

Securing Dynamics GP to Fit Your Business Needs

Presented by:
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Introduction – Charles Allen



- Managing consultant
- More than 20 years experience
- Microsoft MVP

What You Will Learn

What you will learn in this webinar

- User Setup
- Field Level Security
- Security Roles/Tasks
- Activity Tracking
- SSRS and Excel Reports Security
- Q&A

User Setup

- Security Needed to Create Users
- User Options
- Copying Users



User Setup – Security Needed to Create Users

- You don't need the 'sa' user to create users
- The DYNSA user has the necessary permissions
- DYNSA has two fixed server roles assigned:
 - SecurityAdmin
 - dbCreator



Field Level Security

- Enables you to set security to specific fields for users or classes
- Various options are available for setting security to a field

Field Level Security

Field Security Maintenance

File Edit Tools Help sa Fabrikam, Inc. 4/12/2017

Save Clear Delete Copy

Field Security ID: CUSTTRADEDISC

Description: Customer Trade Discount

Product ID: 0 Product Name: Microsoft Dynamics GP

Form Name: RM_Customer_Maintenance

Window Name: RM_Customer_Maintenance

Field Name: Customer Discount

Security Mode: Disable Field Password ID:

by Field Security ID Version 11.00.1734

Comment 2	
Trade Discount	
Payment Terms	Net 30

Security Roles/Tasks

- See KB Article 951229 for frequently asked questions about role-based security
- KB Article 953581 for Extender security
- KB Article 939542 for Integration Manager security
- KB Article 918313 for Home Pages and Area Pages

Activity Tracking

- Free!
- Tracks activities
 - Login
 - Access
 - File
 - Processing
 - Posting
- Must be activated *before* you need it

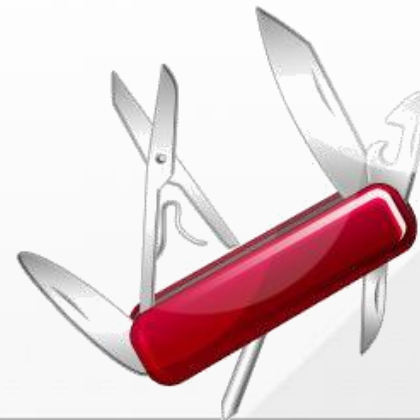
SSRS and Excel Reports

- Need security in database and website
- New SSRS logins needed
- Database roles
 - Dynamics vs. Company Database
 - Existing roles
 - Modifying roles



Tools

- Security Synchronization
- Support Debugger
- Professional Services Tools Library



Where to Get More Information

- BKD Technologies - 877.253.7778 or gpsupport@bkd.com
- System Administrator's Guide for Dynamics GP

BKD Technologies Support Center

- Monday - Friday, 8 a.m. - 5 p.m., call our Support Center toll free at:
- **Dynamics GP - 877.253.7778**
GPsupport@bkd.com

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