SUPPLEMENTAL INFORMATION FOR HELP DOCUMENT #12462 - Navision Security Tips and Tricks.

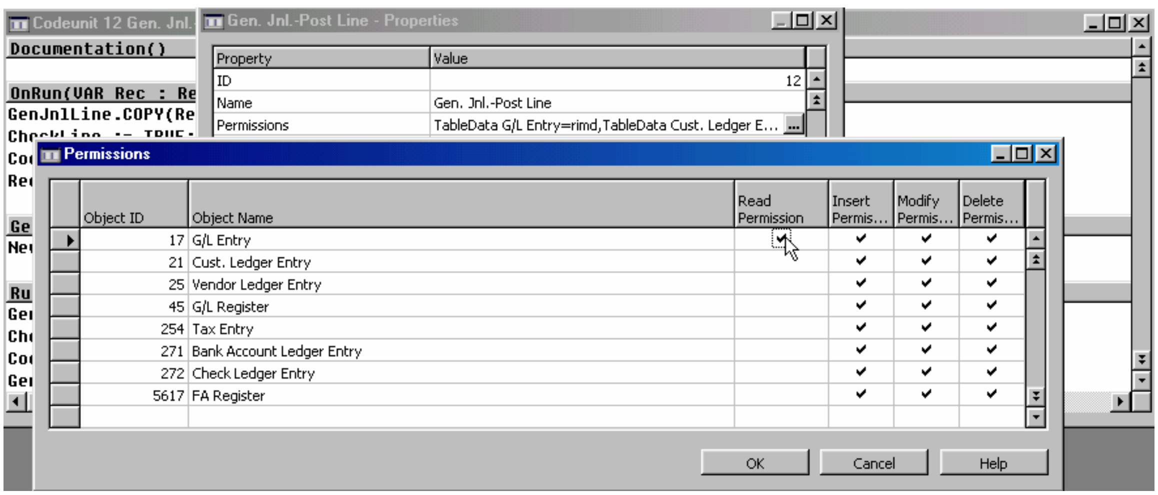
Example of the changes recommended in the Help Document

An example of setting up a Sales Order person will be presented in the following pages. This document is designed to supplement the Help Document Text included in the Navision Support Knowledge Base on the Navision Partner Network. The Identification number for the Navision Security Tips and Tricks document is #12462.

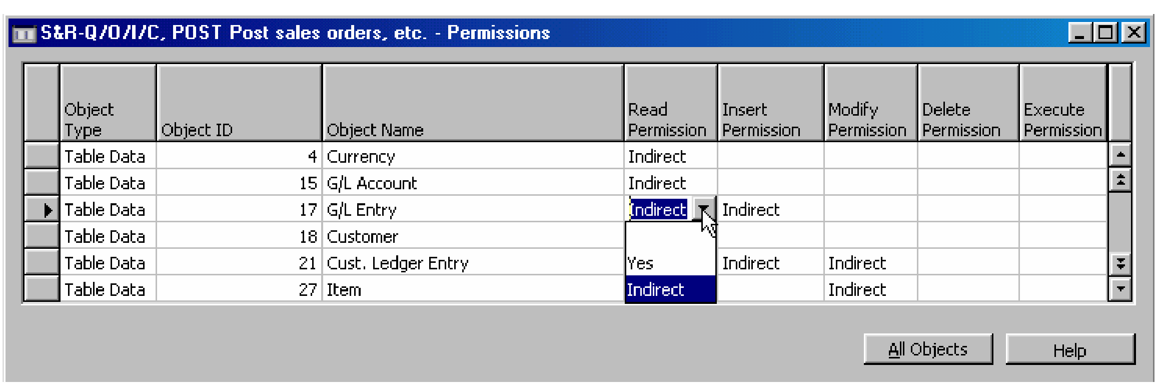
Step 1

A recommended first step is to modify Codeunit 12 to establish Read Rights on the Codeunit. This will allow the "POST" Roles to be changed to "Indirect" permission for Read access to the General Ledger Entry Table. The following reflects the changes that will be made.

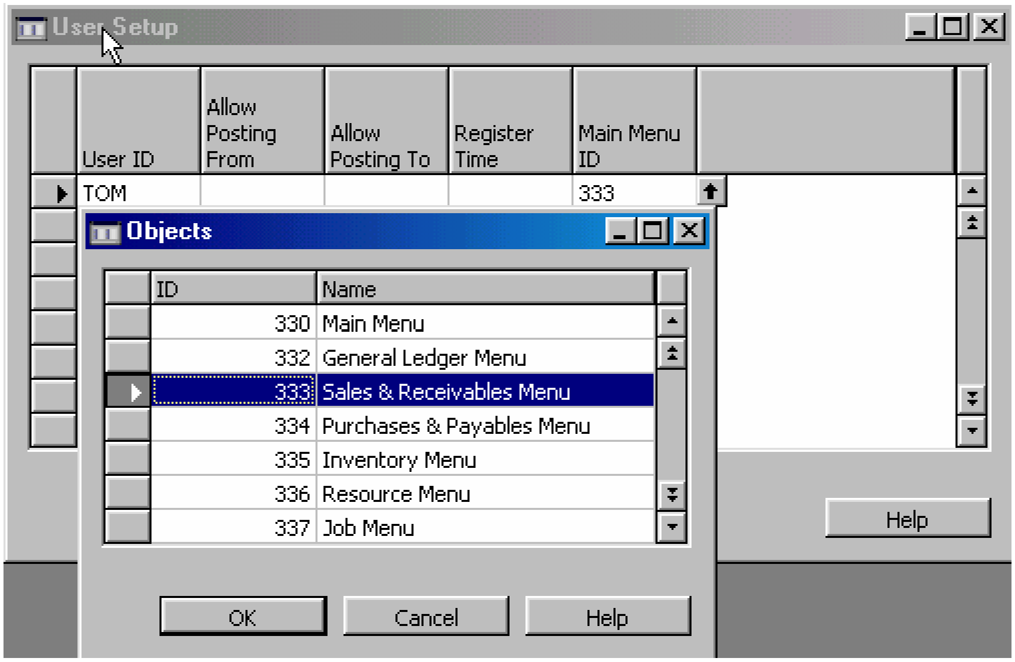
- Access Tools, Object Designer
- Select Codeunit 12
- Select the Design button.
- Select the Properties icon
- Click in the Value field of the Permissions line
- Select the ellipse button (…)
- On the line for Object ID 17, check the "Read Permission" box



You can then go into any of the Roles for "POST" that have "Read Permissions" set to "Yes" and change the setting to "Indirect". For instance, by changing the Read Permission for the "S&R-Q/O/I/C, POST" Role as shown below, the Sales Order processors will have the necessary access to be able to post a Sales Invoice. However, this change will prevent the user from reading the General Ledger Entry Table directly. The change of Codeunit 12 must be made to allow the change below to be implemented.

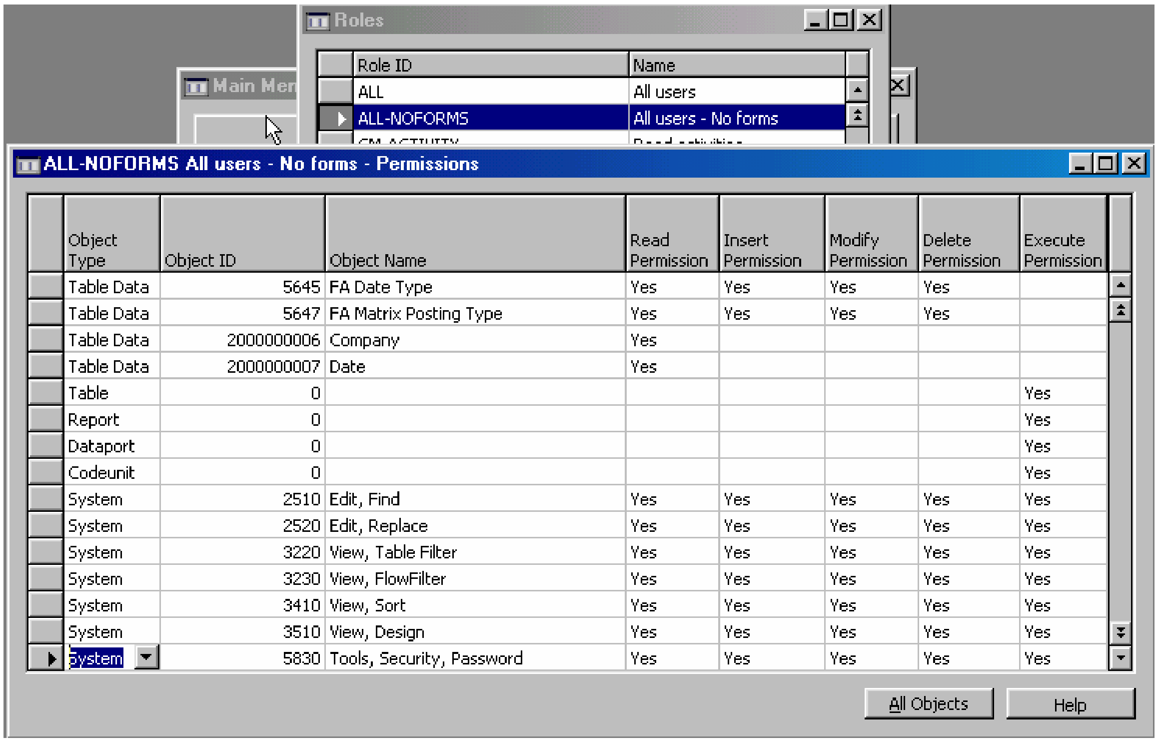


Step 2
Under General Ledger, Setup, Users, User Setup option, choose the Main Menu ID that a user should have access to. For instance, very rarely will a Sales Order Processing clerk ever need access to anything outside of the Sales & Receivables Functional Area. Therefore, you can limit what areas the user can access and eliminate any confusion by establishing the User's Main Menu Screen. As reflected below, Form 333 – Sales & Receivables Menu can be established as the Main Menu ID for the User.



Step 3

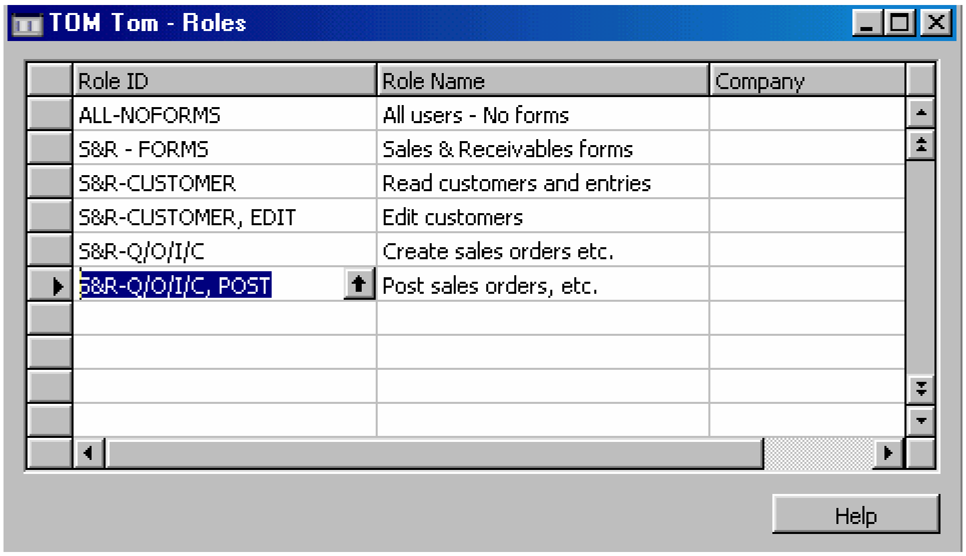
Set up a Role (Group) called "ALL-NOFORMS". As noted in the Help Document, you will copy the Permissions list from the "ALL" Role in Navision Demonstration database. Once the paste is completed, you will delete the Object Type Form, Object ID 0, Execute Yes line from the ALL-NOFORMS permission list. See screen shot below:



Note that Table, Report, Dataport, and Codeunit 0 are still there. However, Form 0 has been deleted. This may need to be done for Reports and a separate Report Role be set up with the specific report numbers, as well. However, that has not been addressed in this support request. You will not use the "ALL" Role in the Navision demonstration database. Rather, you will substitute the "ALL – NOFORMS" Role.

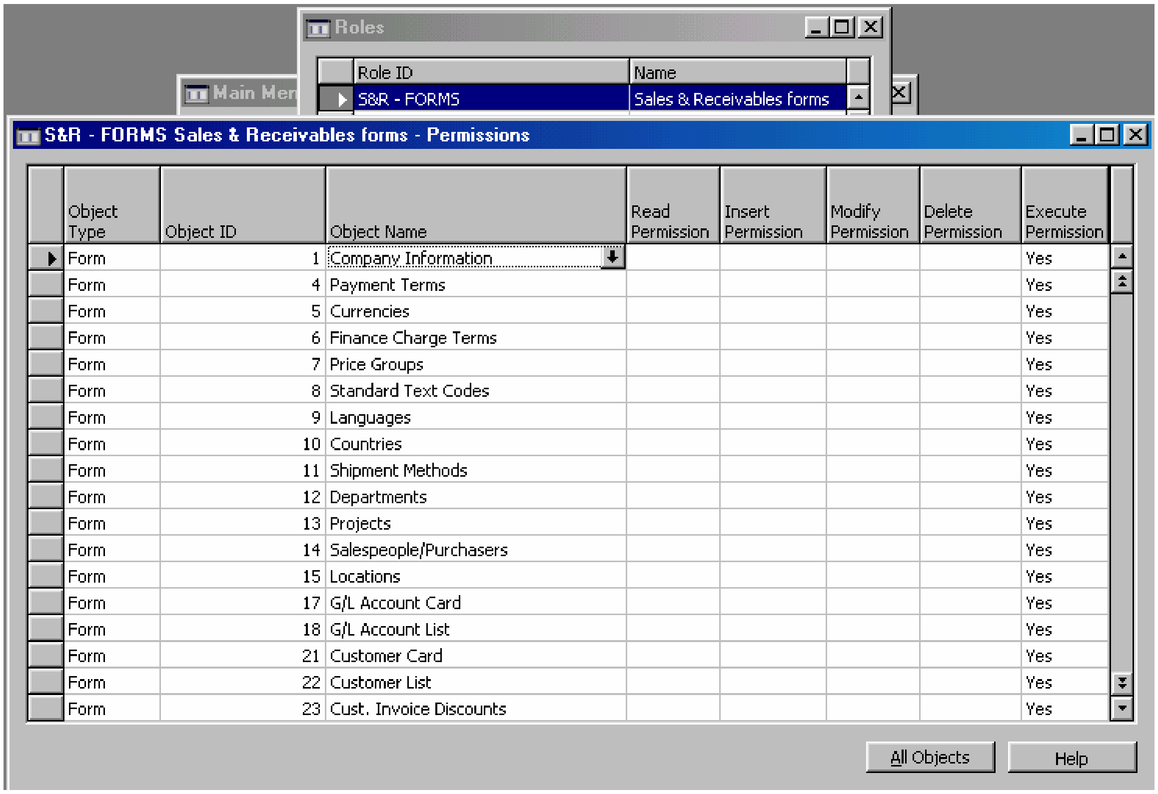
Step 4

You will then set up a separate Role for the Forms for the particular Functional Areas that will be used. In the example below, a salesperson has been set up with the Sales Roles for completing all Sales related transactions, including creating and posting Sales Orders and Invoices, modifying customer data, and creating new customers. In the case of the User below, a Role was set up with the ALL-NOFORMS Role. The S&R-FORMS Role has then been created and added to the Users Permission list to provide the relevant Form numbers for the User's permissions.



Role ID	Role Name	Company
ALL-NOFORMS	All users - No forms	
S&R - FORMS	Sales & Receivables forms	
S&R-CUSTOMER	Read customers and entries	
S&R-CUSTOMER, EDIT	Edit customers	
S&R-Q/O/I/C	Create sales orders etc.	
S&R-Q/O/I/C, POST	Post sales orders, etc.	

Note that the S&R - FORMS Role only includes Execute Permissions set to ‘Yes’ for all the Forms that may apply to a Sales Order processor. Keep in mind, the list below is for example purposes. The list may include Forms that the company may not want all Sales Order people to have. Therefore, some of these may be removed or some additional forms may be added. However, this is intended to provide an example of what could be done.



Object Type	Object ID	Object Name	Read Permission	Insert Permission	Modify Permission	Delete Permission	Execute Permission
Form	1	Company Information					Yes
Form	4	Payment Terms					Yes
Form	5	Currencies					Yes
Form	6	Finance Charge Terms					Yes
Form	7	Price Groups					Yes
Form	8	Standard Text Codes					Yes
Form	9	Languages					Yes
Form	10	Countries					Yes
Form	11	Shipment Methods					Yes
Form	12	Departments					Yes
Form	13	Projects					Yes
Form	14	Salespeople/Purchasers					Yes
Form	15	Locations					Yes
Form	17	G/L Account Card					Yes
Form	18	G/L Account List					Yes
Form	21	Customer Card					Yes
Form	22	Customer List					Yes
Form	23	Cust. Invoice Discounts					Yes

The following is a complete listing of the Forms that could be used for a Sales Order processor. The following is a list of all Forms included in the S&R – Forms Role above. This gives access to all Sales & Receivables Forms and additional Forms used from other Functional Areas during the Sales process. This list is not all encompassing and may include Forms that would be removed for some users, but it gives an example of what could be done.

Object Type	Object ID	Object Name	Read Permission	Insert Permission	Modify Permission	Delete Permission	Execute Permission
Form	1	Company Information					Yes
Form	4	Payment Terms					Yes
Form	5	Currencies					Yes
Form	6	Finance Charge Terms					Yes
Form	7	Price Groups					Yes
Form	8	Standard Text Codes					Yes
Form	9	Languages					Yes
Form	10	Countries					Yes
Form	11	Shipment Methods					Yes
Form	12	Departments					Yes
Form	13	Projects					Yes
Form	14	Salespeople/Purchasers					Yes
Form	15	Locations					Yes
Form	17	G/L Account Card					Yes
Form	18	G/L Account List					Yes
Form	21	Customer Card					Yes
Form	22	Customer List					Yes
Form	23	Cust. Invoice Discounts					Yes
Form	24	Cust./Item Discounts					Yes
Form	25	Customer Ledger Entries					Yes
Form	30	Item Card					Yes
Form	31	Item List					Yes
Form	32	Item/Cust. Discounts					Yes
Form	33	Item Prices					Yes
Form	34	Sales Qty. Discounts					Yes
Form	35	Item Translations					Yes
Form	41	Sales Quote					Yes
Form	42	Sales Order					Yes
Form	43	Sales Invoice					Yes
Form	44	Sales Credit Memo					Yes
Form	45	Sales List					Yes
Form	46	Sales Order Subform					Yes
Form	47	Sales Invoice Subform					Yes
Form	48	Sales Orders					Yes
Form	61	Applied Customer Entries					Yes
Form	64	Printer Selections					Yes
Form	65	Rounding Methods					Yes
Form	67	Sales Comment Sheet					Yes
Form	69	Sales Comment List					Yes
Form	76	Resource Card					Yes
Form	77	Resource List					Yes
Form	95	Sales Quote Subform					Yes
Form	96	Sales Cr. Memo Subform					Yes

Form	110	Customer Posting Groups	Yes
Form	124	Comment Sheet	Yes
Form	125	Comment List	Yes
Form	130	Posted Sales Shipment	Yes
Form	131	Posted Sales Shpt. Subform	Yes
Form	132	Posted Sales Invoice	Yes
Form	133	Posted Sales Invoice Subform	Yes
Form	134	Posted Sales Credit Memo	Yes
Form	135	Posted Sales Cr. Memo Subform	Yes
Form	142	Posted Sales Shipments	Yes
Form	143	Posted Sales Invoices	Yes
Form	144	Posted Sales Credit Memos	Yes
Form	151	Customer Statistics	Yes
Form	155	Customer Sales	Yes
Form	157	Item Availability by Periods	Yes
Form	160	Sales Statistics	Yes
Form	202	Resource Ledger Entries	Yes
Form	203	Resource Costs	Yes
Form	204	Resource Prices	Yes
Form	208	Work Types	Yes
Form	232	Apply Customer Entries	Yes
Form	253	Sales Journal	Yes
Form	255	Cash Receipt Journal	Yes
Form	257	Source Codes	Yes
Form	259	Reason Codes	Yes
Form	282	Report Selections	Yes
Form	300	Ship-to Address	Yes
Form	301	Ship-to Address List	Yes
Form	302	Customer Entry Statistics	Yes
Form	312	Gen. Business Posting Groups	Yes
Form	313	Gen. Product Posting Groups	Yes
Form	314	General Posting Setup	Yes
Form	315	Tax Entries	Yes
Form	330	Main Menu	Yes
Form	333	Sales & Receivables Menu	Yes
Form	342	Check Availability	Yes
Form	343	Check Credit Limit	Yes
Form	344	Navigate	Yes
Form	351	Customer Sales Lines	Yes
Form	353	Item Availability Lines	Yes
Form	367	ZIP Codes	Yes
Form	386	Extended Text	Yes
Form	387	Extended Text Lines	Yes
Form	391	Extended Text List	Yes
Form	396	Sales Shipment Statistics	Yes
Form	397	Sales Invoice Statistics	Yes
Form	398	Sales Credit Memo Statistics	Yes
Form	402	Sales Order Statistics	Yes
Form	423	Customer Bank Account Card	Yes
Form	424	Customer Bank Account List	Yes
Form	427	Payment Methods	Yes

Form	428	Shipping Agents	Yes
Form	429	Territories	Yes
Form	431	Reminder Terms	Yes
Form	432	Reminder Levels	Yes
Form	433	Reminder Text	Yes
Form	434	Reminder	Yes
Form	435	Reminder Lines	Yes
Form	436	Reminder List	Yes
Form	437	Reminder Statistics	Yes
Form	438	Issued Reminder	Yes
Form	439	Issued Reminder Lines	Yes
Form	440	Issued Reminder List	Yes
Form	441	Issued Reminder Statistics	Yes
Form	442	Reminder Comment Sheet	Yes
Form	443	Reminder Comment List	Yes
Form	444	Reminder/Fin. Charge Entries	Yes
Form	445	Finance Charge Text	Yes
Form	446	Finance Charge Memo	Yes
Form	447	Finance Charge Memo Lines	Yes
Form	448	Finance Charge Memo List	Yes
Form	449	Finance Charge Memo Statistics	Yes
Form	450	Issued Finance Charge Memo	Yes
Form	451	Issued Fin. Charge Memo Lines	Yes
Form	452	Issued Fin. Charge Memo List	Yes
Form	453	Issued Fin. Charge Memo Stat.	Yes
Form	454	Fin. Charge Comment Sheet	Yes
Form	455	Fin. Charge Comment List	Yes
Form	456	No. Series	Yes
Form	457	No. Series Lines	Yes
Form	458	No. Series Relationships	Yes
Form	459	Sales & Receivables Setup	Yes
Form	464	Tax Area	Yes
Form	465	Tax Area Line	Yes
Form	466	Tax Jurisdictions	Yes
Form	467	Tax Groups	Yes
Form	468	Tax Details	Yes
Form	469	Tax Area List	Yes
Form	470	Tax Business Posting Groups	Yes
Form	471	Tax Product Posting Groups	Yes
Form	472	Tax Posting Setup	Yes
Form	473	Tax Posting Setup Card	Yes
Form	474	Tax Statement Preview	Yes
Form	475	Tax Statement Preview Line	Yes
Form	476	Copy Tax Setup	Yes
Form	477	Currencies for Fin. Chrg Terms	Yes
Form	478	Currencies for Reminder Level	Yes
Form	481	Customer Stats. by Currencies	Yes
Form	483	Currency Exchange Rates	Yes
Form	486	Cust. Stats. by Curr. Lines	Yes
Form	491	Items by Location	Yes
Form	492	Item Availability by Location	Yes

Form	494	Finance Charge Terms Card	Yes
Form	507	Blanket Sales Order	Yes
Form	508	Blanket Sales Order Subform	Yes
Form	512	Customer Disc. Groups	Yes
Form	514	Cust./Item Discount Overview	Yes
Form	515	Item Avail. by Location Lines	Yes
Form	516	Sales Lines	Yes
Form	522	Item/Cust. Discount Overview	Yes
Form	525	Posted Sales Shipment Lines	Yes
Form	526	Posted Sales Invoice Lines	Yes
Form	527	Posted Sales Credit Memo Lines	Yes
Form	5412	Item Availability by Bin	Yes
Form	5413	Item Availability by Bin Lines	Yes
Form	5414	Item Availability by Variant	Yes
Form	5415	Item Avail. by Variant Lines	Yes
Form	10004	Proposed Order List	Yes
Form	10005	Proposed Order	Yes
Form	10006	Proposed Order Subform	Yes
Form	10007	Customer Credit Information	Yes
Form	10008	Customer Comments	Yes
Form	10009	Customer Order Header Status	Yes
Form	10010	Customer Order Lines Status	Yes
Form	10011	Credit Management	Yes
Form	10013	Customer Care Setup	Yes
Form	10014	Proposed Order Comment Sheet	Yes
Form	10025	Customer Order Status	Yes
Form	10026	Sales Order Shipment	Yes
Form	10027	Sales Order Shipment Subform	Yes
Form	10028	Sales Order Invoice	Yes
Form	10029	Sales Order Invoice Subform	Yes
Form	10030	Customer/Item Sales Statistics	Yes
Form	10031	Item Availability Search	Yes
Form	10032	Item Availability Search Lines	Yes
Form	10033	Item Price Search	Yes
Form	10034	Item Price Search Lines	Yes
Form	10035	Prospect Call List	Yes