

Infor LX 8.4.1 or later Security Management Guide

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## About this guide

#### Intended audience

System Administrators responsible for configuring user access to menus, programs, warehouses, facilities, companies, and transaction effects.

#### **Related documents**

You can find the documents on Documentation Central, as described in "Contacting Infor" on page 5.

# **Contacting Infor**

If you have questions about Infor products, go to Infor Concierge at <u>https://concierge.infor.com/</u> and create a support incident.

The latest documentation is available at Documentation Central <u>https://docs.infor.com</u>. We recommend that you check this portal periodically for updated documentation.

If you have comments about Infor documentation, contact <u>documentation@infor.com</u>.

About this guide

# Chapter 1 LX User Security Overview

This guide will assist you in configuring LX user profiles and setting up user security. It also includes configuration settings for SiM and IDF.

The Access Control features of Infor LX provide you with flexibility that allows many users to access the information, while also limiting user access to Infor LX programs and associated data. Infor LX has multiple levels of control that allow you to set up varying degrees of user information access.

- Product Access Control This is the highest level of access control. Use this level to limit access to the products for business roles or individual users.
- Program Access Control This level is optional. Use this level to limit access to applications in the products for business roles or individual users.
- Warehouse Access Control This level is optional. Use this level to limit access to warehouses in the applications for business units or individual users
- Facility Access Control This level is optional. Use this level to limit access to facilities in the applications for business units or individual users
- Company Number Access Control This level is optional. Use this level to limit access to companies in the applications for business units or individual users
- Order Type Access Control 8.4.2 and above. This level is optional. Use this level to limit access to order types in the applications for business roles or individual users
- Order Class Access Control 8.4.2 and above. This level is optional. Use this level to limit access to order classes in the applications for business roles or individual users
- Transaction Effect Access Control This level is optional. Use this level to limit access to transaction effects in the applications for business roles or individual users
- Function/Action Access Control This is the lowest level of access control. Use this level to limit access to the actions or functions in the applications for a group of users.

# Verifying Installation of Products

You must install the products on your system before you can set up any levels of access control. When you install the products, they are disabled. You must set up access control to use these products.

To verify which products are installed on your system, use the Installed Products Format (SYS821) program in the System Parameters application. Perform these steps:

- 1 Access the Infor LX applications.
- 2 On the SYS menu, select System Parameters Maintenance, SYS800D.
- 3 On the Infor LX System Parameter Generation screen, SYS800D-01, specify 5=Display next to Installed Products Formatline.
- 4 Press Enter.
- 5 The system displays the Installed Products Format screen. This screen lists the products that are installed on your system. Verify that the products are installed.

# Chapter 2 User Profiles Configuration

User profiles used to access LX require some specific configurations. There are several types of access that different users will need. Grouping the users into groups using group profiles allows for easier authorization configurations. You may have several levels of user configurations, for example:

Standard User	Access to LX, no access to LX database outside of LX.
Power User	Access to LX, read access to LX database outside LX for reporting.
Admin User	Access to LX, read/write access to LX database outside LX for applying MRs fixes, PTFs, patches, etc., plus user profile management.

The user profiles for these user types may differ somewhat, but some basic settings will still be needed.

Admin users should be part of group SSA. Only admin users should be part of this group. User profile SSA is created during the product install and owns most of the objects in the LX libraries. Admin user profiles should have settings GRPPRF(SSA) OWNER(\*GRPPRF). This allows for any objects that these users create to be owned by SSA, which would match existing delivered configurations.

Power users should be part of another group such as LXPWUSER and their user profiles should have settings GRPPRF(LXPWUSER) OWNER(\*GRPPRF). The LXPWUSER profile would not have access to objects owned by SSA and would have use access to the LX database library and read access to some or all the files.

Standard users should be part of a different group such as LXUSER and their user profiles should have settings GRPPRF(LXUSER) OWNER(\*GRPPRF). The LXUSER profile would not have access to objects owned by SSA and would have no access to the LX database library or files.

Example of a group profile for standard users would be:

CRTUSRPRF USRPRF(LXUSER) PASSWORD() STATUS(\*ENABLED) USRCLS(\*USER) INLPGM(\*NONE) INLMNU(\*SIGNOFF) TEXT('LX User Group Profile') SPCAUT(\*NONE) GRPPRF(\*NONE) OWNER(\*USRPRF) GRPAUT(\*NONE) SUPGRPPRF(\*NONE)

Example of a standard user profile:

CRTUSRPRF USRPRF(LXUSR001) PASSWORD() STATUS(\*ENABLED) USRCLS(\*USER) INLPGM(\*NONE) INLMNU(\*SIGNOFF) TEXT('first and last name') SPCAUT(\*NONE) GRPPRF(LXUSER) OWNER(\*GRPPRF) GRPAUT(\*NONE) SUPGRPPRF(AULUSER) Note that for standard users additional settings may be required for users using a language that is not the system default. LANGID() CNTRYID() CCSID() may need to be set differently. Also, the password can be set to \*NONE in a Single Sign-On environment.

# System i Workspace users

If LX is being deployed in a web-based configuration and Infor System I Workspace with System I Manager is being used, then the following configuration will be required. Reviewing the security setup in the *Infor SI System Manager Installation Guide* is recommended to fully understand the user setup for proper security setup.

All LX users should have group profile AULUSER added to their supplemental groups and Admin users should also have AULSECOFR added.

## **IDF** considerations

When setting up users IDF requires that any user profile that will be using a language (CCSID) other than the system default will need to have a CCSID assigned to the user profile that matches their language setting assigned in LX.

## Chapter 3 LX User security setup

Setting up security for LX users is primarily defined to three key areas, (1) Access to programs and objects, (2) Limitations on functionality (function keys and action codes), and (3) Access to Data such as Warehouses, Facilities, Companies, Order Type, Order Class, and Transaction Effect codes. There are a few other areas of user setup, but these three areas cover the primary setup.

Setting up security for these areas is best done by defining groups, roles, and units before starting user setup. Once these groups, roles, and units are defined, setting up users is basically assigning the users to these areas.

# **Defining Roles**

Business Roles are defined in Security Master Maintenance (SYS600) the same way users are. The user type is "R". Roles can only be authorized to Products, Programs, Order Types, Order Classes, and Transaction Effects. Setting up roles defines what processing a user can access. Users can be assigned to more than one role. Set these up based on the type of functionality a role will perform in LX.

# **Defining Groups**

Groups are defined in Group Security Maintenance (SYS603). They define the actions a user can take when they are in a LX programs or object. The authority assigned in SYS603 groups controls the function keys and action codes (FKAC) a user can use when in a program or object. Granting a group/user access to any of these setting is ignored if the user is not authorized to execute the program or object from SYS600 from either an assigned role or direct authorization. A user can be assigned to just one group.

# Defining Units

Business Units are also defined in Security Master Maintenance (SYS600). The user type is "T". Units can only be authorized to warehouses, facilities, and companies. Setting up units allows for grouping users into units that share common access to data. Users can be assigned to more than one unit. Set these up based on the data a unit will have access to in LX.

# **Defining Users**

Use Security Type in Security Master Maintenance (SYS600) to indicate the access control for user.

Available Security Types:

- S Security Officer
- M Security Manager
- **U** User
- **D** Database Administrator (same as U)
- P Programmer (same as U)
- **O** Operator (same as U)
- R Business Role (not used for individuals)
- **T** Business Unit (not used for individuals)

Also, SYS603 should be used to configure the groups that users will be assigned to. Groups control what action codes and function keys users can use while in programs.

# **IDF** security

LX security maps directly to IDF security.

- LX security for warehouses, facilities, and companies maps directly to IDF Auto-content security. To view these IDF settings for a single user, launch the User Profiles object, select a user, and view their details. Select the Values tab to see which warehouses, facilities, and companies the user is authorized to use. Additional settings are included in Values tab for financial authorities for CEA and/or EGLI for Ledgers, Books, and Years. Note the Finance tab shows the EGLI group the user is assigned to.
- In LX program, security is handled by SYS600 with Products and Programs security settings. In IDF, this would be security to access business objects and their functionality. This would be handled by CAS security. See Chapter 4 LX IDF Security Overview for details.

# Sending LX security changes to IDF

LX retains security settings from previous versions for LX programs that are now business objects in IDF. For example, access to INV100 would now be access to Enterprise Items. LX maps settings from LX programs to IDF objects wherever possible. See the Security Mappings object on the Environment tab for details of the pre-configured mappings. Note these mappings also map function key and action code settings for some programs to the same functionality in the objects. Synchronize Security with IDF (SYS607D-01) allows for the population of IDF security settings for LX related object, plus auto-content security, financial groups in EGLI, and basic user access to environments. Run SYS607 as part of initial user setup after creating the IDF environment. It can be run once for all users. Choose the settings you want to use for sending LX security settings to IDF in Security Settings Maintenance (SYS802) accessed from System Parameter Generation (SYS800). Subsequent changes in Security Master Maintenance (SYS600) are automatically sent to IDF based on Security Setting Maintenance (SYS802) configurations. Changes to Roles or Units update IDF security for all users assigned to those Roles or Units. Changes to groups in SYS603 update IDF security.

There are components of IDF that are outside the scope of LX security so that security setup needs to be done directly in IDF. See Chapter 4 LX IDF Security Overview for details.

# System i Manager security

LX sends menu and user information to System i Manager (SiM) to allow System i Workspace (SiW) to display menus for users. Whenever menus, users, or user access to menu options change, this information should be updated.

Initial environment setup should include running SiW Configuration Export Selection (SYS075) for all menus and users. When menus change, SYS075 should be rerun to update the menu information. In addition, the IDF menus need to be exported to SiM. This is done from the User Profiles object, *File* menu, *Host Jobs...* option, and selecting Export public metadata to Workspace.

Whenever a new user is added to LX, that user also needs to be added to SiM. Run SYS075 for each added user, or when a user's authority to products or programs is changed to update the user and their menus in SiM.

# Infor Ming.le User Provisioning

BMR 78589 for LX 8.4.1 and LX Extension 3.0 adds support for Infor Ming.le User Provisioning. This enhancement allows for users created in Infor Ming.le IFS to be automatically added and configured for LX as well. Some of this functionality can also be used in LX environments using SiW without Infor Ming.le. SYS802D now allows you to configure how you synchronize LX users with SiM. Once turned-on changes to user product and program security in SYS600 will propagate to SiM and SiW and update the user's menus.

Table ERPUSR is the primary connecting point between LX and IFS users. It stores information that is shared by LX and IFS and connects IFS users to IBM user profiles.

See the Infor LX 8.4.x Configuration Guide for Infor Operating Service 12.x document for details on configuring this feature.

## Chapter 4 LX IDF Security Overview

There are several areas of security to be setup for IDF. This chapter explains how to configure your security for allowing some users to manage IDF environments and settings, allowing some users to modify business objects, and managing which users can access what data in the Infor LX database.

Please note that this document only serves as a quick reference guide. Additional information about security is available in Power-Link and Net-Link in the Online Help and in the 5250 security menu accessed via STRIDF.

Security settings in IDF are updated several ways. (1) As noted above settings for LX related objects and tasks can be automatically updated when running SYS600 or SYS607, these updates will overwrite any settings for these objects and users that are done manually in IDF Security Maintenance. (2) The Security Maintenance menu in STRIDF allows you to configure many areas of IDF security including the settings for objects not part of core LX. Access to EGLI and CRMI objects for example will be managed here. (3) In Power-Link, Auto-Content values and EGLI Financial Groups are maintained.

# Accessing IDF Security Maintenance

To access security maintenance:

- 1 Start a 5250 session
- 2 From a command line enter ADDLIBLE AMCESLIB
- 3 Enter STRIDF
- 4 Select an environment and press Enter twice
- 5 Specify 10, Security Maintenance
- 6 Specify 1, Area and task authorizations.
- 7 Specify 3, Keep this task unlocked.
- 8 Select IDF Server

# **IDF Environment User Access Control**

To restrict user access to the IDF environment:

1 Select option 2 to change IDF Environment and Command Line Access.

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	AMZB6DFR Maintain Tasks DISPL	ΥΥ
	Area : IDF Environment and Command Line Access Position to task ID	
	Type options; press Enter. 4=Delete 11=Authorize users 22=Lock 23=Unlock	
	Opt Task ID Type App Locked	
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	Access to all commands (Application and System i) screen STRIDF command	
	ACCMAPCMDS SEC IDF N Locks IDF commands	
	Access to all Application commands	
	ACCMAPICS SEC IDF Y	
	F3=Exit F6=Add F7=Backward F8=Forward	
	FII=JOD Status FIZ=Keturn FI7=Subset	
мA	MW 14/002	
JI 1902 - Session success	xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	

- 2 The **Access to this environment** option controls the user's ability to log in to the selected environment.
  - a To lock the option for this environment, specify 22.
  - b To unlock it, specify 23.
  - c To select users that are authorized to be in the environment, specify **11**.
  - **d** Note that in SYS800/SYS802 Security Settings Maintenance there is setting "Authorize LX users to IDF environment". If that setting is set on, then adding users to LX will automatically authorize the user to the IDF environment and no action is required in CAS Security.



3 To control access levels, specify 16 or 17.

#### **IDF** Content Security Access

To configure who can modify user profiles in IDF, you need to setup security for assigning security for business objects in Client Administration.

Note: This screen demonstrates that RAPACZD2 is not authorized to change user RAPACZD.

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General Values	
AXX0013 User RAPACZD2 not authorized to function OBJECT SECURITY.	
Continue Help	

LX IDF Security Overview

To allow access:

- 1 Start IDF (STRIDF) and select the environment you want to secure.
- 2 Specify 10, Security Maintenance.
- 3 Specify 1 for Area and task authorizations.



4 Specify 2 for Client Administration.

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File Edit View Communication Actions Window Help	
AMZB5DFR Maintain Security Areas	DISPLAY
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Type options; press Enter. 2=Change 4=Delete 5=Display 11=Authorize users	
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F2=Select application F3=Exit F6=Add F7=Backward F8=Forward F11=Job status F12=Return	
MA b	10/003
JI I902 - Session successfully started HP LaserJet 5P on LPT1:	11.

5 Specify 22 for the OBJECT SECURITY task to activate security.



6 Specify 11 to select users that will be authorized.

## **IDF User Definitions**

To configure the users that can update User Definitions, use the Perform User Definition Maintenance option under Client Administration in IDF.

#### LX IDF Security Overview

File       Customize       Navigation       Help         Default       Infor ERP Lx         Image: Service Management       Customer Service Management         Media Files       Navigation       User Definitions         Bookmarks       Workbenches       Enterprise Financials         Image: Media Files       Navigation       User Definitions         Procurement Management       Environment         Image: Media Files       Navigation       User Management         Procurement Management       Environment         Image: Media Files       Navigation       User Management         Procurement Management       Environment         Image: Media Files       Navigation       User Management         Image: Media Files       Navigation       User Management         Image: Media Files       Navigation       User Management         Image: Media Files       Navigation       Image: Media Files         Image: Media Files       Navigation       User Management         Image: Media Files       Navigation       User Management         Image: Media Files       Addet Management       Image: Management         Image: Media Files       Navigation       User Management       Image: Management         Image: Media	🛈 (XX) Infor	ERP LX Pov	ver-Link			_ 🗆 🗙
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- 1 Start IDF and select the environment you want to secure.
- 2 Specify 10, Security Maintenance.
- 3 Specify 1 for Area and task authorizations.

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Secu	rity Maintenance	81
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2. User authorizations		
3. Generate reports		
5. Work with Client Data Com	nection User Profil	es
6. Synchronize Security Files	S	
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4 Specify 2 for Client Administration.

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5 Specify 22 for **DEFINITION ADMIN** to activate security.

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Assign Security Categories	5	101		
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Assign Security Categories	5			
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MA a MU				04/030
ල් I902 - Session successfully started				

6 Specify **11** to select users that are authorized.

# Security to change data on all IDF Business Objects

If you want to verify a user can only use Business Objects for inquiry, use the Maintain Business Objects option under Client Administration.

Note: This is Global for all Business Objects.

- 1 Start IDF and select the environment you want to secure.
- 2 Specify 10, Security Maintenance.
- 3 Specify 1 for Area and task authorizations.



4 Specify 2 for Client Administration.

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Opt Area 2 Client Administration Client All Applicatio Client Application Se Client Attachment Tas Client Attachment Tas Client Change Tasks Client Code File Task Client Copy Tasks Client Create Tasks Client Customization Client Delete Tasks	n Tasks ttings Tasks ks ks s	56-044	+
F2=Select application F7=Backward F8=Forward	FJ=EXIT F11=Job status	F5=Hdd F12=Return	
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5 Specify 22 for the OBJECT ADMIN to activate security.

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Type options; press Enter.		00-11-11		
4=Delete 11=Huthorize users	S ZZ=LOCK	23=Unlock		
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Maintain Business Objects	ere	TOE	N	
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MA a MW				10/002
🗊 1902 - Session successfully started				1.

6 Specify **11** to select users that are authorized.

# Preventing IDF end users from changing public cards

To prevent users from changing public cards, use the Maintain Public Cards option under Client Customization.

Note: This is Global for all Business Objects.

- 1 Start IDF and select the environment you want to secure.
- 2 Specify 10, Security Maintenance.
- 3 Specify 1 for Area and task authorizations.



4 Specify 2 for Client Customizations.

изснюов	
File Edit View Communication Actions Window Help	
AMZB5DFR Maintain Security Areas	DISPLAY
Application : IDE IDE Server	
Position to area	
Type options; press Enter. 2=Change d=Delete E=Dicplay 11=Outhorize years	
2-change 4-betete 5-bisptag 11-huthorize users	
Opt Area	
Client Administration	
Client All Application Tasks	
Client Application Settings Tasks	
Client Attachment Tasks	
Client Change Tasks	
Client Code File Tasks	
Client Copy Tasks	
Client Create Tasks	
2_ Client Customization	
Client Delete Tasks	+
F2=Select application F3=Exit F6=Add	
F7=Backward F8=Forward F11=Job status F12=Return	
MA A MW	19/003
ුරි 1902 - Session successfully started	

5 Specify **22** for **CARDS MNTPUBLIC** to activate the security. Then, specify **11** to select the individual users that should have access to this function.

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Elle Edit View Communication Actions Window Help	
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Pa Na 🕼 独 速 🖼 🎟 💥 🍰 🚔 📥 🚽 🕖 🏵 📅 📆 🖻	
AMZB6DFR Maintain Tasks	DISPLAY
Area Client Customization Position to task ID <u>CARDS</u>	< OP <sup>2</sup> <
Type options;>press Enter. > 4=Delete 11=Authorize users 22=Lock 23=Unl	У ock
Opt Task ID Type App	Locked
CARDS MNTPRIVATE SEC IDF	N
CARDS MNTPUBLIC SEC IDF Maintain Public Cards	Y the second sec
CARDS SEC IDF	N C
Maintain Temporary Cards CARDS MNTUSER SEC IDF	Y OPT
PRESSCHEME MNTPRIVATE SEC IDF	N
Maintain Private Presentation Schemes	+
F3=Exit F6=Add F7=Backward F8=For	ward
F11=Job status F12=Return F17=Subset	
M£∎+ C MW	12/002
USALID29 resolved to usalid29.infor.com/10.39.117.122 (IPv4)	🔺 💽 USALID29:992 🔂

**6** To see the security in action, specify any card to change and note that the pencil option is inactive.

#### LX IDF Security Overview

💶 (XX) Vendor Cards		<
ET Vendor Cards		
	The Change Icon	
Description	'Pencil' is inactive	
(new)	<u> </u>	ň
Addresses		
411 Attachments		J
ank Bank		J
<sup>1</sup> 2 <sup>1</sup> Control		
Corporate		
<sup>1</sup> 1 <sup>2</sup> Definition		
👸 General		
👿 Invoice Detail		
Invoices		
Tem Vendor		
Rotes		
Regional Payments	~	
Use Purchase orders		
All Public	Private	
Continue Cancel	Help	

🛈 (XX) Edit Vendor Card		
Vendor Card Name (temporary) Card properties Tab label (same as name)	Domain Private Private After clicking the 'N option is to create	User RAPACZD2 V III
Description 1099 Social security number 1099 User identification 1099 Vendor 1099 Vendor tax ID Address line 1 (Bank options) Address line 1 (Company option All By Object	ns)	

Similar to securing public cards are the settings that allow users to create temporary cards (CARDS MNTTEMP) and User owned public cards (CARDS MNTUSER). The configuration for these security tasks is quite similar to CARDS MNTPUBLIC.

#### Preventing users from using IDF Link Manager

To prevent users from using Link Manager to start and stop IDF environments:

- 1 Start IDF and select the environment you want to secure.
- 2 Specify 1 for Area and task authorizations.
- 3 Specify 2 for Client Administration.



4 Specify 22 on JAVASVRS CONTROL to lock the task.

🛢 🛱 B - Uschi008.ws - mlarson1	रा	5		
File Edit View Communication Actions Window Help				
844 80 2 3 20 -	🧉 🛅 🛅	a 🖬 📋	۲	
AMZB6DFR	Maintain	Tasks		DISPLAY
Area	ent Admini	stration		
Type options; press Enter. 4=Delete 11=Authorize users	22=Lock	23=Unloc	k	
Opt Task ID	Туре	Арр	Locked	
DEFINITION ADMIN	SEC	IDF	N	
PERTORM USER DETINITION Ham	NINISTRATI SFC	ON INF	N	
Assian Security Categories	520	101		
FIELDS SECURITY	SEC	IDF	N	
Assign Security Categories				
22 JAVASVRS CONTROL	SEC	IDF	N	
Lontrol Java Servers	SEC	TOF	N	
	SEU	IDF	N	+
F3=Exit F6=Add F	7=Backward	F8=Forwa	rd	
F11=Job status F12=Return F1	l7=Subset			
М <u>А</u> Ь				18/002
🕤 I902 - Session successfully started			HP LaserJet 5P on LPT1:	11.

- 5 To select user that are allowed access, specify **11**.
- 6 Then, specify **16** for each user that should be granted access or choose **17** to revoke a user's access.

B - Uschi008.ws - mlarson1	24	
File Edit View Communication Actions Window Help		
844 86 25 20 2	1 <b>b b b b b</b>	
AMZB1DFR Aut	horize Users to Task	DISPLAY
Task Cont Locked Y Position to user ID	rol Java Servers	
Type options; press Enter. 16=Authorize 17=Revoke		
OptAuthorizedUser ID—NHOSTELM1—YLARSONM116NRAPACZD	<b>Name</b> Mark Hosteland Mark Larson Dave	
F3=Exit F7=Backward F8=Fo F12=Return F17=Subset	orward F11=Job status	
М <u>А</u> Ь		05/030
🔊 I902 - Session successfully started	HP LaserJet 5P on LP	T1: //.

# Secure IDF object's tasks

All LX 8.4 IDF objects have CAS security added. To review and maintain object's security:

- 1 Start IDF and select the environment you want to secure.
- 2 Select 10, Security Maintenance.
- 3 Select 1, Area and task authorizations.
- 4 The list of LX 8.4 product applications in IDF is:
- ACR LX Accounts Receivable
- COM LX Common Application Support
- LCS LX Customer Service Management
- LEF LX Enterprise Financials
- LPD LX Enterprise Product Data Mgt
- LMM LX Materials Management
- LOP LX Order-Based Production Mgt
- LPM LX Procurement Management
- LRB LX Rate-Based Production Mgt
- If STTi is installed this product application may also be secured:
- STT Serial Number Tracking and Tracing
- For CRMi use the following product applications to secure objects:
- CRM Customer Relationship Management
- CSM Customer Service Management

For EGLi use the following product applications to secure objects:

• EGL Enterprise General Ledger

For Brazil Pack use the following product applications to secure objects:

- LBP LX Brazil Production Mgt
- 5 Select an application. The **Maintain Security Areas** screen lists all available application tasks.

20 Session B - [24 x 80]
Eile Edit View Communication Actions Window Help
AMZB5DFR Maintain Security Areas DISPLAY
Application : LPD LX Enterprise Product Data Mgt
Position to area
Transformed Street Street
lype options; press Enter.
2=Unange 4=Delete D=Display 11=Huthorize users
Ont Grea
IPD All Application Tasks
LPD Attachment Tasks
LPD Change Tasks
LPD Code File Tasks
LPD Copy Tasks
LPD Create Tasks
LPD Delete Tasks
LPD Enterprise Item MLS Note Tasks
LPD Enterprise Item MLS Override Tasks
LPD Enterprise Item Tasks
LPD Facility Item Tasks +
F2=Select application F3=Exit F6=Hdd
F7=Backward F8=F0rward F11=Job Status F12=Return
201 D 04/028
37         1992 - Session successfully started

6 Use option **2=Change** for selected task.



7 Use option 22=Lock to activate task's security. The Locked flag is set to Y.

2 Session B - [24 x 80]				
<u>File Edit View Communication Actions Window He</u>	lp			
	' 🌰 🤣			
AMZB6DFR	Maintain	Tasks		DISPLAY
Area	LPD Enterpris	e Item T	asks	1
Position to task ID				
Tupe options: press Enter.				
4=Delete 11=Authorize u	sers 22=Lock	23=Ur	lock	
		20 01	it ben	
Opt Task ID	Type	Арр	Locked	
	SEC	IDF	Y	
Display Enterprise Iter	ns			
LITM ACTIVATE	SEC	IDF	N	
Activate Item				
LITM ATTACH	SEC	IDF	N	
Maintain Enterprise Ite	em Attachments			
LITM CHANGE	SEC	IDF	N	
Change Enterprise Item	5			
LITM COPY	SEC	IDF	N	
Copy Enterprise Items				+
				1
F3=Exit F6=Add	F7=Backward	F8=Fc	orward	
F11=Job status F12=Return	F17=Subset			
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🗊 1902 - Session successfully started				1.

As a result, the User will not be able to execute this task. In this example, user will not be able to open Enterprise Item object.

8 Start IDF and try to open Enterprise Item object:

🔤 (AA) Infor LX Power-Link		
File Customize Navigation Help		
Default 🗸		
		Enterprise Financials
		Materials Management
		Customer Relationships
Enterprise Items Facility Items Warehouses Facilities		Customer Service Management
		Procurement Management
		Serial Number Tracking
Item Location Item Cycle Counts Item Inventory		Environment
1053	=	Integrator
I 🤗 💯 🐕		
Shop Orders Inventory Enterprise Item		
Transactions Period Summary		
History		
Period Summary Period Summary	-	
		Powered by infor
	_	

The error message is displayed.

	Mar (AA) User Messages	Ì
	AXX0013 User DEMCHEV not authorized to function LITM.	
1	AYY0012	
	AXX0013	
	Explanation You are not authorized to use this function LITM	
	Your action . Use a different function. Or contact the person who sets up security for your	
	company.	
	Close	
		J

9 To authorize user to the task, use option **11=Authorize users**.

<b>D</b> Session	8 - [24 x 80]	-				
<u>File Edit</u>	View Communication	Actions Window Help				
		🛋 🐚 💺 🛃 🕷	<b>e</b>   🔗			
AMZB	6DFR		Maintain	Tasks		DISPLAY
Area		: - LI	PD Enterprise	e Item Tasks		
Posi	tion to task	ID				
Type	options; pr	ess Enter.				
4=	Delete 11=	Authorize use	rs 22=Lock	23=Unlock		
Opt	Task ID		Type	App Lo	cked	
11	LITM		SEC	IDF	Y	
	Display Ent	erprise Items				
_	LITM	ACTIVATE	SEC	IDF	Ν	
	Activate It	em				
	LITM	ATTACH	SEC	IDF	N	
	Maintain En	terprise Item	Attachments			
	LITM	CHANGE	SEC	IDF	Ν	
	Change Ente	rprise Items				
	LITM	COPY	SEC	IDF	Ν	
	Copy Enterp	rise Items				+
F3=E:	xit	F6=Add	F7=Backward	F8=Forward		
F11=	Job status	F12=Return	F17=Subset			
MA	В					12/002
3 <sup>10</sup> 1902 -	Session successfully started	i				18

10 Use code 16=Authorize to authorize user to the task.

3 Session B - [24 x 80]			
<u>File Edit View Communication Actions</u>	<u>W</u> indow <u>H</u> elp		
🖸 🖻 🖉 🔍 🖼 🛍	🎭 💩 💩 🧶		
AMZB1DFR	Authorize	e Users to Task	DISPLAY
Task	. : Display Er	nterprise Items	
Locked	. : Y		
Position to user ID .	× ×	_	
Type options; press E	nter.		
16=Authorize 17=R	evoke		
Opt Authorized	User ID	Name	
<u>16</u> Y	ADMIN	Environment Admins	
N	AGOYAL	AGOYAL	
N N	AKAMALUDEE	AKAMALUDEE	
N	ALLEN1	Allen 1	
N N	AMARAM	A Maram	
N	AM2000	Jason L test	
N	ANGHELR	Rodica Anghelescu	
N	ANGLINC	Curt	
N	ANGLINC1	Curt	
N N	APRASADD	APRASADD	+
F3=Exit F7=Backw	ard F8=Forward	F11=Job status	
F12=Return F17=Subs	et		
мА В			12/002
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Locate LPD Field Level Security. It has two tasks that secures two sets of attributes:

• Maintain LX QMS fields

LX IDF Security Overview

• Maintain LX API fields

If you locked the task, only authorized users can maintain the group of the attributes.

When a user is authorized to the task:

Open Item. The attributes are input allowed and you can change them.

uting Inventory Ta	as Cycle Counts	Sales	Quality Records	Period On-hand Summary	Serial Numbers
neral	Inventory	Activities		History	MDM
Quality assurance control	🔿 Yes 💿 No		Days		
Verification required	🔿 Yes 💿 No		Shelf life	0	
Automatic stability select	Yes O No		Retest	0	
Hazard	Q •!		Quarantine	0	
UN/NA ID	(blank)	- 15 15	Expiration date horizon	0	
Standard potency percent	0.0000		Retest date horizon	0	
Standard batch weight	0.000		QA lead time	0	
Batch balancing UM	(blank)	-	QA lead time 2	0	
Alternate UM physical/theoretical	(blank)	-	Defaults		
Physical or theoretical UM	<ul> <li>Stocked in physical quantities</li> </ul>	Stocked in theoretical quantities	Component usage	None 👻	]
			Manufacturer	Q 😻	-
Round exp. date last day prior mont	h None 👻		Quantity per container	0.000	
Expry - Hetest date basis	None	▼.	Average	0.000	
			Lot size	0.000	
			Number Containers	0	
				Language ENU	
Pack description 1				(blank)	
Pack description 2				(blank)	
specification	4	X			
esting level		2			
stability planning spec.		X			
un cost center					
an corporate code	· · · · · · · · · · · · · · · · · · ·	•			
ingineering Quality					
	-				

Lock LPD Field Level Security/Maintain LX API fields.

D] Session B - [24 x 80]				
<u>File Edit View Communication Actions Window H</u> elp				
	<i></i>			
AMZB6DFR	Maintain	Tasks		DISPLAY
Area LPD	Field Leve	el Security		
Position to task ID				
Type options; press Enter.				
4=Delete 11=Authorize users	22=Lock	23=Unlock	<	
		_		
Opt Task ID	Туре	App L	ocked	
FIELDS LXAPIMNT	SEC	IDF	Y	
Maintain LX API fields				
FIELDS LXQMSMNT	SEC	IDF	N	
Maintain LX QMS fields				
F3=Exit F6=Add F	7=Backward	F8=Forwar	°d	
F11=Job status F12=Return F	17=Subset			
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🗊 1902 - Session successfully started				1.

The attributes become protected.

📥 (AA) Change Enterprise Item - QAI	ATTEM	o x
File Display Maintain Customize Navig	vigation Help	
Default 🗸 👂 🎒 📹 🗋 🦯 .	▲ ===  22 次 === === === === === === === === ==	
1998 Item : QAITEM QA Item test		
General Inventory Acti	crivities History MDM Routing Inventory Tags Cycle Counts Sales Quality Records Period On-hand Summary Senial Numbers	
Quality assurance control	Yes No Days	<u> </u>
Verification required	○ Yes    No Shell life   0	
Automatic stability select	Yes @ No Retest 0	
Hazard	Quasiantine 0	
UN/NA ID	[blank] - EE Explanation 0	
Standard potency percent	0 0000 Retest date horizon 0	
Standard batch weight	0.000 QA lead time	
Batch balancing UM Alternate LIM obwical //hervetical	(Nank) QA lead time 2 0	
Physical or theoretical UM	(cost) Component usage None	
Round exp. date last day prior month Expiry - Retest date basis	th None  Quarkly per container 0.000 Average Lot size 0.000 Number containers 0	Е
	Language ENU	
Pack description 1	(Bark)	
Specification		
Testing level		
Stability planning spec.		
QA cost center		
QA corporate code	Q. 55	
		-
Engineering Quality		
Definition Engineering/Qua	Supply/Demand Order Notes Overrides Cost Substitute Items Senialization	
Update	Cancel Help	
		1

# Securing IDF Mass Change and Mass Delete actions

This is strongly recommended to secure the tasks that allows mass update or delete actions.

The following tasks are:

- Mass Change Customers
- Mass Change Item Costs
- Mass Change Vendors
- Mass Change Enterprise Items
- Mass Delete Item Costs
- Mass UPC Update for Enterprise Item

In order to secure them, you have to lock these tasks using the action 22=Lock (see the previous topic for details). You may authorize none or limited number of experienced users to these tasks.

B Session	A - [24 x 80]					
<u>File</u> <u>E</u> dit	View Communication	Actions <u>W</u> indow <u>H</u> elp				
0 B	è 🛃 🛼 🔛 🔳	🖬 🌭 💩 🛃 🦉	٠			
AMZB	6DFR		Maintain	Tasks		DISPLAY
Area		$\ldots \ldots \ldots := L$	CS Customer	[asks		
Posi	tion to tas	k ID				
		_				
Type	options; p	ress Enter.				
4=1	Delete 11:	Authorize use=	rs 22=Lock	23=Unlock		
Opt	Task ID		Туре	App Lo	cked	
	LCUS	CREATE	SEC	IDF	N	
	Create Cus	tomers				
	LCUS	HISTORY	SEC	IDF	N	
	Display Cu	stomer Mainten	ance History			
	LCUS	MASSCHG	SEC	IDF	N	
	Mass Change	e Customers				
·	LCUS	SUSPEND	SEC	IDF	N	
	Suspend Cu	stomer				
	LCUS	TEMPLATE	SEC	IDF	Ν	
	Maintain Cu	ustomer Templa	tes			
F3=E:	xit	F6=Add	F7=Backward	F8=Forward		
F11=	Job status	F12=Return	F17=Subset			
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g <sup>1</sup> 1902 -	Session successfully start	ed				1.

# Chapter 5 Updating IDF security from LX

The Copy Security to IDF (CPYSECIDF) command was a tool used with LX 8.3.5 and 8.4.0 to help with the setup of user security in IDF for LX. In LX 8.4.1, CPYSECIDF has been replaced by several programs and objects. CPYSECIDF should no longer used.

These LX security areas can be mapped to IDF security:

LX Security	IDF CAS Security
Data Security: Company	Auto-Content Security: Company (LX)
Data Security: Facility	Auto-Content Security: Facility (LX)
Data Security: Warehouse	Auto-Content Security: Warehouse (LX)
Data Security: CEA Ledger, Book, Year	Auto-Content Security:
	Ledger
	Ledger; Book
	Ledger; Book; Year
Data Security: CEA Ledger, Book, Year	Auto-Content Security:
	EGLI Ledger
	EGLI Ledger; Book
	EGLI Ledger; Book; Year
Access Security: Product	Business Object
Access Security: Program	Business Object
Access Security: Function Keys and Action Codes	Business Object Actions

Data security for Company, Facility, and Warehouse in LX is setup in SYS600 for each user, either directly for a user or through assigned Business Units. Data security for CEA Ledger, Book, and Year in LX is set up in CLD177 for each user via their group in SYS600. These same values are migrated to IDF and can be viewed and modified in the User Profiles business object.

Access security for products and programs is controlled by SYS600 for users, either directly for a user or through assigned Business Roles. Function Keys and Action Codes security is controlled by SYS603 for groups assigned to users in SYS600. These settings map to Business Object actions such as create, change, copy, activate, suspend.

The steps to configure, initialize, and maintain user security integration with IDF are as follows.

# Set IDF integration defaults

For initial setup use SYS800/SYS802 Security Settings Maintenance to choose the default settings you wish to use to update IDF security settings from LX. These settings will be the default settings when SYS607 is run, but can be changed when running SYS607, plus those settings will be used by other programs like SYS600 or SYS603 to update IDF security.



#### Synchronize IDF users existence with LX users

When a user is created or deleted in SYS600 then user will be created or deleted in IDF security.

#### Authorize LX users to IDF environment

When a user is created in SYS600, the user is authorized to access the IDF environment.

## Update IDF tasks/sub-tasks

Either when a user's products or programs authorities change directly or when they are assigned to or removed from Roles, or when an assigned Role's products or programs authorities are changed, the user's access to business objects may change also.

# Update IDF Auto-Content Security (Warehouse, Facility, Company)

When a user's authorities to warehouses, facilities, or companies change either directly or when they are assigned to or removed from Units, or when an assigned Unit's authorities to warehouses, facilities, or companies are changed, the user's access to business objects may change also.

# Update CEA Auto-Content Security (Ledger, Book, Year)

When CEA Ledger/book/year security changes for a group, all users in that group will have their Auto-content security for CEA updated in IDF also.

# Update EGLI Auto-Content Security (Ledger, Book, Year)

When CEA Ledger/book/year security changes for a group, all users in that group will have their Auto-content security for EGLI updated in IDF also.

#### Synchronize LX user groups with EGLI Financial Groups

When a user's group is changed in SYS600 the EGLI Financial group assigned to the user will also be updated. Use the User Profiles object to view a user's EGLI Financial Group.

## Create EGLI Financial Groups for LX Groups in CLD170

When a new group is created in CLD170, also create an EGLI Financial Group.

# **Configuring Security Mappings**

To change the default mapping of LX product/program/FKAC to IDF business object security settings launch the Security Mappings object from the **Environment** tab.

![](_page_39_Picture_3.jpeg)

This object shows for each CAS security task/sub-task, the security in LX that will provide access to it. For example, the LCUS task is for the Customers object. Anyone that is authorized to ACR or ACR100 in LX security will be able to launch the Customers object and view the data. LCUS also has sub-tasks for ACTIVATE, CHANGE, COPY, CREATE, and SUSPEND. These are mapped to ACR100D1 numbered items 1,2,3,4. Those are SYS603 settings and any user assigned to a group in LX that has authority to these tasks will also have that same authority in Customers. For example, any user assigned to a group that has authority to ACR100D1 action "1" will have authority to LCUS CREATE and will be able to create customers in the Customers object.

infer (11) Security Mappings			_ 🗆 ×		
File Display Maintain Customize Navigati	on Help				
General 💽 (all records) 💽 🍂 🕵 🚳 🔛 🖾 🗋 🦯 🖉					
Security Mappings					
LX Product 🔊 LX Program LX FKA.	- CAS Task 🛆	CAS Subtask 🖄			
SYS SYS119	0 LCTY1		<b>A</b>		
ACR ACR100	0 LCUS				
ACR ACR100D1	2 LCUS	ACTIVATE			
ACR		ATTACH			
ACR ACR100D1		CHANGE			
ACR ACR10001		COPY			
ACR ACKTOODT		HISTORY			
ACK		MASSCHG			
ACR ACR100D1	4 1 015	SUSPEND			
ACR		TEMPLATE			
	LCUS	XMAINTAIN			
ORD ORD150	0 LCUSITM				
ORD	0 LCUSITM	ATTACH			
ORD	0 LCUSITM	TEMPLATE			
SYS SYS105	0 LC01				
SYS	0 LC01	ATTACH			
SYS	0 LC01	TEMPLATE			
SYS SYS105	0 LC02				
SYS	0 LC02	ATTACH			
SYS	0 LC02	TEMPLATE			
SYS SYS105	0   LC03		<b>_</b>		
			ملا		

LX security settings are mapped to IDF CAS Security by the ZXYP file. There are two types of records in ZXYP, SYS600 based entries for product and program authorities and Function Key Action Code (FKAC) settings from SYS603.

#### SYS600 based settings

Records with LX FKAC Sequence = 0 map SYS600 product or program authorities to IDF CAS Security Tasks and Subtasks. Note that LX Program only uses the first 6 chars when mapping SYS600 programs.

## Function Key Action Code (FKAC) settings

Records with LX FKAC Sequence <> 0 map Function Key Action Code settings from Program Option Authorities File (ZAUP) to IDF CAS Security Tasks and Subtasks. For these settings, the full program name is used for LX Program.

All CAS Security Tasks related to LX business objects have been added to ZXYP although many do not have a direct correlation to LX security settings, so the LX Product and LX Program fields are left

blank and no LX to IDF security is mapped. If you wish to map LX security to these tasks, update the LX Product and/or LX Program fields for those tasks you wish to map. Additionally, if you create custom IDF objects that have CAS Security task created you can add records to Security Mappings to map SYS600 products and/or programs or FKAC options to those tasks.

Any CAS security settings in IDF that do not have records in Security Mappings with LX Product or LX Program values are not impacted by LX processing and will need to be managed through IDF Security Maintenance. Examples would be authority to CRMi or EGLI objects. Although, you could add new mappings, for example, if someone is authorized to ACR100, you may grant them access to the CRMi Accounts or Contacts objects, or maybe if someone is authorized to certain CEA programs you may grant them access to EGLI objects. Use the IDF security menu option Area and task authorizations to locate the tasks to assign. See Chapter 4 LX IDF Security Overview for details.

One special CAS task is the ACCMAPICS task that allows users access to the environment, which is controlled for LX users via SYS802 Authorize LX users to IDF environment setting. With this setting turned on when users are added in SYS600, they are also granted access to the IDF environment.

Once all security mappings are configured, the initial synchronization can be done.

## Run SYS607 for initial synchronization

Use SYS607 to update all users IDF security from LX security. It can also be used for a subset of users or users assigned to Roles or Units.

©⊯D29 MLARSONC0		
File Edit View Communication Actions Window Hel	p	
D29 MLARSONC0 🗧 🖂 🕂		
🖷 🖬 🏦 速 🗶 🖼 🎬 🐇 🐇	👂 👁 📅 🖬 🗏	
SYS607D-01 USALID29	** 8.4.1 Development Environment ** Synchronize Security with IDF	MLARSONC0 10/25/20 LARSONM1 17:46:55
User(s), Role(s), Units(s), +ALL, generic* Include Roles in generic selection Authorize users to environment Update IDF tasks/sub tasks Update IDF Ruto-Content Security Update CEA Auto-Content Security Update EGLI Auto-Content Security Update EGLI Financial Groups	*81 (12*(es, 8=No) 1 (12*(es, 8=No) 1 (12*(es, 0=No) 1 (12*(es, 0=No)	D29.0
Submit to Batch	1 (1=Yes, 0=No)	
Warning: For the selected users, this proce See Security Mappings for details on the imp	ess will replace any IDF Security settings released IDF Security tasks.	ated to LX Security settings.
F1=Help F3=Exit F6=Accept		029-2
MAL+C MW	05/062	
USALID29 resolved to usalid29.infor.com/10.39.117.122 (IPv	4)	🔺 🖂 🗖 USALID29:992 🔓

Once all users have been synchronized with IDF security, ongoing security changes will be automatically updated based on the settings in SYS802 when SYS600 or SYS603 are used to update LX roles', units', or users' security.