

NEO SECURITY VIEWER USER MANUAL (VERSION 1.0.2.0)

Contents

I. What does Neo Security Viewer do?.....	2
II. How to obtain the solution	2
III. How to install the solution	2
IV. How to open the application.....	3
V. How to see security details	6
▪ View by User.....	6
▪ View by Team	7
▪ View by Security Role	8
▪ View by Entity	9
VI. How to get Support for Neo Security Viewer	10

I. What does Neo Security Viewer do?

Neo Security Viewer is a free third-party add-on for Dynamics CRM and Dynamics 365, which allows administrator type users to see assigned security roles of system users and teams, and access privileges to entities.

It basically consist of two CRM web resources: an html interface and a JavaScript behind it which reads all required data from CRM via web services and compose them to make data easily viewable by users. Neo Security Viewer does not require any external web application, and is completely integrated with CRM.

II. How to obtain the solution

Neo Security Viewer is listed in AppSource and can be downloaded from the link, <https://appssource.microsoft.com/en-us/product/dynamics-365/neoxrm.ef6fc142-c092-44a0-97ef-b98f26c8c3c9>.

Neo Security Viewer can also be downloaded from NeoXrm web site, <https://www.neoxrm.com>. BY filling out the [short registration form](#), you can download the CRM solution file for free. That will also create a NeoXrm support account for you. By using your NeoXrm support account, you can download the latest version of the software at any time, create a support case if encounter any issue or have question, or you can easily download other products.

If you need help about downloading the product, please contact to NeoXrm support via email at support@neoxrm.com or via phone 1-844-NEOXR1.

III. How to install the solution

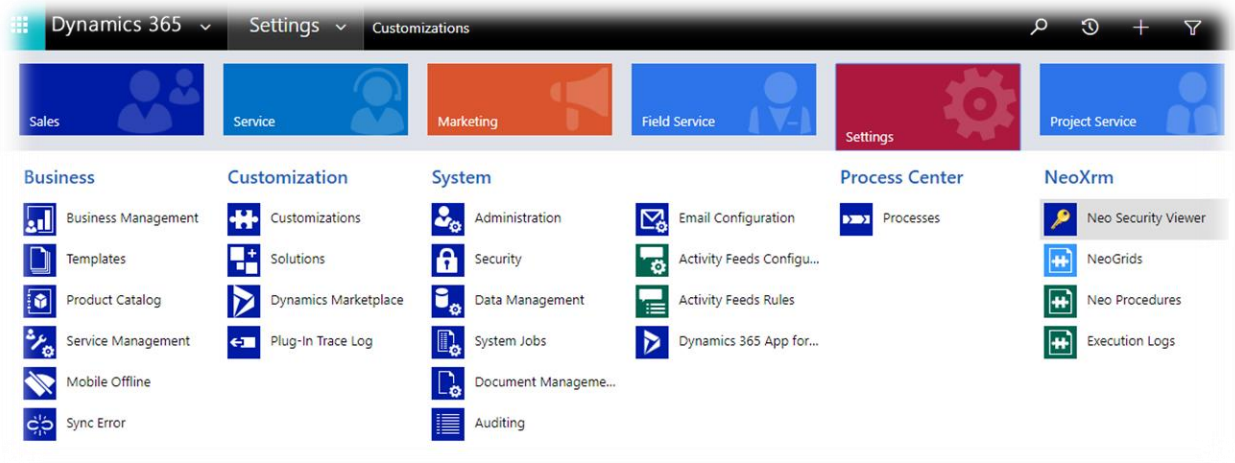
If you are downloading via AppSource, please follow the instructions.

If you download the solution file from our website, the next step is to import the downloaded solution file into your CRM environment. You need to have system admin or system customizer role to be able to import CRM solution in general. Once the solution is imported successfully, your Neo Security Viewer is ready to use.

IV. How to open the application

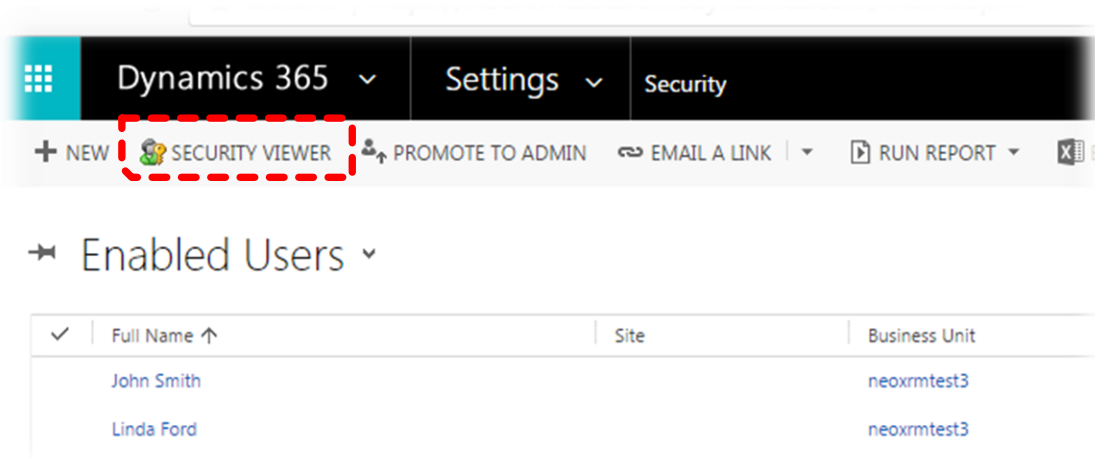
Once the CRM solution imported successfully, a ribbon button will be added to the SiteMap.

Go to Settings → NeoXrm → Neo Security Viewer

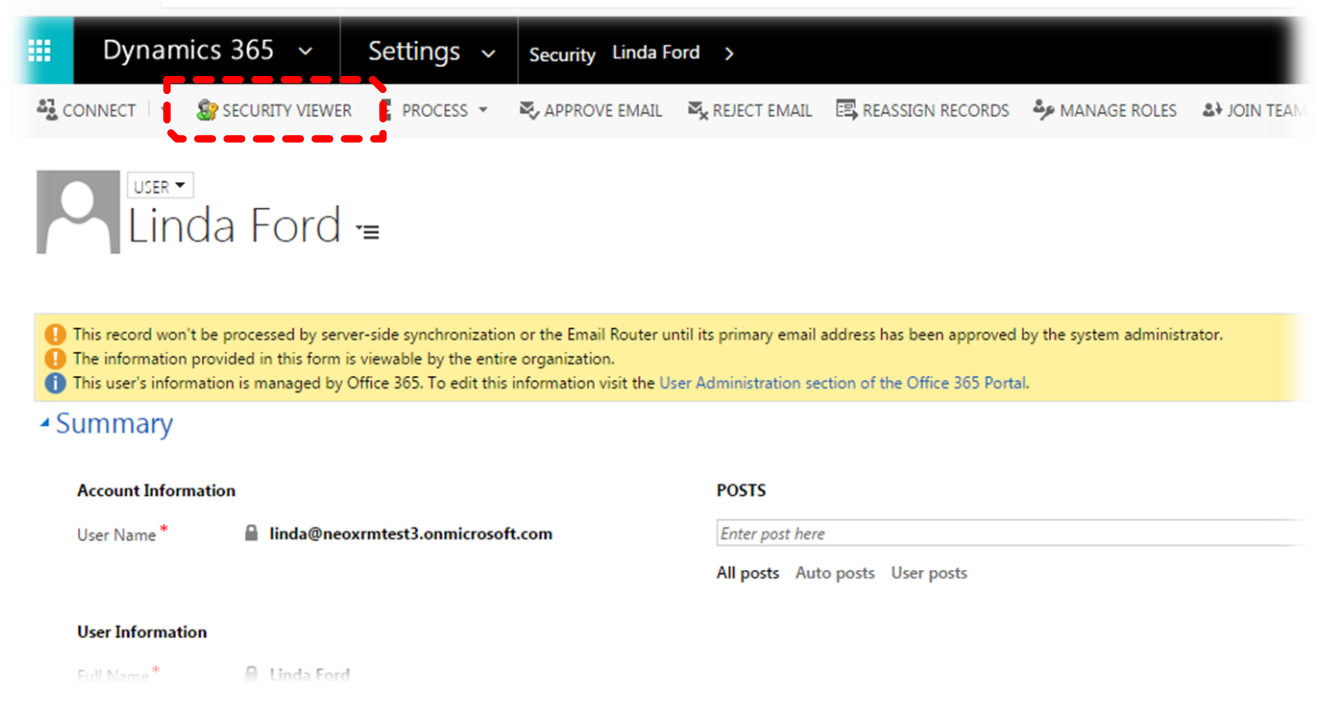


You will also notice “SECURITY VIEWER” button in four places which will allow you to open the Neo Security Viewer application.

Go to Settings → Security → Users



Open a User record



Dynamics 365 **Settings** **Security** Linda Ford

CONNECT **SECURITY VIEWER** PROCESS APPROVE EMAIL REJECT EMAIL REASSIGN RECORDS MANAGE ROLES JOIN TEAM

USER
Linda Ford

Summary

Account Information

User Name * **linda@neoxrmttest3.onmicrosoft.com**

User Information

Full Name * **Linda Ford**

POSTS

Enter post here

All posts Auto posts User posts

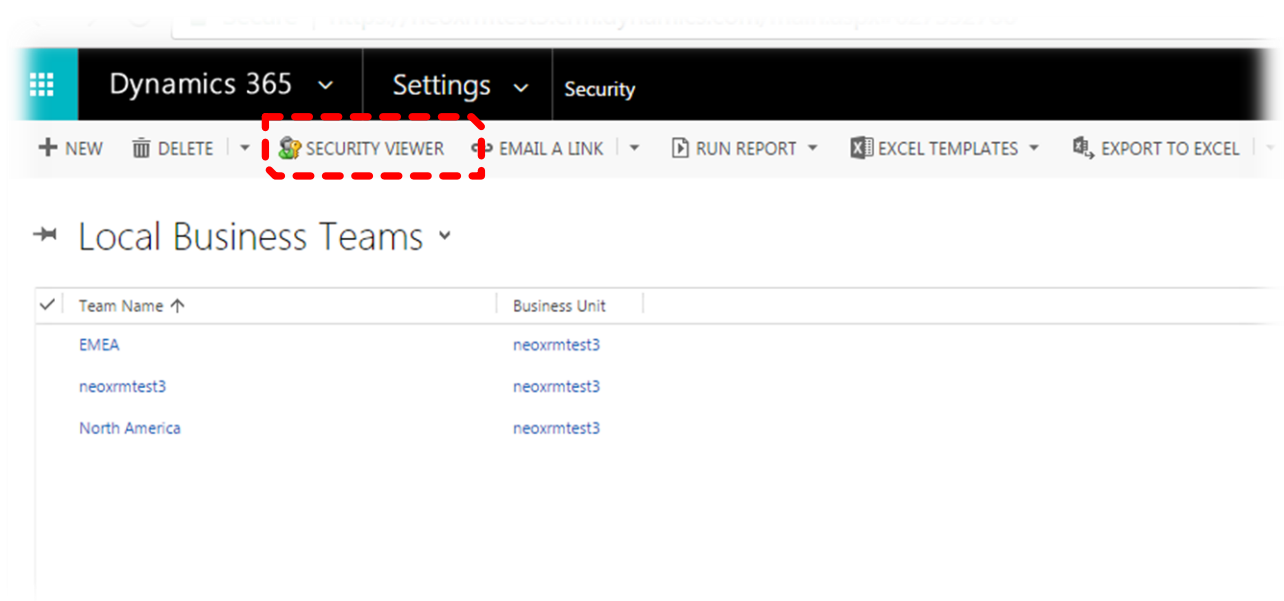
Summary

This record won't be processed by server-side synchronization or the Email Router until its primary email address has been approved by the system administrator.

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.

Go to Settings → Security → Teams



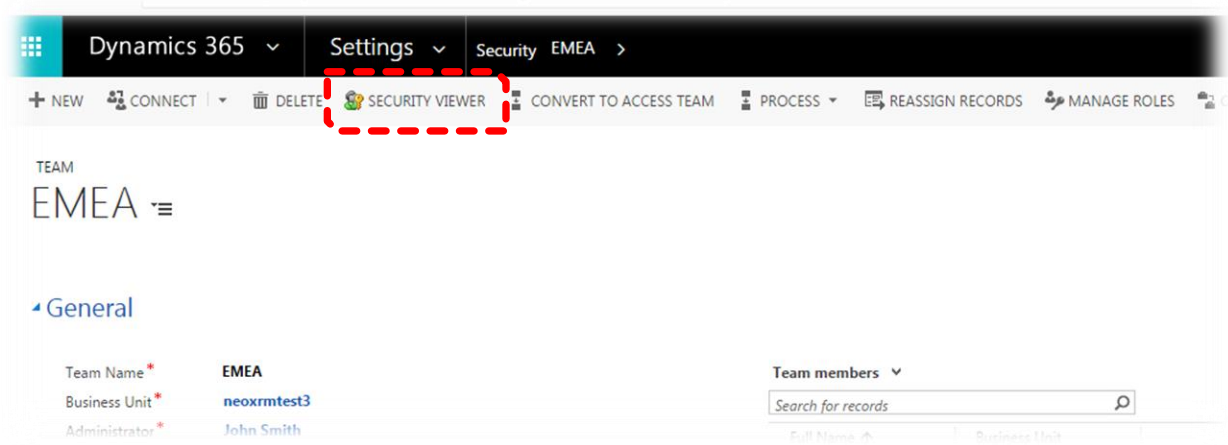
Dynamics 365 **Settings** **Security**

+ NEW DELETE **SECURITY VIEWER** EMAIL A LINK RUN REPORT EXCEL TEMPLATES EXPORT TO EXCEL

Local Business Teams

Team Name	Business Unit
EMEA	neoxrmttest3
neoxrmttest3	neoxrmttest3
North America	neoxrmttest3

Open a Team record



V. How to see security details

Once the user clicks on “SECURITY VIEWER” button, a new window will open like below.

■ View by User

Once a user is selected from the option set, it will show three information about the selected user:

- List of teams the user is part of,
- List of security roles the user assigned (including security roles inherited roles via teams), and
- Access privileges for each entity. When cursor go over to any icon, list of privileges coming from each assigned role is shown.



The screenshot shows the Neo Security Viewer application in a Google Chrome browser window. The URL is [https://neoxrmtest3.crm.dynamics.com/%7B636242255620000792%7D/WebResources/neo_security/viewer.htm?Data=userId%3d%";](https://neoxrmtest3.crm.dynamics.com/%7B636242255620000792%7D/WebResources/neo_security/viewer.htm?Data=userId%3d%). The application has four tabs: 'View By User' (selected), 'View By Team', 'View By Security Role', and 'View By Entity'. The 'User' dropdown is set to 'John Smith'.

Entity Access Privileges

Entity	Create	Read	Write	Delete	Append	AppendTo	Assign	Share
Inventory Adjustment	●	●	●	●	●	●	●	●
Inventory Adjustment Product	●	●	●	●	●	●	●	●
Inventory Journal	●	●	●	●	●	●	●	●
Inventory Transfer	●	●	●	●	●	●	●	●
Invoice	●	●	●	●	●	●	●	●
Invoice Frequency	●	●	●	●	●	●	○	○
Invoice Frequency Detail	●	●	●	●	●	●	○	○
Invoice Line Detail	●	●	●	●	●	●	○	○
Invoice Process	●	●	●	●	●	●	○	○
Journal	●	●	●	●	●	●	●	●
Journal Line	●	●	●	●	●	●	●	●
Knowledge Article	●	●	●	●	●	●	●	●
Knowledge Article Views	●	●	●	●	●	●	○	○
Knowledge Base Record	●	●	●	●	●	●	○	○
Knowledge Search Model	●	●	●	●	●	●	○	○
Language	●	●	●	●	●	●	○	○
Lead	●	●	●	●	●	●	○	○
Lead To Opportunity Sales Process	●	●	●	●	●	●	○	○
License	○	●	○	○	○	○	○	○
Mail Merge Template	●	●	●	●	●	●	●	●
Mailbox	●	●	●	●	●	●	●	●
Mailbox Auto Tracking Folder	●	●	●	●	●	●	●	●
Mailbox Statistics	○	●	○	○	○	○	○	○
Manager	○	○	○	○	○	○	●	○
Marketing List	●	●	●	●	●	●	●	●
MarketingSiteMap	●	●	●	●	●	●	○	○
Mnhile Offline Profile	●	●	●	●	●	●	●	●

Assigned Security Roles

- Field Service - Inventory Purchase (via team: North America)
- Field Service - Resource (via team: North America)
- Marketing Professional (via team: North America)
- Sales Manager (via team: North America)
- Sales app access
- Salesperson
- Schedule Manager (via team: North America)
- System Administrator

Assigned Teams

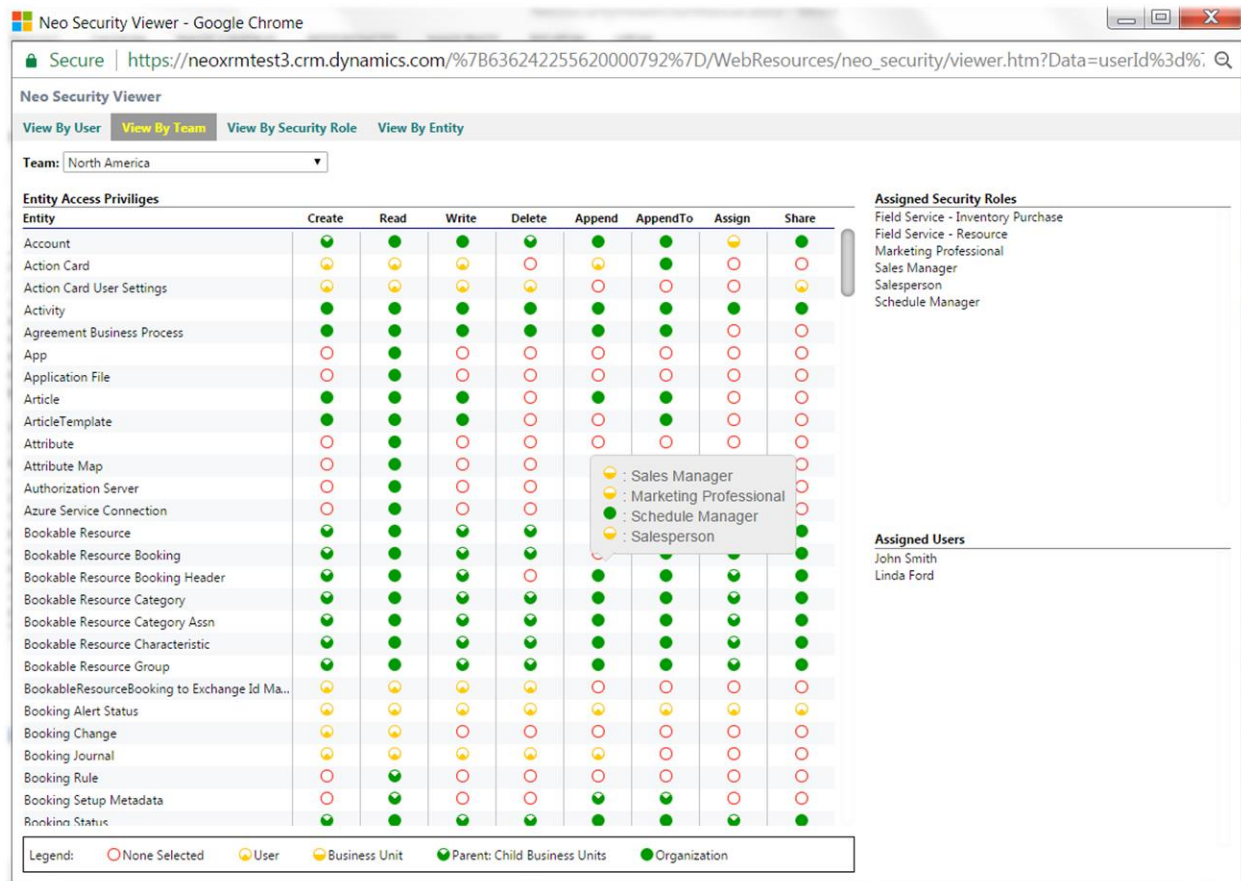
- North America
- neoxrmtest3

Legend: ○ None Selected, ● User, ● Business Unit, ● Parent: Child Business Units, ● Organization

■ View by Team

Once a team is selected from the option set, it will show three information about the selected team:

- List of users part of that team,
- List of security roles the team assigned to, and
- Access privileges for each entity. When cursor go over to any icon, list of privileges coming from each assigned role is shown.



Neo Security Viewer - Google Chrome

Secure | [https://neoxrmtest3.crm.dynamics.com/%7B636242255620000792%7D/WebResources/neo_security/viewer.htm?Data=userId%3d%";](https://neoxrmtest3.crm.dynamics.com/%7B636242255620000792%7D/WebResources/neo_security/viewer.htm?Data=userId%3d%)

Neo Security Viewer

View By User View By Team View By Security Role View By Entity

Team: North America

Entity Access Privileges

Entity	Create	Read	Write	Delete	Append	AppendTo	Assign	Share
Account	👤	👤	👤	👤	👤	👤	👤	👤
Action Card	👤	👤	👤	👤	👤	👤	👤	👤
Action Card User Settings	👤	👤	👤	👤	👤	👤	👤	👤
Activity	👤	👤	👤	👤	👤	👤	👤	👤
Agreement Business Process	👤	👤	👤	👤	👤	👤	👤	👤
App	👤	👤	👤	👤	👤	👤	👤	👤
Application File	👤	👤	👤	👤	👤	👤	👤	👤
Article	👤	👤	👤	👤	👤	👤	👤	👤
ArticleTemplate	👤	👤	👤	👤	👤	👤	👤	👤
Attribute	👤	👤	👤	👤	👤	👤	👤	👤
Attribute Map	👤	👤	👤	👤	👤	👤	👤	👤
Authorization Server	👤	👤	👤	👤	👤	👤	👤	👤
Azure Service Connection	👤	👤	👤	👤	👤	👤	👤	👤
Bookable Resource	👤	👤	👤	👤	👤	👤	👤	👤
Bookable Resource Booking	👤	👤	👤	👤	👤	👤	👤	👤
Bookable Resource Booking Header	👤	👤	👤	👤	👤	👤	👤	👤
Bookable Resource Category	👤	👤	👤	👤	👤	👤	👤	👤
Bookable Resource Category Assn	👤	👤	👤	👤	👤	👤	👤	👤
Bookable Resource Characteristic	👤	👤	👤	👤	👤	👤	👤	👤
Bookable Resource Group	👤	👤	👤	👤	👤	👤	👤	👤
BookableResourceBooking to Exchange Id Ma...	👤	👤	👤	👤	👤	👤	👤	👤
Booking Alert Status	👤	👤	👤	👤	👤	👤	👤	👤
Booking Change	👤	👤	👤	👤	👤	👤	👤	👤
Booking Journal	👤	👤	👤	👤	👤	👤	👤	👤
Booking Rule	👤	👤	👤	👤	👤	👤	👤	👤
Booking Setup Metadata	👤	👤	👤	👤	👤	👤	👤	👤
Rnnkinn Status	👤	👤	👤	👤	👤	👤	👤	👤

Assigned Security Roles

- Field Service - Inventory Purchase
- Field Service - Resource
- Marketing Professional
- Sales Manager
- Salesperson
- Schedule Manager

Assigned Users

- John Smith
- Linda Ford

Legend: ○ None Selected 👤 User 🏢 Business Unit 🟢 Parent: Child Business Units 🟢 Organization

- View by Security Role

Once a security role is selected from the option set, it will show three information about the selected role:

- List of users assigned to this security role,
- List of teams assigned to this security role, and
- Access privileges for each entity.

Neo Security Viewer - Google Chrome

Secure https://neoxrmtst3.crm.dynamics.com/%7B636242255620000792%7D/WebResources/neo_security/viewer.htm?Data=userId%3d% Q

Neo Security Viewer

View By User View By Team **View By Security Role** View By Entity

Role: Field Service - Inventory Purchase ▼

Entity Access Privileges

Entity	Create	Read	Write	Delete	Append	AppendTo	Assign	Share
Agreement Business Process	●	●	●	●	●	●	○	○
Attribute	○	●	○	○	○	○	○	○
Attribute Map	○	●	○	○	○	○	○	○
Case to Work Order Business Process	●	●	●	●	●	●	○	○
Customization	○	●	○	○	○	○	○	○
Entity	○	●	○	○	○	○	○	○
Entity Map	○	●	○	○	○	○	○	○
Expired Process	●	●	●	●	●	●	○	○
Hierarchy Rule	○	●	○	○	○	○	○	○
Inventory Adjustment	⚠	●	⚠	○	⚠	●	○	○
Inventory Adjustment Product	⚠	●	⚠	○	⚠	●	○	○
Inventory Journal	⚠	●	⚠	○	●	●	○	○
Inventory Transfer	⚠	●	⚠	○	⚠	●	○	○
Invoice	●	●	●	●	●	●	○	●
Lead To Opportunity Sales Process	●	●	●	●	●	●	○	○
New Process	●	●	●	●	●	●	○	○
Opportunity Sales Process	●	●	●	●	●	●	○	○
OptionSet	○	●	○	○	○	○	○	○
Phone To Case Process	●	●	●	●	●	●	○	○
Plug-in Assembly	○	●	○	○	○	○	○	○
Plug-in Type	○	●	○	○	○	○	○	○
Process	○	●	○	○	○	○	○	○
Process Configuration	○	●	○	○	○	○	○	○
Product	●	●	●	○	●	●	○	○
Product Inventory	●	●	●	○	●	●	○	○
Purchase Order	⚠	●	●	⚠	●	●	●	●
Purchase Order Bill	⚠	●	●	⚠	●	●	●	●

Assigned Users

- Alicia Thomber (Sample Data)
- John Smith (via team: North America)
- Linda Ford (via team: North America)

Assigned Teams

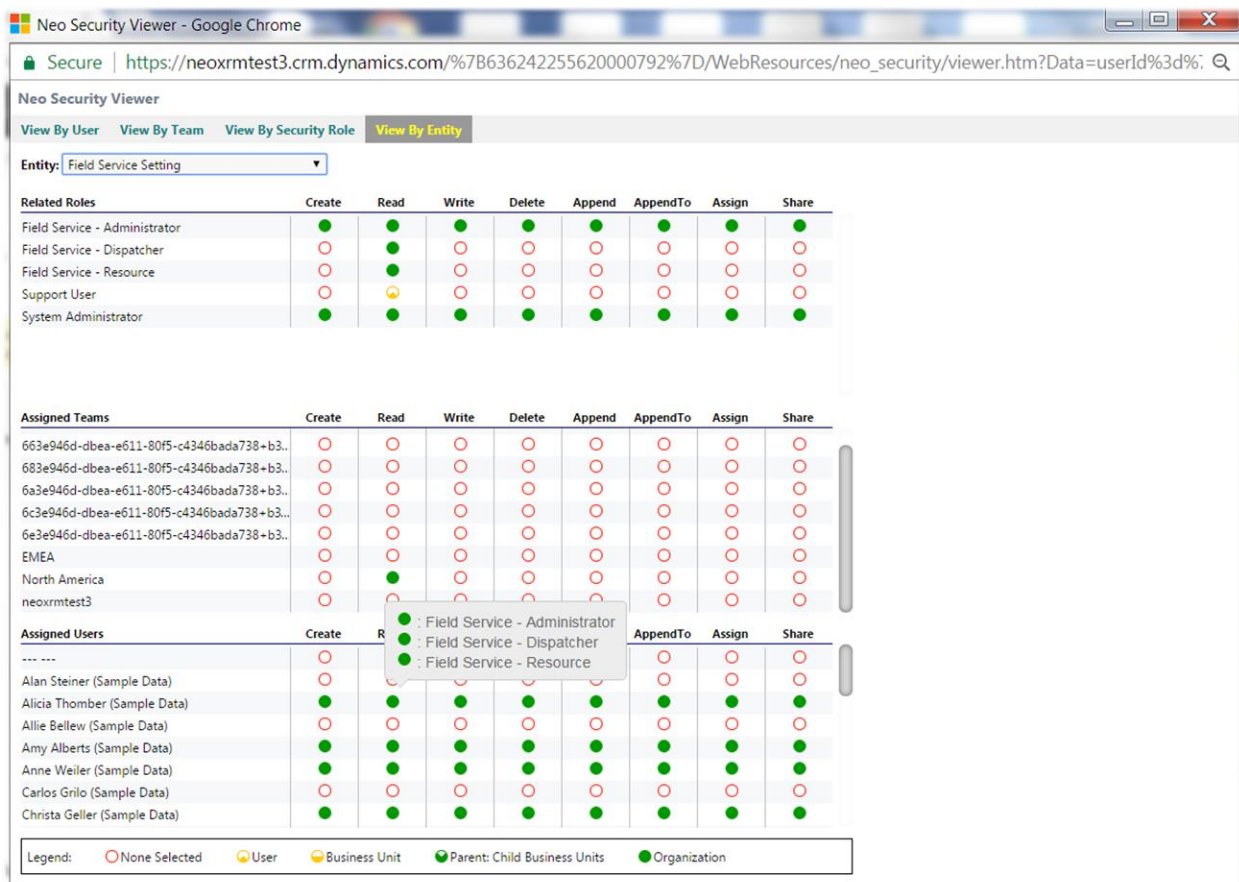
- North America

Legend: ○ None Selected ⚠ User ⚠ Business Unit ● Parent: Child Business Units ● Organization

■ View by Entity

Once an entity is selected from the option set, it will show three information about the selected entity:

- Access privileges for each security role,
- Access privileges for each team, and
- Access privileges for each user.



The screenshot shows the Neo Security Viewer application in a Google Chrome browser window. The URL is https://neoxrmtest3.crm.dynamics.com/%7B636242255620000792%7D/WebResources/neo_security/viewer.htm?Data=userId%3d%7B636242255620000792%7D%7D. The application is titled "Neo Security Viewer" and has four tabs: "View By User", "View By Team", "View By Security Role", and "View By Entity" (which is selected). Below the tabs, there is a dropdown menu for "Entity:" with "Field Service Setting" selected. The main content area displays three tables: "Related Roles", "Assigned Teams", and "Assigned Users". Each table has columns for "Create", "Read", "Write", "Delete", "Append", "AppendTo", "Assign", and "Share". The "Related Roles" table lists roles like "Field Service - Administrator", "Field Service - Dispatcher", "Field Service - Resource", "Support User", and "System Administrator". The "Assigned Teams" table lists teams with GUIDs and names like "EMEA", "North America", and "neoxrmtest3". The "Assigned Users" table lists users like "Alan Steiner (Sample Data)", "Alicia Thomber (Sample Data)", "Allie Bellew (Sample Data)", "Amy Alberts (Sample Data)", "Anne Weiler (Sample Data)", "Carlos Grilo (Sample Data)", and "Christa Geller (Sample Data)". A legend at the bottom indicates the status of each role/team/user: "None Selected" (red circle), "User" (yellow circle), "Business Unit" (orange circle), "Parent: Child Business Units" (green circle), and "Organization" (dark green circle). A tooltip is visible over the "Field Service - Resource" role, showing its status as "Organization".

Related Roles	Create	Read	Write	Delete	Append	AppendTo	Assign	Share
Field Service - Administrator	●	●	●	●	●	●	●	●
Field Service - Dispatcher	○	●	○	○	○	○	○	○
Field Service - Resource	○	●	○	○	○	○	○	○
Support User	○	○	○	○	○	○	○	○
System Administrator	●	●	●	●	●	●	●	●

Assigned Teams	Create	Read	Write	Delete	Append	AppendTo	Assign	Share
663e946d-dbea-e611-80f5-c4346bada738+b3...	○	○	○	○	○	○	○	○
683e946d-dbea-e611-80f5-c4346bada738+b3...	○	○	○	○	○	○	○	○
6a3e946d-dbea-e611-80f5-c4346bada738+b3...	○	○	○	○	○	○	○	○
6c3e946d-dbea-e611-80f5-c4346bada738+b3...	○	○	○	○	○	○	○	○
6e3e946d-dbea-e611-80f5-c4346bada738+b3...	○	○	○	○	○	○	○	○
EMEA	○	○	○	○	○	○	○	○
North America	○	●	○	○	○	○	○	○
neoxrmtest3	○	○	○	○	○	○	○	○

Assigned Users	Create	Read	Write	Delete	Append	AppendTo	Assign	Share
Alan Steiner (Sample Data)	○	○	○	○	○	○	○	○
Alicia Thomber (Sample Data)	●	●	●	●	●	●	●	●
Allie Bellew (Sample Data)	○	○	○	○	○	○	○	○
Amy Alberts (Sample Data)	●	●	●	●	●	●	●	●
Anne Weiler (Sample Data)	○	○	○	○	○	○	○	○
Carlos Grilo (Sample Data)	○	○	○	○	○	○	○	○
Christa Geller (Sample Data)	●	●	●	●	●	●	●	●

Legend: ○ None Selected ● User ● Business Unit ● Parent: Child Business Units ● Organization

VI. How to get Support for Neo Security Viewer

You can always get help for Neo Security Viewer by contacting to our support team via email at support@neoxrm.com or via phone 1-844-NEOXRM1.