Control "Who Will See What" in Your Database

Turn standard Microsoft Dynamics SL screens and reports into self-service applications
Empower users to update information and run their own reports
Restrict user access to data for their area of responsibility

Privacy Manager

Privacy Manager is the "automatic gatekeeper" that allows every user to be responsible for running their own reports and maintaining their own data. Now, access to a Microsoft Dynamics® SL screen or report means users don't get to see all the data.
Privacy Manager restricts each user to viewing and updating only the data matching their individual access permissions.

Use any of 50 Dynamics SL key fields to specify access permissions. An additional 16 custom permission fields allow custom applications and third-party applications to be privacy-enabled.

Specify a single permitted value, use wildcards to specify a range of values, or use advanced criteria to set up permissions such as 'everything but …' or 'in the list …'.

Limit access for each user based on subaccount, project id, ledger id, currency id, state, country, customer number, ship to location, customer class, sales person, territory, vendor, vendor class, buyer id, inventory id, inventory class, site id, product line, employee id and more.

Privacy Manager also allows you to restrict access based on accounting periods and document data. Prevent users from creating batches for past periods. Limit a user's access to current records.

Set up multiple restrictions on screens and reports. Privacy Manager automatically ignores the restrictions that do not apply to a particular user.

For example, a single customization can tailor the Project Maintenance screen so that project managers see only their own projects, managers are permitted to access all projects for their office, and headquarters staff are permitted access to all projects other than a list of internal management projects.
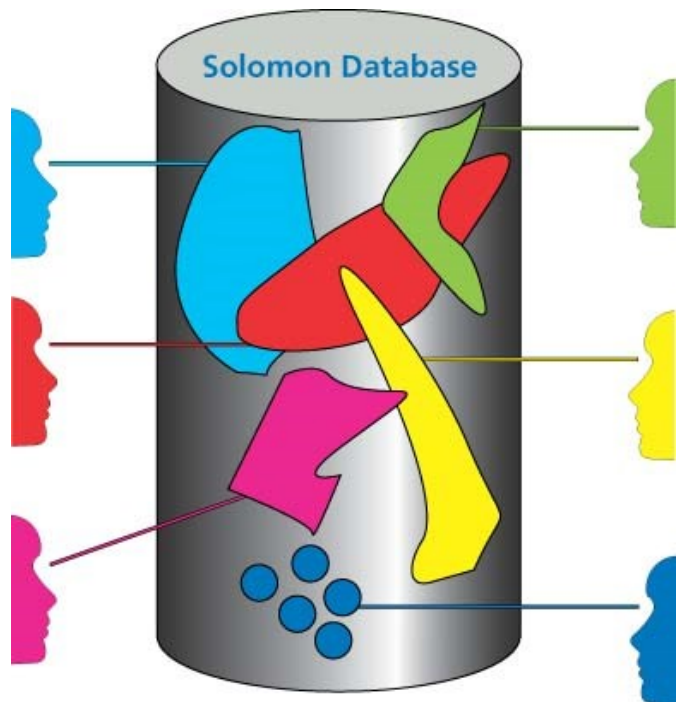
Privacy Manager works automatically once installed. Once Privacy Manager is installed for a screen or report, each user is only able to view, update, update or create records which meet their personal privacy permissions. Users without a Privacy Manager Permission record are denied access to any data.

Privacy Manager is easy to implement and maintain.
- One User Permission record per user.
- One Report Privacy Template per report format.
- One Privacy Customization per screen.

Virtually every Dynamics SL report and data entry screen becomes a self-service application with Privacy Manager.

PRIVACY MANAGER

Privacy Manager allows user permissions to be specified for these standard Dynamics SL key fields:

Account	Currency Id	Product Line
Account Class	Customer Class	Product Manager Id
AP Discount Date	Customer Id	Project Id
AP Doc Ref Nbr	Employee Id	Purchase Order Nbr
AP Document Date	External Ref Nbr	Salesperson Id
AP Due Date	Inventory Class Id	Ship To Id
AR Discount Date	Inventory Id	Ship Via Id
AR Doc Ref Nbr	Kit/BOM Id	Shipper Id
AR Document Date	Labor Class Id	Site Id
AR Due Date	Last Update Date	State
Bank Account	Last Update User	Subaccount
Bank Subaccount	Ledger Id	Task Id
Buyer Id	Material Type	Territory
Cash Entry Type	Order From Id	Vendor Class
Company Id	Order Number	Vendor Id
Country	Period Closed	Whse Location
Created On Date	Period Entered	Work Location
Created By User	Period to Post	Zip/Postal Code

Use Custom Permissions for other key fields.

Establishing "Report Privacy Templates"

A single Report Privacy Template maps user permissions to specific fields in a report. Privacy Manager includes more than 450 report privacy templates for standard Microsoft Dynamics SL reports. Custom reports are privacy-enabled in seconds. Simply select the report and format. Then select the table (or view), the column and the associated privacy permission..

Technical Specifications

Product Type
VB Tools Application
Customization Manager enabled

Technical Requirements
Standard Dynamics SL environment
Customization Manager

Supported Versions
Microsoft Dynamics SL 2015
Microsoft Dynamics SL 2011 FP1
Microsoft Dynamics SL 2011

Available Versions*
Solomon 5.5 and later

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