Role Based Views for Microsoft Dynamics CRM

Release Notes

Release Date: August 2016

Role Based View Configurator

Version 1

Revision History

Date	Description of Change	Author Information
August 2016	Initial Release	Debajit Dutta

Overview

Security is a cornerstone of Microsoft Dynamics CRM and with the passing time Microsoft never ceased to mesmerize us by evolving new security features of Dynamics CRM platform. Despite these evolutionary features still there are lot of scenarios which CRM administrators face in their day to day life which cannot be achieved by out of box features. One such request CRM administrators gets more often is the request to display or hide system views for entities based on the security roles of the users, simply called as Role based Views. Role Based View Configurator is the tool which is designed to accomplish exactly the same.

Record Cloning or Record Copying for Microsoft Dynamics CRM is one of the methods which can reduce the time spent on data entry, particularly if the data being entered is similar. Record Cloning or Record Copying allows you to create one or multiple records with the same values as the parent record.

Installation Requirements

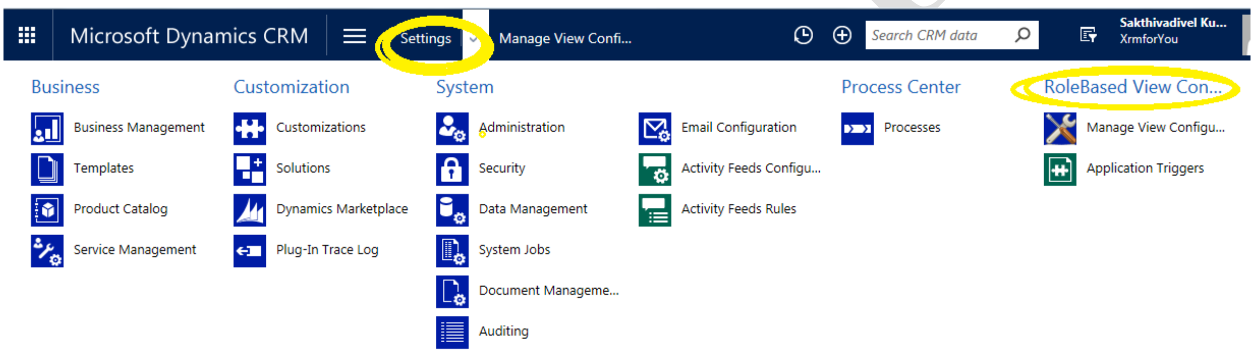
Components	Supported Version
Microsoft Dynamics CRM	Microsoft Dynamics CRM Online
	Microsoft Dynamics CRM 2016
	Microsoft Dynamics CRM 2015
Browsers	Internet Explorer 10 and above
	Google Chrome
	Firefox

Deployment Steps

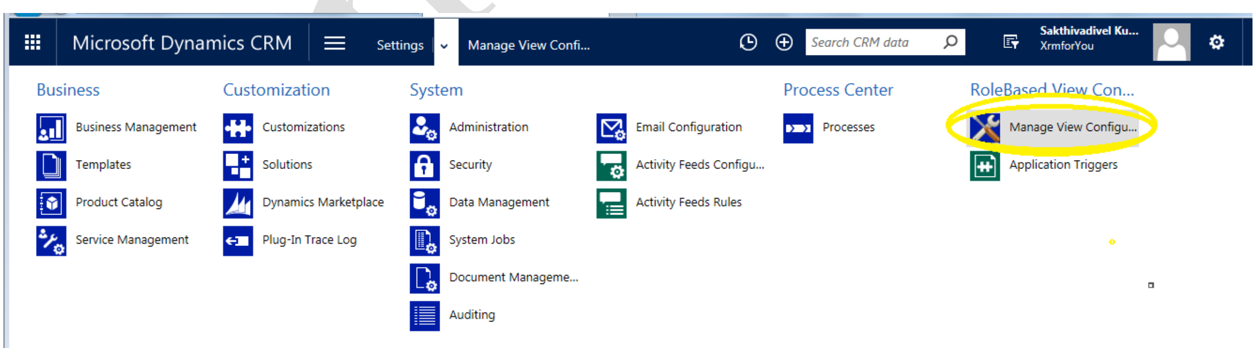
- Login into your Microsoft Dynamics CRM application with a user having System Administrator role (also Deployment Administrators for On Premise).
- Import the ***"XrmForYou.RoleBasedViews*** "solution into your CRM application and publish it.

Navigation

Once Role Based Views is deployed to CRM, Please navigate to "**Settings**" area and you can find all the menus related to Role based Views under the "**Role based view" subarea**.



Please click on "**Manage View Configurations**" to access Role Based View Configuration page.

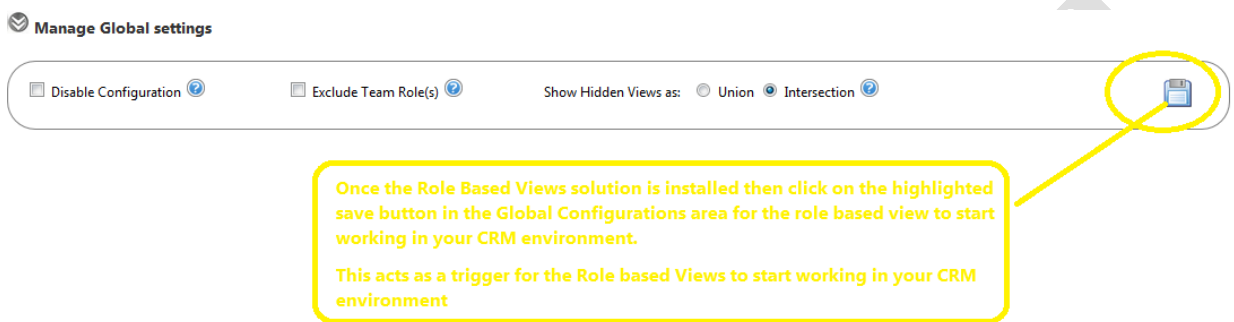


How to Activate the Trial

- Please go to Manage View Configurations page by navigating to

Settings >>RoleBased View Configurations >> Manage View Configurations

Then Click on the **Save Button** on the **Global Configurations** area to start the trigger for Role Based Views in your CRM environment.



Features

Role based View configurator will allow you to configure visibility and setting the default view of a logged in user based on security roles.

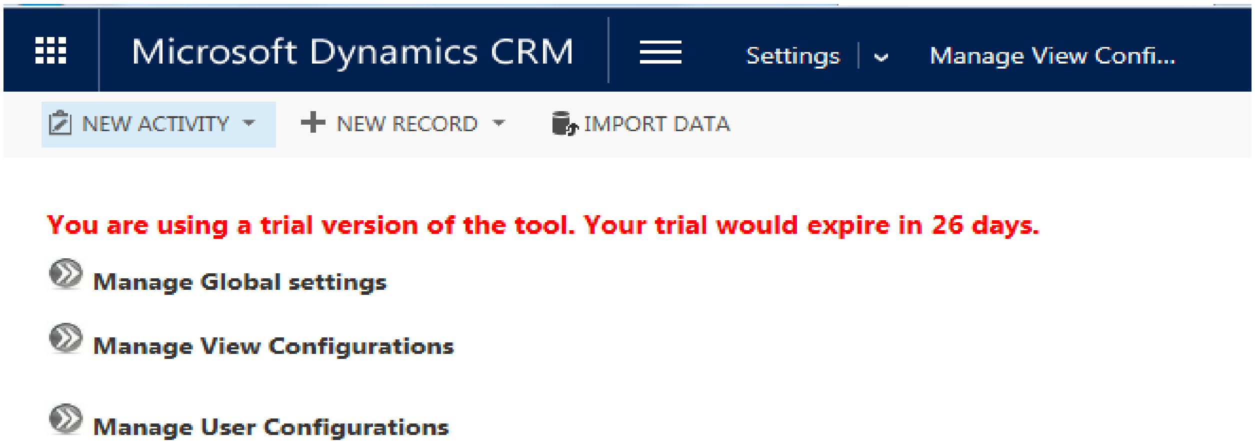
The tool provides the following functionalities

- Set the default view for a user for a particular entity based on security role
- Hide/ Show views for a user for a particular entity based on his security role
- Choose the preferred role for a user for view configuration when the user have more than one security role in the system.
- Ability to exclude/ include a user from view configuration as per business requirements
- Clone View Configurations between security roles.

The Role based View configurator have three main sections namely

- Manage Global Settings
- Manage View Configurations
- Manage User Configurations

as shown below.

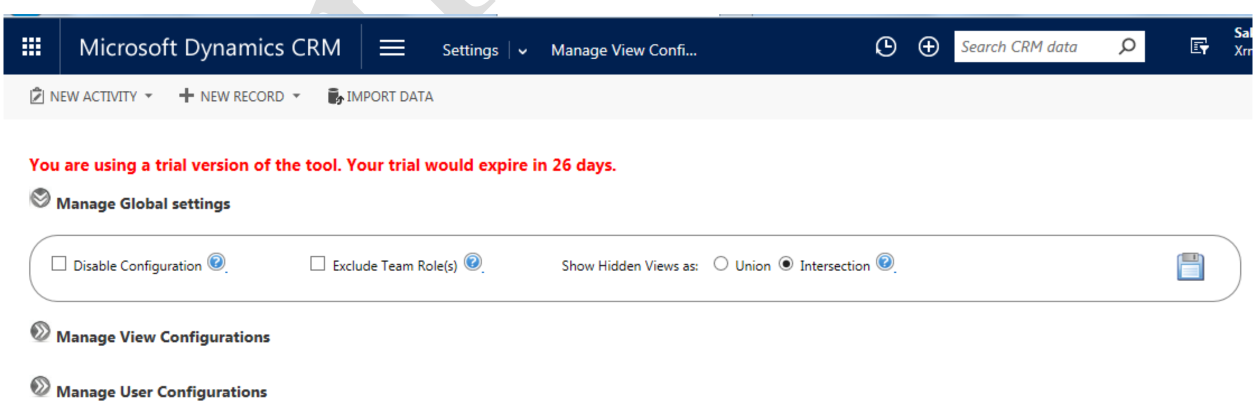


Manage Global Settings

Manage Global settings is the section of the tool where you will have the options to configure and manage the role based view settings at your CRM Organization level.

Note

Global Settings will override and take priority over all the individual role based view settings which are configured at User (or) Entity level.



Let us see the different options available for global settings in detail:

i. **Disable Configuration:** This is the Option by which you can disable the available role based configurations at CRM Organization level. If the Disable Configuration Checkbox is checked then the existing role based for the specific CRM Organization will be disabled at CRM Organization level. Please note this setting will override all the individual role based view settings which are configured for Users (or) Entities so if this option is selected then whatever settings enabled for individual users will also be disabled.

ii. **Exclude Team Role(s):** As CRM administrators we are already aware that a User's security role is the combination of security roles that are associated with the user directly and the security roles that are inherited by the user by the way of their team association.

In some scenario, for configuring role based views we may specifically want to consider only the security roles associated with the user directly and not the roles inherited through team association then here comes handy the "**Exclude Team Role(s)"** feature of the tool.

By checking the checkbox of "**Exclude Team Role(s)"** setting you can just exclude / ignore the team roles in the working of the role based view configurations. (i.e.) once this setting is enabled then Role based views will consider only the security roles directly associated with the CRM user and behaves accordingly.

Again this setting is also at the CRM Organization level and override any individual user level settings of the same effect. On top of this this is an Opt in / Opt out feature which can be dynamically enabled or disabled as and when the need arises.

iii. **Show Hidden Views as:** This functionality comes into play when the user is associated with more than one security role in CRM. When a user is having two security role which have different view configuration for a same entity. Then we can have two scenarios as follows:

a. **Union**: This works as the cumulative set of Hidden views of all the security roles which are associated to a user. This works on the principle of maximum availability. Let us see this in detail with an example.

Example:

For example, let us consider we have three system views for Contact entity in CRM as follows:

Contact System Views

- Active Contacts
- Inactive Contacts
- Contacts I follow
- My Connections
- Contacts: No active orders
- My Active Contacts

In this case let's consider for **Salesperson** security role the role based view is already configured on contact entity to hide the below three views and sales person can only see the remaining system views of Contact entity.

Hidden Views for Salesperson role

- Inactive Contacts
- Contacts I follow
- My Connections

Similarly let's consider for **Sales Manager** Security role the role based view is already configured on contact entity to hide the below three views and Sales Manager can only see the remaining system views of Contact entity.

Hidden Views for Sales Manager role

- Contacts: No active orders
- My Active Contacts
- My Connections

So now let's see what will happen if a CRM user is having both **Salesperson** and **Sales Manager** role in CRM and we are applying the **Union** clause in the **Show Hidden Views as** feature of the role based view configurator. As per the definition **Union** is cumulative set of Hidden views of all the security roles which are associated to a user so in this case for a user having both **Salesperson** and **Sales Manager** role in CRM, **Inactive Contacts, Contacts I follow** and **My Connections** views of contact entity will be hidden in the context of **Salesperson role** and **Contacts: No active orders, My Active Contacts,** and **My Connections** views of contact entity will be hidden in the context of **sales Manager role** so all these six views will be hidden for the users having these two roles together and the users can see only the remaining system views.

Views visible to users having both Salesperson and Sales Manager role together in CRM after applying Union:

- Active Contacts

b. **Intersection:** This works as the Intersection set of Hidden views of all the security roles (Common hidden views between all the security roles associated with a user) which are associated to a user. This works on the principle of maximum availability. Let us see this in detail with an example.

Example:

Let us consider the same above example we have six system views for Contact entity in CRM as follows:

Contact System Views

- Active Contacts
- Inactive Contacts
- Contacts I follow
- My Connections
- Contacts: No active orders
- My Active Contacts

In this case let's consider for **Salesperson** security role the role based view is already configured on contact entity to hide the below three views and sales person can only see the remaining system views of Contact entity.

Hidden Views for Salesperson role

- Inactive Contacts
- Contacts I follow
- My Connections

Similarly let's consider for **Sales Manager** Security role the role based view is already configured on contact entity to hide the below three views and Sales Manager can only see the remaining system views of Contact entity.

Hidden Views for Sales Manager role

- Contacts: No active orders
- My Active Contacts
- My Connections

So now let's see what will happen if a CRM user is having both **Salesperson** and **Sales Manager** role in CRM and we are applying the **Intersection** clause in the **Show Hidden Views as** feature of the role based view configurator. As per the definition **Intersection** is Intersection set of Hidden views of all the security roles (Common hidden views between all the security roles associated with a user) which are associated to a user. so in this case for a user having both **Salesperson** and **Sales Manager** role in CRM, the common view hidden between the two role is My Connections view of the contact entity so the users with both these roles together in CRM will see all the remaining system views of contact except My Connections view which is hidden in the context of both the roles.

Views visible to users having both Salesperson and Sales Manager role together in CRM after applying Intersection:

- Active Contacts
- Inactive Contacts
- Contacts I follow
- Contacts: No active orders
- My Active Contacts

Help

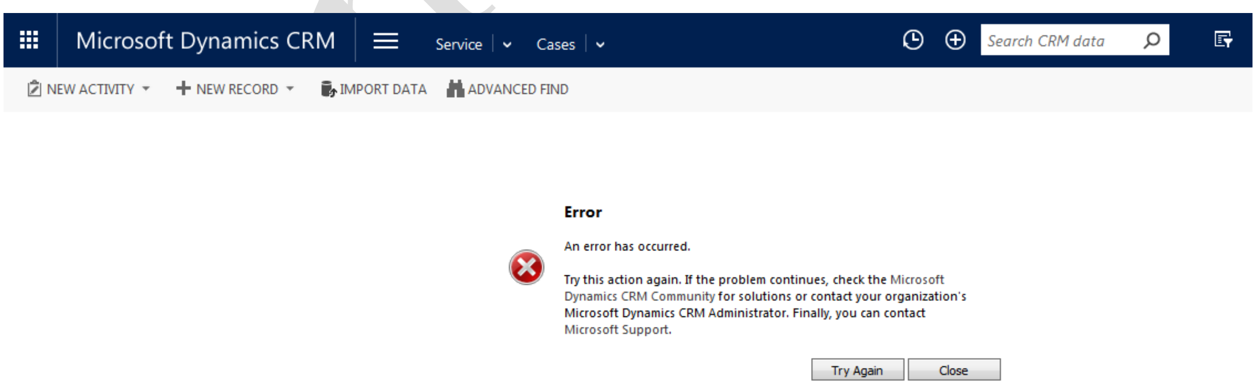
Click on the icon near the relevant settings to read the corresponding help instructions.

Important

Scenarios to Consider while using Unon (or) Intersection feature

- For users having multiple security roles associated with them directly or inherited through team associations, when using Union or Intersection functionality you may end up in a scenario where all the system views for a particular entity have been hidden.

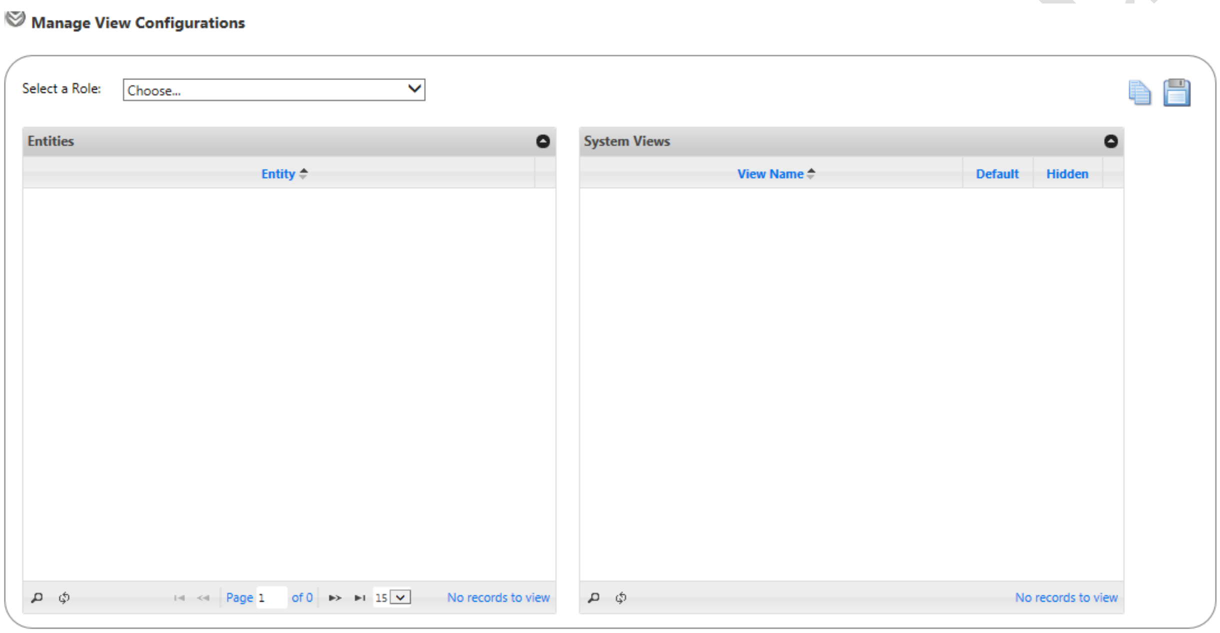
- In this scenario, although you may have some default view setup in one security role, the same view can be hidden in Other security roles so the entity may not have any view to show and all the view may be hidden so when there is no system views for the entity to show, then the system throws an generic error message as show below.



- When handling these kind of scenarios, CRM administrators should be extra careful and make sure there is at atleast one system for each entity to show.

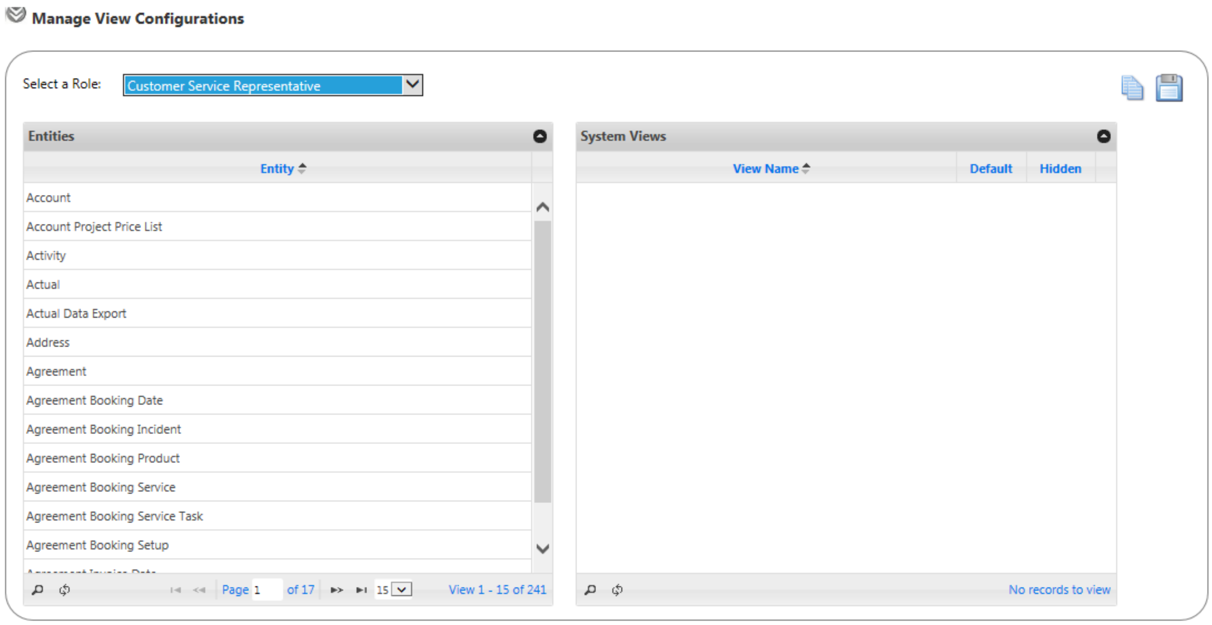
Manage View Configurations

- This section of the Role Based View Configurator is the section where you can configure the hidden / shown views for available entities for different security roles.
- This section also helps you to configure the default view for entities for the available security roles.



Let us see the steps to configure the Role Based View configurations

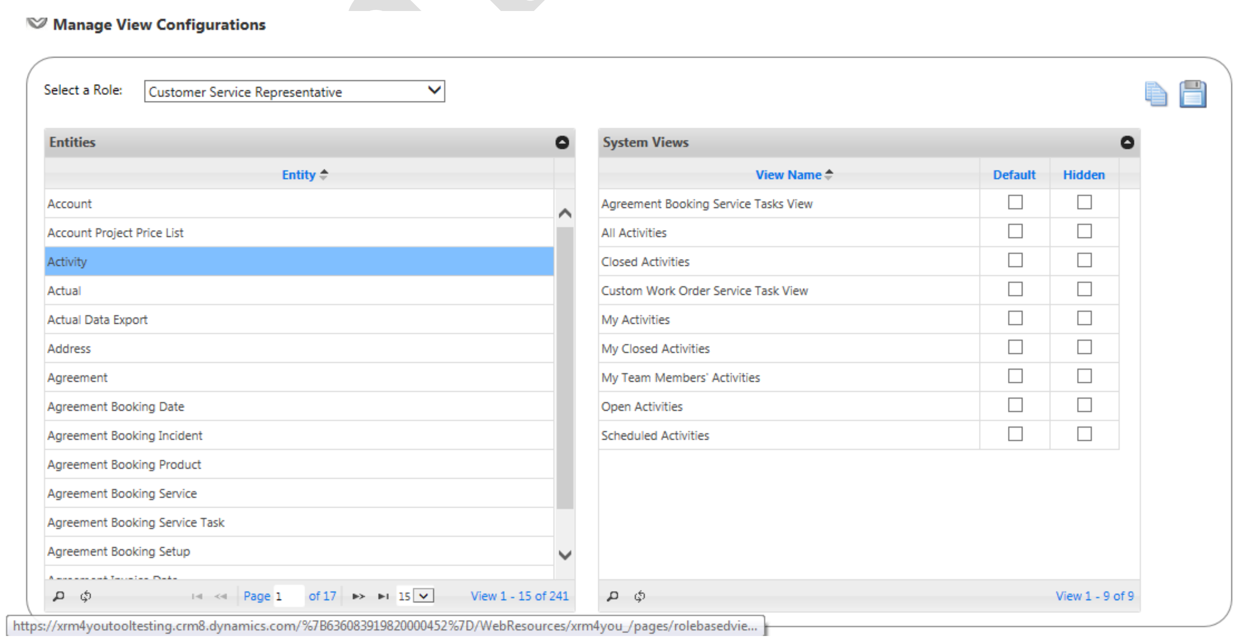
1. Select the role you want to create / modify view configuration. Once you select a role it will load all the available entities in the Entities area as shown below.



2. Click on the specific entity to load all the System Views for the specific entity in the System Views area.

Note

Please note that the associated and the quick find views will not be loaded.



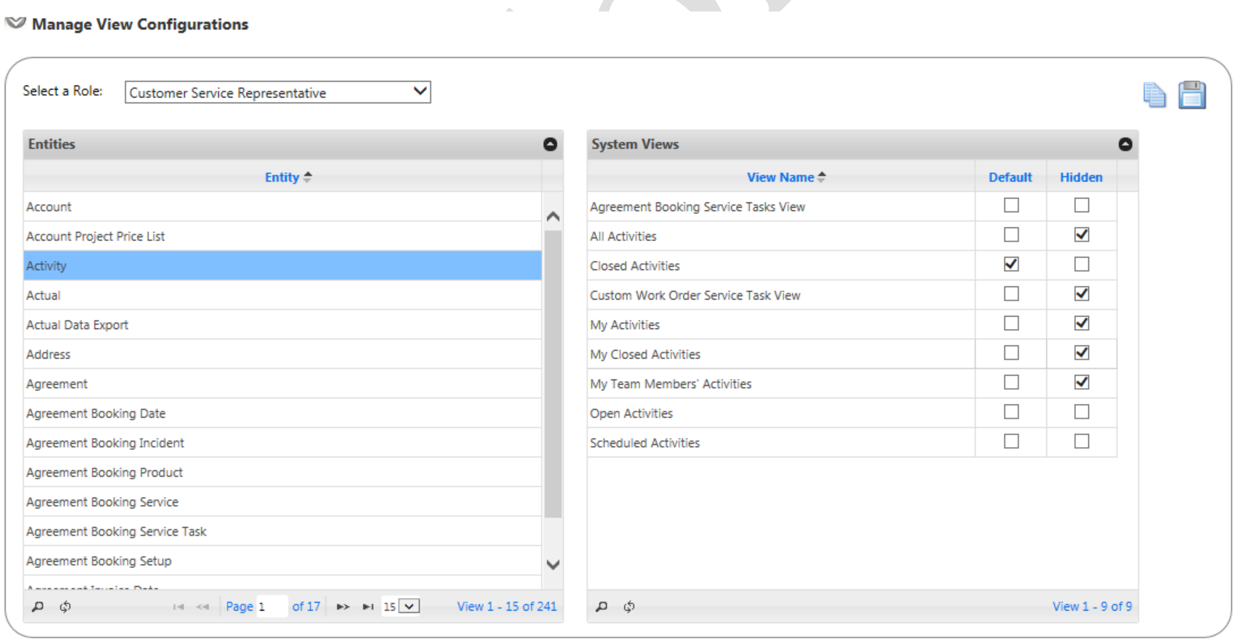
3. Now once the system views are loaded, you can configure hidden views and default view by checking the **available check boxes against the each views.**

Important Note

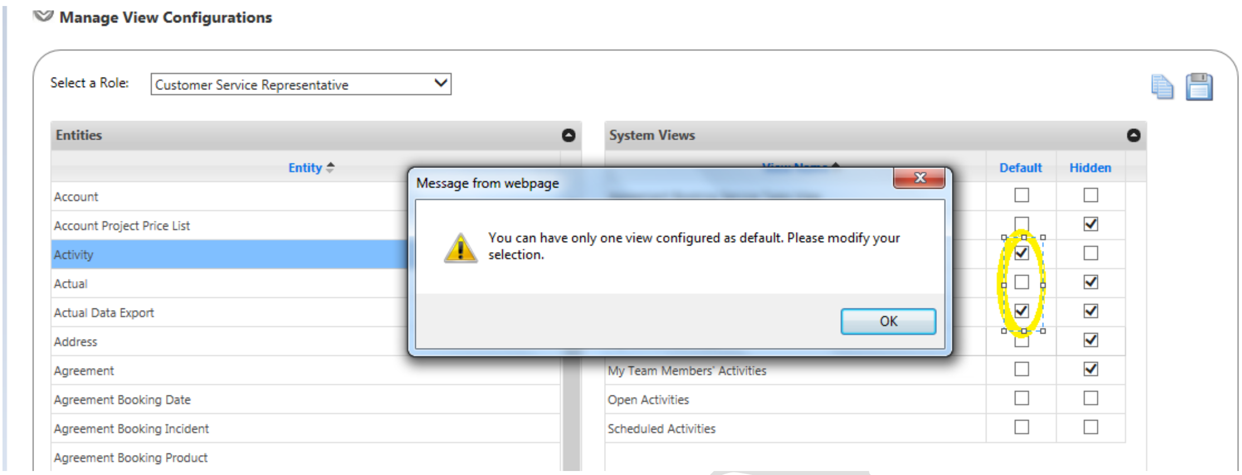
Only one default view can be selected for an entity at one time.

You will not be able to select a Hidden view as Default for an entity

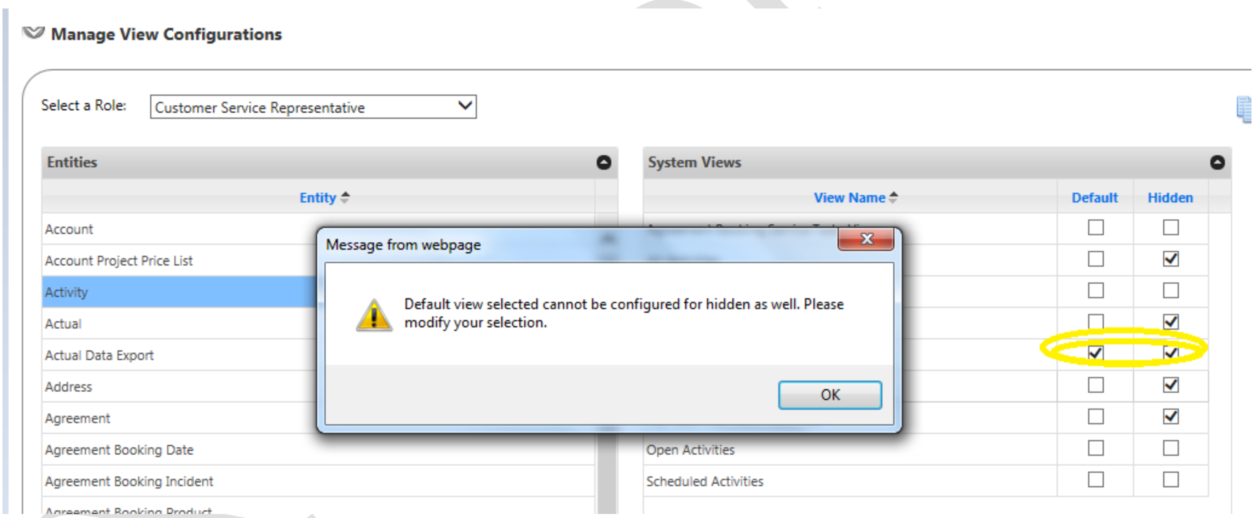
4. Once the required configurations are selected, then go ahead and save the configurations using the **Save** button.



Error while saving multiple views as Default View



Error while saving Hidden view as Default View

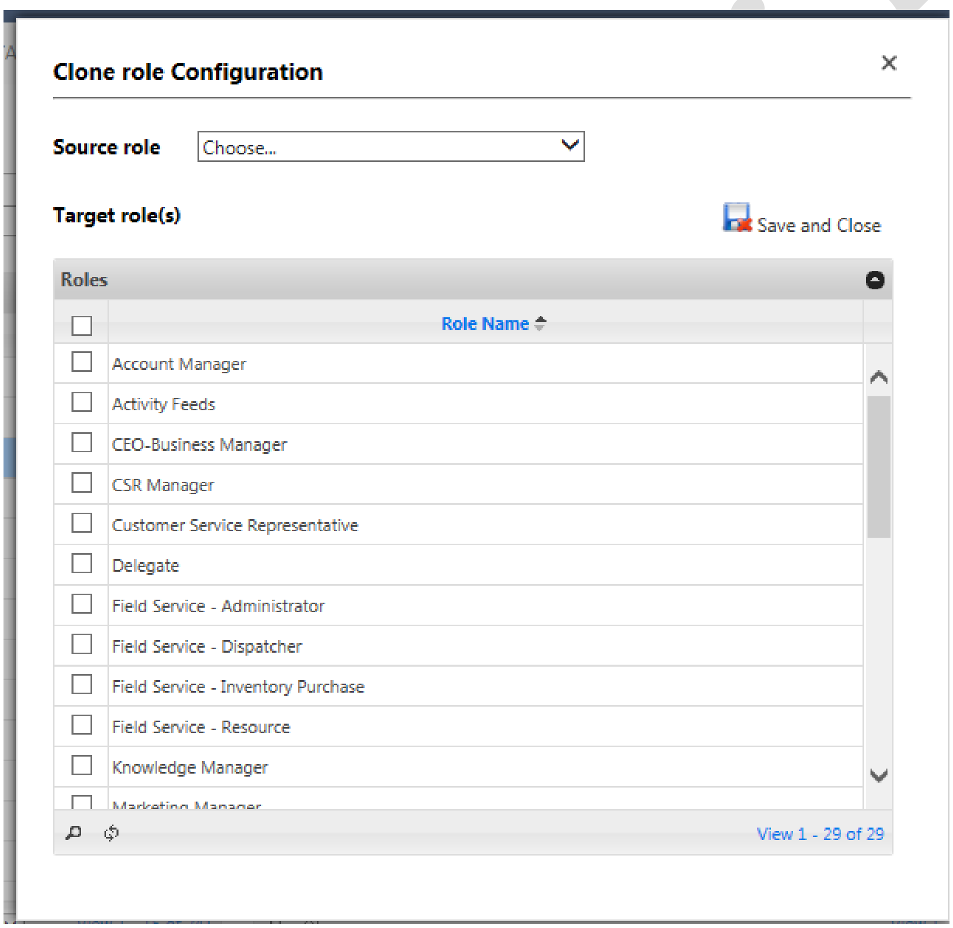


Additional Features available in the Manage View Configurations section:

Clone Configuration:

At times as CRM administrators, you may need to have same role based view configurations for more than one security and you will love to have a one click copy functionality to copy role based configurations between system views. Here comes handy the **Clone functionality** which helps to copy /replicate the role based configuration of one security role to one or multiple other security roles by simple clicks.

Clone Popup Window



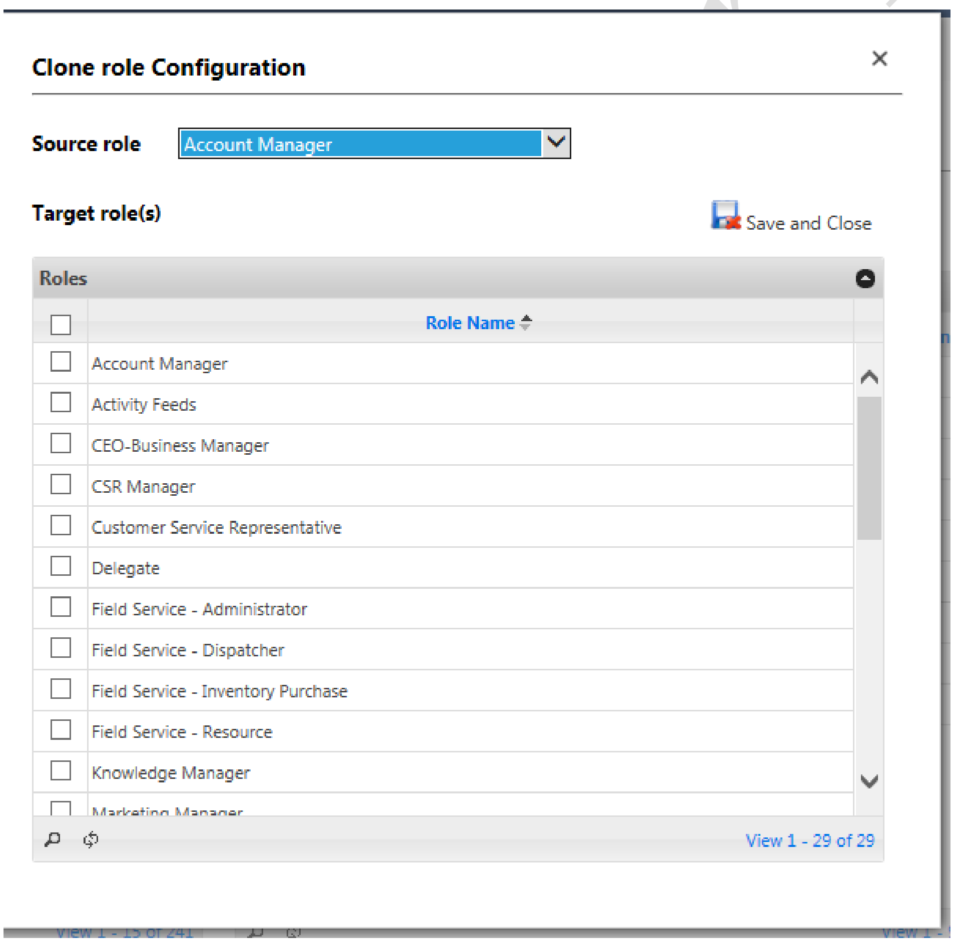
Let us see the steps to clone configuration in detail below:

Example:

For Example let us consider that you have already completed the setup of role based view configurations for **Account Manager** security role and you want to copy the same configuration to **Salesperson** and **Sales Manager** security roles so here **Account Manager** is the Source role and **Salesperson** and **Sales Manager** roles are the Target roles.

Now let's see steps to clone the role based view configurations from source role **(Account Manager)** to target roles and (**Salesperson** and **Sales Manager).**

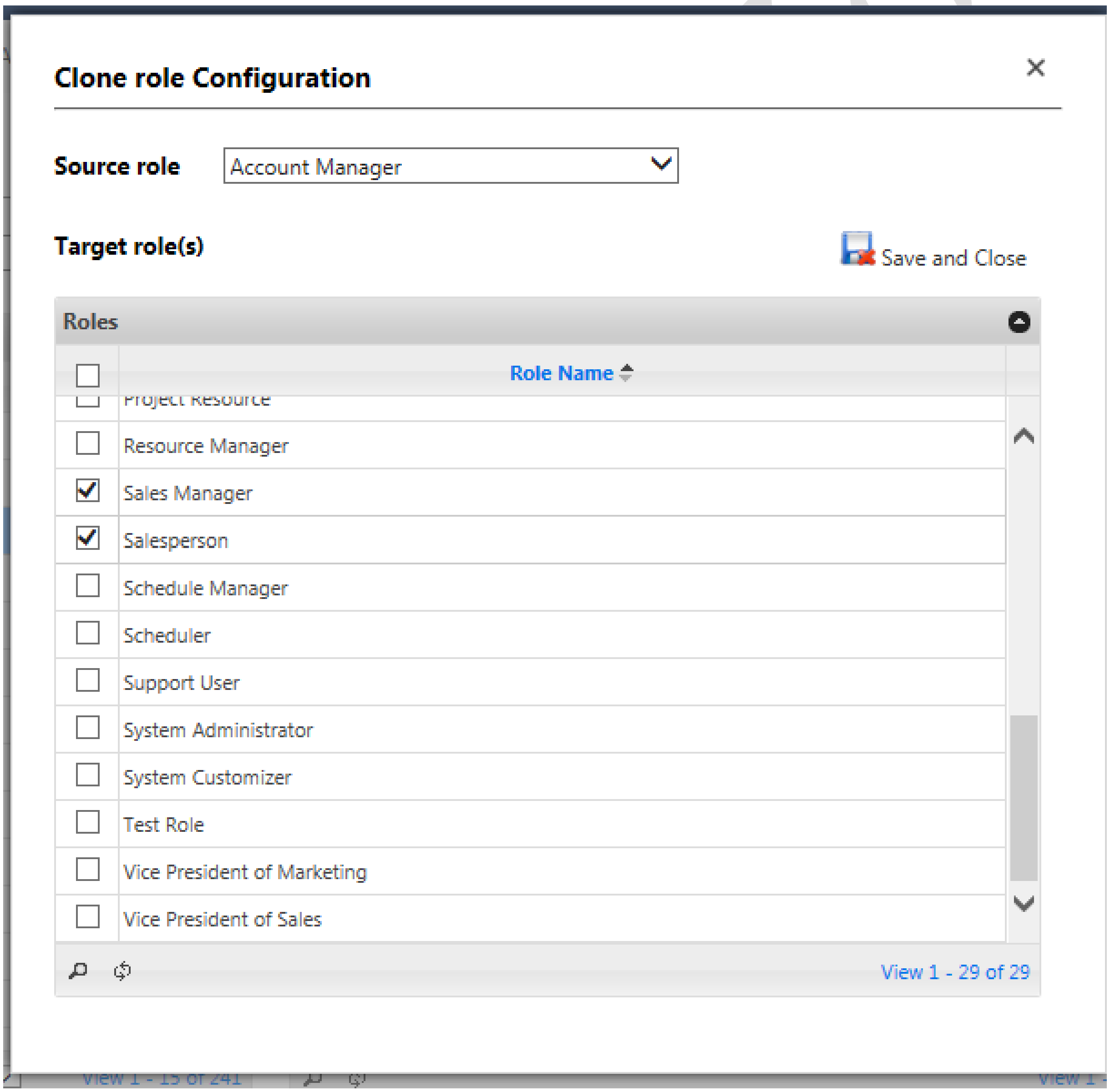
1. Select the source role (**Account Manager**) in the **Source role** dropdown in the clone page.

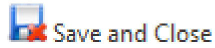


2. Select the Target roles (**Salesperson** and **Sales Manager)** by checking the check boxes against the required security roles in the Target Roles area of the clone window.

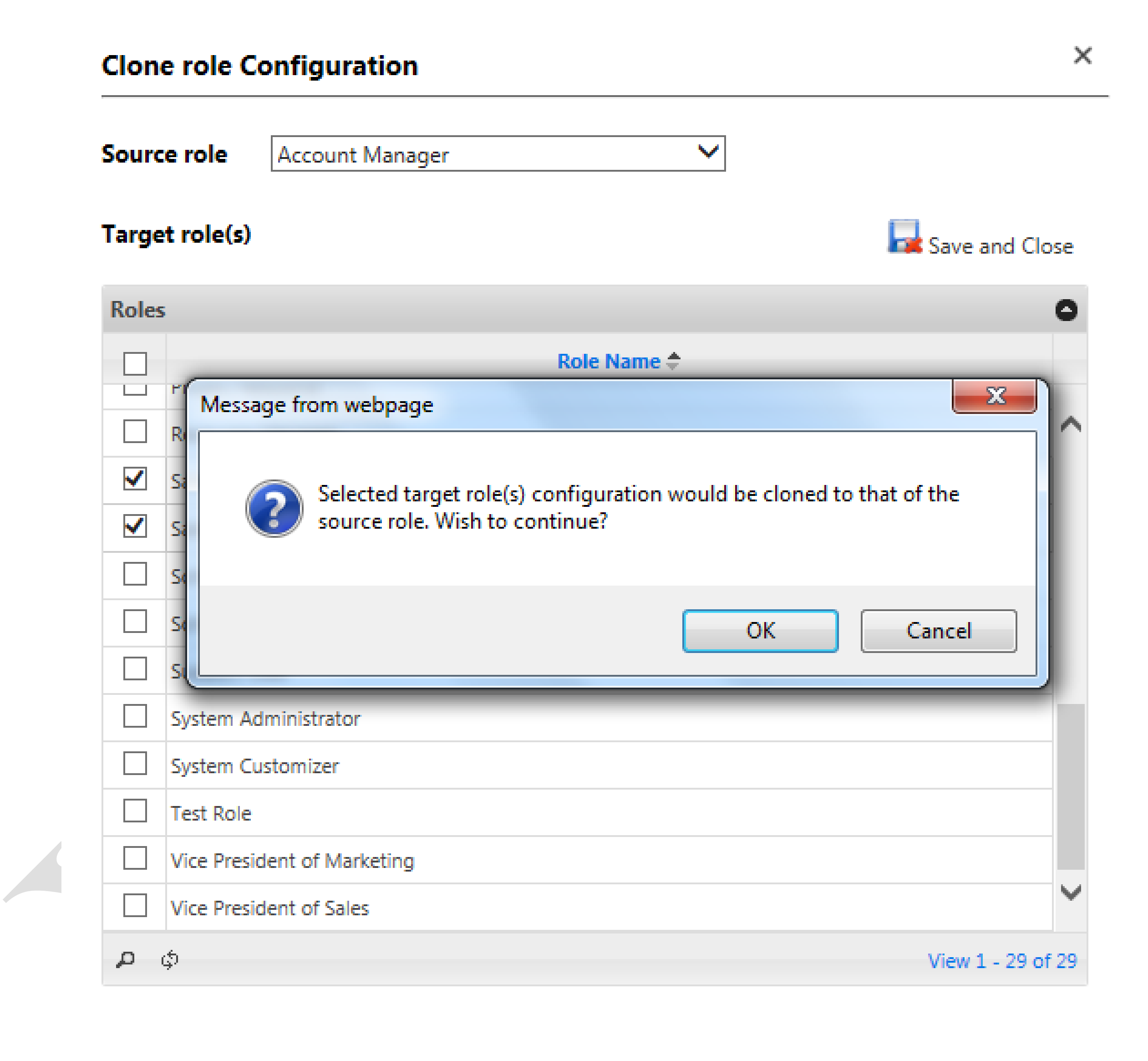
Note

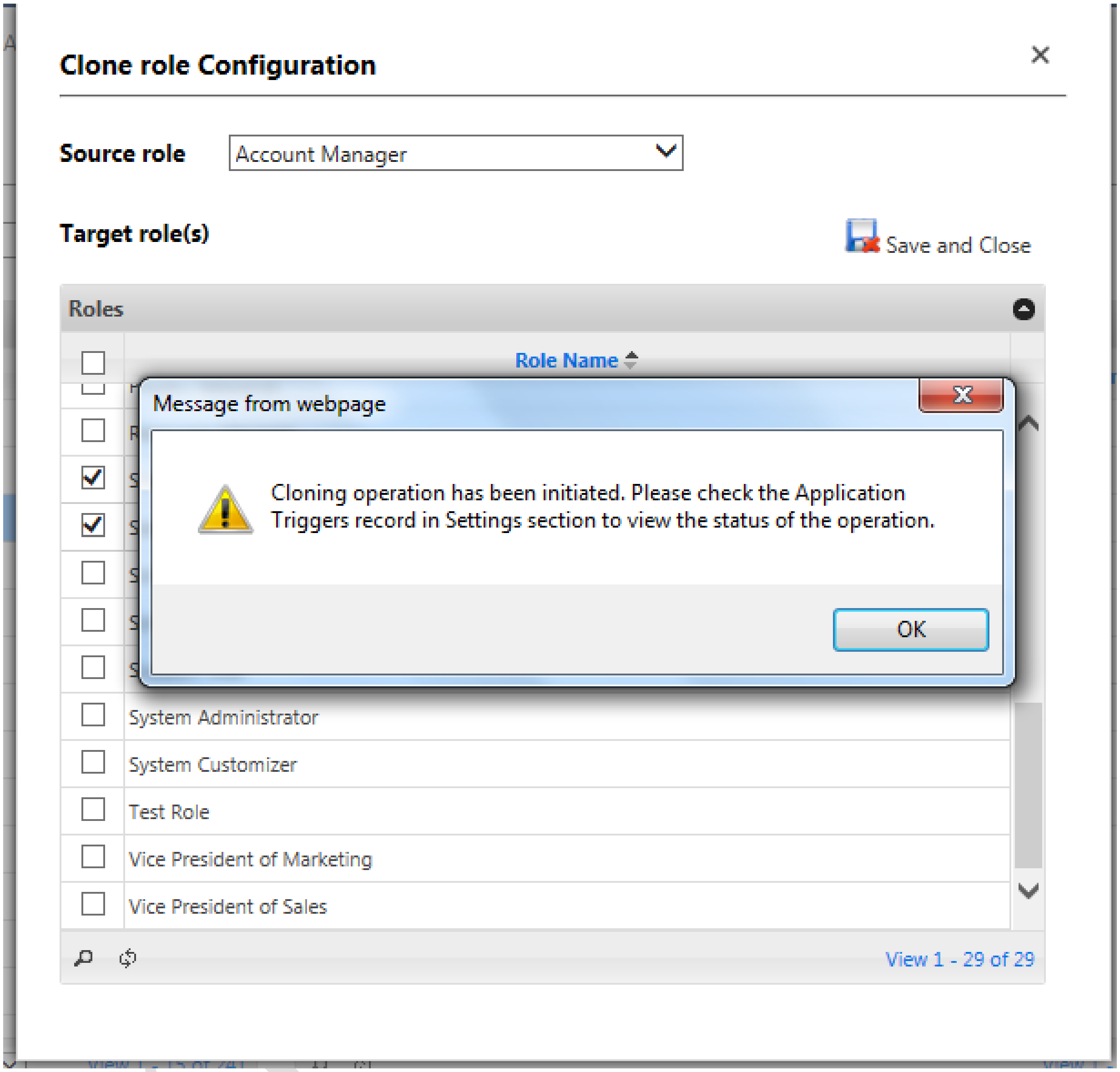
You can select multiple Target roles to clone the role based view configuration from a single Source role.



3. Once the required source role and Target roles are selected, click on the "**Save and Close button"** 

to clone the configurations from source security role to target security roles.




Clone role Configuration
Source role
Account Manager
Target role(s)
Save and Close
Roles
Role Name
Message from webpage
Cloning operation has been initiated. Please check the Application Triggers record in Settings section to view the status of the operation.
OK
System Administrator
System Customizer
Test Role
Vice President of Marketing
Vice President of Sales
View 1 - 29 of 29

Note for Administrators on Cloning

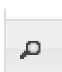
Cloning can be a heavy operation based on the records involved in the cloning operation and to avoid any lag to the users the cloning operation is handled asynchronously and the details of these operations are stored in a separate entity called "**Application Triggers**".

This Entity holds the details like Operation, Operation Status and Message.

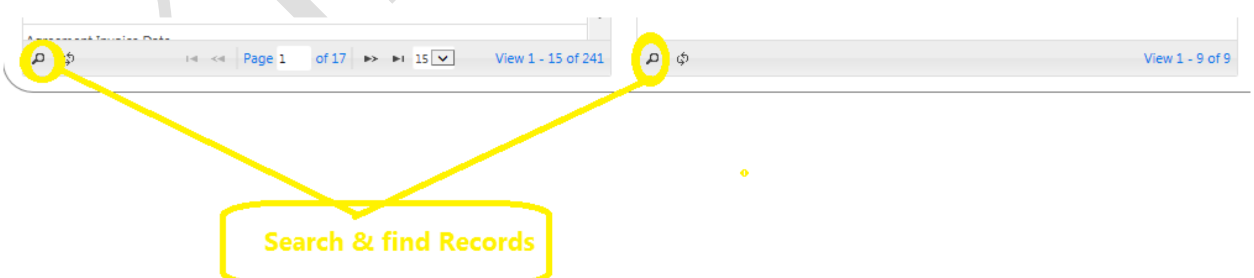
Note

If a cloning operation fails with an error, then the respective Operation will be marked with Operation Status as "**Failed**" and the error stack stored in the "**Message**" attribute of the **"Application Trigger"** entity. So developers and administrators can refer the message of the failed operation to know the exact details of the error and can take corrective action if required.

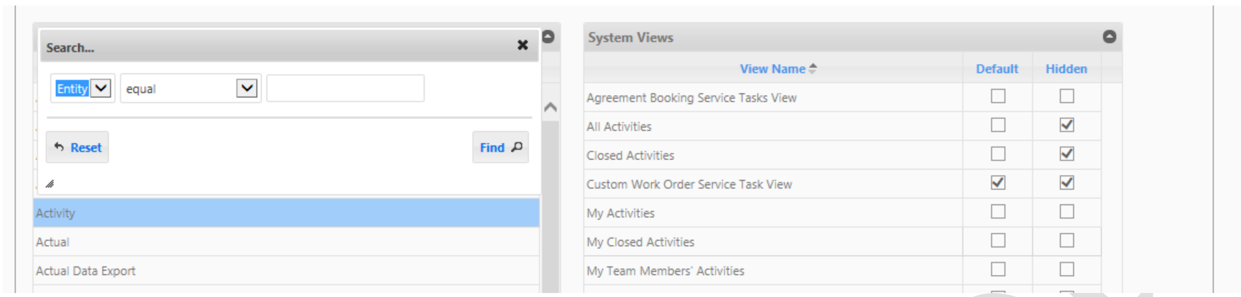
Find Records:

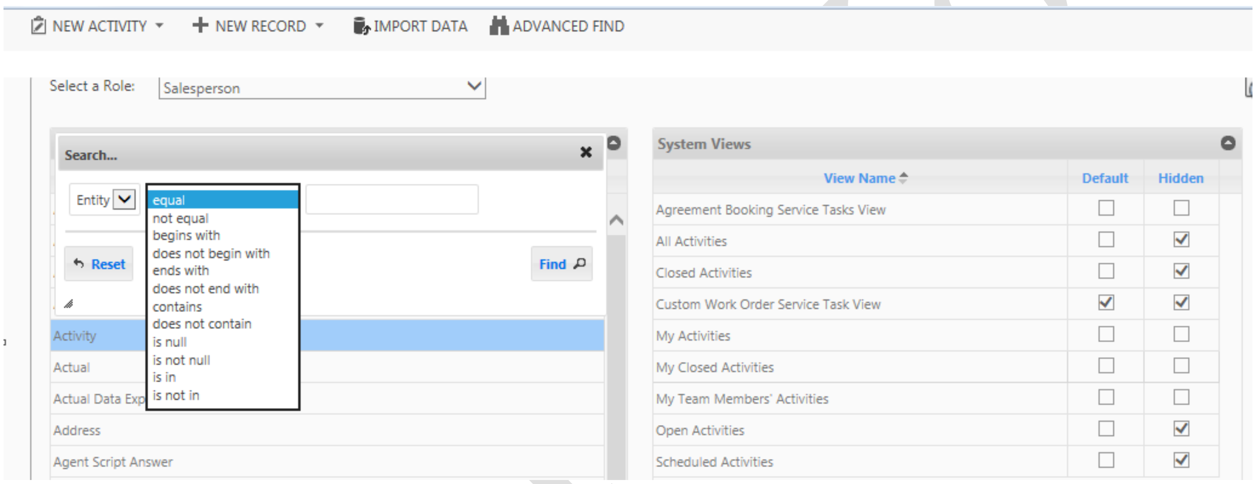


Find Records is the functionality which gives you a **Search and Find** option where you can search and find the required records easily instead of traversing through multiple pages in the scenario where you have a large number of records in CRM.

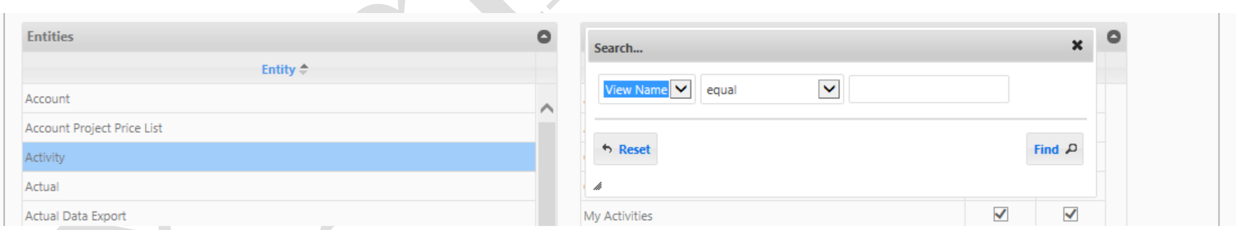


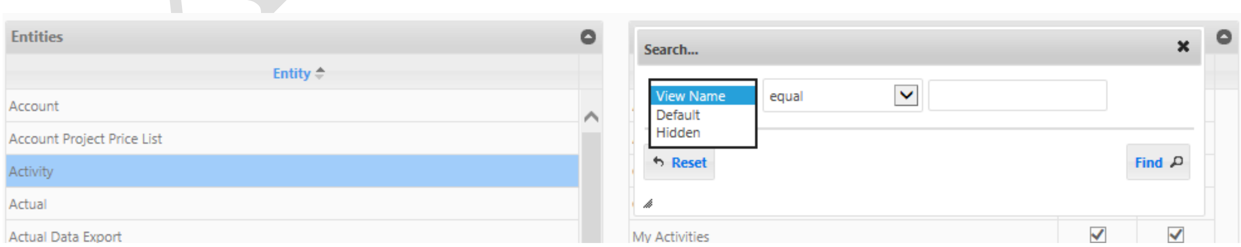
Search and Find functionality in the Entity area

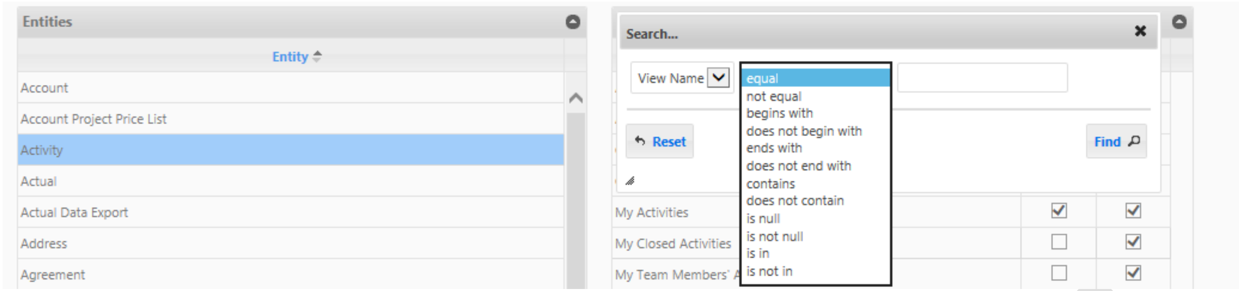




Search and Find functionality in the System Views area



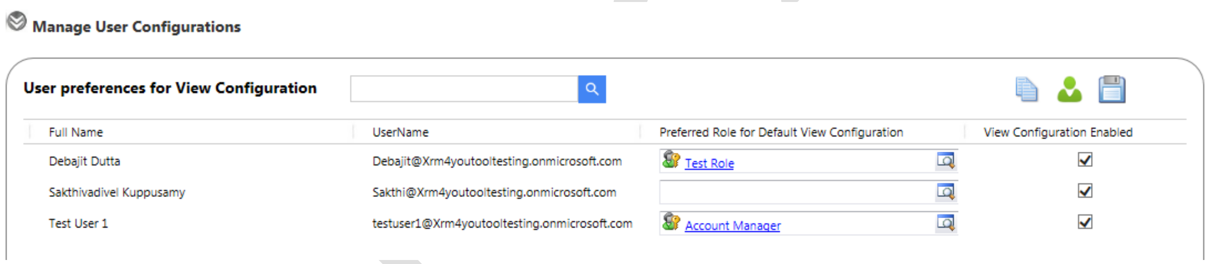




Reload the grid

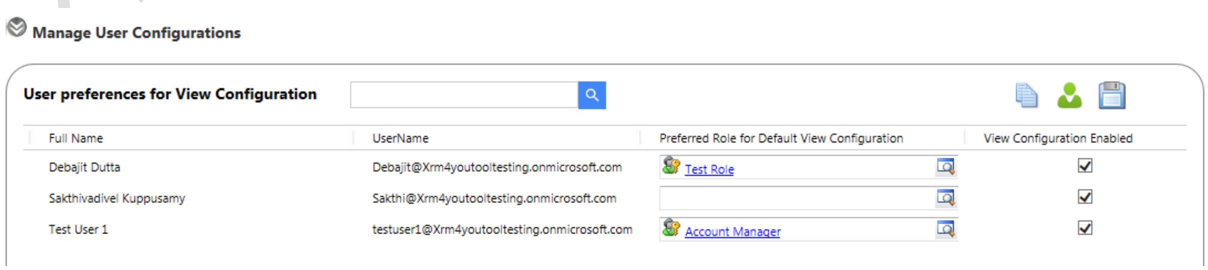
Manage User Configurations

- This section of the Role Based View Configurator helps us to manage **the user preferences for Default Views** on role based configurations when the user is having multiple security roles in CRM
- As you are already aware each security role can have its default view configured for each entities role based view configuration and if a user is having multiple security roles then they need a way to configure themselves on which security role should be considered for loading their view based role configuration. Manage User configurations is the section designed to do exactly the same. In this section users can be configured to the role which will be considered while loading their role based view configurations in CRM.
- Additionally in this section, Role Based View Configurations can be **enabled / disabled at the user level.**



Let us see the steps to configure the preferred security role to consider for Default view setting in CRM.

1. Click on the **"Load Data"** icon to load all the available users and their existing settings (if any already).



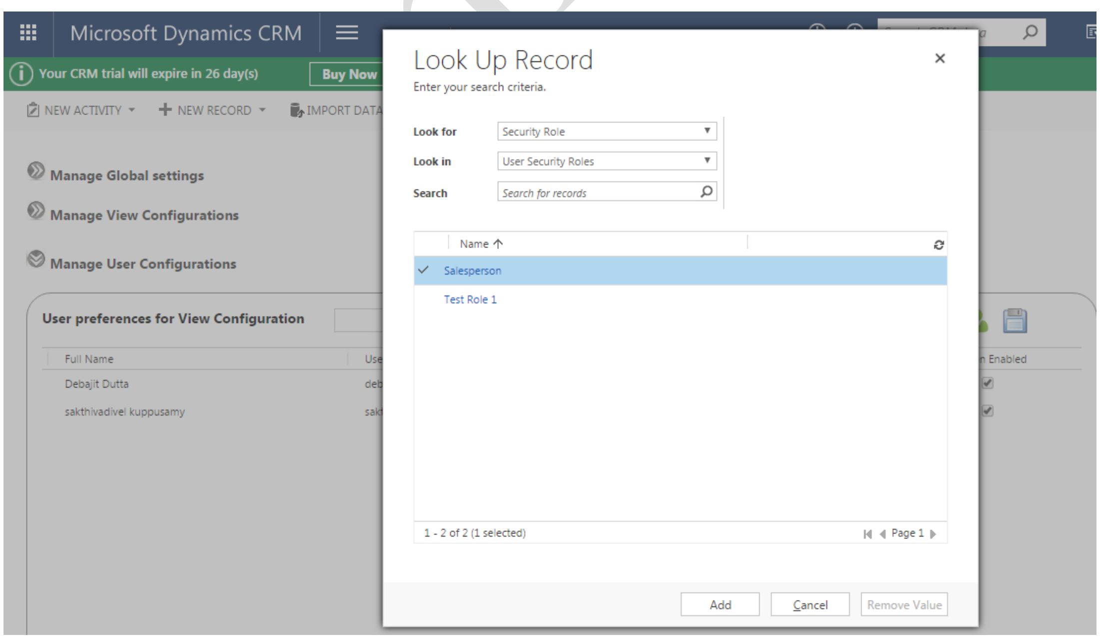
2. Once all the user data is loaded, you can configure any one of the role user is associated with (in this case user may be associated with multiple security roles in CRM) to consider for while loading your default views for entities in CRM.
3. The Security role lookup shown in the preferred view section is a filtered lookup and it will show only the roles currently associated with the user in CRM not all the available security roles in CRM.

Note

If a User is associated with only one role in CRM then no need for setting up the preferred role for default view in this section and the associated role will be automatically considered for loading the default view setting.

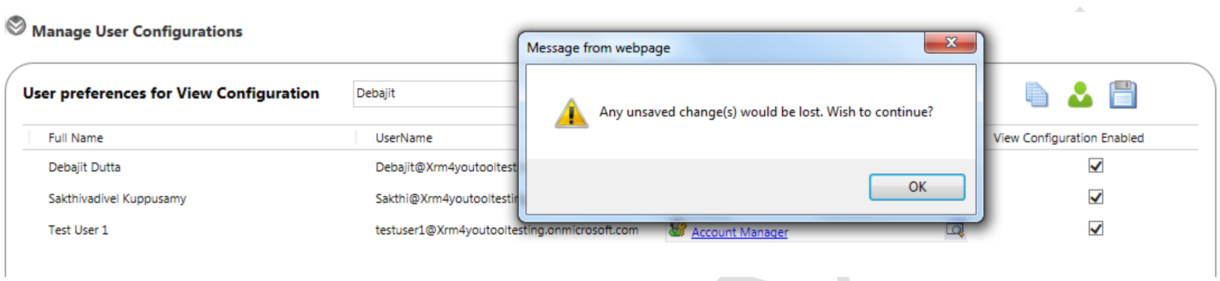
If a role which is already setup for preferred view is removed from the user in CRM then if the user is associated with a single security role then that role will be considered for loading default view settings or else if the user is associated with multiple security role then the system will load system default views.

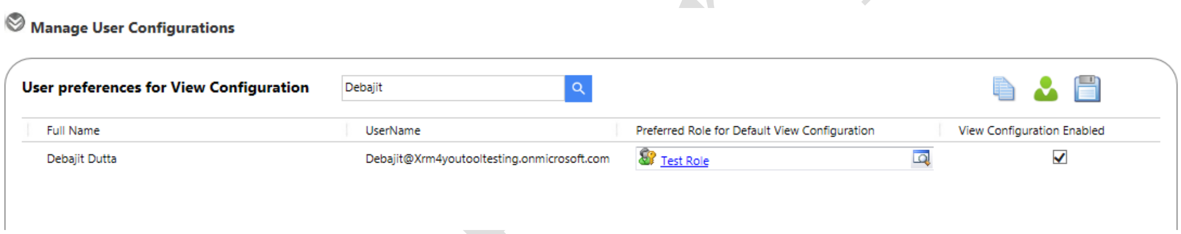
If a user is associated with multiple security roles in CRM and none of the role is setup for preferred for default view settings then system will load system default views.



Search & Find Users to Setup Preferences

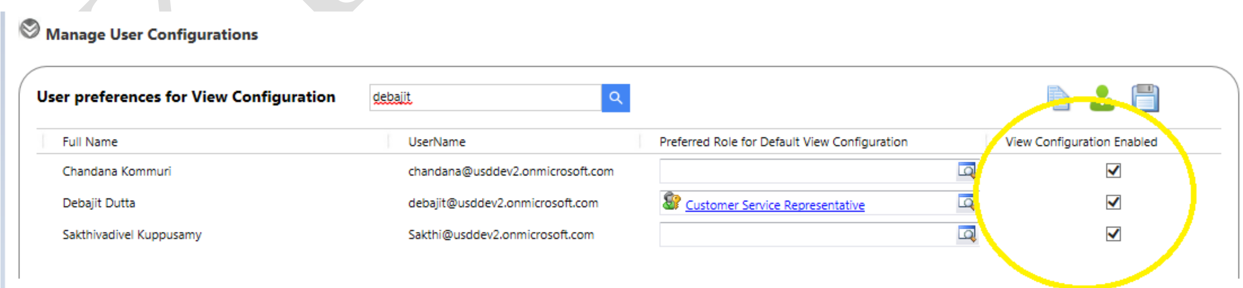
❖ There is option to search for particular user from the list of available user preferences.





Enable / Disable View Configurations at the User Level

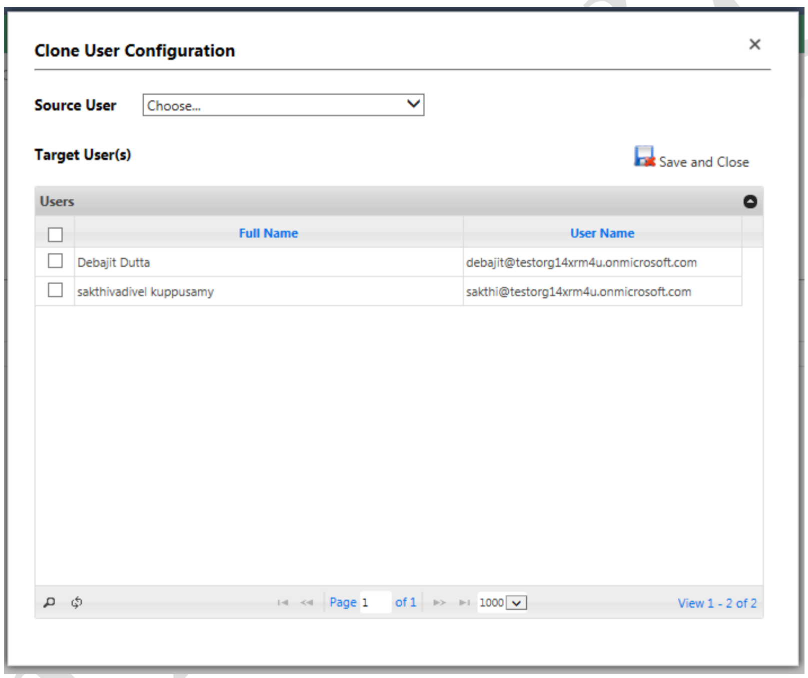
❖ The view configurations can be **enabled / disabled** at the user level.



Clone User Preferences:

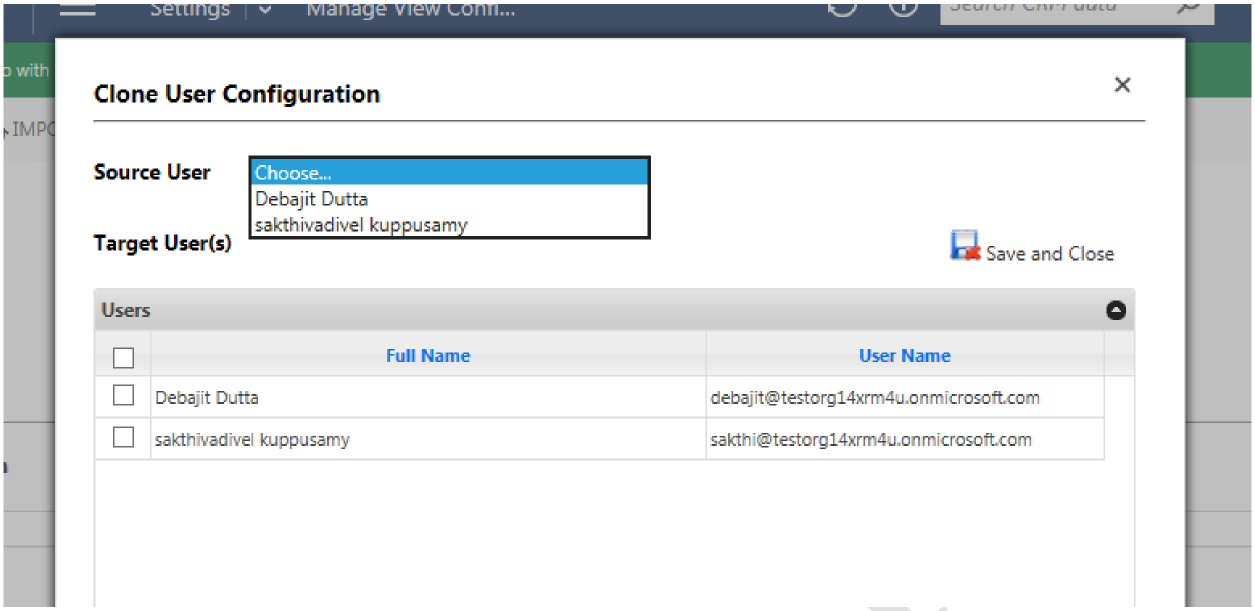
At times as CRM administrators, you may need to have same user preferences for more than one users and you will love to have a one click copy functionality to copy user preferences from one user to one or multiple users. Here comes handy the **Clone functionality** which helps to copy /replicate the user preferences of one user to one or multiple other users by simple clicks.

Clone Popup Window

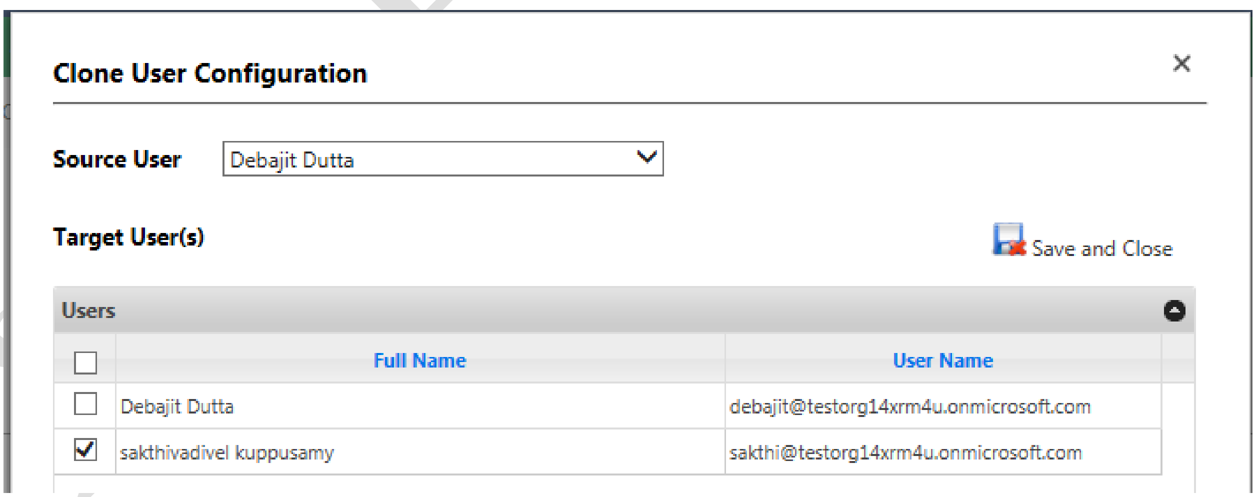


Let us see the steps to clone user preferences in detail below:

1. Select the source user (**user whose preferences needs to be copied**) in the **Source user** dropdown in the clone page.

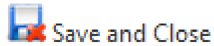


2. Select the Target users (**users to whom the preference has to be replicated)** by checking the check boxes against the required users in the Target users area of the clone window.

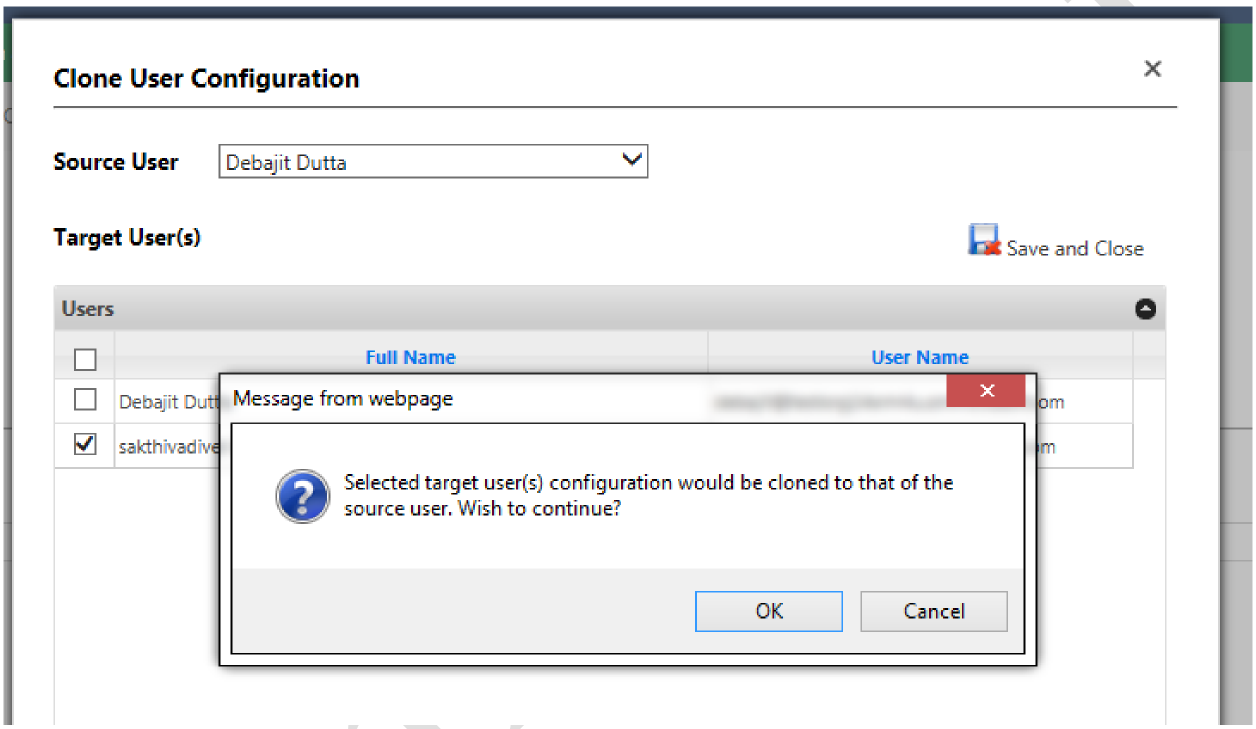


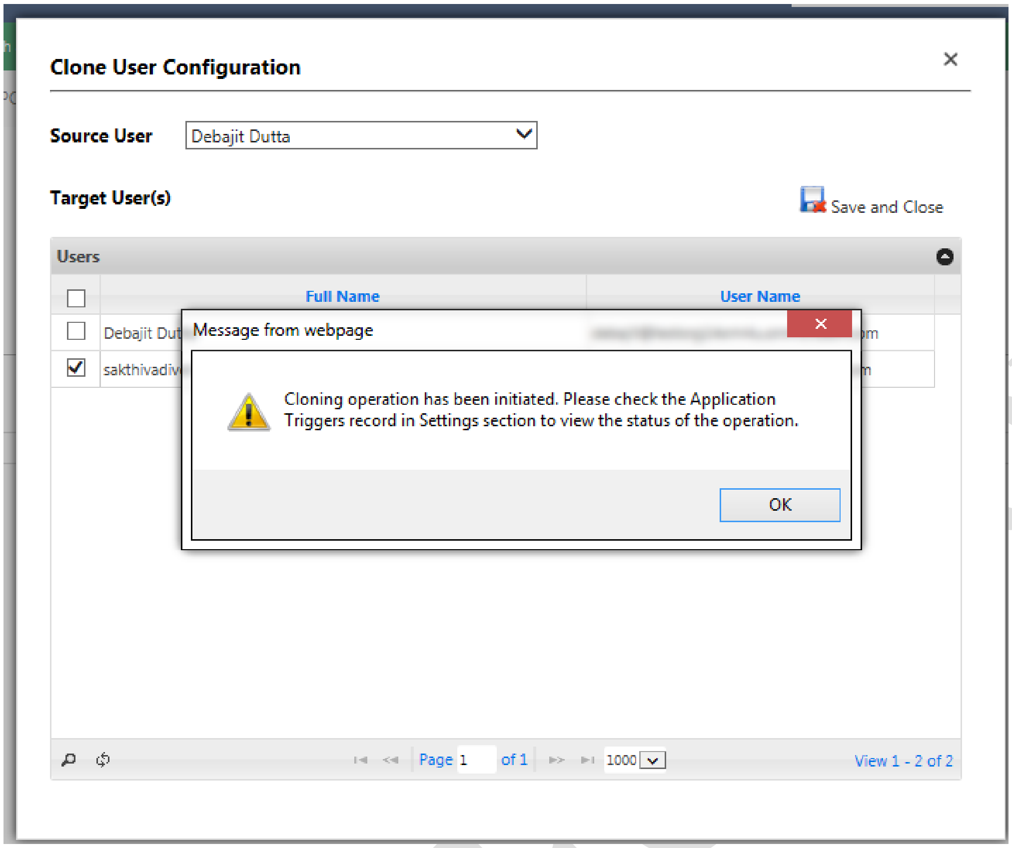
Note

You can select multiple Target users to clone the user preferences from a single Source role.

3. Once the required source user and Target users are selected, click on the "**Save and Close button"** 

to clone the user preferences from source security role to target security roles.



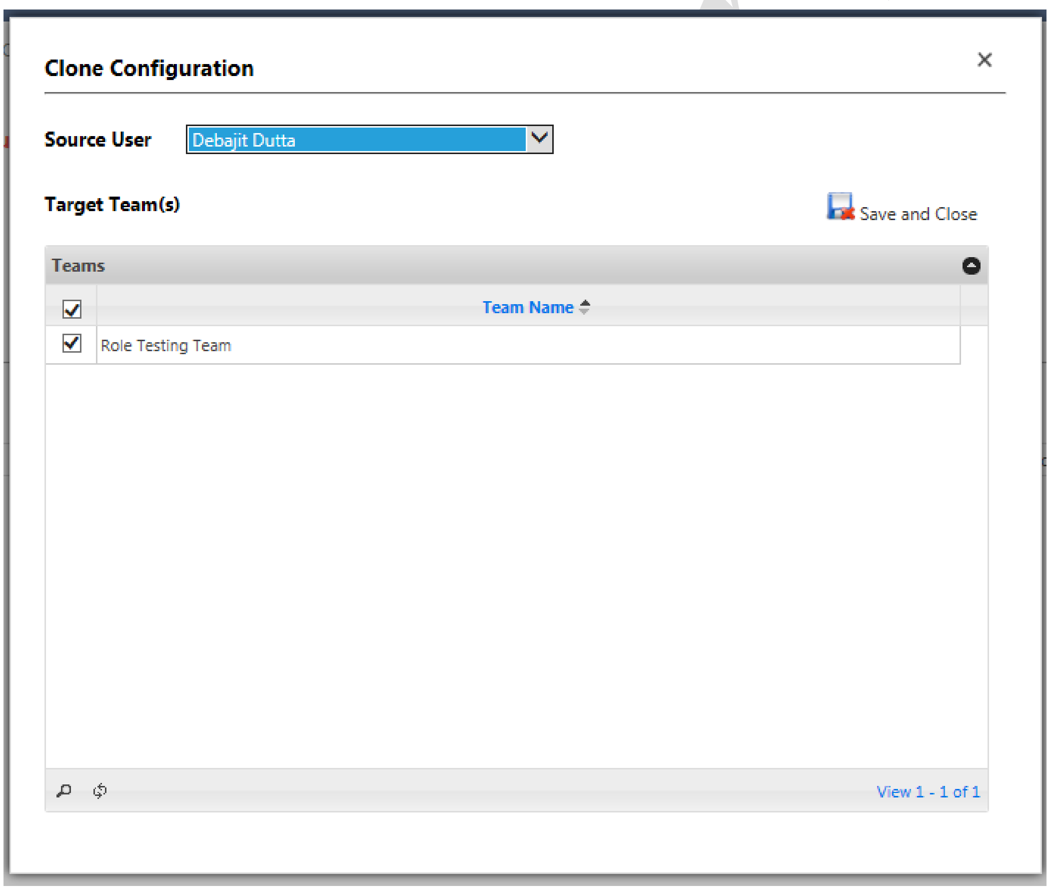

Clone User Configuration
Source User
Debajit Dutta
Target User(s)
Save and Close
Users
Full Name
User Name
Debajit Dut
sakthivadiv
Message from webpage
Cloning operation has been initiated. Please check the Application Triggers record in Settings section to view the status of the operation.
OK
Page 1 of 1
1000
View 1 - 2 of 2

Cloning User Preferences from One User to Members of Team(s)

For Customers who are mainly Controlling users access and security through Teams (Ownership Teams) instead of individual users there may be scenario where the CRM administrators want to clone User Preferences from one user to all the members of one or more teams , This also can be achieved by the Cloning functionality provided at the User Preferences section.

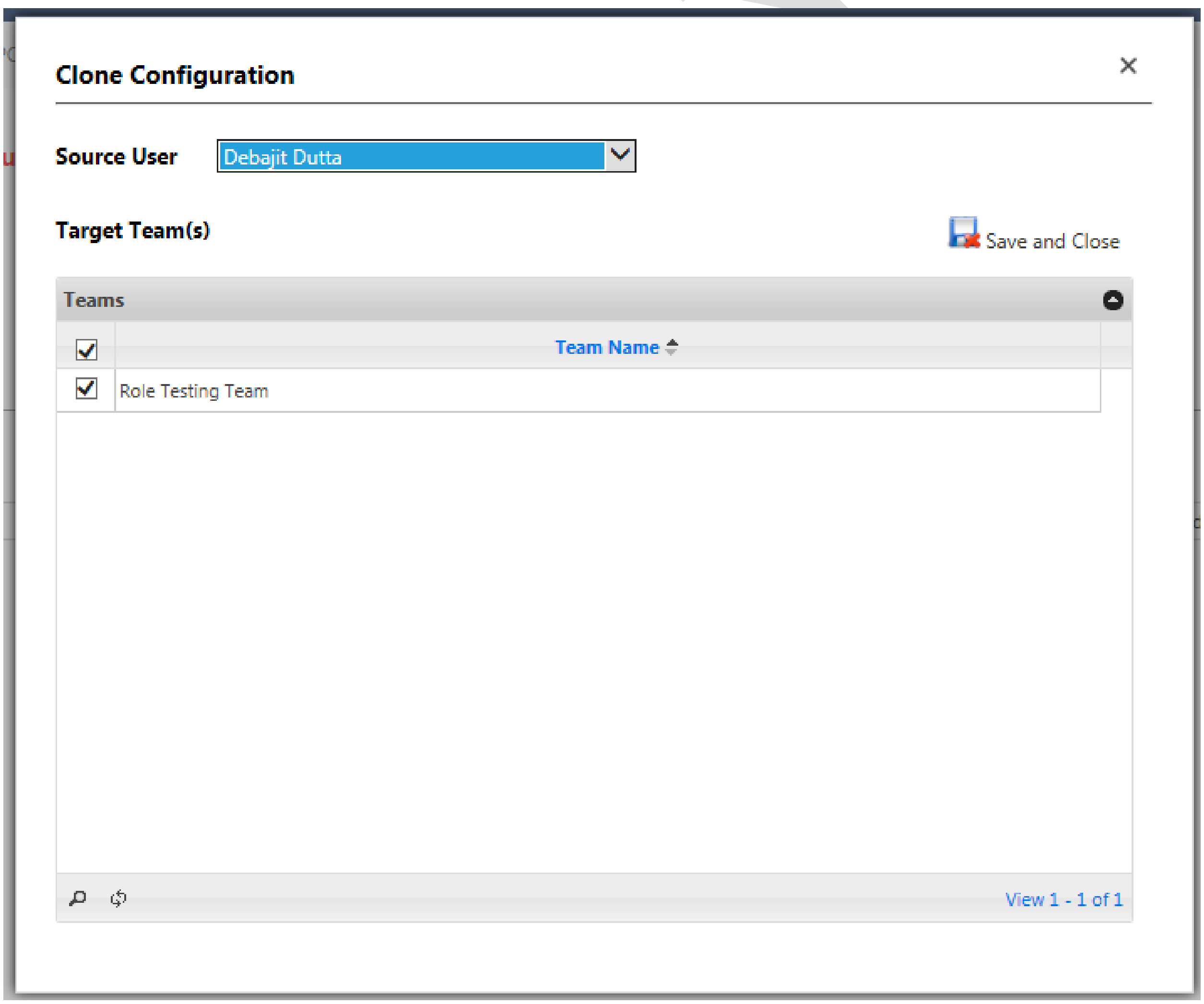
Let us see the steps to clone user preferences from one User to one or more Teams in detail below:

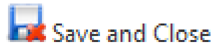
1. Select the source user (**user whose preferences needs to be copied**) in the **Source user** dropdown in the clone page.



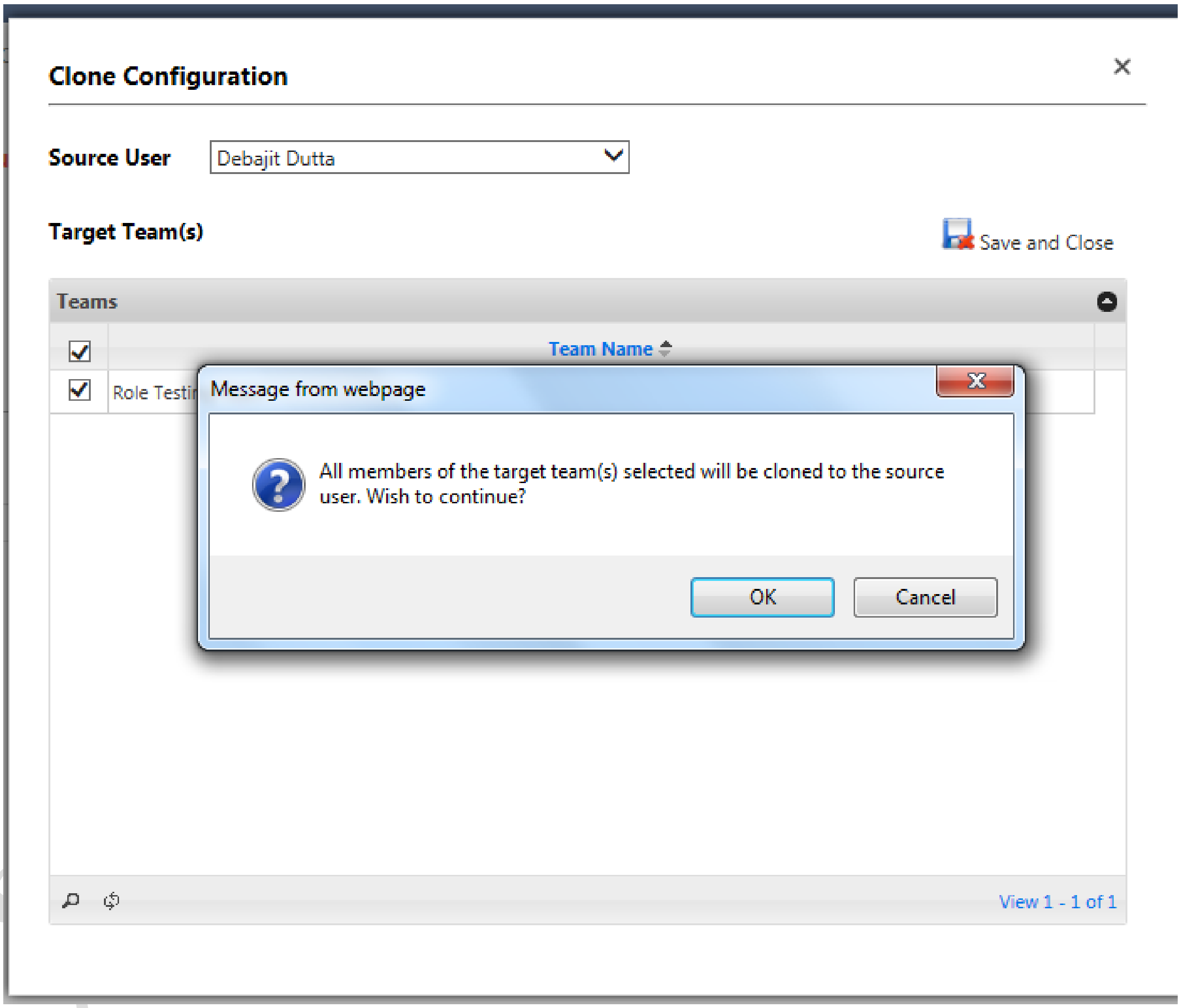
2. Select the Target Teams (**Teams whose members' wants the preference has to be replicated)** by checking the check boxes against the required teams in the Target team(s) area of the clone window.

Note
You can select multiple Target users to clone the user preferences from a single Source role.



3. Once the required source user and Target teams are selected, click on the "**Save and Close button"** 

to clone the user preferences from source security role to target security roles.



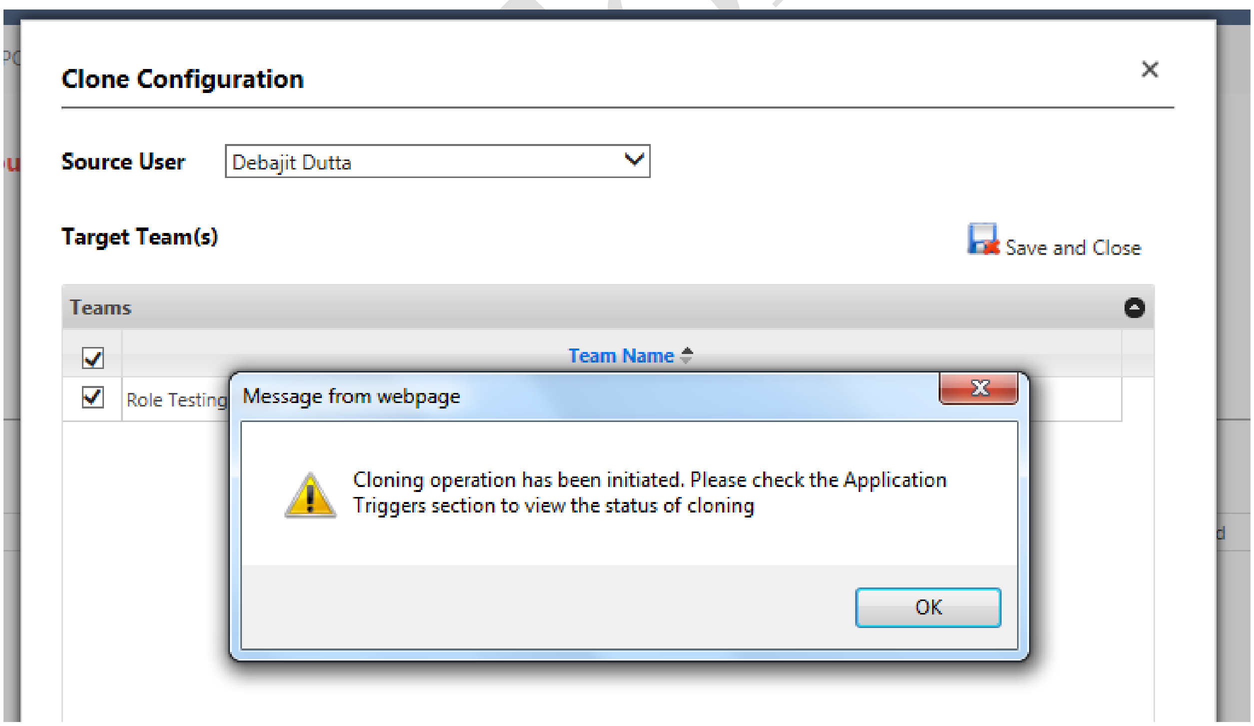
Note for Administrators on Cloning

Cloning can be a heavy operation based on the records involved in the cloning operation and to avoid any lag to the users the cloning operation is handled asynchronously and the details of these operations are stored in a separate entity called "**Application Triggers**".

This Entity holds the details like Operation, Operation Status and Message.

Note

If a cloning operation fails with an error, then the respective Operation will be marked with Operation Status as "**Failed**" and the error stack stored in the "**Message**" attribute of the **"Application Trigger"** entity. So developers and administrators can refer the message of the failed operation to know the exact details of the error and can take corrective action if required.



Data Migration

Sometimes moving data setup between CRM environments is a herculean job and it involves huge effort and time. So as CRM administrators you will always love to have data migration functionality with the tool you choose to work with.

Note

For the data migration to be successful, you must have same schema and meta data in both source and target CRM environments. i.e. both the source and target CRM environments must have all the configured security roles, users, entities , base language and views as same.

Note

Data Migration Utility is provided only with our full version not with our trial version

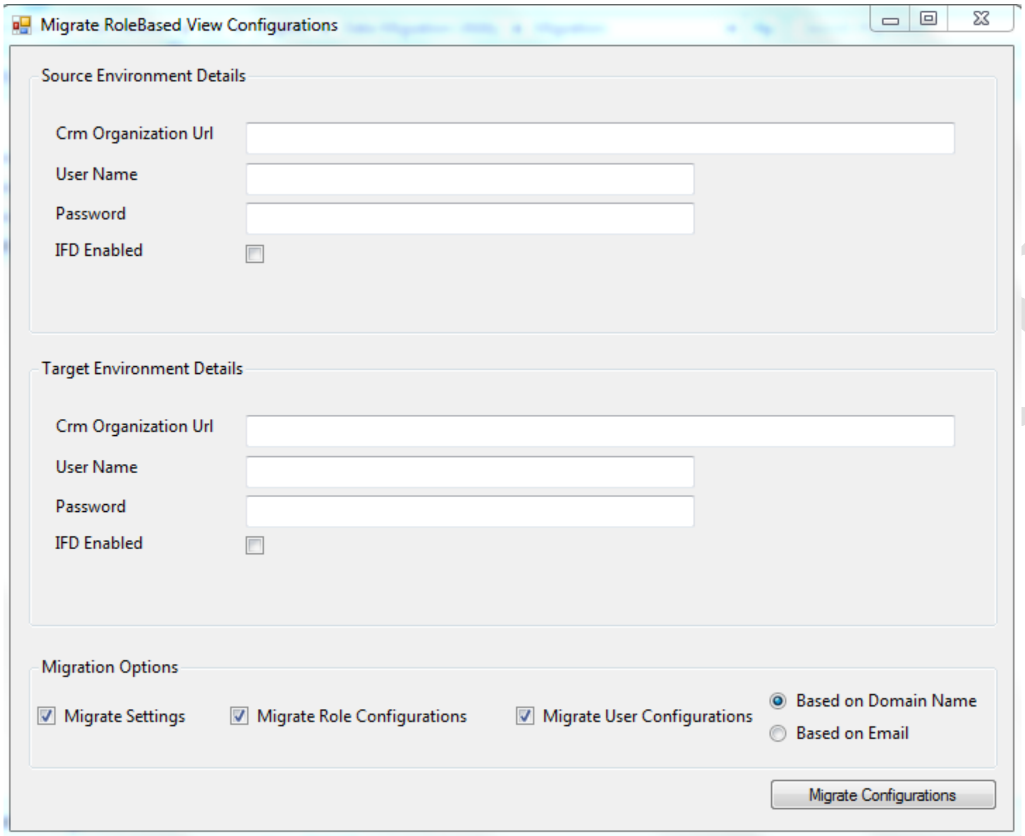
Data Migration Utility

Note

You have full control on which are all the settings you want to migrate from source CRM environment to Target CRM environment as

- Migrate Settings (Global Settings)
- Migrate Role Configurations
- Migrate User Configurations

Data Migration Utility



Contact us

For free trial and further info on Role Based View Please feel free to write to us @ ***info@xrmforyou.com***

****