


Improving Performance with Access Teams in Microsoft Dynamics CRM 2013









Introduction

Access Teams is a new addition in Microsoft Dynamics CRM 2013 that brings along a new way to define privileges and permissions for entities in CRM.


Prior to Microsoft Dynamics CRM 2013 (in CRM 2011), security roles were the only means by which privileges were defined for entities. These privileges— Create, Read, Write, Delete, Append, Append To, Assign, Share—were defined in configurations for Security Roles from a User level of access to an Organization level of access.





Security Role: CSR Manager


Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Custom Entities
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Account								

Key

 None Selected

 User

 Business Unit

 Parent: Child Business Units

Once security roles had been configured, they were then assigned to various users or teams where the privileges defined in the security roles would get additively applied.

However, there are a couple of caveats with the previous implementation of security:

1. Security roles defined privileges for an entire entity.
2. Due to the cumulative effect of security roles, if a user has several roles and/or belongs to a team with a role, performance can suffer as CRM needs to process and calculate the final set of privileges. Furthermore, any time roles get added/removed from users frequently, the cache in CRM is flushed for the user and performance is slowed further.

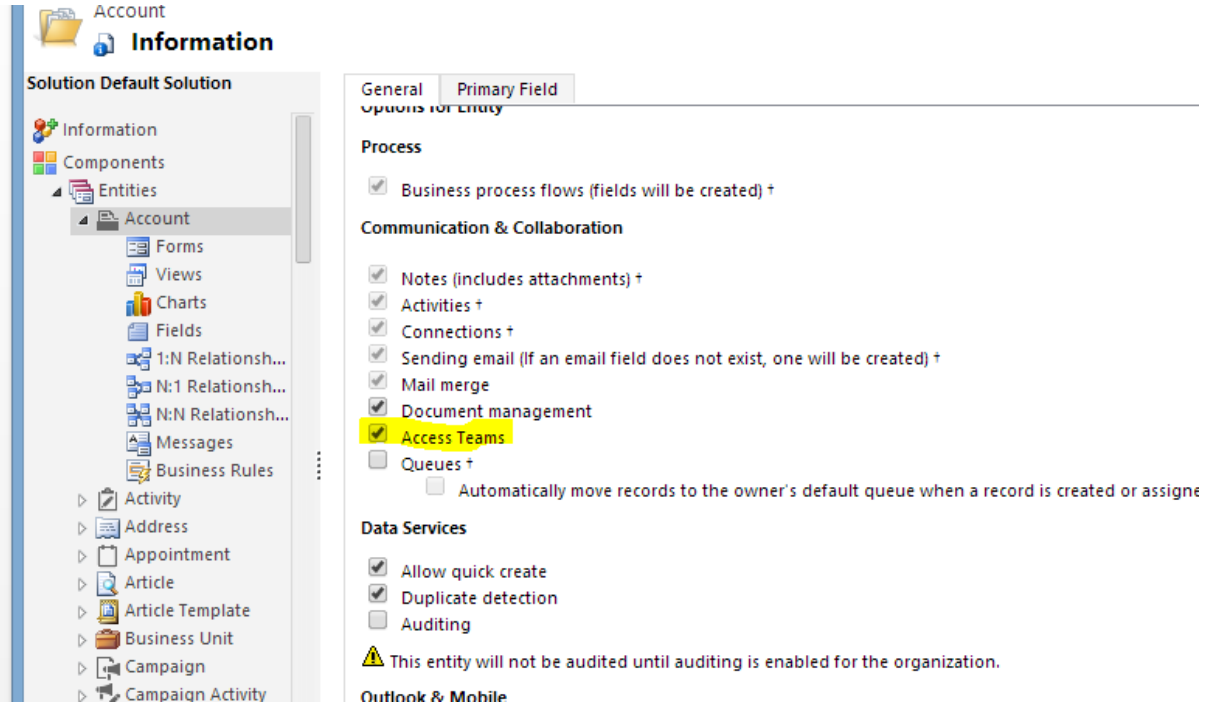
So, in CRM 2013 we have the introduction of **Access Teams** where privileges can get set for an individual record level, and since Access Teams don't have security roles associated with them, the performance implications involved with multiple security roles and changing of the security roles have been eliminated.

Setting up Access Teams

Access Teams are easily configurable out of the box. Here are the steps to set up an Access Team for a record:

Step 1

Enable the entity for Access Teams:



In Settings -> Customizations, select the checkbox for Access Teams (highlighted in screenshot above)

Step 2.

Set up the Access Team Template for the entity's Access Team:

Microsoft Dynamics CRM | SETTINGS | Administration | Create | Henry Lin

CRM for Outlook | See how CRM for Outlook makes you even more productive. | Get CRM for Outlook

Administration

Business Units
Add new business units. Edit and deactivate existing business units. Change the parent business unit.

System Settings
Set the format for various values, such as numbers, the calendar, and currency. Select tracking, marketing, and customization options for your organization. Set Microsoft for Outlook options. Manage report categories.

Security Roles
Create new security roles. Manage and delete existing security roles for your organization.

Field Security Profiles
Manage user and team permissions to read, create, or write information in secured f

Teams
Add new teams and new members to existing teams. Modify the team description and delete members from teams.

Users
Add new users. Edit information about users and deactivate user records. Manage tr and licenses assigned to users.

Languages
Add or remove support for additional languages.

Privacy Preferences
Set the privacy preferences for the organization.

Subscription Management
See payment and billing options, and purchase additional licenses. You must be a member of an appropriate security role to do these tasks.

System Notifications
View important system messages such as scheduled outage notifications.

Resources In Use
View details about your organization's use of storage, custom entities, and workflows and dialogs.

Yammer Configuration
Connect Microsoft Dynamics CRM to your enterprise Yammer network

Access Team Templates
Add new team templates. Modify the team template description.

In Settings -> Administration, click open **Access Team Templates** and create a new Access Team. In addition, select the privileges in Access Rights that you would like to assign for the **Access Team**:

Team template: Henry Sample - Microsoft Dynamics CRM - Google Chrome

https://henrydemo.crm.dynamics.com/main.aspx?etc=92&extraqs=%3fetc%3d92%26id%3d%257b43005781-1BAB-E311-

FILE | TEAM TEMPLATE

Save | Save & Close | Delete

Team template : TeamTemplate

General

Related

Common

Audit History

Team template Henry Sample

Team templates

Name * Henry Sample Entity * Account

Description

Sample Access Team

Access Rights *

- ☐ Delete
- ☐ Append
- ☒ Append To
- ☐ Assign
- ☒ Share
- ☒ Read
- ☒ Write

Step 3.

Add a Sub-Grid for Users on the form for the entity that you wish to enable Access Teams for:

The screenshot shows the 'Set Properties' dialog box for a sub-grid. The 'Data Source' section is highlighted with a blue circle. It contains the following settings:

- Records: All Record Types
- Entity: Users
- Default View: Associated Record Team Members
- Team Template: Henry Sample

Below the 'Data Source' section, there are 'Additional Options':

- ☐ Display Search Box
- ☐ Display Index
- View Selector: Off

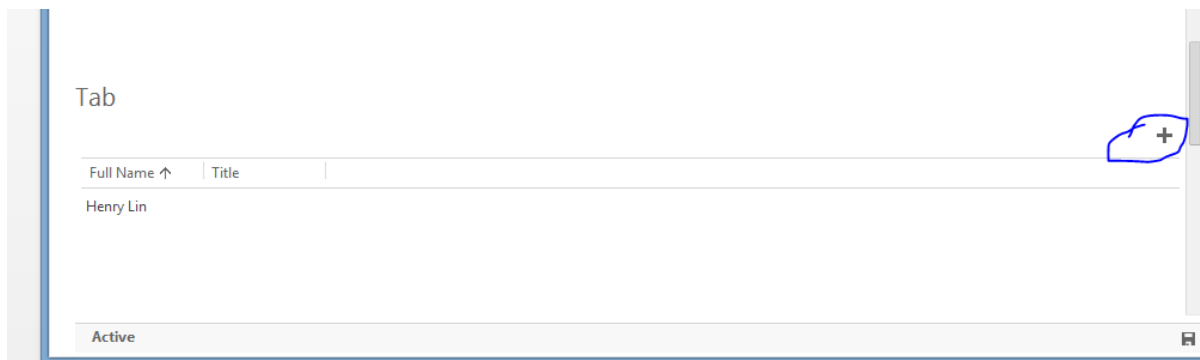
On the right side, the 'Field Explorer' is visible, showing a list of fields including 'Account Number', 'Account Rating', 'Address 1: Address Type', 'Address 1: City', 'Address 1: Country/Region', 'Address 1: County', 'Address 1: Fax', 'Address 1: Latitude', 'Address 1: Longitude', 'Address 1: Name', 'Address 1: Post Office Box', 'Address 1: Primary Contact Name', 'Address 1: State/Province', 'Address 1: Street 1', 'Address 1: Street 2', and 'Address 1: Street 3'.

Make sure to select:

All Record Types for Records, **Users** for entity, **Associated Record Team Members** for Default View; this selection will pop up the team template that you wish to use and select your Team Template.

Step 4.

On any given record, add Users to the sub-grid to grant them privileges based on the Team Template specified in the Sub-Grid:



Step 5.

Alternatively, a new message has been added to the SDK—**AddUserToRecordTeamRequest**—which can programmatically add a user to an access team—you just need to specify the GUID's of the Record, the User you want to add, and the Access Team Template you want to add to, also add a reference to **Microsoft.Crm.Sdk.Proxy**:

```
AddUserToRecordTeamRequest adduser = new AddUserToRecordTeamRequest()
{
    Record = recordID,
    SystemUserId = sysUserID,
    TeamTemplateId = teamTemplateID
};
// Execute the request.
AddUserToRecordTeamResponse response =
(AddUserToRecordTeamResponse)service.Execute(adduser);
```