

Assigning System Views Based on Security Roles in Dynamics CRM

Have you ever had a request to assign system views based off of security roles? This is not an out of the box function of CRM 2015, but the following tool from codeplex makes this a reality:

<http://rolebasedviews.codeplex.com/>

First, download the **RolebasedViews_managed** and **RolebasedViews_executables** zip files from codeplex. Then import the **RolebasedViews_Managed.zip** solution into your CRM environment. When that step is completed, click the **RoleBasedViews Application** file within the RolebasedViews_executables zip. This will open up the interface below.

Configure Role based Views - Developed by Debajit Dutta (debajit.prod@gmail.com)

Configure Views for Security Roles

Select Security Role

Load Data Save Changes

Please donate if this tool really helps.

Entities

Entity

Views

View Name	Default	Visible
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User Preferences for View Configuration

Load User Data Save Changes

User	Preferred Role for View Configuration	View Configuration Enabled
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Not connected

Using the drop down menu at the bottom left of the screen you can connect into your CRM. Once connected, click load data at the top right of the screen. This will list out all of the entities and allow you to select security roles from the drop down menu.

Configure Views for Security Roles

Select Security Role: Sales Manager

Entities

Entity
Campaign Response
Case
Competitor
Connection
Contact
Contract
Contract Line

Views

View Name	Default	Visible
My Active Contacts	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Active Contacts	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Inactive Contacts	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Contacts I Follow	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Contacts Being Followed	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Contacts: No Orders in Last 6 Months	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Contacts: Influenced Deals That We Won	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Now you have the ability to select which views are visible within each entity for each security role enabling role based views in CRM! You can also select the default view within each entity. For further detailed instructions, please click on the codeplex link below.

<http://rolebasedviews.codeplex.com/documentation>