TVision, How-to

Personal Data Encryption Add-on App For Microsoft Dynamics 365 Business Central

CONTENTS

INTRODUCTION

Personal Data Encryption is an extension for Dynamics 365 Business Central to securely store and handle sensitive personal data and it also provides additional security to support your company's GDPR compliance.
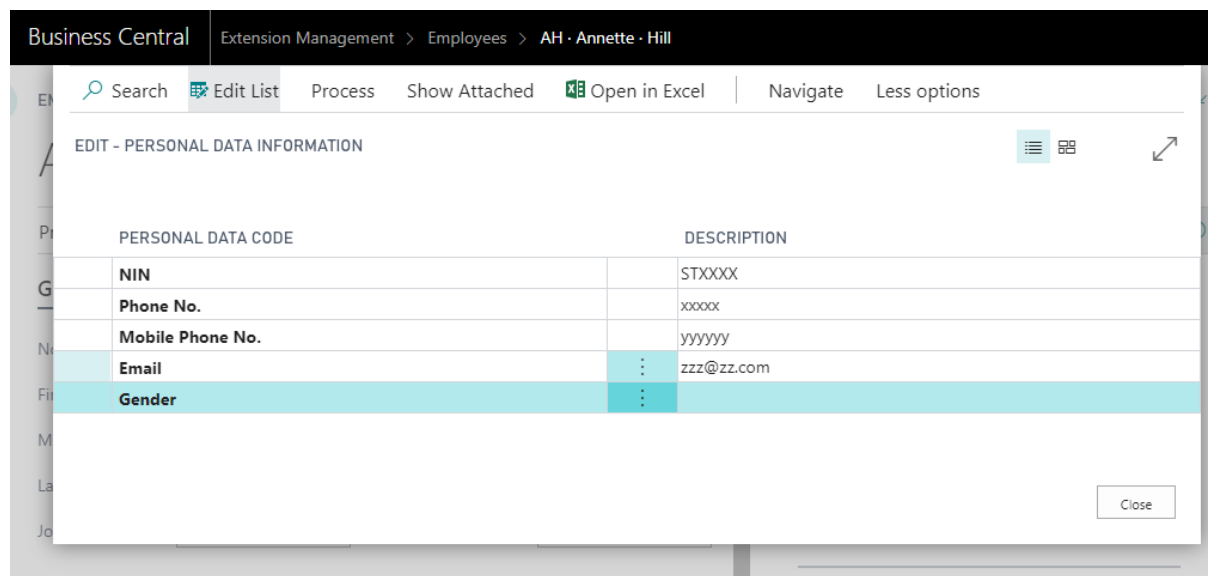
Feature Highlights

- Extend the standard tables related to individuals, such as Employee, Contact, and Resource
- Access Control: Authorise groups of users to only access specific personal data
- Audit the reading of personal data
- Store sensitive data with Encryption

Additional Features

- Map extended fields with standard fields, and be able to move data
- Setup types of fields and define specific lookup options
- Define translations for each field description.

New custom fields can easily be added to employees, contacts and resources
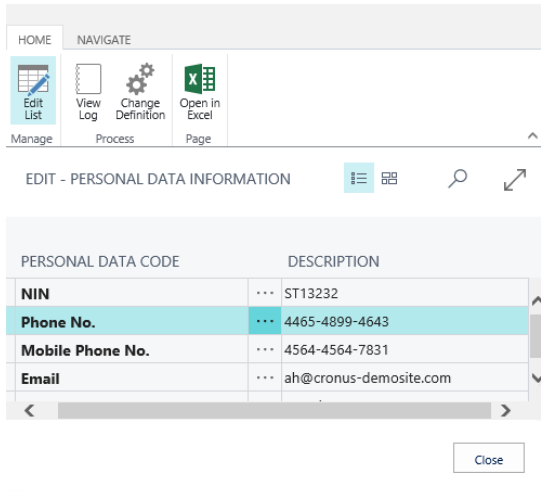
Easily create groups with different levels of access to sensitive information

FULL ACCESS

LIMITED ACCESS

Log who is accessing what information and when

VIEW - PERSONAL DATA LOG

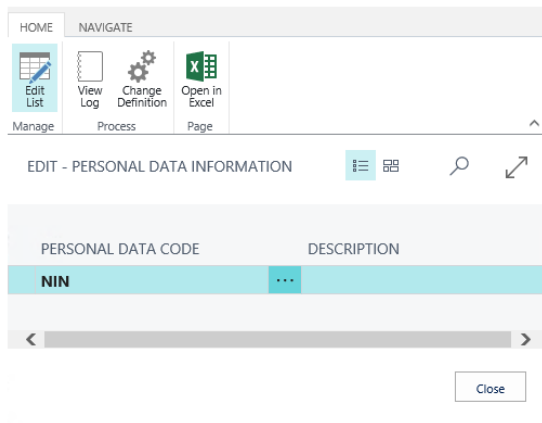| DATE	TIME	OPERATION	USER ID	RECORD CODE	FIELD
Friday, 18 May 2018	12:06:08 PM	Insert	FIN	AH	Phone No.
Friday, 18 May 2018	3:03:20 PM	Read	TVTNAVUSER	AH	Phone No.
Friday, 18 May 2018	3:03:27 PM	Read	TVTNAVUSER	AH	Phone No.
Friday, 18 May 2018	3:05:18 PM	Read	FIN	AH	Phone No.
Friday, 18 May 2018	3:05:43 PM	Read	FIN	AH	Phone No.
Friday, 18 May 2018	3:34:18 PM	Read	TVTNAVUSER	AH	Phone No.
Wednesday, 30 May 2018	2:08:26 PM	Read	TVTNAVUSER	AH	Phone No.
Wednesday, 30 May 2018	2:11:17 PM	Read	TVTNAVUSER	AH	Phone No.

All sensitive data is stored in an encrypted format

	timestamp	Key	Value
1	0x00000000000BFA26	4BB72DCC-FE02-4230-8980-0105F4735D9A	0x02457D5B05C14B8243300000D0B9CF2C6889B0E82291664C29A654...
2	0x00000000000BFA5A	1DF410F8-99D7-4E01-8ABE-064A0899B52D	0x02457D5B05C1C99A43300000E0791F079F25DA1E7A105497105A4B...
3	0x00000000000BE889	44D23E05-E95C-466C-9004-29A9AD9F4DF7	0x02457D5B05C1C98243300000D0F99F39582A98430FB612845A4670B...
4	0x00000000000BF633	6B20EBD7-9E4A-4C31-9469-2ECBDB78F7CA	0x02457D5B05C1D9A242400000D0FB3F1EECE4A18718656264489637...
5	0x00000000000BEC3C	153907D1-17C6-42AD-AF7C-4256D6845BE4	0x02457D5B05C1DDA242300000E0F33EBB50FAE3E25C24FF2C3B64E...
6	0x000000000009ACB1	FA0D4E1D-C2F6-4085-9095-441BCE2030C1	0x02457D5B05C1CBA242400000D0FB3F165E338C458BBC1A431E3545...
7	0x00000000000BFB62	7E165A5C-94B0-4566-A9CA-612DBAB34987	0x02457D5B05C1DB8242400000D0FD9F1ECCB06E0FFB30344491C890...
8	0x00000000000BF983	2389D877-97E7-4212-B4EB-740C92EB1D2E	0x02457D5B0DCAC98243300000D0F91F076B83430F157B353434CA4D...
9	0x00000000000BECD1	043B0F82-CF4B-4792-8241-79BC50C41B67	0x02457D5B05C1478282300000C0FD4F0E520CE5E041962A22911E6F...
10	0x00000000000BFA13	63BD1A5A-D12F-424F-81EA-82AAACAABF51	0x02457D5B05C1C98243300000D0F91F078A361CE62025D6D616A1BD...
11	0x00000000000BFA53	E62EB929-6FED-4D53-9772-8A67DA36C039	0x02457D5B05C1C98243300000D0F91F872AA9D6610E25969A5448A9...
12	0x00000000000BF79C	70F12A1F-590F-4958-9A41-9B55064C3BD2	0x02457D5B0DCA399682300000D0B90F85382A68614110C266882C12...
13	0x00000000000BFB64	AC0D2DFA-6083-4B4C-8CC8-9EF9152B7EDE	0x02457D5B0DCC479682300000D0B98F0B404280858B0844CA8BE2D0...
14	0x00000000000BFB4D	9B31E3D6-0988-4BA2-A0D1-A2F3CECAE1AA	0x02457D5B05C1C78243400000D0FD1F07AC7ED8438644094118656E...
15	0x00000000000BFA5E	77F17437-8626-450A-8D4B-B657BBE3C789	0x02457D5B05C1478282300000C0FD0F87D0C58307A44989910824672C...

GETTING STARTED

The first step is to sign up for Microsoft Dynamics 365 Business Central at
https://dynamics.microsoft.com/en-us/business-central/overview/.

Once your solution is up and running, add the extension from the AppSource marketplace
here. For more information on how to do that, see the Business Central documentation here.

🔒 Personal Data   The first time that you try to access Personal Data Information page
with the Personal Data button, the following notification is displayed.

✕ Personal Data setup is missing.   Open Setup Wizard
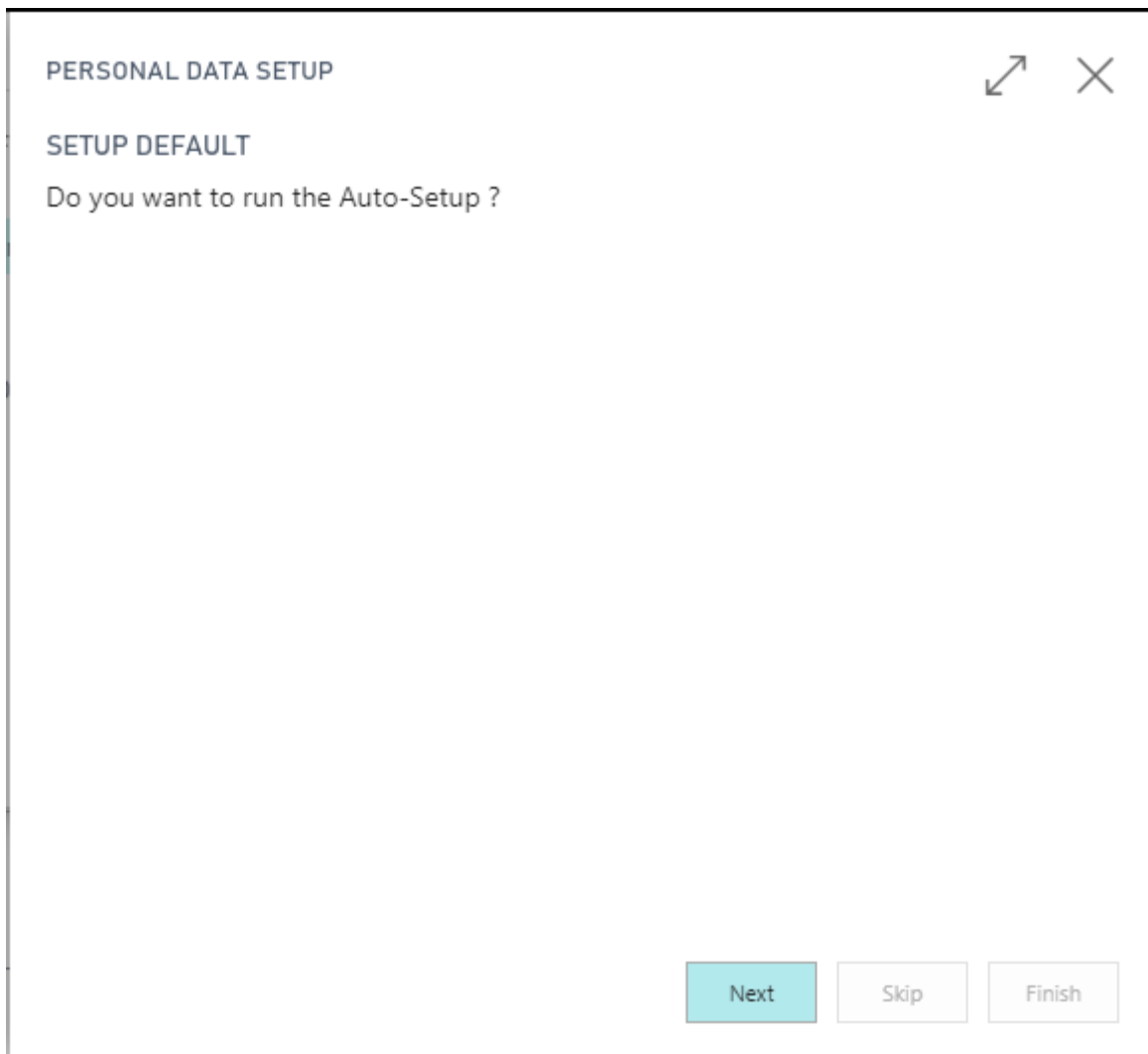
Click on 'Open Setup Wizard' to launch the wizard.

WIZARD SETUP

You can setup the application with three easy steps:

Step 1 Initialisation

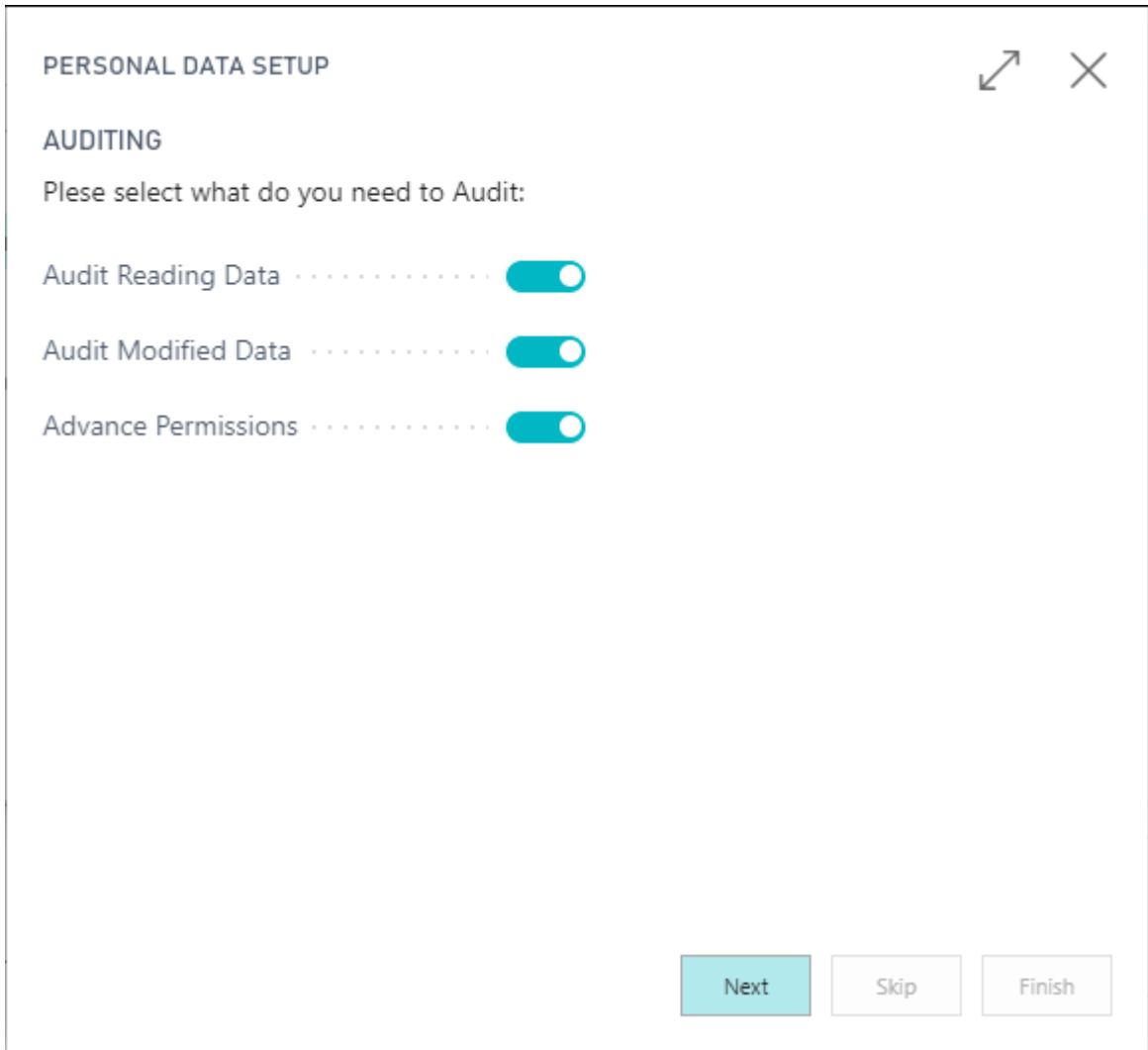This step will create the roles and basic data on the extensions table.

Step 2 Select Auditing

This step will activate the auditing for all the activities on your personal data records.
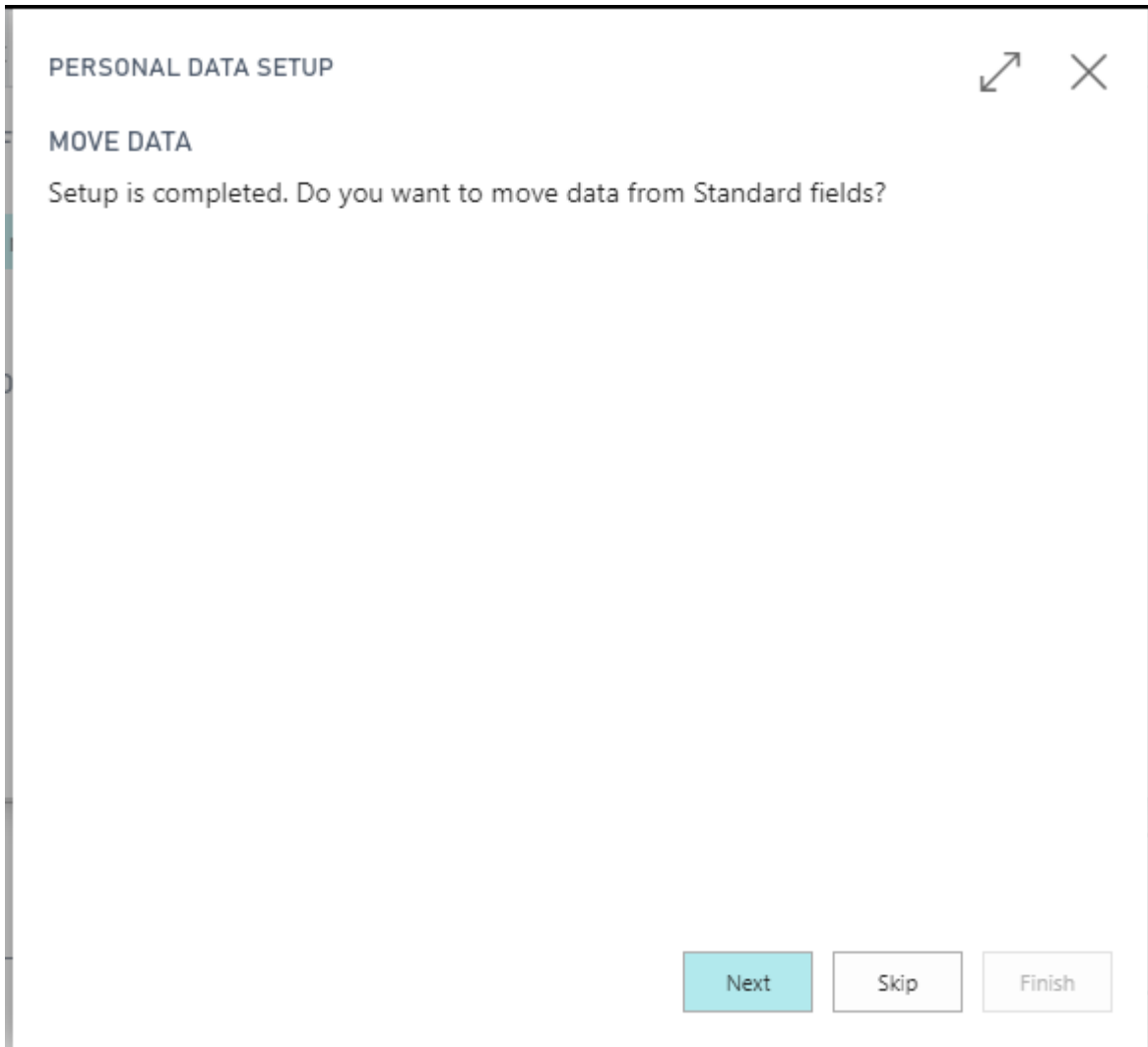
Step 3 Copy Data from standard fields

This step will move data from standard fields such as Social Insurance No. or Email, etc. to the new encrypted entity. You can skip this step if you want to.
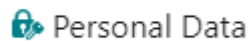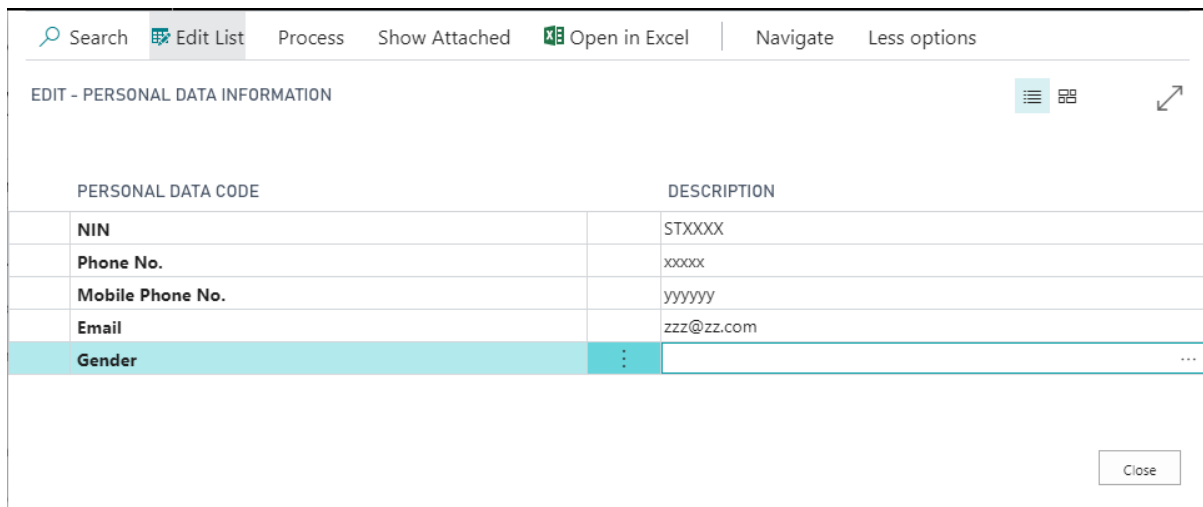
Step 4 All Done

The Setup is complete. You can press the Finish button, and close any opened personal data pages.
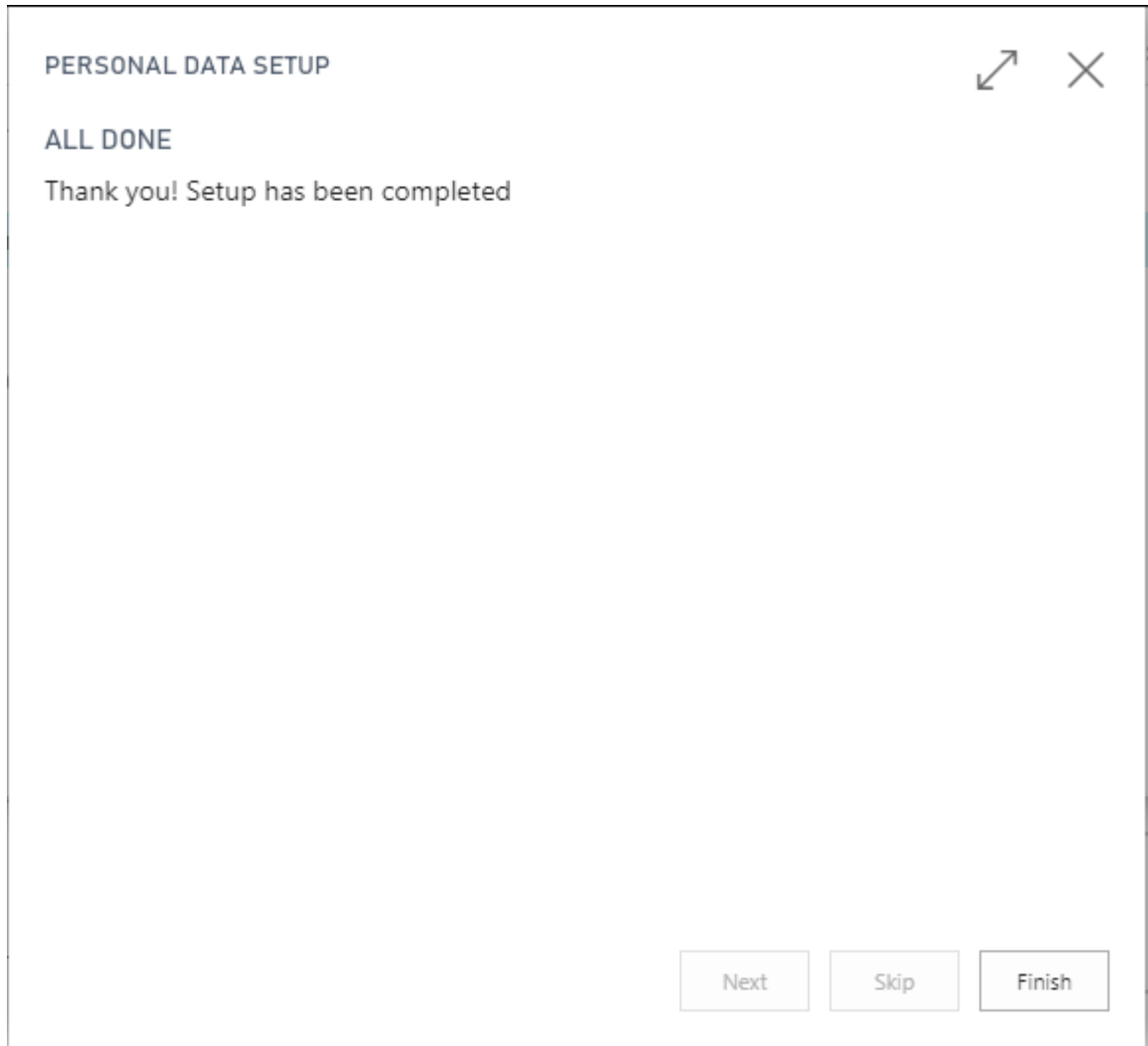
WHERE IS THE EXTENSION IS VISIBLE ON MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

🔒 Personal Data
      You can open the Personal Data Information page with this button.

PERSONAL DATA CODE	DESCRIPTION
NIN	STXXXX
Phone No.	xxxxx
Mobile Phone No.	yyyyyy
Email	zzz@zz.com
Gender	

The pages that have been extended with the action "Personal Data" are:

- Employee List
- Employee Card
- Contact List
- Contact Card
- Resource List
- Resource Card

Employee List

Employee Card

PERSONAL DATA DEFINITION

This is where you can set up which fields you want to secure. You can reach this page with

the [💡] button searching for "Personal Data Definition".

PERSONAL DATA DEFINITION

🔍 Search ＋ New 📝 Edit List ✕ Delete Process Show Attached 📊 Open in Excel ▽ ☰

TABLE NO	TABLE NAME	PERSONAL DATA CODE	FIELD TYPE	LOOKUP GROUP CODE	STANI FIEL
156	Resource	NIN	Text		
5050	Contact	Private Mobile No.	Text		
5050	Contact	Private Email	Text		
5050	Contact	Gender	LookUp	GENDER	
5200	Employee	NIN	Text		
5200	Employee	Phone No.	Text		
5200	Employee	Mobile Phone No.	Text		
5200	Employee	Email	Text		
5200	Employee	Gender	LookUp	GENDER	

Mandatory Fields

- Table No. (Use the lookup or capture it directly)
- Personal Data Code (Description of the field to show to the user) *see translation
- Type
- Lookup Group Code (Only if Type is Lookup).

Other Fields

- Standard Field (If you need to move data from the standard)
- Sorting No. (Only for visualisation purposes)
- Blocked (Hide the field from the page).

Page Actions Fields

PERSONAL DATA DEFINITION

🔍 Search ＋ New 📝 Edit List ✕ Delete Process Show Attached 📊 Open in Excel

🔲 View Log 🔗 Permissions: 📑 Translations ⚙ Personal Data Setup [ ] Lookup Group

Translations

🔣 Translations

With this button you can setup translation for a different language rather than showing the Personal Data Code.

Lookup Group

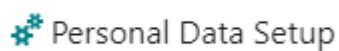[ ] Lookup Group

With this button you can setup other lookup group and options.

View Log

🗒 View Log

With this button you can view the audit log for the current field.

Personal Data Setup

⚙ Personal Data Setup

With this button you can open the Personal Data Setup Page where you can check all the settings of this extension.
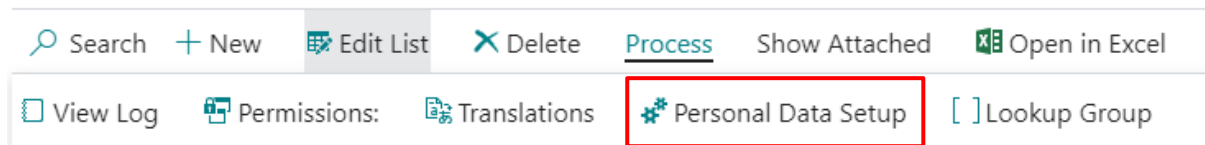
Permissions

🔲 Permissions:

With this button you can open the Personal Data Setup Page where you can check all the permission settings of this extension.

PERSONAL DATA SETUP

You can reach this page with the action "Person Data Setup" from the Personal Data Definition page.

Permissions Tab

You can activate the permission roles visualisation and define the superuser role. The superuser role is usually assigned to the person that completed the setup wizard.

View Log Tab

You can activate auditing for any events related to your Personal Data Value.

Actions

⇄ Copy Data From Standard Fields

This action will move data from the standard fields to the encrypted fields according to the mapping specified on the definition page.
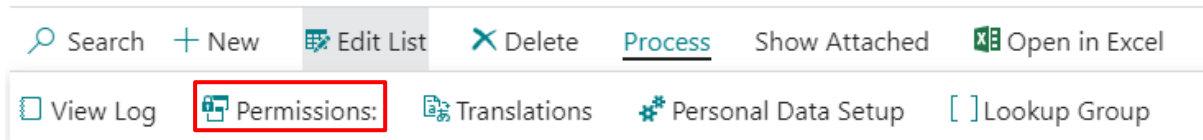
⬚ Users Group Permission

This action runs the Users Permission page where you can assign roles to users.

PERSONAL DATA PERMISSION ROLE FOR FIELDS

You can reach this page with the action Permissions on the Page Personal Data Definition, and can select the field that you need to define.
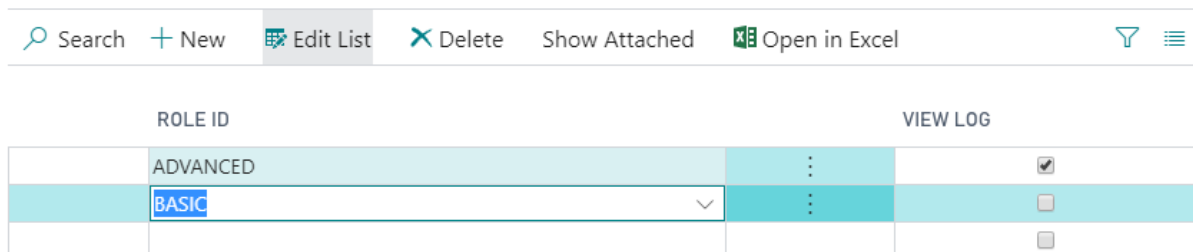
PERSONAL DATA DEFINITION

🔍 Search	+ New	📝 Edit List	✕ Delete	Process	Show Attached	📊 Open in Excel
🗋 View Log	🔳 Permissions:	📑 Translations	⚙ Personal Data Setup	[ ] Lookup Group		

You can add new records by selecting the Role ID.

TVT PERSONAL DATA PERMISSIONS

🔍 Search	+ New	📝 Edit List	✕ Delete	Show Attached	📊 Open in Excel	▽	≣

	ROLE ID		VIEW LOG
	ADVANCED	⋮	☑
	BASIC ⌄	⋮	☐
			☐

You can also specify whether this role has the ability to open the View Log.

VIEW LOG

☑
☐

These are the auto created roles:

- Basic: Limited Access.
- Advanced: Full Access but not to Setup Personal Data.
- Super: Full Access and Setup Personal Data.

PERSONAL DATA ASSIGN PERMISSION ROLE TO USER

You can reach this page with the action Users Permission from page Personal Data Setup.

Personal Data Setup

New   Show Attached

☐ Users Group Permission   ⇄ Copy Data From Standard Fields

Then you can add new records selecting Role and User.

PERSONAL DATA ACCESS LIST

🔍 Search + New   📝 Edit List   ✕ Delete   Show Attached   📊 Open in Excel   ▽ ≡

PERMISSION GROUP	USERNAME:	PERMISSION GROUP DESCRIPTION	USER FULL NAME
BASIC		Basic: Limited Access	
SUPER		Administrator: Setup and Full Access	
⌄			

Please check the flag Advance Permissions on the Setup Page

Personal Data Setup

New   Show Attached

Access Control and Permissions

Advance Permissions · · · · 🟢

Admin Group Permiss… · | SUPER   ⌄ |

Auditing

Audit Reading Data · · · · 🟢   Advance Permissions · · · · 🟢

Audit Modified Data · · · · 🟢