shown in Figure 4 – Mark 2.
f. Make sure that you views code and tables diagram as shown in Figure 4 – Mark 3.
g. Customize Columns Names as shown in Figure 4 – Mark 4.
h. Add whatever filters you need to this view as shown in the Figure 4 – Mark 5, please notice that you can add unlimited filters to columns considering unchecking the “Output” checkbox to mark the column for filter only.
i. Review the code and data as shown the above figure marks 6 and 7.
j. Final save the view and name it “DLS_ClassAVendors”.
k. Make sure that all users can access the view by running the below command:

“GRANT ALL ON DLS_ClassAVendors TO DYNGRP”

2. Dynamics GP Preparation:

Using the same security as in MS Dynamics GP user’s roles and tasks were used, as known Roles may contain one task or more depend on the case.

a. Security Tasks:

Security tasks contain the windows that users need to change to complete tasks in Microsoft Dynamics GP. You can use default security tasks, modify the default security tasks or you can create new security tasks to fit your needs.

To add a new Task:

- Go To "MS Dynamics GP -> Setup -> Tools -> System-> Security Tasks.
- In the Menu Bar -> Additional -> Data Level Security Tasks
- Data Level Security task screen will appear as follows:

```
Task ID
Enter Task ID

Task Description
Enter Task Description

Form Name
Select the form name which to apply data level security on.
By default forms technical name will appear *

Button Screen Name
Select required screen which includes the required lookup button to apply the data level security on search function related.*

Button Name
Select the required lookup button name to apply the data level security on the search function related.*

Text Screen Name
Select the screen which contains the text box which ```
<table>
<thead>
<tr>
<th>Text Name</th>
<th>Select the text box which will display the retained value.*</th>
</tr>
</thead>
</table>

*: It is recommended to use MS Name Wizard Tool (Available on Dynamics GP SDKs) to determine Technical Names.

**Note:** predefined list of tasks has been prepared by Dynamics Innovations the trial version contains almost all vendors’ tasks.

b. **Security Roles:**

Use the Security Role Setup window to create new security roles or modify the default security roles that are already available to you.

You must assign security roles to users in each company so that they have the appropriate access within Microsoft Dynamics GP to do their job and they only can see information with restricted lists.

**To add a new Role:**

- Go To "MS Dynamics GP -> Setup -> Tools -> System -> Security Roles.
- In the Menu Bar -> Additional -> Data Level Security Roles.

![Figure 9: Dynamics GP Security Roles](image)

Data Level Security Role screen will appear as follows:
### Data Level Security Roles

![Data Level Security Roles](image)

**Figure 10: Data Level Security Roles**

- **Fields Details:**

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Filed Function – Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role ID</td>
<td>Enter Role ID</td>
</tr>
<tr>
<td>Role Description</td>
<td>Enter Role Description</td>
</tr>
<tr>
<td>View Name</td>
<td>Select/Enter the SQL view we just created (DLS_ClassAVendors) or select statement which will retrieve the filtered lookup. If you used query and not view you will need to use the below format: &quot;(Select * from Vendors as Vendor) As V&quot; We recommend that you use SQL Views to filter your data instead of writing the SQL Commands into the application to avoid any syntax errors in your query that might affect the application integrity.</td>
</tr>
<tr>
<td>Grid</td>
<td>Select the related Tasks.</td>
</tr>
</tbody>
</table>

**c. User Security Setup:**

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E-Mail: info@di.io  
Mob: +962 79 999 65 85  
Tel: +962 6 401 5565
Use the User Security Setup window to assign security roles to users. Each user must be assigned to a security role before they can see customized lookups within Microsoft Dynamics GP. You must assign roles to a user for each company that user has access to.

**To link users with DLS roles:**

- Go To "MS Dynamics GP -> Setup -> Tools -> System-> User Security
- In the Menu Bar -> Additional -> Data Level User Security.

User Setup screen will appear as follows:
Fields Details:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Filed Function – Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID</td>
<td>Select MS Dynamics GP User ID.</td>
</tr>
<tr>
<td>User Name</td>
<td>Disabled – Automatically holds selected user name.</td>
</tr>
<tr>
<td>Grid</td>
<td>Select the related Roles.</td>
</tr>
</tbody>
</table>
Lookup Screens

- User can search by any column by clicking on column header.
- Default search criteria is contains and not as default MS Dynamics GP (Start with).
- User can sort records ascending or descending by clicking on the column.

Uninstall

If you would like to uninstall the product, you will have the following options:

1. **Remove the product from the “Machine” and keep the “Server” objects:**
   - If you are removing the tool from one machine only and would like to keep the setup, just go to your AddIns folder and delete the Lookup.dll file, you will be no longer running the tool.

2. **Remove the product from the “Machine” and from the “Server”:**
   - If you are removing the tool completely from the client machines and servers and no longer interested to keep existing configurations, follow steps below:
     a. You will need to go to your AddIns folder and delete the Lookup.dll file.
     b. Go to your server machine and open SQL Server Management Studio, locate and delete the following tables:
        i. DI_ROLEDETAL
        ii. DI_ROLEHDER
        iii. DI_SECURITYTASK
        iv. DI_USERSECURITY
How to get support?

Our call center is available Saturday – Thursday from 9:00 AM till 6:00 PM Amman – Jordan time (GMT +3) through the following:

1. Call Center Phone: +96264015565
2. Development Team Direct Line: +962799996585
3. Helpdesk Support Mail mbsquery@di.jo
4. Support Team Manager daoudm@di.jo