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://appsource.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-NEOXRM1.

III. How to install the solution

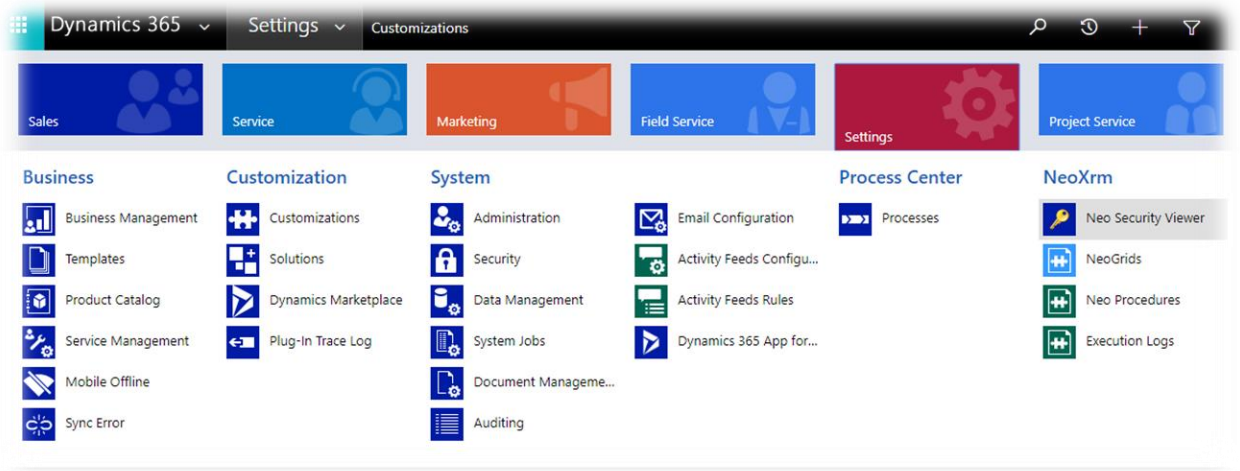
If you are downloading via AppSource, please follow the instructions.

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

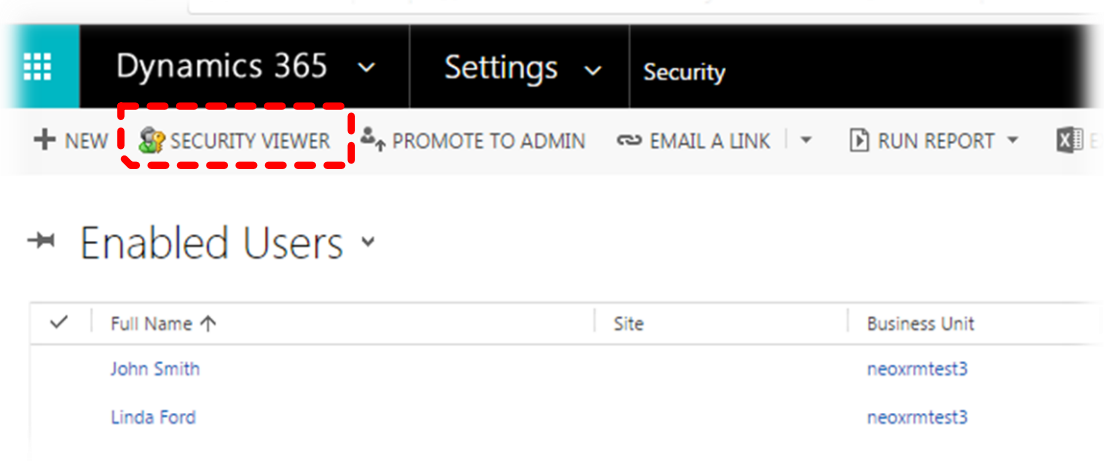
Once the CRM solution imported successfully, a ribbon button will be added to the SiteMap.

Go to Settings → NeoXrm → Neo Security Viewer

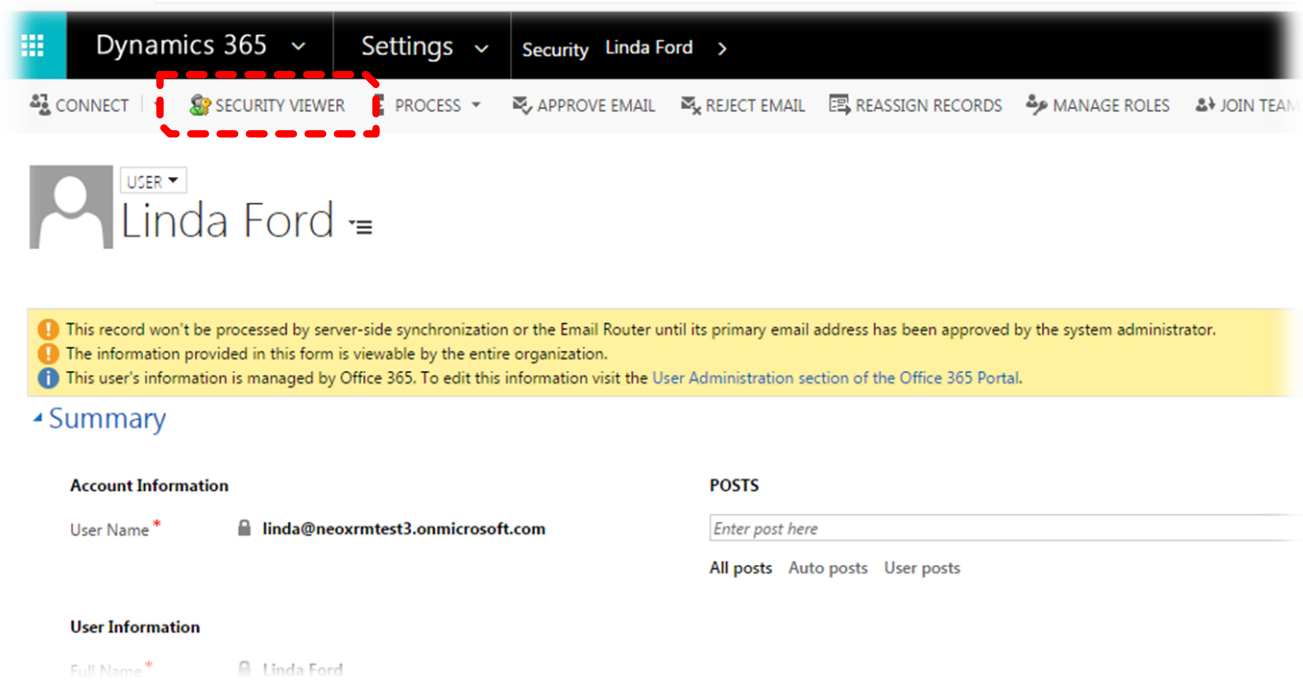


You will also notice “SECURITY VIEWER” button in four places which will allow you to open the Neo Security Viewer application.

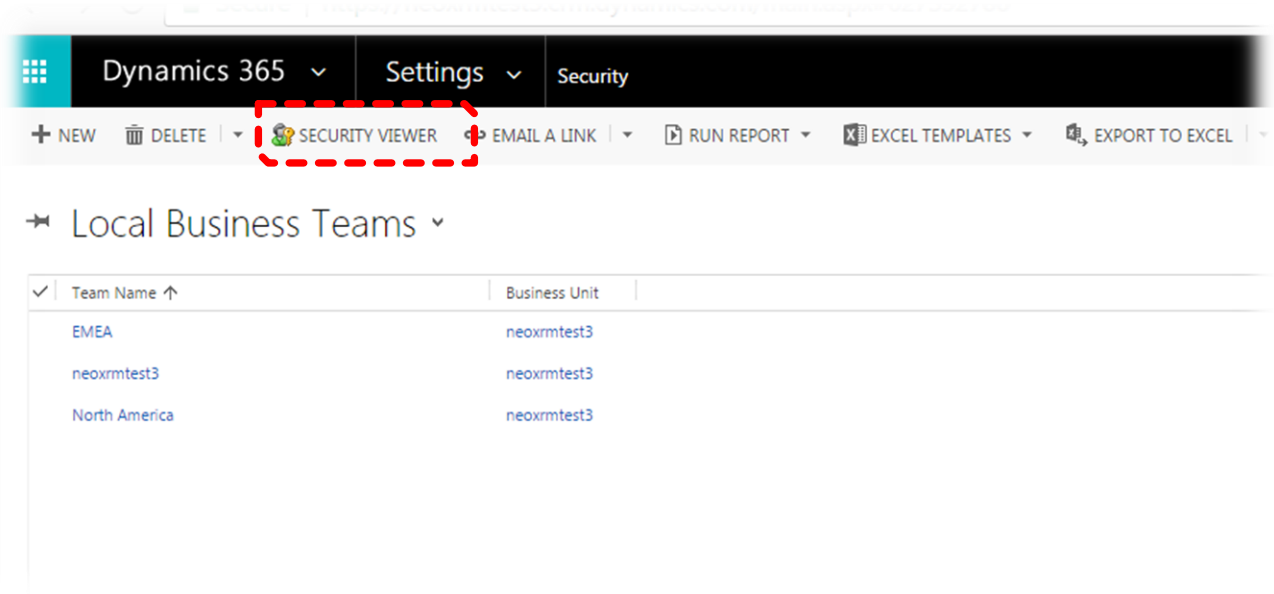
Go to Settings → Security → Users



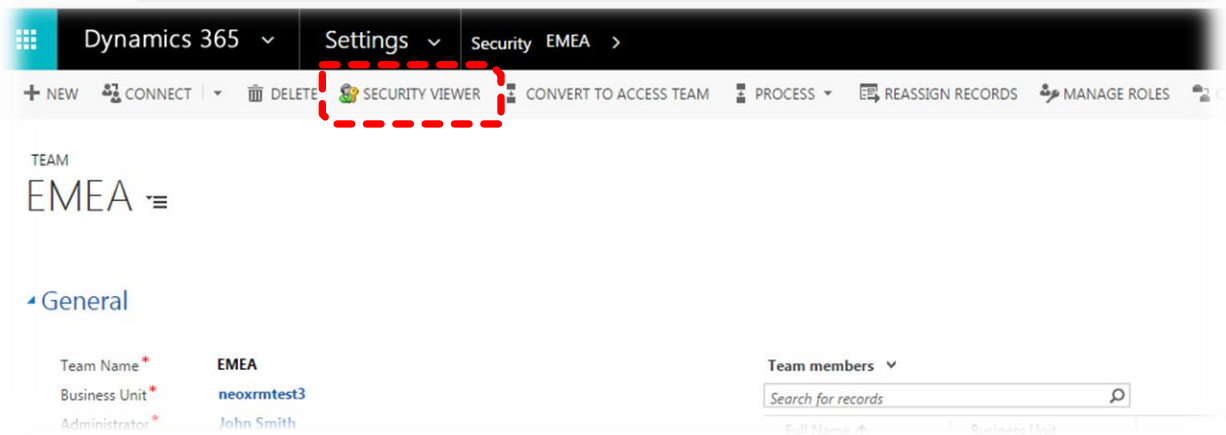
Open a User record



Go to Settings → Security → Teams



Open a Team record



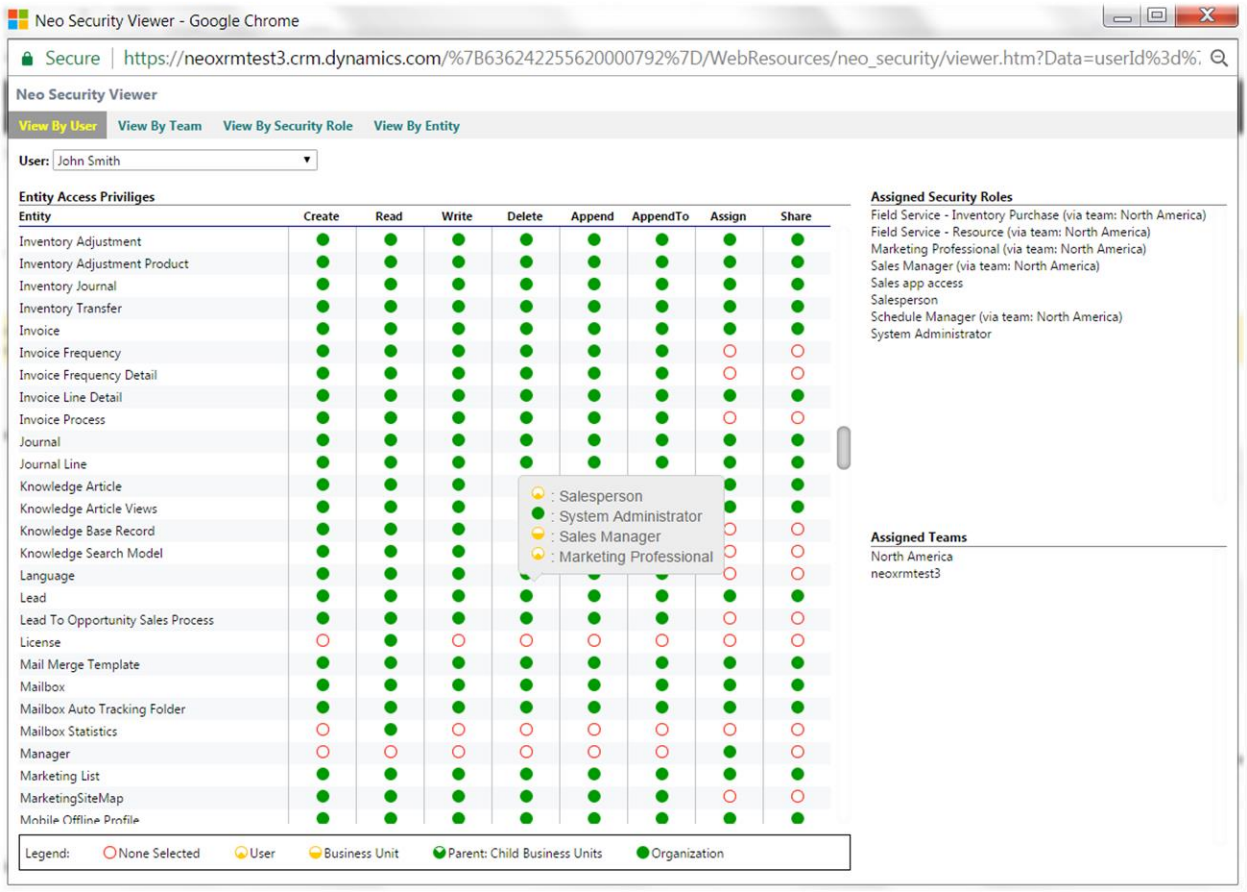
V. How to see security details

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:

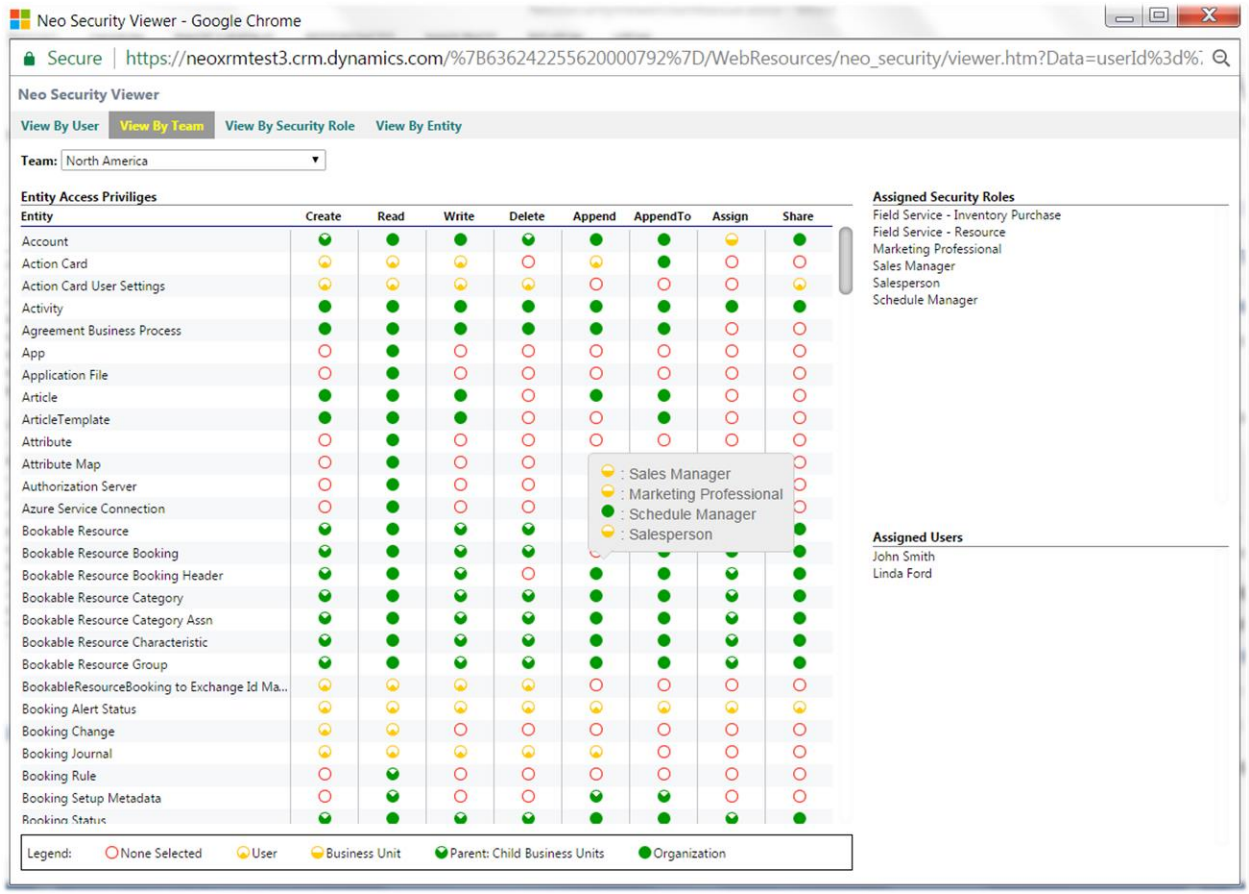
- List of teams the user is part of,
- List of security roles the user assigned (including security roles inherited roles via teams), and
- Access privileges for each entity. When cursor go over to any icon, list of privileges coming from each assigned role is shown.



View by Team

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

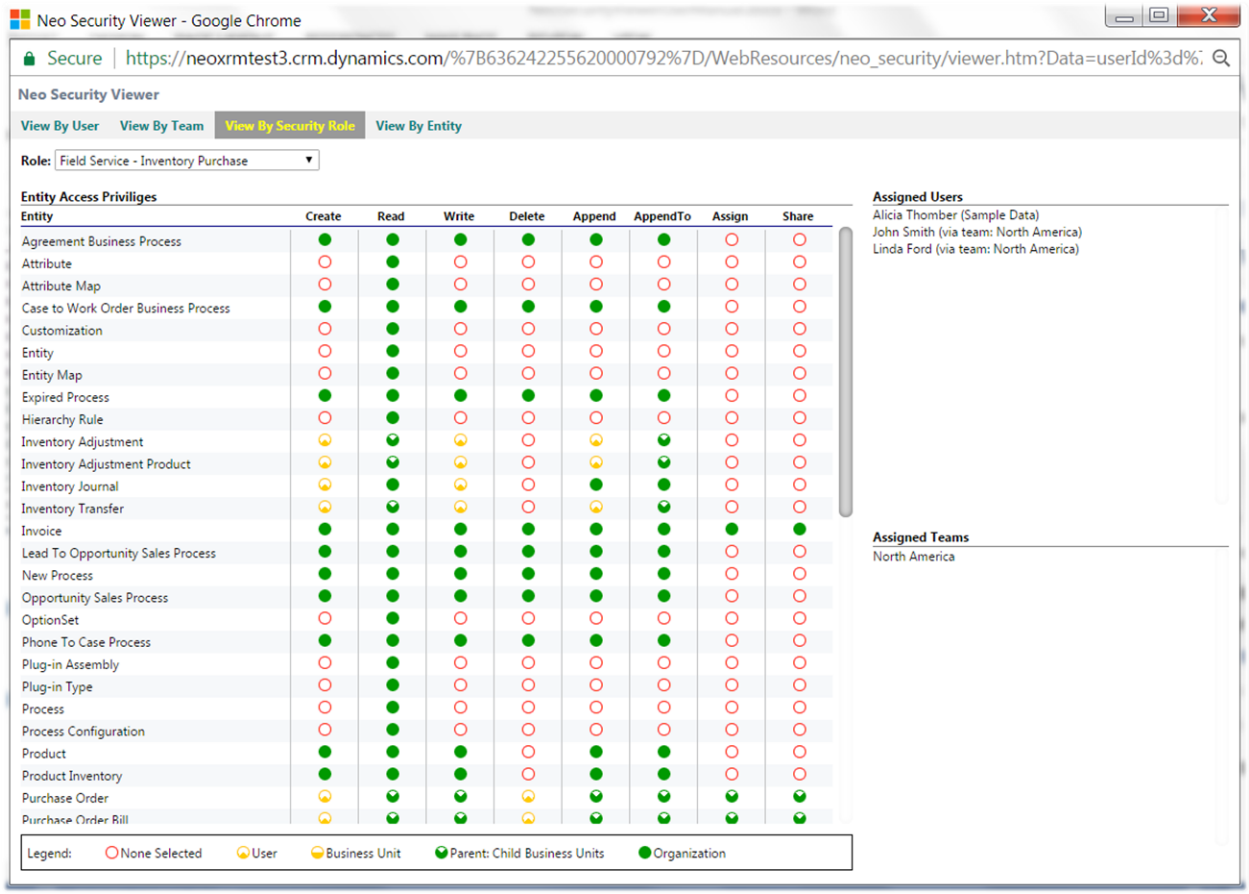
- List of users part of that team,
- List of security roles the team assigned to, and
- Access privileges for each entity. When cursor go over to any icon, list of privileges coming from each assigned role is shown.



View by Security Role

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

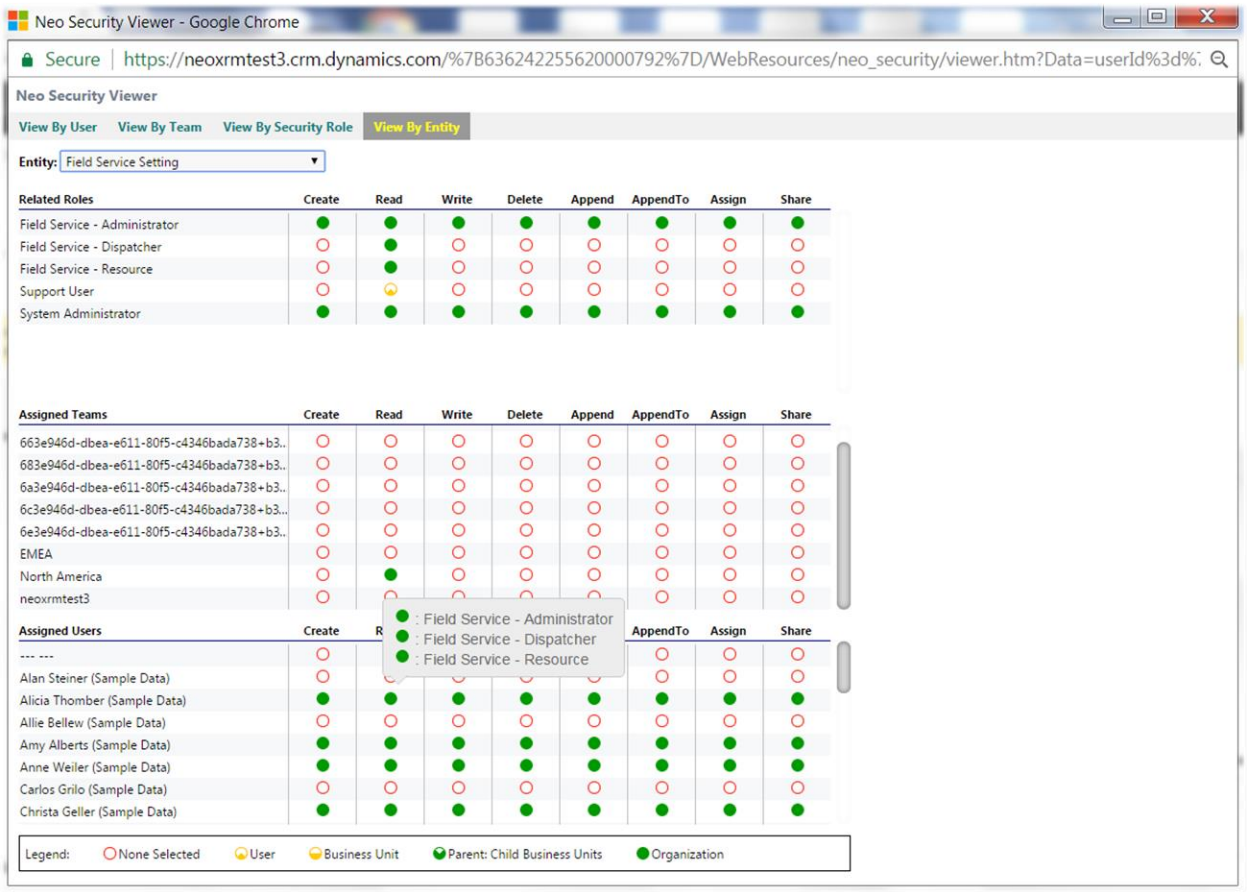
- List of users assigned to this security role,
- List of teams assigned to this security role, and
- Access privileges for each entity.



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.



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.