Objectives

- Create and assign user roles
- Assign rights to users
- Set security through user roles
- Use DynaChange
  - Screen Designer
  - Menu Designer
  - Tab Designer
- View/Edit visual customizations through Designer Version Manager
- Assign shortcuts to MyMenu
This course will NOT cover...

- Adding Custom Columns
DynaChange Designer

- Customize the appearance of Prophet 21
  - Color of words and fields
  - Wording and titles on menu items and field options
- Set security
  - Disable access to fields, tabs and menu options
- Make fields required
- Add fields to tabs and panes
Screen Adjustments

- Customize the appearance of Prophet 21
DynaChange Setting Security

Use DynaChange to Set Security
Block access to fields, tabs and menu options
Getting Started

- Determine Roles
- Create Roles in Role Maintenance
- Assign Roles in User Maintenance
- Determine Designer Rights
- Track your decisions
DynaChange modifications can be assigned to groups of users by using roles

- **Function or Department**
  - Payables, Receivables, Shipping, Order Desk, Purchasing, Sales, etc.

- **Security Level**
  - System Administration, President, Director, Manager, etc.
Create Roles

- System Administration > Maintenance > Role Maintenance

- Roles are available for assignment in User Maintenance

- Only one role can be assigned to a user
Portal Maintenance

System Setup > System > Portal Maintenance
Role Maintenance Portal View Tab

- Assign portal name to role
- Define URL for browses
- Define parameters for transactions shown in panes

### Portal View Tab

<table>
<thead>
<tr>
<th>Portal Element Name</th>
<th>Parameter Name</th>
<th>Value</th>
<th>Data Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home page</td>
<td></td>
<td><a href="http://wdncustomer.activant.com">http://wdncustomer.activant.com</a></td>
<td>Alphanumeric</td>
</tr>
<tr>
<td>Open orders</td>
<td>View Portal as Sales Rep</td>
<td>N</td>
<td>Alphanumeric</td>
</tr>
<tr>
<td></td>
<td>Portal Sales Rep</td>
<td></td>
<td>Alphanumeric</td>
</tr>
<tr>
<td></td>
<td>Look forward days</td>
<td>999</td>
<td>Integer</td>
</tr>
<tr>
<td>Open quotes</td>
<td>View Portal as Sales Rep</td>
<td>N</td>
<td>Alphanumeric</td>
</tr>
<tr>
<td></td>
<td>Portal Sales Rep</td>
<td></td>
<td>Alphanumeric</td>
</tr>
<tr>
<td></td>
<td>Look forward days</td>
<td>999</td>
<td>Integer</td>
</tr>
</tbody>
</table>
Assign Roles to Users

Assign a ROLE to each user
Determine Designer Rights

- **Designer Editing Rights**
  - **NONE** - has no DynaChange editing rights
  - **BOTH** - can edit either ROLE or USER screens
  - **ROLE** - can edit screens assigned to current role
  - **USER** - can edit only their own screens
Application Security Tab

- Enable RMB Save As set to No so user cannot access data that is hidden or protected
Use the right mouse button to access DynaChange Designer
DynaChange Screen Designer

- Move, hide or protect fields
- Change the color of fields
- Change field titles
- New fields may be added thru Field Chooser
DynaChange Screen Designer

- Change the text of a field
- Make a field required
- Protect a field
- Make a field invisible
- RMB click to launch Field Chooser
- Drag fields to desired location in window
DynaChange Screen Designer

- Prompted for Version and Roles/Users when changes are saved.
Apply to All

- Only available for Screen Designer changes
- Applies to all users
Use the right mouse button to access DynaChange Designer
Names of tabs can be:
- Renamed
- Disabled
- Edited
DynaChange Tab Designer

- Prompted for Version and Roles/Users when changes are saved
DynaChange Menu Designer

- Use the right mouse button to access DynaChange Designer
Click Menu Name to edit
Disable menu option by un-checking Enabled
Rename by typing in Text field
Preview changes/adjustments to menu design
Choose the Save icon or the Save As icon to save your changes.
DynaChange Menu Designer

- Cannot disable “File”, “Save”, “Print”, or “Exit” menu options
- Only one menu change per role or user
DynaChange Designer Version Manager

- View/Edit all visual customizations made through DynaChange
DynaChange Designer Version Manager

- Expand Users, Roles or Global folders to look at existing changes
DynaChange Designer Version Manager

- Screen change
- Menu change
- Tab change
<table>
<thead>
<tr>
<th><strong>Version ID:</strong></th>
<th>Order_Entry_order takers</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description:</strong></td>
<td>Moved Quote checkbox, made it red and bold. Protected the Approved checkbox. Made Customer ID and Ship To ID blue.</td>
</tr>
<tr>
<td><strong>Object Name:</strong></td>
<td>w_order_entry_sheet.d_oe_header</td>
</tr>
<tr>
<td><strong>Role:</strong></td>
<td>Order Takers</td>
</tr>
<tr>
<td><strong>Type:</strong></td>
<td>Role</td>
</tr>
</tbody>
</table>
DynaChange Designer Version Manager
RMB Functionality

- Use RMB to edit, copy or delete the customization OR view Role Members.
DynaChange MyMenu

- Provides shortcuts to windows commonly accessed by user
- Windows do not have to be in the same modules
To add a window to MyMenu, RMB on the desired window
To delete a window from MyMenu, RMB in the desired window again.
Additional Notes About MyMenu

- When access is denied to a menu option, that menu is:
  - Removed from the user’s MyMenu automatically
  - Deleted from the “Most Recently Used” list in the File menu
Summary

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- Assign shortcuts to MyMenu
Published Solutions

- Solution 3921: Why can’t you see all roles in Dynachange Designer
- Solution 4114: Set security prevent access to modules, Steps for DynaChange menu designer
- Solution 4367: How to delete a DynaChange entry
- Solution 7638: Protecting unit/extended price on sales orders using DynaChange
Published Solutions

- Solution 7819: How to Edit the field/background color vs. the text file font color – DynaChange
- Solution 24416: How to DynaChange extended cost in order entry grid window
- Solution 24839: Protecting the unit price field in order entry via DynaChange
- Solution 25353: Can DynaChange be used for parameters of reports
For More Information…

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