



ENHANCED SECURITY FOR MICROSOFT DYNAMICS® AX FORMS

Secure forms under observation

Abstract

The document is about a development project, which is intended to secure critical data in Microsoft Dynamics® AX

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Summary

Data security is critical for most businesses. Client information, payment information, personal files, bank account details - all of this information can be hard to replace and potentially dangerous if it falls into the wrong hands.

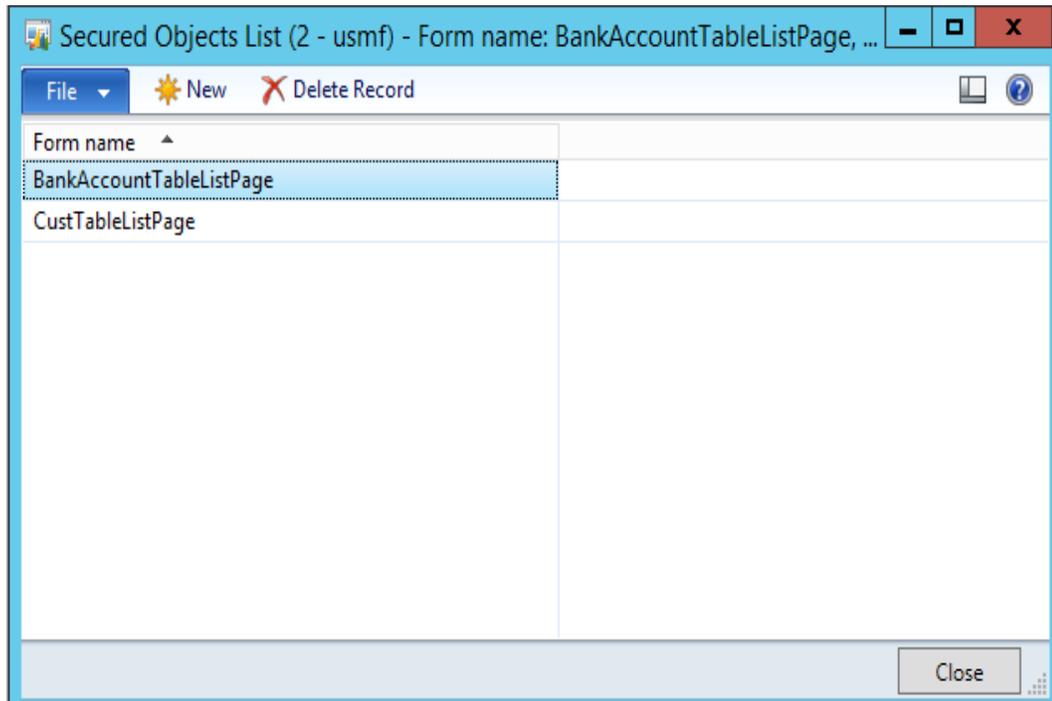
In Microsoft Dynamics® AX there is role-based security, which is aligned with the structure of the business. Users are assigned to security roles based on their responsibilities in the organization and their participation in business processes. The administrator grants access to the duties that users in a role perform, not to the program elements that users must use.

But Microsoft Dynamics® AX does not provide any security mechanism to individual forms. Tasks. If a user has view access of a Form/List Page; He/she can play with data. The user can export data. He/she can copy/Paste it and can use it. There is no support in Standard Microsoft Dynamics® AX, to control export of data, copy-paste of Data. Any user having access to a form, can perform these tasks i.e. Export if Data, copy/paste of data from AX to anywhere (notepad, excel).

Solution summary and how it works:

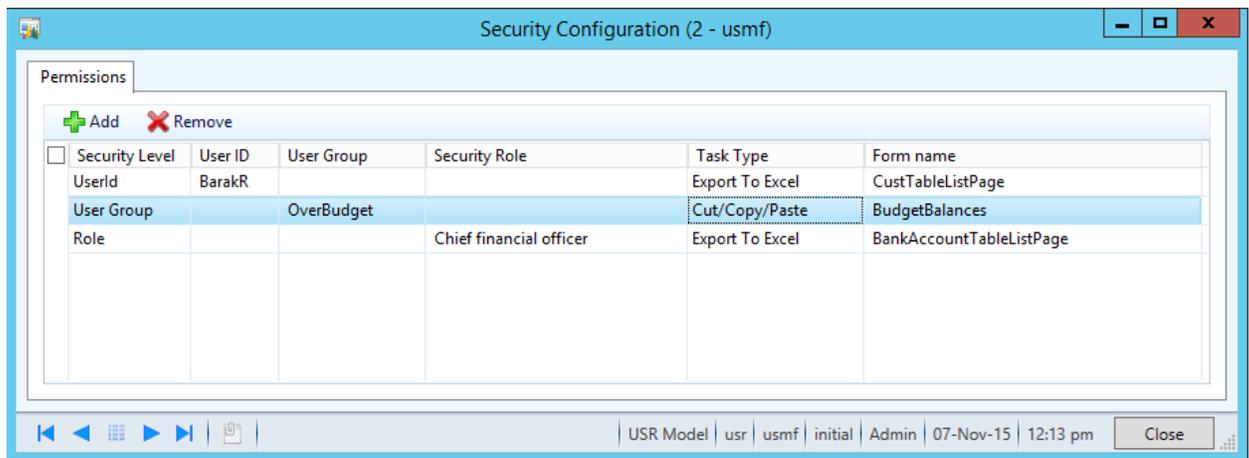
In order to address this issue, we developed a customized solution, which allows you following:-

1. You can list down, the forms, on which you need high security. You will get a setup where you can define/select all those forms, which you want to keep under observation.



You can define as many forms as you want, in order to put those under observation or high security.

- Now, once a form is listed under 'Secure Object List', no user can 'export To Excel', No user is allowed to Copy Paste Data from those forms to anywhere. But this does not ends the story. Yet, you have choice to give permission, to do these tasks (Export to excel and cop-paste), by assigning special permissions to users. In order to do that you can setup security as shown below



You have got the choice to configure security by three options

- 1) Security Role
- 2) User Group
- 3) UserId

I.e. you can assign permission to any Security Role, you can assign permission to any UserGroup and you can assign permission to any individual User, in order for the users to perform tasks such as Export to excel and Cut/Copy/Paste.

Important Notes:

- Only those forms will be under observation of security, which you have added under 'Secured Object List' as shown in image-1

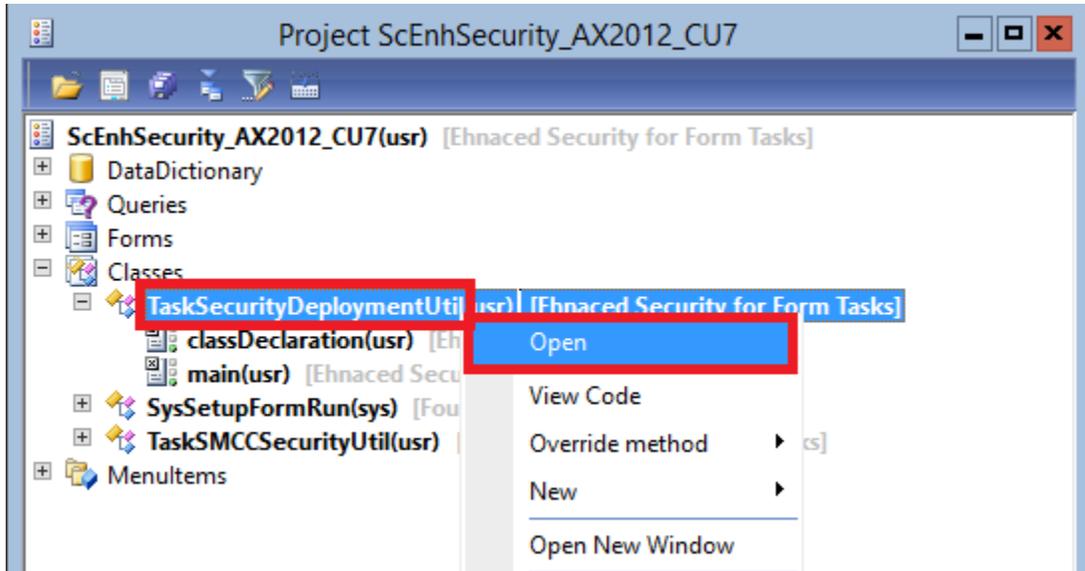
How to deploy solution

You have choice to deploy it either using Model or using XPO. Download XPO or model as per need and import it.

After XPO or Model is imported, open the project. It will be Private Project named as ScEnhSecurity_AX2012*****

*** represent AX Version such as R2_CU7, R3_RTM, R3_CU8, and R3_CU9

- Download the project XPO or model, Import it and open private project.
- Under Classes there will be a class named as TaskSecurityDeploymentUtil
- Simply run this class TaskSecurityDeploymentUtil



Remember Right click on Class and it will give you option for Open.
After running this class, it will automatically add two menu Items, under following path

System Administration >> Setup >> Security >>

