# Finding User Roles with Access to a Specific Window/Report is as Easy as A, B, C!

by **Abra Lynne Gilman and Mike Gilman**
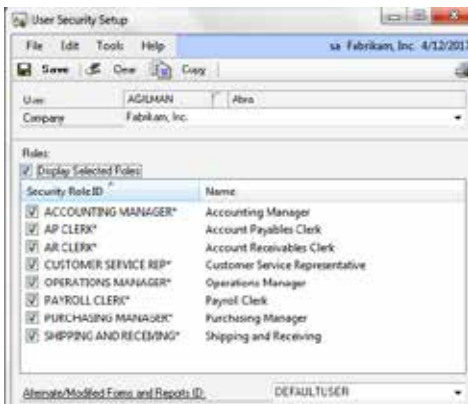
**M**any Customers need to give their auditors an answer to the question, "Who can get to THIS window?" It's easy enough to see the Roles that a User is assigned to, but getting to the exact windows and reports they will be able to access is a different story.



*User Setup Screen with "Selected Roles" displayed.*

Although Users can eventually get to the answer by printing and deciphering several reports that show which windows within tasks, within roles a User can get to, there must be a simpler way!

*Existing Microsoft Dynamics GP*

*Security Report List:*



Well, there is an easier solution – and here it is! Microsoft support has suggested these steps and script (that an administrator can run) to find out exactly what roles can get to "a specific window or report".

## The ABC's of Getting a List of User Roles for a Specific Window/Report:

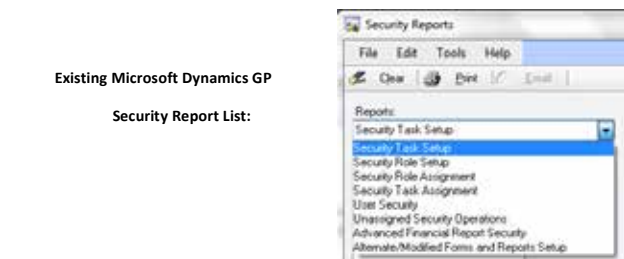A. **Populate the Security Resource Description Table. Just follow these steps:**
   1. Click **Microsoft Dynamics GP**, point to **Maintenance**, and then click **Clear Data** to open the Clear Data window.
   2. On the top **Display** menu, select **Physical**.
   3. In the **Series** list, select **System**.
   4. In the **Tables** pane on the left, click the **Security Resource Descriptions** table, and then click **Insert**.
   5. Select **OK**, select **Yes,** to clear data (BE SURE ONLY the one table is listed on the right, otherwise select NO). In the Report Destination window, select the **Screen** check box, and then select **OK** to send the report to the screen. Close the report.

   The Security Resource Descriptions table is now populated with your current information.
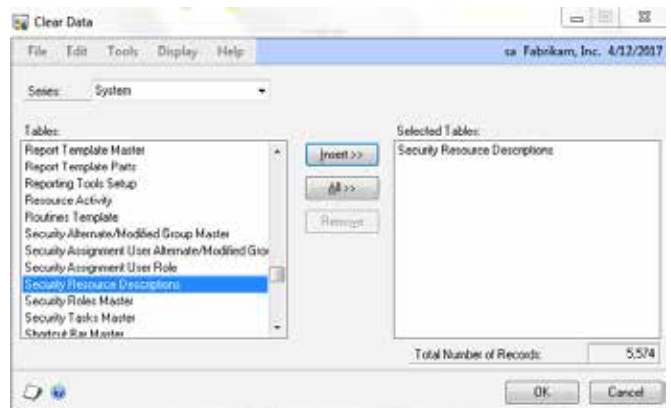
**Clear Data Maintenance Window**

### B. Find out the "Display Name" of the Window (or Report) your auditor is requesting:

1. Sign into Microsoft Dynamics GP as a User authorized to open the window/report in question. Pull up the window/report and look at the **name displayed in the header of the screen**. In most cases (unless someone has modified it), the display name is the one shown. Use that "**display name**" in step "C".
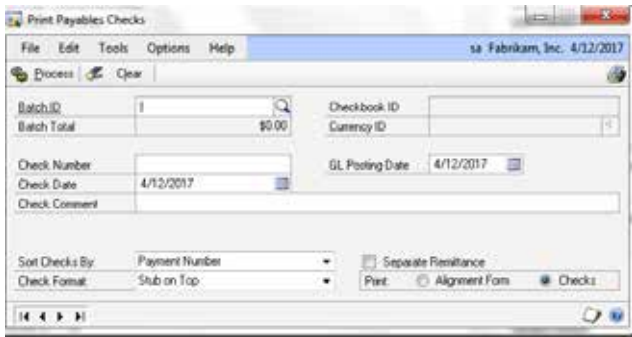


OR

You can glance through the ENTIRE list of w**indow display names** by clicking on **Microsoft Dynamics GP**, point to **Tools**, point to **Resource Descriptions**, and Click **Windows** to open the Windows Descriptions screen. You can then choose the Series (Purchasing, Financial, etc.) and scroll until you find what you are looking for.

### C. Query the Security Resource Description Table by doing these steps:

1. Go to the SQL Query Tool (Start > Programs > Microsoft SQL Server > **Microsoft SQL Server Management Studio**). Sign in as a User authorized to run SQL scripts.
2. Click on the button **New Query** on the top left side of the screen.
3. Select the **Company database** in question from the database dropdown (it will most likely be displayed as "master" until you select the specific company database).
4. In the white query area type in the following SQL query:

```
SELECT  ISNULL(A.SECURITYROLEID,'') AS SECURITYROLEID,
ISNULL(M.SECURITYROLENAME,'') AS SECURITYROLENAME,
--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 = '<Window_or_Report_Display_Name_Here>'
```

5. Replace the last part of the SQL query with the actual Window/Report display name (ie. "Print Payables Checks").
6. Execute the query by hitting "Ctrl E" or selecting the Execute button to the right of the database name in the screen.
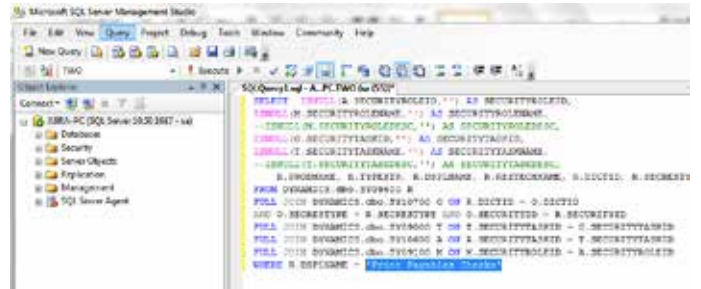


7. The results will display the **User Roles** with access to the Window/Report. The task ID and Task Name will also be displayed.



8. To see the list of User Roles for a different Window/Report, just change the last line of the query to the new screen in question.



This SQL Query has saved our consulting team/Customers hours of deciphering Roles, Tasks, Windows, and Reports! Take a moment to step thru A, B, and C to see how much time you can save! **GPUG**

*Abra Lynne Gilman and Mike Gilman are senior consultants at Collins Computing, Inc. They can be reached at Agilman@collinscomputing.com and Mgilman@collinscomputing.com, respectively, or 949-457-0500.*