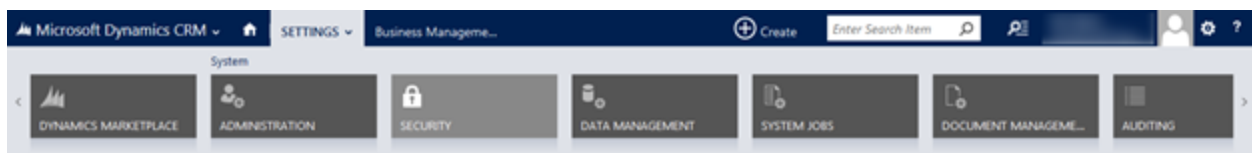


Hierarchical Security Models in Dynamics CRM 2015

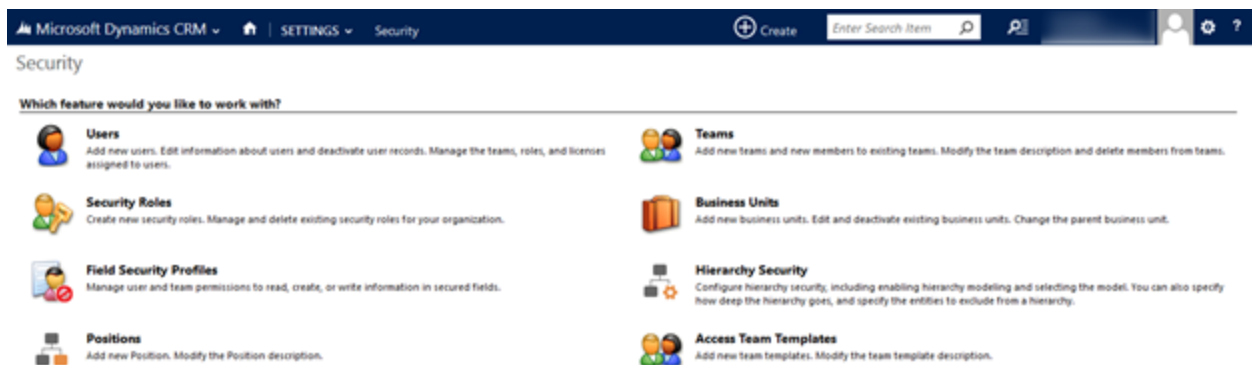
With the coming Microsoft Dynamics CRM 2015 a new addition has been made to the security model to provide hierarchical visibility based on the manager field in the user record. This new change will make it possible for managers to see records for the people under them.

This will let a direct manager of a person read, update, append and append to owned records, and read permissions to managers above the direct manager allowing for easier visibility of subordinates activities that can be used in dashboard and reporting easily.

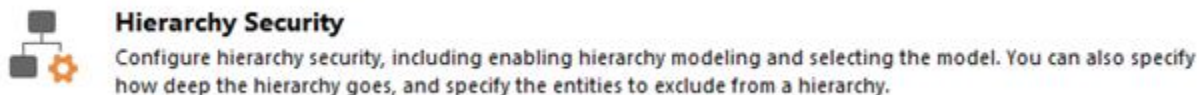
With the addition of the new security items, the Security has been moved to its own section in the navigation under Settings:



Security related items have been moved to security along with the new Hierarchy settings:



To enable the Hierarchy Security model select the **Hierarchy Security** item.



This will bring up the settings:

Microsoft Dynamics CRM | SETTINGS | Security

Save and Close | Discard

Hierarchy Security

Configure hierarchy security, including enabling hierarchy modeling and selecting the model. You can also specify how deep the hierarchy goes, and specify the entities to exclude from a hierarchy.

Turn on Hierarchy Modeling

☒ Enable Hierarchy Modeling 1

Select Hierarchy Model

☒ Manager Hierarchy 2 ☐ Custom Position Hierarchy

Hierarchy Depth 3

Exclude following entities from hierarchy

Available Entities

- Account
- Activity
- Appointment
- Campaign
- Campaign Activity
- Campaign Response
- Case
- Case Creation Rule

Selected Entities

Add > < Remove

1. Turns on or off the Hierarchy Modeling
2. Sets the Hierarchy to Manager
3. Sets the depth the hierarchy will be applied to (Note that there may be a performance impact on depths greater than 4)
4. Any entity that should be excluded from the hierarchy model can be set here

A new hierarchy view has been added that is available once the Manager Hierarchy is turned on and it can be viewed from the user record by opening a user and selecting View Hierarchy.

Microsoft Dynamics CRM | Training User 1

CONNECT | APPROVE EMAIL | REJECT EMAIL | REASSIGN RECORDS | MANAGE ROLES | JOIN TEAMS | CHANGE BUSINESS UNIT

USER: Training User 1

The information provided in this form is viewable by the entire organization. This user's information is managed by Office 365. To edit this information visit the User Administration section of the Office 365 Portal.

Summary

Account Information

User Name: TrainingUser1@thaddeusmf1ega.onmicr

User Information

Full Name: Training User 1

POSTS

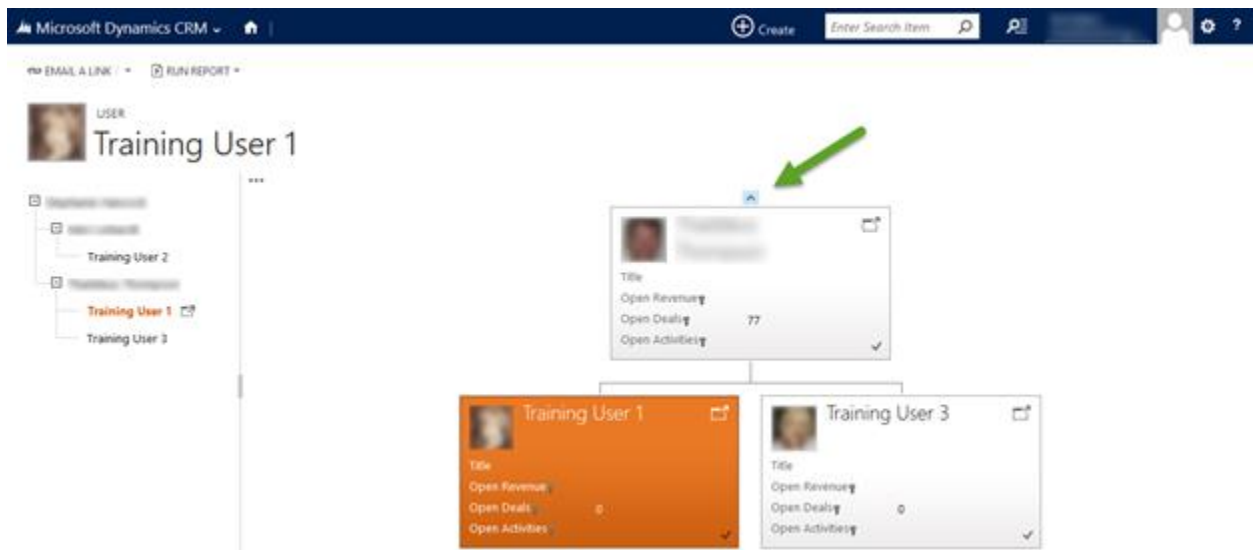
Enter post here

Both Auto posts User posts

We didn't find any posts.

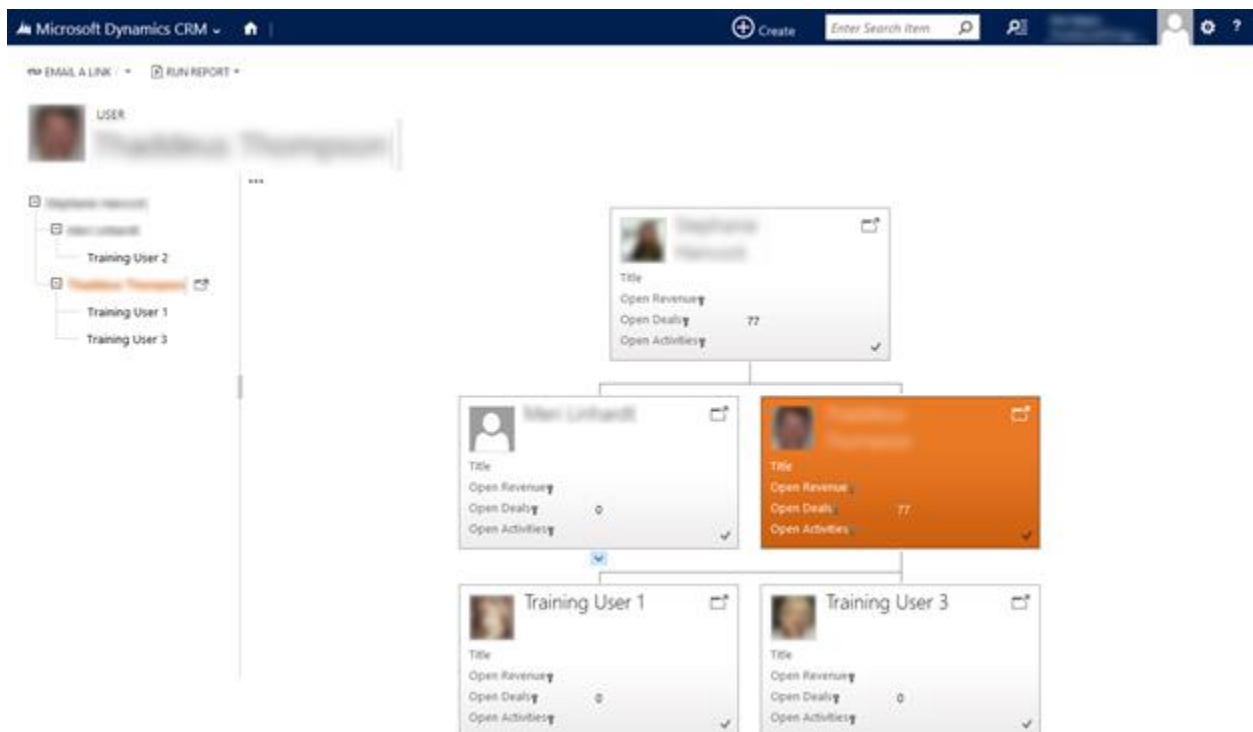
Change Manager
Change Position
Open Mailbox
View Hierarchy
Send Direct Email
Share Secured Fields
Email a Link
Follow
Run Workflow
Start Dialog
Run Report
Form Editor

This will show the user in relation to the manager and other users within the scope of the current level.



This will show the user, the manager, and other people at the same level as the selected user.

By selecting the up arrow the Hierarchy View can be changed to show more of the structure and shift the focus from the originally selected user to the manager and show a larger portion of the tree.



The managers will then have rights to all the records owned by their direct reports without the need of a sharing model.

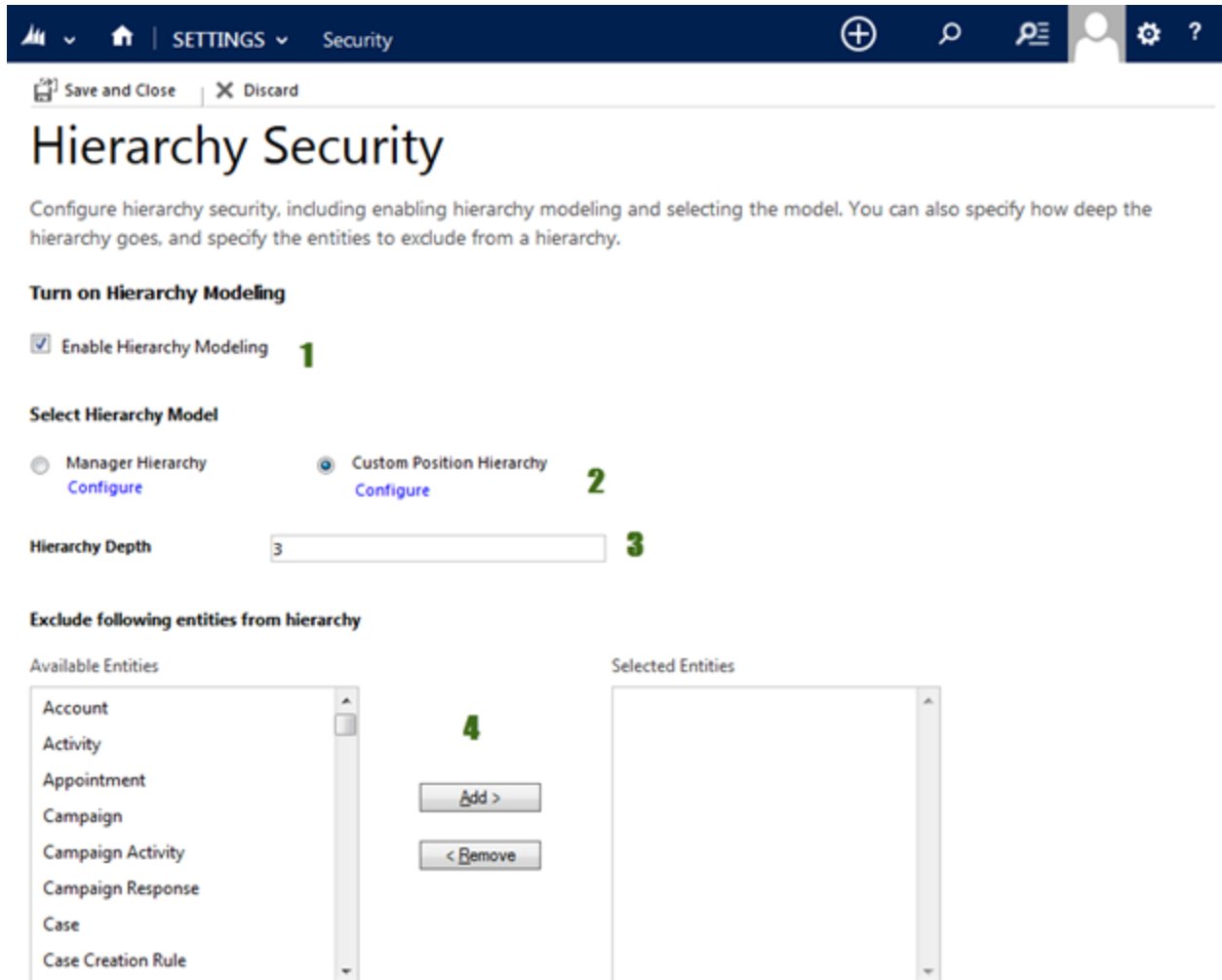
To enable the Positional Security model select the **Hierarchy Security** item.



Hierarchy Security

Configure hierarchy security, including enabling hierarchy modeling and selecting the model. You can also specify how deep the hierarchy goes, and specify the entities to exclude from a hierarchy.

This will bring up the settings:



The screenshot shows the 'Hierarchy Security' configuration page. At the top, there's a navigation bar with 'SETTINGS' and 'Security' tabs. Below the title, there's a description: 'Configure hierarchy security, including enabling hierarchy modeling and selecting the model. You can also specify how deep the hierarchy goes, and specify the entities to exclude from a hierarchy.'

Turn on Hierarchy Modeling

☒ Enable Hierarchy Modeling **1**

Select Hierarchy Model

☐ Manager Hierarchy [Configure](#) ☒ Custom Position Hierarchy [Configure](#) **2**

Hierarchy Depth **3**

Exclude following entities from hierarchy

Available Entities

- Account
- Activity
- Appointment
- Campaign
- Campaign Activity
- Campaign Response
- Case
- Case Creation Rule

4

Selected Entities

[Add >](#)

[< Remove](#)

1. Turns on or off the Hierarchy Modeling
2. Sets the Hierarchy to Custom Position
3. Sets the depth the hierarchy will be applied to (Note that there may be a performance impact on depths greater than 4)
4. Any entity that should be excluded from the hierarchy model can be set here

Go back to the security main page and click Select.



Positions

Add new Position. Modify the Position description.

Which will bring up the position definition list:

The screenshot shows the 'Active Positions' list in Microsoft Dynamics CRM. The table has two columns: 'Name' and 'Parent Position'. The list contains four entries: 'Sales VP' (no parent), 'Area Manager' (parent: Sales VP), 'Sales Manager' (parent: Area Manager), and 'Sales Person' (parent: Sales Manager).

✓	Name	Parent Position
	Sales VP	
	Area Manager	Sales VP
	Sales Manager	Area Manager
	Sales Person	Sales Manager

Where you can define positions and which position reports to another position. This model is best for an organization that is based on one or more manager needs access to records of a group of people in a position below that manager.

Defining a position is simple in that it needs a name, and a parent position if it applies. Once this is saved, users can be added to the position using the sub grid.

The screenshot shows the 'Sales VP' position detail page in Microsoft Dynamics CRM. The page has a 'General' tab. The 'Name' field is 'Sales VP' and the 'Parent Position' is '--'. The 'Description' field is '--'. There is a 'Users in this position' sub-grid with a search bar and a table showing one user: 'Sales VP'. A green arrow points to the 'VIEW HIERARCHY' button in the top navigation bar.

Microsoft Dynamics CRM | SETTINGS | Security | Sales VP | Create | Search | List View

+ NEW | DEACTIVATE | CONNECT | DELETE | CHANGE PARENT POSITL... | VIEW HIERARCHY

POSITION : INFORMATION

Sales VP

General

Name * Sales VP

Parent Position --

Description --

Users in this position v

Search for records P

Full Name ↑	Position
Sales VP	Sales VP

You can look at the positional hierarchy by selecting View Hierarchy item.

Navigation bar: SETTINGS Security

Actions: + NEW EMAIL A LINK RUN REPORT

POSITION

Sales VP

Sales VP

Area Manager

Sales Manager

Sales Person

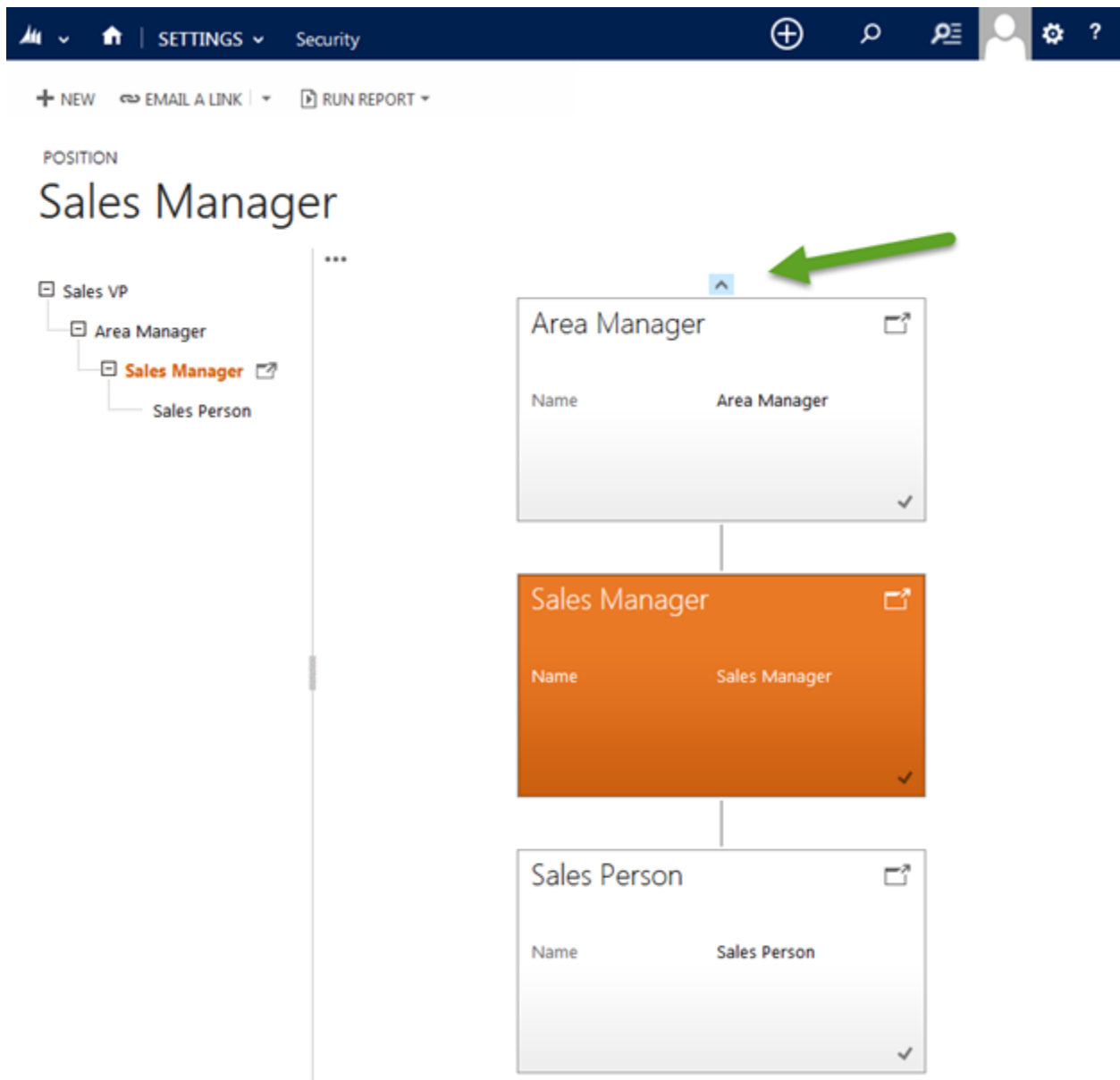
Sales VP

Name Sales VP

Area Manager

Name Area Manager

This will bring up a view of the relationship of the positions and can be navigated with the blue arrows, similar to the manager hierarchy.



These two models are in addition to the current security models and will adhere to business unit restrictions or if using a team model, the teams the person is on. This adds visibility based on the hierarchical structure to allow for an easier way for managers to see the records for their people and those below them.