Defining security roles involves the right creation of the business units. Security roles are defined by creating the right structure (Business Units) & Applying the right security role.**So before you read this topic, It is a "MUST" that you first ready through the business unit topic completely.**

What is Security Role ….?

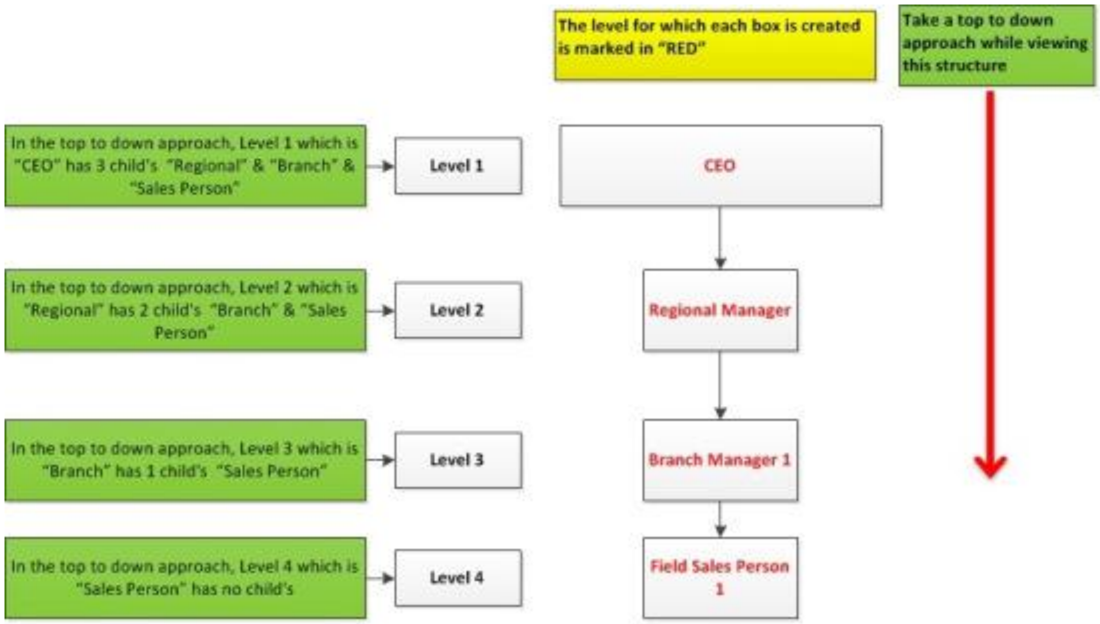
In simple words "Security roles" is where you define the "User rights". Rights like the user should be able to only "View" the accounts on the system but should not be allowed to "Delete" them or make any "Changes", OR the user should not be able to "See" the "Quote" entity on his system page.

How is a security role created …..?

For creating a security role there are 3 aspects you have to look into

1st –Business Unit Structure (Below "Image 1")
2nd –Role options (Below "Image 2")
3rd – Role level (Below"Image 3")
Before we create a security role let's understand the options first.

1st – Business Unit Structure
Image 1



1st – Business Unit Structure (Above "Image 1")

If you have still not gorn through the "Business Unit" topic, Please do so otherwise you will not be able to understand the concept totally.What the "Image 1" is showing is the structure of a business unit from level 1 to level 4 (remember always take the "Top to Bottom" approach). Also keep a concept in mind call "Parent Child" & remember that a parent can always view the child. So if there is a single "Parent" & it has 3 Child's , Then the parent will be able to view all it's 3 children & their created data. Keeping the same fundamentals in mind (Refer "Image 1) "Level 1" has 3 child's so the parent would be able to see all data for "It's 3 Children's", Same way "Level 2" would be able to see it for its 2 children, "Level 3" for its 1 child & "Level 4" non as it has no child under it. Eg.ExampleLet's say there is a company, It is into sales, So it would have "1 sales field person", who would report to his "branch manager", The branch manager in turn would report to his "Regional manager" & the regional manager finally would report to his "C.E.O", It's understood that the "CEO" would want access to all the level i.e. the regional manager & branch manager & field sales person. But the "branch manager" should be able to see the information of this team i.e. the field sale person. He should not be able to see the data for the Regional OR CEO level.So the CEO would be placed in Level 1, The Regional manager in Level 2, The branch manager in Level 3 & the field sales person in level 4. These

rules can always change depending on the projects requirements, But this is the fundamentals of a business unit & why it is created.

2nd – Role options
Image 2

	2nd – Role options (Above "Image 2") Within the security roles the below options are provided.
1st – Create	If this right is given to the user, The will be able to create a "NEW" entry in the system. Eg. Create a "New" account or contract or opportunity
2nd – Read	If this right is given to the user, They will "ONLY" be able to view the entry, They will not be able to create a "NEW" entry or even "EDIT" an entry. ONLY VIEW
3rd – Write	If this right is given to the user, The user can "EDIT" an entry, Remember the user will be able to "EDIT" a entry but not be able to create a "NEW" entryEg You create an entry in the system called "Samsung" & I have a "Write" right, I can "Edit" the name to "Samsung Ltd"
4th – Delete	If this right is given to the user, They will be able to delete an entry in the system.
5th – Append & Append To	This option is quite easy if it is understood well, So let's understand the same through an example.For the customer master to be complete in MS CRM 2011, we have to relate the account & the contacts with each other.Now imagine you are standing at the back of a car & looking in the front, So the tail light is the account &the head light is a contract, When you are seeing it from that prospective, The account will be considered as "Append" & the Contact will be considered as "Append To", If you go & stand in the

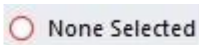
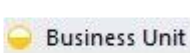
	front of the car near the headlight & look towards the back of the car i.e. it’s tail lights, Then from that prospective the contact will be considered as “Append” & the account would be considered as “Append To”. Hope you get the idea.So if you remove the “Append” & OR “Append To” rights, The user will not be able to relate the information he wants to. Eg A quote & quote product are linked to each other, You need both of then to be able to relate to each other otherwise you will not be able to create a quote. Just as a example the same can happen for opportunity & opportunity product / Order & order product / Invoice & invoice product
6th – Assign	We both work for the same company, The customer’s that we handle are owned by us in the system, I resign from my current company, So all my customer will get “ASSIGNED” to you. It’s like I permanently make you the owner of those entries on the system as I am not longer going to be around.
7th – Share	We both work for the same company, The customer’s that we handle are owned by us in the system, The kind of business we are into involves interacting with our customers every day. I am going on a 1 week holiday, In this case I will “SHARE” my customer with you, So that while I am away if you need to access the data that is owned by me in the system you can, It something like a temporary sharing of my data.

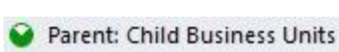
3rd – Role level

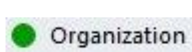
Image 3

Symbol Descriptions

(In the table for “Symbol Description” where ever the word “Business Unit” is used, Remember it’s the box in the organisation chat)

Symbol No	Symbol	Type	Description
1		None Selected	This symbol indicates that there are no right given
2		User	This symbol indicates the rights provided are at the user level. i.e. the system user will only be able to see his created data/entries
3		Business Unit	This symbol indicates the rights provided are at the business unit level. i.e. the system user will be able to see the created data/entries for the entire business unit which he belongs

			too, Which would include his data too.I know the above “User” & “Business Unit” explanations are the same. But going forward you will understand where they differ.
4		Parent Child	This symbol indicates the rights provided are at the parent child level. i.e the user will be able to see the data of his business unit & also the rest of the business units which are the child’s to the parent business unit. Eg the

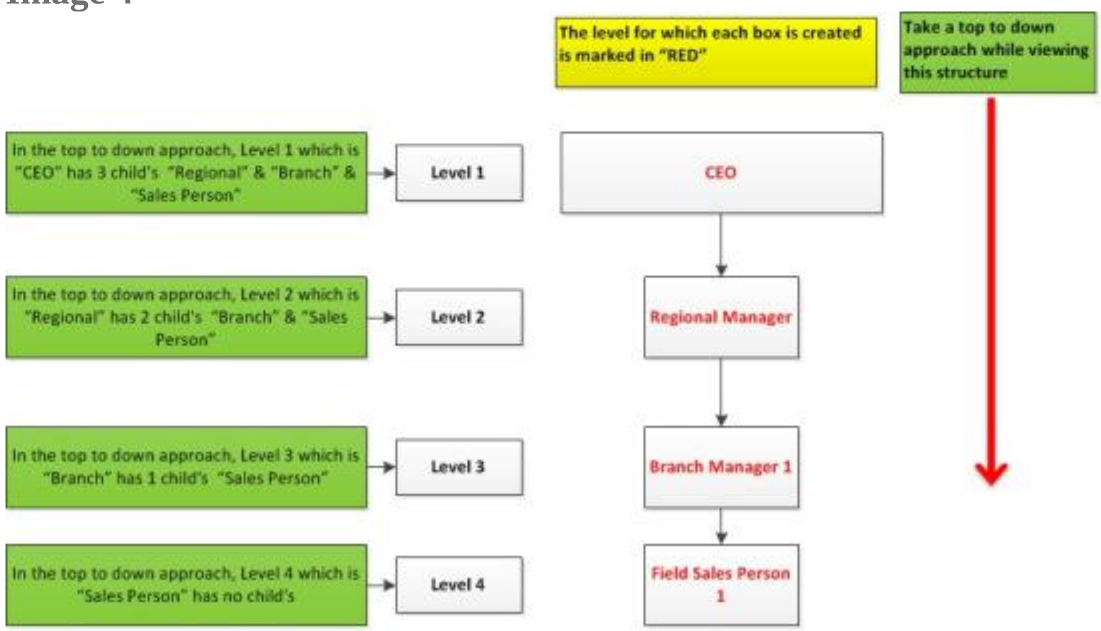
			Regional manager will be able to see the entries he has created, plus also see the entries for the branch manager & the fields sale person
5		Organization	This symbol indicates the rights provided are at the organisation level. i.e the user will be able to see the entire data of all the business units under it. Eg. The CEO would be able to view the entries of the Regional manager, plus branch manager & also the field sales

			person

CREATING A SECURITY ROLE

Now as we understand all the aspect that are required to create a security role. Let's understand how to create them.

Image 4



Creating a Security Role
When you define the security roles, They are defined for the entities, For the below explanation we will use the example of 2 entities "Accounts" & "Contacts"AlsoJust remember the terms "Each box is a "Business Unit" & the "Parent Child Concept"

In this table we are defining the various aspects, Ready the "Remarks" table below to understand

User	Business Unit	Role Option	Role Level
CEO	The parent business unit "CEO" will have	Create, Read, Write,	Organization – With this level, will be

	access to child's Regional & Branch & Sales Person	Delete, Append, Append To, Assign, Share	able to see all across the hierarchy
Regional Manager	The parent business unit "Regional" will have access to child's & Branch & Sales Person	Create, Read, Write, Delete, Append, Append To, Assign, Share	Parent Child – With this level, Will be able to see entries on the regional, branch & sales person level
Branch Manager	The parent business unit "Branch" will have access to child's Sales Person	Create, Read, Write, Delete, Append, Append To, Assign, Share	Parent Child – With this level, Will be able to see entries on the, branch & sales person level
Sales Person	At this level that is the extreme end there is ONLY a business unit "Sales Person" no child's	Read, Write, Append, Append To, Assign, Share	User – With this level, Will be able to see entries ONLY created by this user.

Remarks

CEO	At the CEO level we are giving him all the right to perform any & every action on the system
Regional	At the regional level, The person should not be seeing the entries of the CEO, But should be able to

	see the entries of his entire team, So that why “Parent Child” &all the role options too.
Branch Manager	At the Branch level, The person should not be able to see the entries of the CEO or Regional Manager, But should be able to see the entries of his team members who are the sales persons. So again “Parent Child” & all the role options
Sales Person	At this level, The sales person should not be able to see the entries of the CEO or Regional Manager or Branch Manager &**also not his “Colleagues**”, So if you want him to ONLY see this entries, The role level should be “User”, If you give him the “Business Unit” role, Then he will be able to see all the entries of the branch.Hope now the difference between “Business Unit” & “User” level role is clear

GROUP SECURITY ROLE

To make life easy, I had been taking an example of only 1 part of the entire hierarchy. If we had to decide the security roles for the entire organisation then what would be different. See the image below

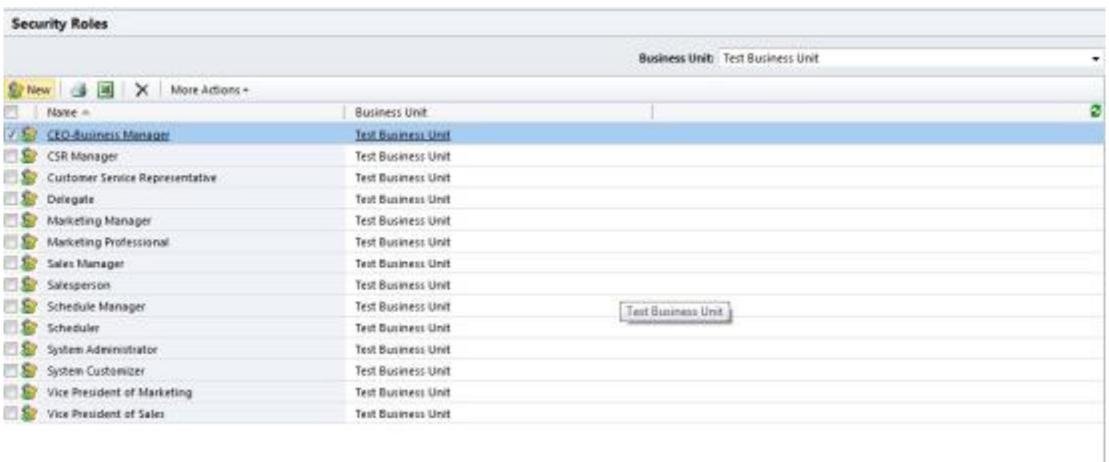
Image 5

The above “Image 5” is an example of a full-blown organisation chat. So how different would it be if we had to decide the security

roles for this structure. Well the answer is**"NOTHING"**, Yes nothing would change. But I can't go creating security roles for 21 users. So what u do is simply is create group. i.e.CEO GroupRegional Manager GroupBranch Manager GroupFields Sales Person Group
In the above example we had defined all the 3 aspects for CEO, Regional Manager, Branch Manager & Sales Persons. So what we will do here is create 4 security role group called "CEO Role" "Regional Manager Role" "Branch Manager Role" & "Sales Person Role" add the 3 aspects to them. & then finally add the users to the group, It's as simple as that.

Below I have just shown a few screenshot of the security roles

MS CRM 2011 SECURITY ROLES GROUP LIST



The image above shows you the list of security role that are present within MS CRM 2011. Also for reference below is the table.

Role	**Description**
CEO-Business Manager	A user who manages the organization at the corporate business level.
CSR Manager	A user who manages customer service activities at the local or team level.

Customer Service Representative (CSR)	A customer service representative (CSR) at any level.
Delegate	A user who is allowed to act on behalf of another user.
Marketing Manager	A user who manages marketing activities at the local or team level.
Salesperson	A salesperson at any level.
Sales Manager	A user who manages sales activities at the local or team level.
Salesperson	A salesperson at any level.
Schedule Manager	A user who schedules appointments for services.
Scheduler	A user who manages services, required resources, and working hours.
Support User	A user who is a customer support engineer.
System Administrator	A user who defines and implements the process at any level.
System Customizer	A user who customizes Microsoft Dynamics CRM entities, attributes, relationships, and forms.
Vice President of Marketing	A user who manages marketing activities at the business unit level.
Vice President of Sales	A user who manages the sales organization at the business unit level.

Security Role Screenshots

Security Role: Salesperson
This is the "Sales Person Group" security role
These are the entities for which the role is getting defined
These are the levels for each of the entity.
You can also refer to the level which are indicated at the bottom on the page