STONERIDGE CONNECT
2016 Client Conference

AX 2012 Security Tip and Tricks

About the Speaker

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Stoneridge: 2 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
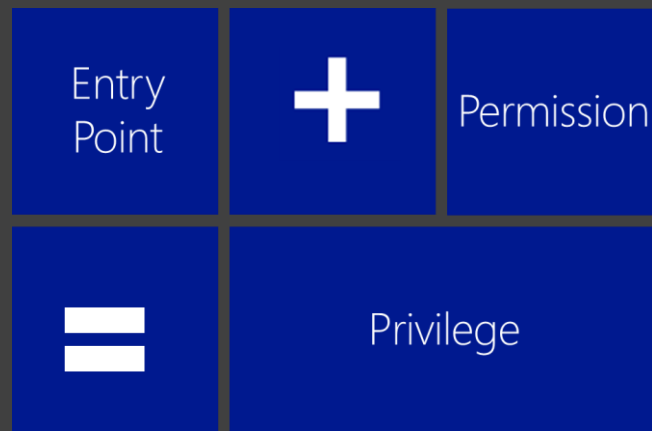- Process cycles, Duties, Privileges
- Privileges

AX 2012 Security Over

- Example of what a typical role looks like

    - Let's take a look at an Accountant role

Privileges

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

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

Privileges

- More about entry points

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Tips and Tricks

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

Delete   VS   Update

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.

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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

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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

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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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