

The logo graphic consists of two overlapping chevron-like shapes. The top shape is a dark grey line pointing upwards and to the right. The bottom shape is a white line pointing upwards and to the right, slightly offset from the top one.

# STONERIDGE CONNECT

2016 Client Conference



AX 2012 Security Tip and Tricks



# About the Speaker

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Stoneridge: 2 years

Microsoft: 14 years

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# Agenda

- Security in AX 2012 QUICK overview
- Tips and Tricks
- Dynamics AX Security Development Tool
- Stoneridge security setup tool

# AX 2012 security overview

- Role based
  - Allows a user to perform their job function in AX
- Process cycles, Duties, Privileges
- Privileges

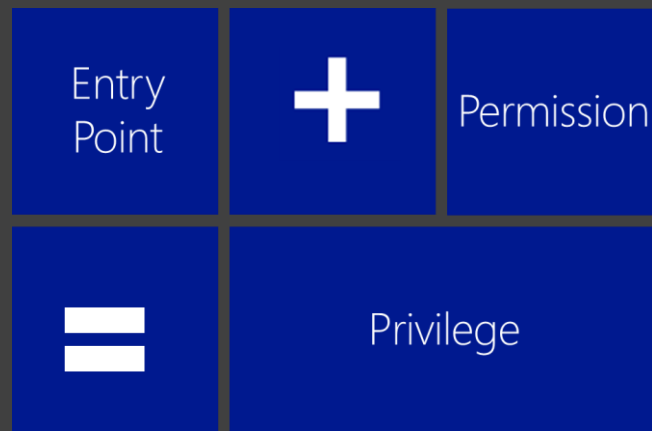


# AX 2012 Security Over

- Example of what a typical role looks like
  - Let's take a look at an Accountant role

# Privileges

- Entry Points
  - Menultem (Forms, Reports, Actions), service operations
  - Assign/modify permission here



<https://technet.microsoft.com/en-us/library/gg731787.aspx>

# Privileges

- More about entry points

# Tips and Tricks

- Permission set in a privilege matters
  - Entry points---> access level

Delete

The screenshot shows the 'Delete' interface for the 'Vendor Rebate Matrix'. The top menu bar includes 'File' and 'Vendor Rebate Matrix'. Below the menu, there are three icons: a sun icon labeled 'Vendor Rebate', a pencil icon labeled 'Edit', and a red 'X' icon labeled 'Delete'. The 'Edit' icon is highlighted with a yellow background. Below the icons, there is a 'Maintain' button. The main area contains a table with columns: 'Vendor account', 'Rebate Program', and 'Rebate Type'. The first row of data shows '077255', 'EATN 82.90', and 'Percent'. At the bottom, there is a '+ New' button and a '- Delete Record' button.

VS

Update

The screenshot shows the 'Update' interface for the 'Vendor Rebate Matrix'. The top menu bar includes 'File' and 'Vendor Rebate Matrix'. Below the menu, there are three icons: a sun icon labeled 'Vendor Rebate', a pencil icon labeled 'Edit', and a red 'X' icon labeled 'Delete'. The 'Vendor Rebate' icon is highlighted with a red border. Below the icons, there is a 'Maintain' button. The main area contains a table with columns: 'Item code', 'Item / Item Group', and 'Customer account'. At the bottom, there is a '+ New' button and a '- Delete Record' button.



# Tips and Tricks

- Don't change the default security objects. Instead make a copy and change the copy.
- Check before you change!
  - AOT>Security>Duties or Privilege> Add-ins> Security Tools> View related security roles
  - Export the list to Excel if you need to
  - Decide if you can change an existing security object or if you need to create a new one. You can easily create a new object by duplicating an existing one.

# Tips and Tricks

- When you make a change to the security objects, you are updating your AX\_Model db – so always do your development work in your development environment.
- Use the Dynamics AX 2012 Security development tool (do not install to Production)
- Use TFS – to help track changes made by you or another developer
- Always have users thoroughly test your changes

# Tips and Tricks

- You can override a permission assigned to a Role or a Privilege
  - This can cause performance issue so use sparingly and test
- You can use query and policy to limit what your users can view in AX (XDS)
  - Performance issue
- Run Axutil Refreshrolcecache – after promotion of code

# Dynamics AX Security Development Tool

- How it helps...
  - You can see what permissions the role has
  - You can see the name of the entry point to a menu item
  - You can test the role you just created right from this tool
  - A changed item will show as bolded when you use this tool to change a security objects
  - You can use it to determine what type of AX license you will need

# Stoneridge Security Builder Tool

- How it helps
  - If used with task recorder, this tool helps you build privileges and duties.

<https://stoneridgesoftware.com/product/stoneridge-ax-security-builder/>

- Questions? Comments?
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