

Frequently asked questions about role-based security in Microsoft Dynamics GP 10.0

CONFIDENTIAL ARTICLE

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INTRODUCTION

This article contains frequently asked questions about role-based security in Microsoft Dynamics GP 10.0.

MORE INFORMATION

Overview

Q1: Is documentation available that describes role-based security for Microsoft Dynamics GP 10.0?

A1: The SystemSetup.pdf file describes security in Microsoft Dynamics GP 10.0. The file contains information about role-based security for Microsoft Dynamics GP 10.0. To obtain the file, visit the following Microsoft Web site:

<https://mbs.microsoft.com/downloads/public/GP10Docs/SystemSetup.pdf>

Q2: What are the basic components of role-based security?

A2: The basic components are as follows:

- **Operation:** The Operation component is the base level element of security for windows, for reports, for posting permissions, and for document access.
- **Task:** The Task component is the group of operations that are needed to complete a business task. For example, the business task can be the Enter Customers task and the Post Sales Transactions task.
- **Role:** The Role component is the group of tasks that defines a particular job in a company.

Operations are assigned to tasks. Tasks are assigned to roles. Roles are assigned to users. More than one operation can be assigned to a task. More than one task can be assigned to a role. A user can be assigned many roles.

Q3: Is the security setup company-specific?

A3: Yes. The roles that are assigned to each user are company-specific.

Q4: What is the DEFAULTUSER task?

A4: The DEFAULTUSER task is automatically assigned to each role. This task grants access to the basic areas that all users usually access, such as the User Date window.

Q5: What is the POWERUSER role?

A5: By default, the POWERUSER role is assigned to the sa user. The POWERUSER role grants the user access to all areas and to all modules in Microsoft Dynamics GP 10.0.

Q6: The security tables in Microsoft Dynamics GP 9.0 and Microsoft Business Solutions - Great Plains are the SY02000 table and the SY40300 table. Do both tables exist in Microsoft Dynamics GP 10.0?

A6: No. These tables are removed when you convert the security to Microsoft Dynamics GP 10.0. For more information, see the "Security conversion" section in this article. The following are the new security tables in Microsoft Dynamics GP 10.0:

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- SY09000: Task master
- SY09100: Role master
- SY09200: Alternate or modified form and report ID master
- SY10500: Role assignment master
- SY10550: DEFAULTUSER task ID assignment master
- SY10600: Tasks assignments master
- SY10700: Operations assignments master
- SY10750: DEFAULTUSER task assignment
- SY10800: Alternate or modified form and report ID assignment master

Security setup

Q1: What are the steps to assign roles to a user?

A1: The SystemSetup.pdf file describes how to assign roles to a user in Microsoft Dynamics GP 10.0. To obtain the SystemSetup.pdf file, visit the following Microsoft Web site:

<https://mbs.microsoft.com/downloads/public/GP10Docs/SystemSetup.pdf>

Q2: What are the steps to grant a user access to a SmartList object that is created by the SmartList Builder?

A2: To grant access to a **SmartList** object that is created by the SmartList Builder, follow these steps:

1. Click **Microsoft Dynamics GP**, point to **Tools**, point to **Setup**, point to **System**, and then click **Security Tasks**.
2. In the Security Tasks Setup window, open an existing task, or create a new task to find the **SmartList** objects.
3. In the **Product** list, click **SmartList**.
4. In the **Type** list, click **SmartList Object**.
5. In the **Series** list, click **SmartList Objects**.
6. After the **SmartList** objects appear in the **Access List** pane, click to select the check boxes of the **SmartList** objects to which you want to grant access.
7. Click **Save**.

Q3: How do I grant a user access to a custom report in Microsoft Dynamics GP 10.0?

A3: To add the custom report to a current security task that is assigned to the security role, use Method 1. To create a new security task for the custom report, create a new security role, assign the new security task to the new security role, and grant the access to the new security role, use Method 2.

Method 1: Add the custom report to a current security task

1. Log on to Microsoft Dynamics GP 10.0 as the sa user.
2. Specify the security task. To do this, follow these steps:
 - a. On the **Microsoft Dynamics GP** menu, point to **Tools**, point to **Setup**, point to **System**, and then click **Security Tasks**.
 - b. In the Security Task Setup window, click the lookup button next to the **Task ID** field.
 - c. Click the security task to which you want to add the custom report, and then click **Select**.

- d. In the **Product** list, click the product for which the custom report is used.
- e. In the **Type** list, click **Custom Reports**.
- f. In the **Series** list, click the appropriate series.

The **Access List** area displays the reports.

- g. Click to select the check boxes for the custom reports to which you want to grant access.
- h. Click **Save**.
- i. Close the Security Task Setup window.

3. Specify the security role. To do this, follow these steps:

- a. On the **Microsoft Dynamics GP** menu, point to **Tools**, point to **Setup**, point to **System**, and then click **Security Roles**.
- b. In the Security Role Setup window, click the lookup button next to the **Role ID** field.
- c. Click the security role that you want to use.
- d. Verify that the check box for the security task that you specified in step 2 is selected. Otherwise, click to select the check box.
- e. Click **Save** to save the changes to the security role.

Note Any users who are assigned to the security role have access to the reports that you select for the task.

- f. Close the Security Roles Setup window.

4. Verify that the security role is assigned to the appropriate user. Otherwise, add the security role to the appropriate user. To do this, follow these steps:

- a. On the **Microsoft Dynamics GP** menu, point to **Tools**, point to **Setup**, point to **System**, and then click **User Security**.
- b. In the User Security Setup window, click the lookup button next to the **User** field, click a user who you want to use, and then click **Select**.
- c. In the **Company** list, click a company that you want to use.
- d. Verify that the check box for the security role that you specified in step 3 is selected. Otherwise, click to select the check box.
- e. Click **Save** to assign the user to the security role.
- f. Close the User Security Setup window.

Method 2: Create a new security task and a new security role for the custom report

1. Log on to Microsoft Dynamics GP 10.0 as the sa user.
2. Create a new security task. To do this, follow these steps:
 - a. On the **Microsoft Dynamics GP** menu, point to **Tools**, point to **Setup**, point to **System**, and then click **Security Tasks**.
 - b. In the Security Task Setup window, type a task identifier (ID) in the **Task ID** field, type a task name in the **Task Name** field, and then type a description in the **Task Description** field.
 - c. In the **Category** list, select the category that you want to use for the task.
 - d. In the **Product** list, click the product that you want to use for the custom report.
 - e. In the **Type** list, click **Custom Reports**.
 - f. In the **Series** list, click the appropriate series.

- The **Access List** area displays the custom reports.
- g. Click to select the check boxes for the custom reports.
 - h. Click **Save**.
 - i. Close the Security Task Setup window.
3. Create a new security role for the security task that you created in step 2. To do this, follow these steps:
- a. On the **Microsoft Dynamics GP** menu, point to **Tools**, point to **Setup**, point to **System**, and then click **Security Roles**.
 - b. In the Security Role Setup window, type a role identifier (ID) in the **Role ID** field, type a role name in the **Role Name** field, and then type a description in the **Role Description** field.
 - c. Click the security role that you want to use.
 - d. Click to select the check box for the security task that you created in step 2.
 - e. Click **Save**.
 - f. Close the Security Roles Setup window.
4. Assign the security role to the user. To do this, follow these steps:
- a. On the **Microsoft Dynamics GP** menu, point to **Tools**, point to **Setup**, point to **System**, and then click **User Security**.
 - b. In the User Security Setup window, click the lookup button next to the **User** field, click a user who you want to use, and then click **Select**.
 - c. In the **Company** list, click a company that you want to use.
 - d. Verify that the check box for the security role that you specified in step 3 is selected. Otherwise, click to select the check box.
 - e. Click **Save**.
 - f. Close the User Security Setup window.

Q4: What are the steps to find the SECURITYRESIDs for windows and for reports?

A4: To find the SECURITYRESIDs for windows and for reports, follow these steps:

1. Click **Microsoft Dynamics GP**, point to **Maintenance**, and then click **Clear Data** to open the Clear Data window.
2. On the **Display** menu, click **Physical**.
3. In the **Series** list, click **System**.
4. In the **Tables** pane, click the **Security Resource Descriptions** table, and then click **Insert**.
5. Click **OK**.
6. Click **Yes**.
7. In the Report Destination window, select the **Screen** check box, and then click **OK** to send the report to the screen.
8. Close the report.

The Security Resource Descriptions table is populated. You can use the table in an SQL query in Microsoft SQL Query Analyzer or in Microsoft SQL Server Management.

The following query is used to display security roles and security tasks that are associated with a specific window or with a specific report. You can specify the window or the report by changing the

display name in the last line of the query.

```
SELECT ISNULL(A.SECURITYROLEID, '') AS SECURITYROLEID,
ISNULL(M.SECURITYROLENAMENAME, '') AS SECURITYROLENAMENAME,
--ISNULL(M.SECURITYROLEDESC, '') AS SECURITYROLEDESC,
ISNULL(O.SECURITYTASKID, '') AS SECURITYTASKID,
ISNULL(T.SECURITYTASKNAME, '') AS SECURITYTASKNAME,
--ISNULL(T.SECURITYTASKDESC, '') AS SECURITYTASKDESC,
R.PRODNAME, R.TYPESTR, R.DSPLNAME, R.RESTECHNAME, R.DICTID, R.SECRESTYPE, R.SECURITYID
FROM DYNAMICS.dbo.SY09400 R
FULL JOIN DYNAMICS.dbo.SY10700 O ON R.DICTID = O.DICTID
AND O.SECRESTYPE = R.SECRESTYPE AND O.SECURITYID = R.SECURITYID
FULL JOIN DYNAMICS.dbo.SY09000 T ON T.SECURITYTASKID = O.SECURITYTASKID
FULL JOIN DYNAMICS.dbo.SY10600 A ON A.SECURITYTASKID = T.SECURITYTASKID
FULL JOIN DYNAMICS.dbo.SY09100 M ON M.SECURITYROLEID = A.SECURITYROLEID
WHERE R.DSPLNAME = '<Display_Name>'
```

Note The *<Display_Name>* placeholder represents the actual display name. For example, the display name may be "Sales Transaction Entry."

The following table lists the result of the query for the **Sales Transaction Entry** object against a default installation.

SECURITYROLEID	SECURITYROLENAMENAME	SECURITYTASKID	SECURITYTASKNAME	PRODNAME	TYPESTR	DSPLNAME	RESTECHNAME	DICTID	SECRESTYPE	SECURITYID
BOOKKEEPER*	Bookkeeper	TRX_SALES_001*	Enter SOP transactions	Microsoft Dynamics GP	Windows	Sales Transaction Entry	SOP_Entry	0	0	619
CUSTOMER SERVICE REP*	Customer Service Representative	TRX_SALES_001*	Enter SOP transactions	Microsoft Dynamics GP	Windows	Sales Transaction Entry	SOP_Entry	0	2	619
OPERATIONS MANAGER*	Operations Manager	TRX_SALES_001*	Enter SOP transactions	Microsoft Dynamics GP	Windows	Sales Transaction Entry	SOP_Entry	0	2	619
SHIPPING AND RECEIVING*	Shipping and Receiving	TRX_SALES_001*	Enter SOP transactions	Microsoft Dynamics GP	Windows	Sales Transaction Entry	SOP_Entry	0	2	619

If no security roles are assigned to the security tasks, the table is blank. If no security tasks are assigned to the operation, the table is also blank.

Q5: How can I create my own security task and assign the task to a new security role?

A5: For information about how to create a task and to create a role, see page 33 in the SystemSetup.pdf file. To view this file, visit the following Microsoft Web site:

<https://mbs.microsoft.com/downloads/public/GP10Docs/SystemSetup.pdf>

Q6: How do I set up a security role for the navigation lists?

A6: You can grant access to the navigation lists by using a task. The default tasks already include access. To grant access to a navigation list by using a new task, follow these steps:

1. On the **Microsoft Dynamics GP** menu, point to **Tools**, point to **Setup**, point to **System**, and then click **Security Tasks**.
2. Enter the security task that you want to use.
3. In the **Product** list, click **Microsoft Dynamics GP**.
4. In the **Type** list, click **Navigation Lists**.

5. In the **Series** list, click **Navigation lists**.
6. Click the navigation lists to which you want the task to have access.
7. Assign the new task to a role.

Note For more information about how to do this, see question 4 in the "Security setup" section.

Q7: How do I grant access to the Create Return feature in the Sales Transaction Entry window?

A7: To grant access to the Create Return feature in the Sales Transaction Entry window, follow these steps:

1. On the **Microsoft Dynamics GP** menu, point to **Tools**, point to **Setup**, point to **System**, and then click **Security Tasks**.
2. In the **Task ID** field, type an ID.
3. In the **Category** list, click **Sales**.
4. In the **Task Name** field, type a name.
5. In the **Product** list, click **Field Service**.
6. In the **Type** list, click **Windows**.
7. In the **Series** list, click **Project**.
8. In the **Access List** pane, click to select the following check boxes:
 - **Create Return**
 - **Invoice Document Lookup**
 - **Invoice Document Lookup**
 - **Sales Invoice Return Item Selection**

Note Two identical check boxes exist for **Invoice Document Lookup**. Click to select both check boxes.

9. Click **Save**.

Security conversion

Q1: What occurs if I perform the security conversion when I upgrade from Microsoft Business Solutions - Great Plains 8.0 or Microsoft Dynamics GP 9.0 to Microsoft Dynamics GP 10.0?

A1: If you perform the security conversion when you upgrade to Microsoft Dynamics GP 10.0, the following actions occur:

- For each user in a company, a task and a role are created. The name of the task and the role is CNV_USERID_COID. For example, if you perform the security conversion for the Phyllis user in the TWO company, the task and the role are named as CNV_PHYLLIS_TWO.
- The existing security access is assigned to the CNV_USERID_COID task. Additionally, the task is assigned to the CNV_USERID_COID role.
- The CNV_USERID_COID role is assigned to the user for the company.
- All accesses to alternate forms and to modified forms are converted to an identifier (ID) of CNV_USERID_COID. The ID is assigned to the user in each company.
- The SY02000 security table and the SY40300 security table in Microsoft Business Solutions - Great Plains 8.0 or in Microsoft Dynamics GP 9.0 are removed.

Q2: Do I have to convert the security to Microsoft Dynamics GP 10.0?

A2: No. You are not required to convert the security. However, if the security is not converted, non-sa users do not have access to any modules in Microsoft Dynamics GP 10.0.

Q3: If the security is not converted when I upgrade to Microsoft Dynamics GP 10.0, can I go back and convert the security?

A3: No. It is difficult to go back after you upgrade to Microsoft Dynamics GP 10.0. We recommend that you convert the security when you update to Microsoft Dynamics GP 10.0.

Q4: How can I view the records that are created when I perform the security conversion?

A4: To view the records that are created when you perform the security conversion, you can run the following SQL script:

```
select * from DYNAMICS.dbo.SY10700 where SECURITYTASKID like 'CNV%'
select * from DYNAMICS.dbo.SY09000 where SECURITYTASKID like 'CNV%'
```

```
select * from DYNAMICS.dbo.SY10600 where SECURITYROLEID like 'CNV%'
select * from DYNAMICS.dbo.SY09100 where SECURITYROLEID like 'CNV%'
```

```
select * from DYNAMICS.dbo.SY10500 where SECURITYROLEID like 'CNV%'
```

```
select * from DYNAMICS.dbo.SY10800 where SECMODALTID like 'CNV%'
select * from DYNAMICS.dbo.SY09200 where SECMODALTID like 'CNV%'
```

```
select * from DYNAMICS.dbo.SY10550 where SECMODALTID like 'CNV%'
```

Q5: What should I consider before I convert the security?

A5: See the Critical Updates area of the following Microsoft Web sites:

https://mbs.microsoft.com/customersource/support/knowledgebase/hottopics/hot_topic_updatingMicrosoftDynamicsGP10.htm?printpage=false

https://mbs.microsoft.com/customersource/support/knowledgebase/hottopics/hot_topic_updating_bp40.htm?printpage=false

The Critical Updates area contains pre-update checks to run.

Q6: When I convert the security, I receive a "The application at the location you specified is a different version than the database that you are attempting to convert. You must specify the location to the version X.0.0 application" error message. How can I resolve this problem?

A6: To resolve this problem, review the resolution that Microsoft Knowledge Base article 935750 describes.

For more information, click the following article number to view the article in the Microsoft Knowledge Base:

[935750](#) Error message in the Transfer Security Data window when you try to upgrade to Microsoft Dynamics GP 10.0: "The application at the location you specified is a different version than the database that you are attempting to convert"

Troubleshooting

Q1: Why do I receive a "You don't have security privileges to open this window. Contact your system administrator for assistance" error message when I use the Payroll Clerk security role to calculate payroll checks in Microsoft Dynamics GP?

A1: When you assign the Payroll Clerk security role to a user, the Calculate Payroll Taxes window is not included in the TRX_PAYRL_003* task ID. To work around this problem, follow these steps:

1. On the **Microsoft Dynamics GP** menu, point to **Tools**, point to **Setup**, point to **System**, and then click **Security Tasks**.
2. In the **Task ID** list, click **TRX_PAYRL_003***.
3. In the **Product** list, click **Microsoft Dynamics GP**.
4. In the **Type** list, click **Windows**.

5. In the **Series** list, click **System**.
6. Click to select the **Payroll Calculate Taxes** check box.
7. Click **Save**.

For more information, click the following article number to view the article in the Microsoft Knowledge Base:

[942007](#) Error message when you use the Payroll Clerk security role to calculate payroll checks Microsoft Dynamics GP: "You don't have security privileges to open this window"

Q2: When I open the Purchase Order Entry window in Purchase Order Processing in Microsoft Dynamics GP 10.0, I receive a "You don't have security privileges to open this window. Contact your system administrator for assistance" error message. How can I resolve this problem?

A2: To resolve this problem, review the resolution that Microsoft Knowledge Base article 945957 describes.

For more information, click the following article number to view the article in the Microsoft Knowledge Base:

[945957](#) Error message when you try to open the Purchase Order Entry window in Purchase Order Processing in Microsoft Dynamics GP 10.0: "You don't have security privileges to open this window"

APPLIES TO

- System Manager, when used with:
Microsoft Dynamics GP 10.0

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