# Houdini Security - Record Classification
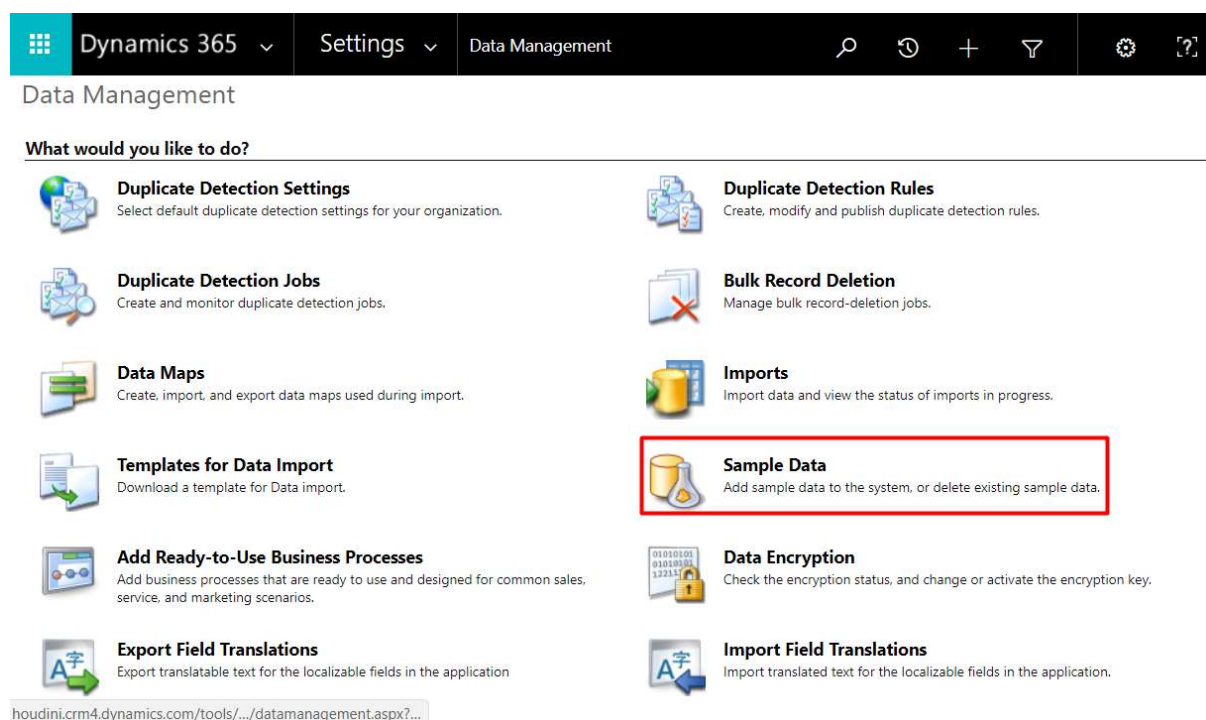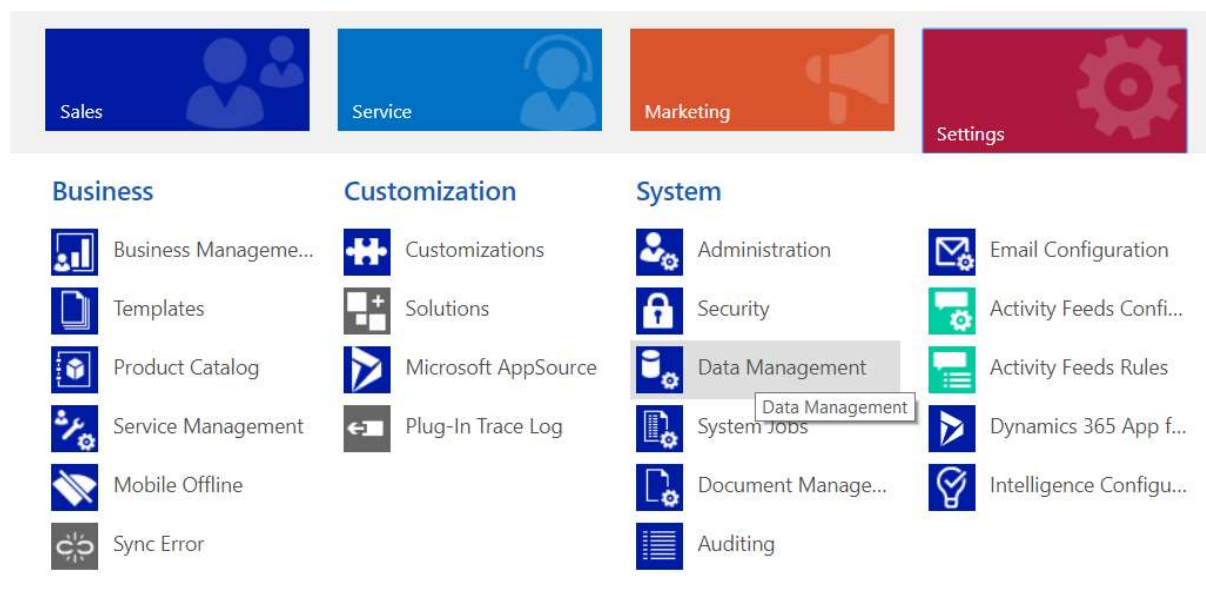
QUICK START GUIDE
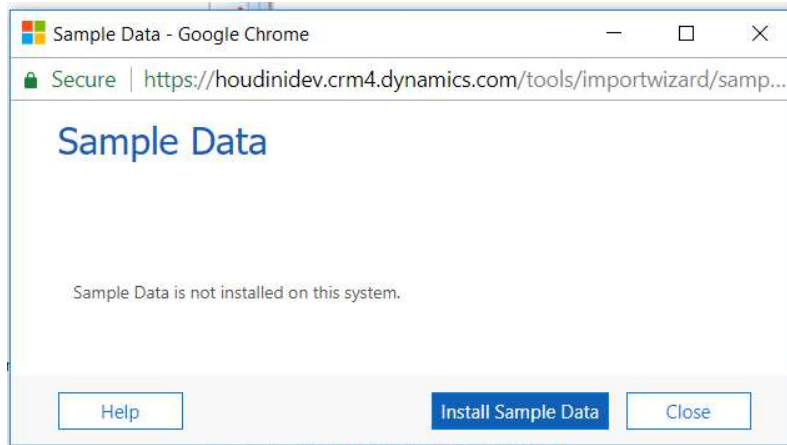
# Contents

# Quick Start Guide

## Introduction

This document provides a quick 5 minute start up guide to Houdini's Record Classification solution to show you how the solution works and to confirm it has been installed correctly.

For convenience we are using the Dynamics 365's Sample Data set which you can install and remove using the Sample Data option within Settings -> Data Management
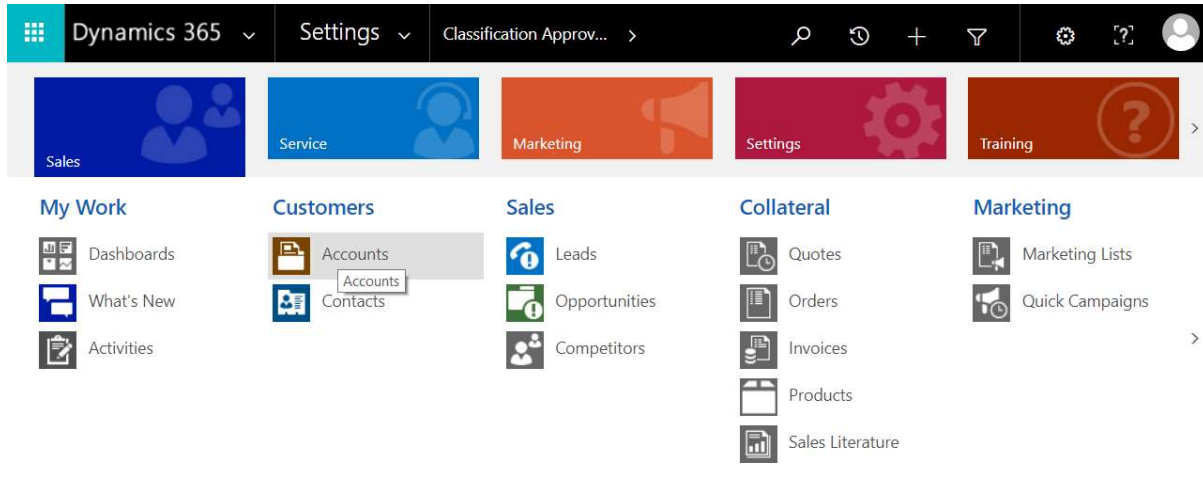
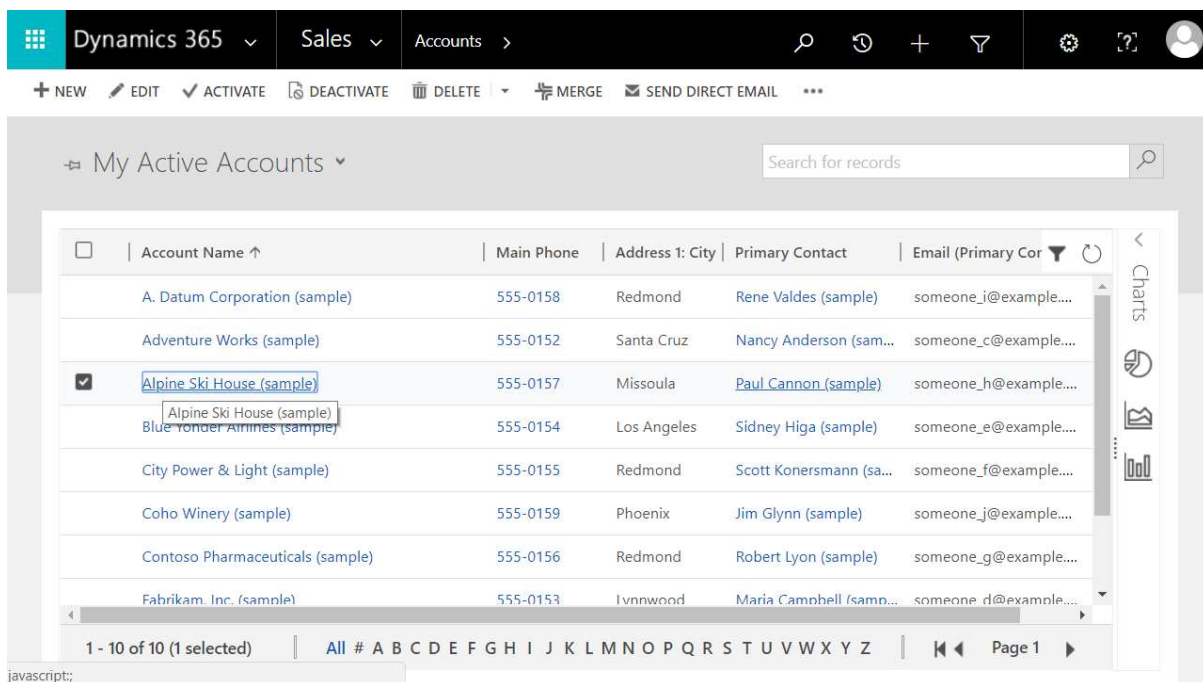If the data has not already been installed you will see the following

## Classifying Records

Once the Sample Data has been loaded Navigate back to the account records (Sales > Accounts) and you should see 10 records.



Select and open the *Alpine Ski House (Sample)* record.

When the record has open scrolled down to the Record Classification Section and select Germany within Classification 1.
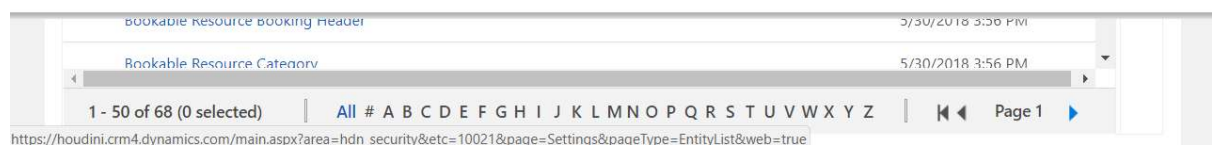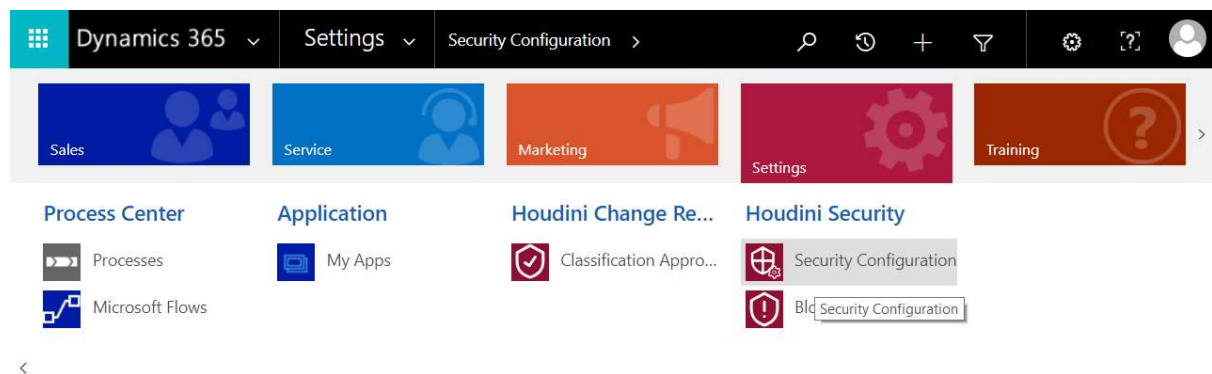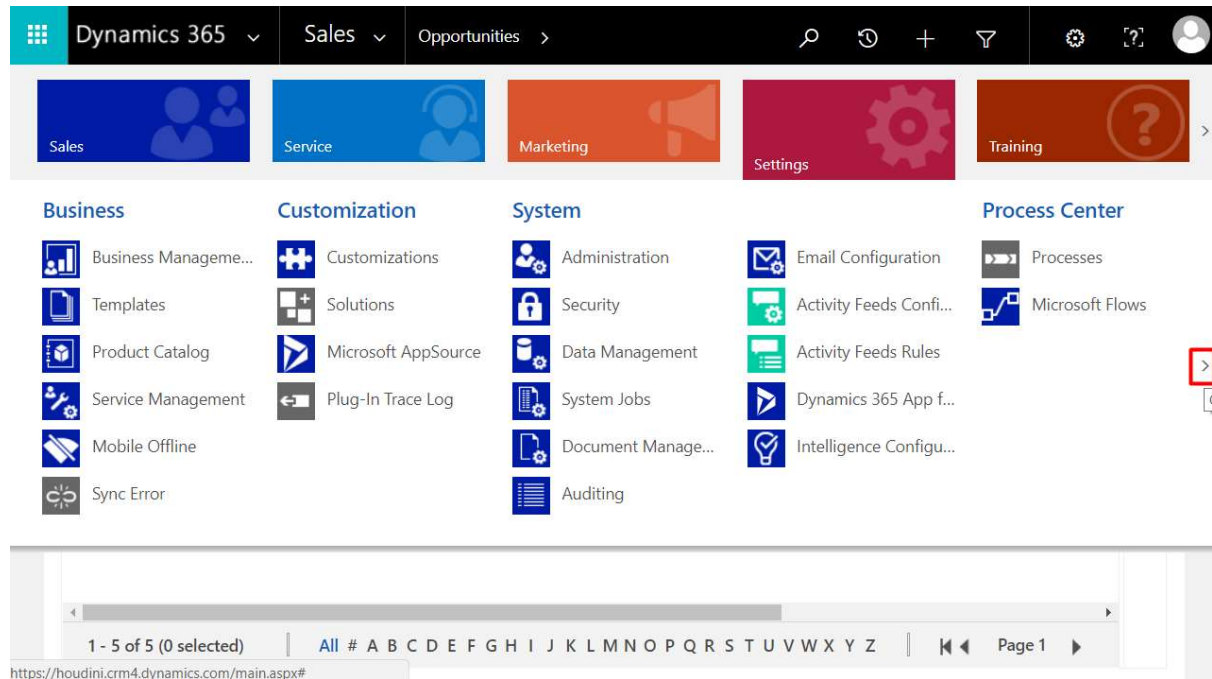




Finally save the record.

Next, navigate back to the list of Accounts, select Blue Yonder Airlines (Sample) and choose France within the Classification 1 field. Save the record.

## Configure Security

As we have now classified a couple of the 10 sample Account records we can now switch on the security module and confirm that it works.

Navigate to the Security Configuration section via Settings > Security Configuration (it's on the right hand side of the Settings menu so you may need to click the right arrow to see it.

Hopefully you should see a grid with 60+ records in it. If not follow the advice in *Appendix A – Populate Houdini Security Configuration Records*.



Once you can see a list of records open the Account record and in the Filter Settings section set the Filter to *"On this Record"* and save the record.
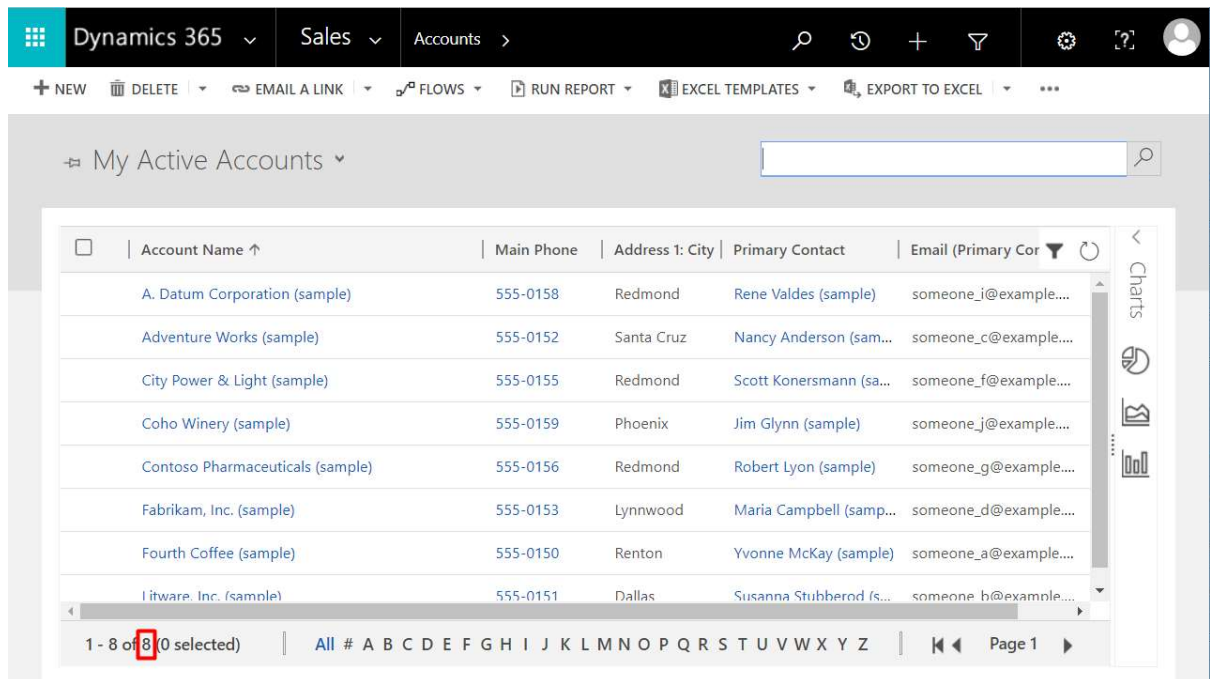
## Test the Classifications

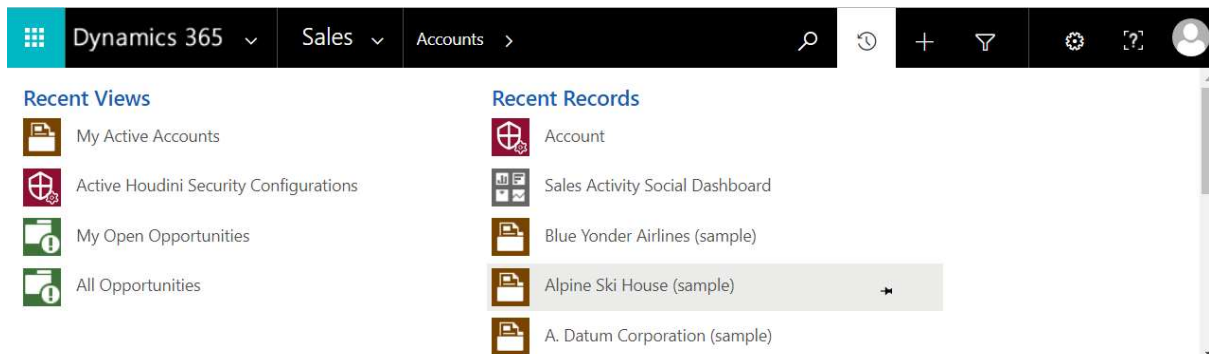Open the recently viewed records menu



And select *My Active Accounts.* This will once again open up the list of Active Accounts we saw before but it will now show only 8 records. The two classified records (*Blue Yonder Airlines* and *Alpine Ski House*) are filtered from the results.
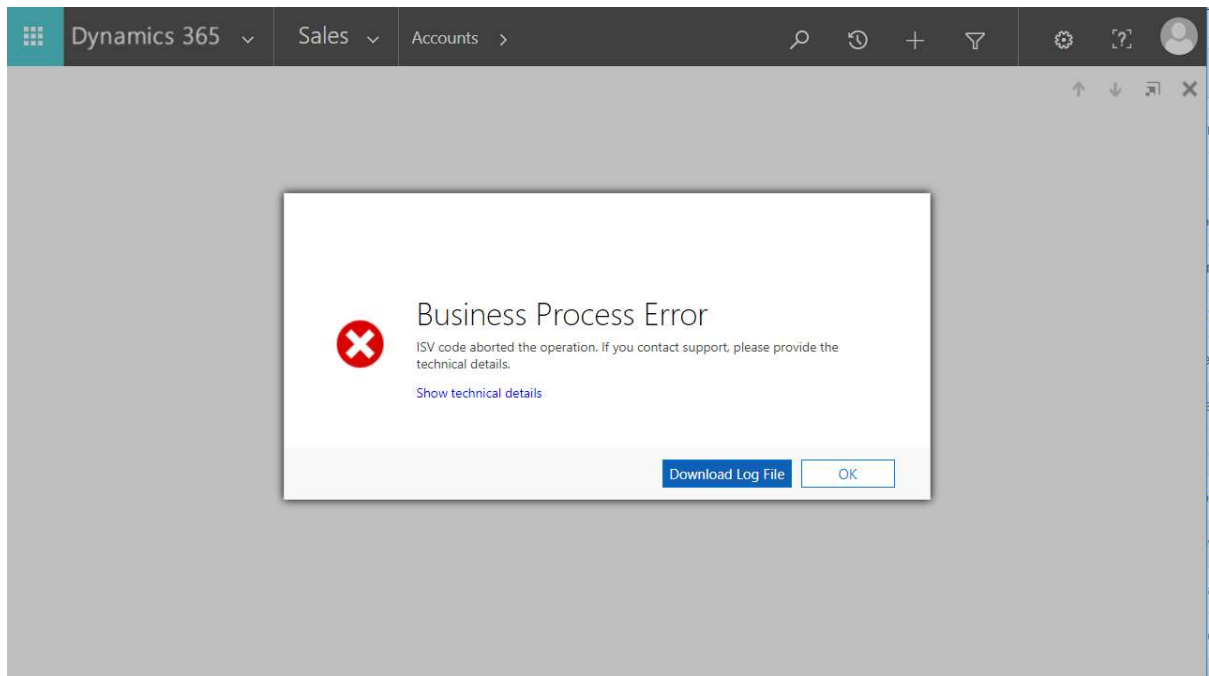
Next open the recently viewed Records menu and try to open the *Alpine Ski House (Sample)* record.



This will result in an error message appearing. Click OK and you will be returned to last page you had open (the *My Active Accounts* list page) which will again show the 8 unclassified Accounts.
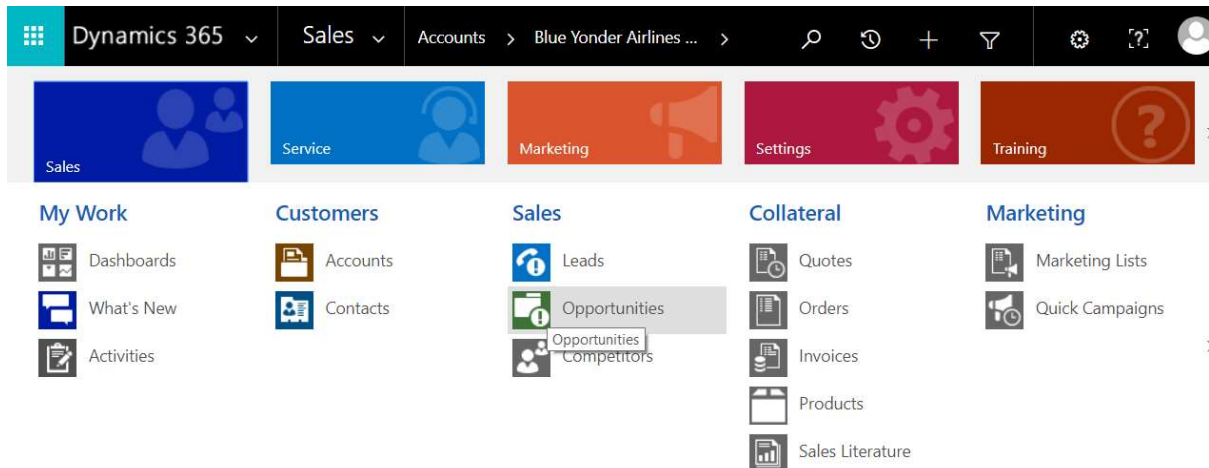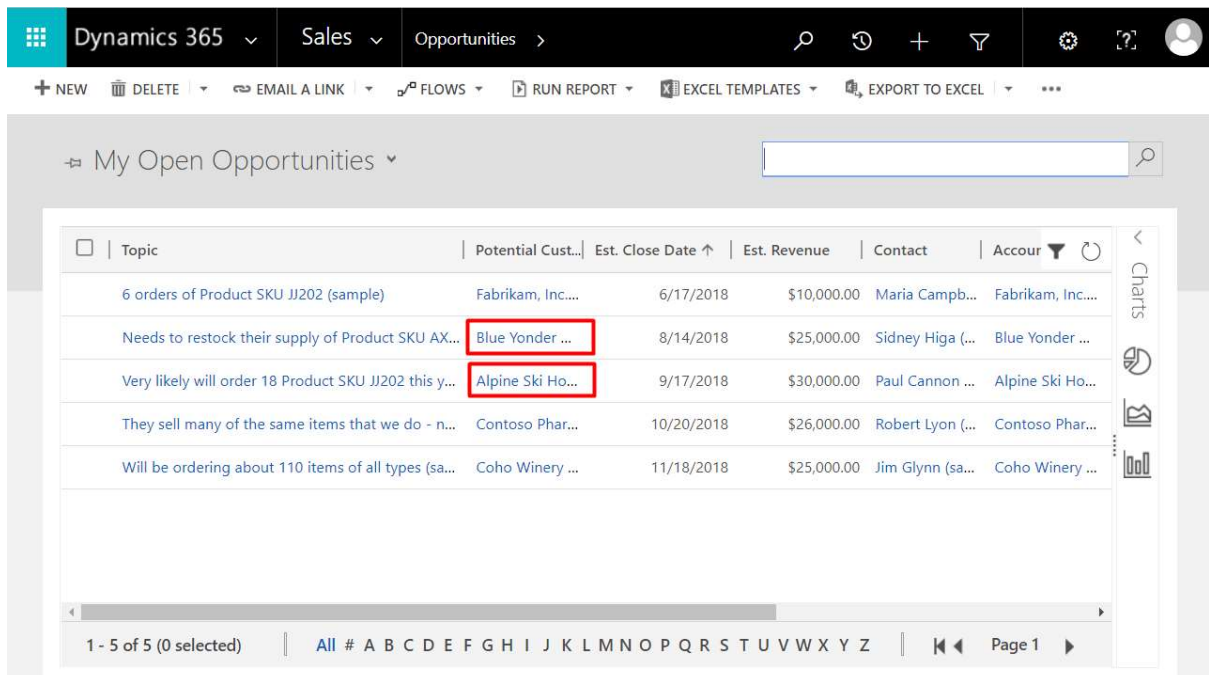
## Filtering on a Parent Record

Now let's look at how filtering on a parent record works and confirm that everything has been set up correctly.

From the Sales Menu select Opportunities



This will open up the "*My Open Opportunities*" list which will show 5 open opportunities.



When you look at them in detail you will see that 2 of the Opportunities (highlighted in Red above) belong to the Potential Customers who have been classified and did not appear in the list of Accounts shown on the previous screen.

As we probably don't want these child records to be shown to users who cannot see the main account record we need to ensure that Opportunity records are also filtered.

To do that we need to return to the Security Configuration list and configure the Opportunity Record. But, before we do that open the "*Needs to restock their supply of ….*" Opportunity so that it appears on the recently viewed records menu. We will return to this later.



## Configure Security

Open the Security Configuration list page again and select the Opportunity Record

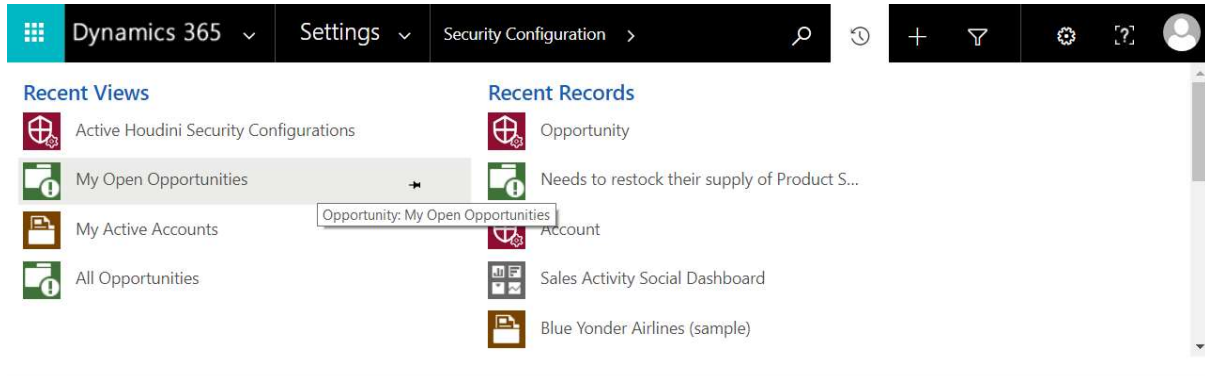With the record open select the "*On Parent / Connected Record*" option from the filter field in Filter Settings.



On selecting that option a mandatory lookup field *Connected Record Type* will appear. Select the Account option and save the record.
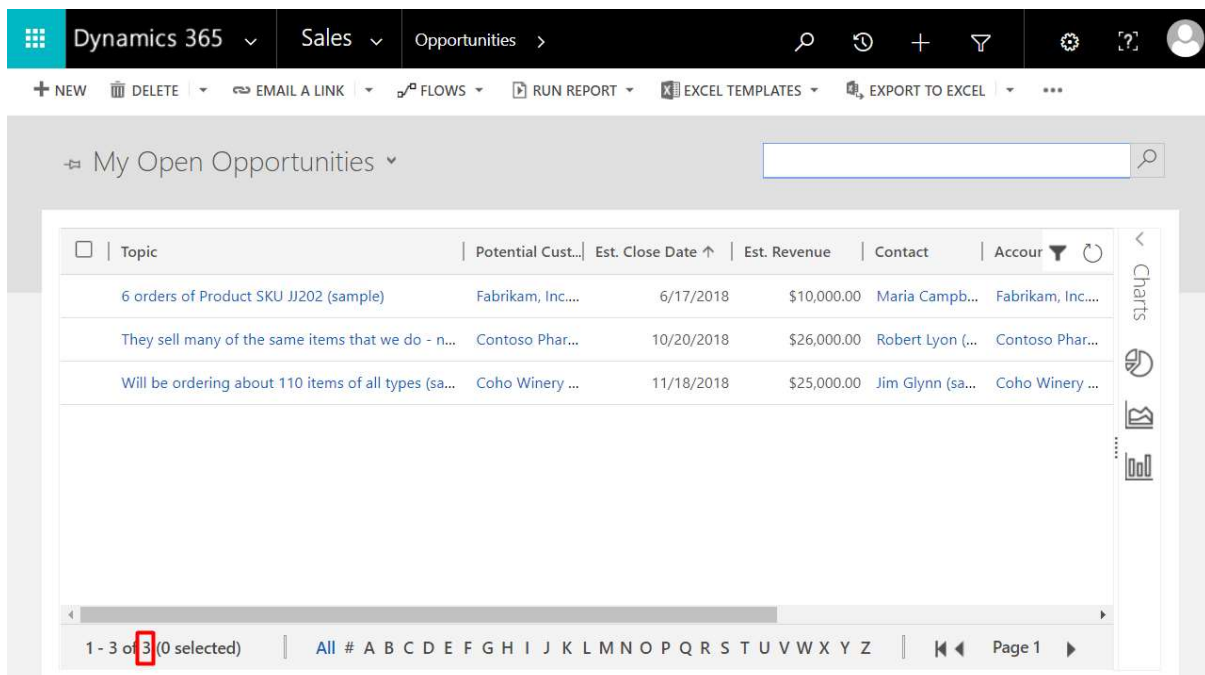
## Test Parent / Connected Record Security

With configuration complete let's test the results. Navigate back to "My Open Opportunities" via the Recently viewed records option
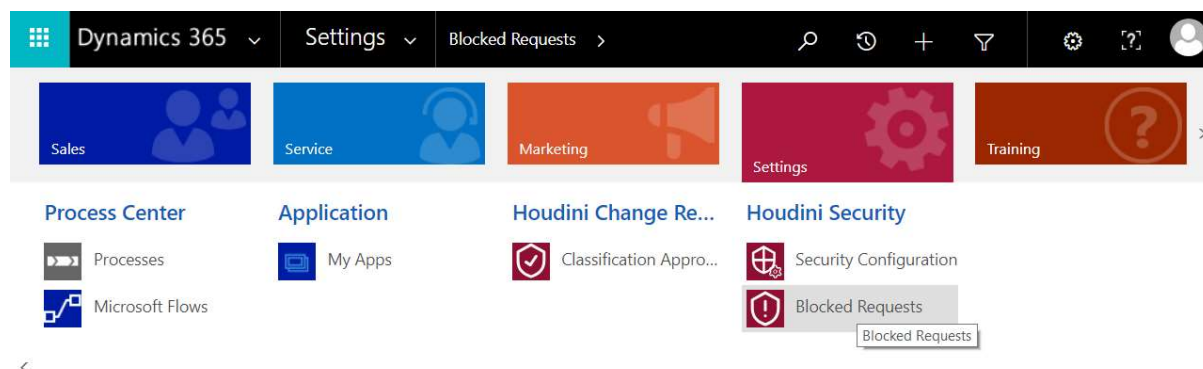


This will open up the "My Open Opportunities" list page with a list of 3 results. The two opportunities that belong to the Accounts we do not have permission to see are now filtered from view.
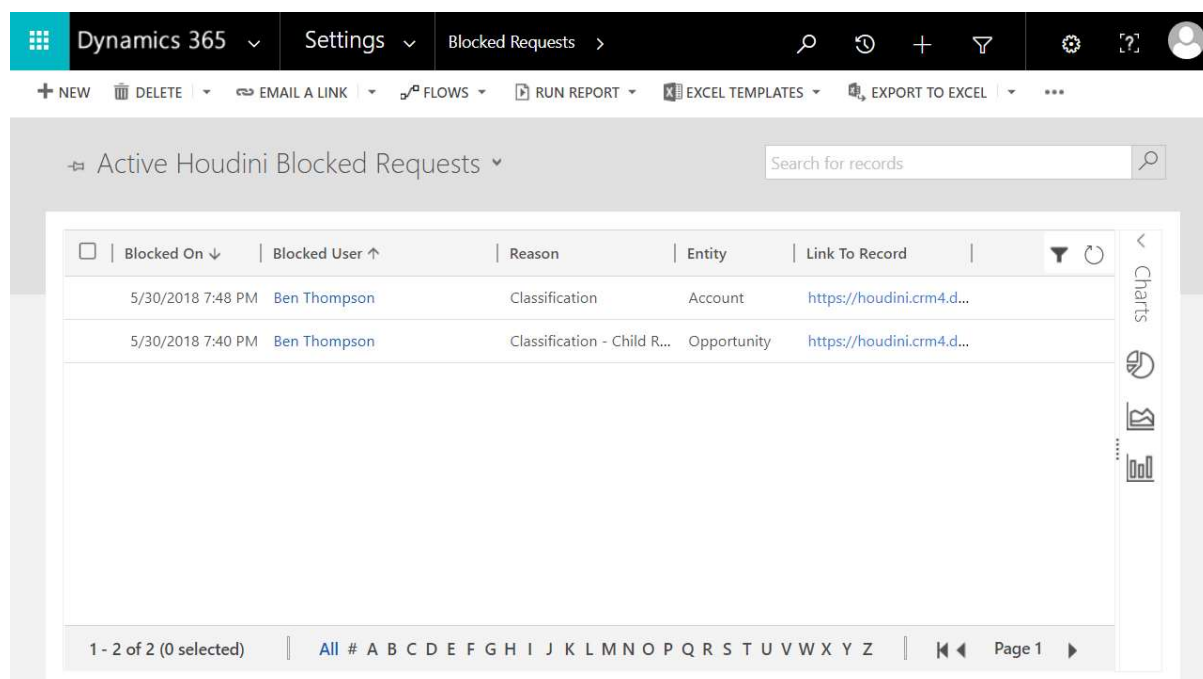


To confirm this, open the Recently viewed items menu again and try to open the "*Needs to restock their supply of ….*" Opportunity and you will see another Business Process Error message screen. Clicking OK will once again return you to the last page you accessed, the "*My Open Opportunities*" list.

# Blocked Records

When a request to view a record is blocked, the system captures the request and logs it as a Blocked Request. You can view these blocked requests in Blocked Requests within Settings



Opening the record will show 2 blocked requests records reflecting the attempts made to view the "Blue Yonder" Account record and the "*Needs to restock their supply of ….*" Opportunity record after the records had been classified.

## Authorising a User to view a category / classification record

From the Blocked Request list page, we can directly access the blocked user's user account records. To save a step click on the user account record link in the Blocked User column and open your user account record.



Scroll down to the Record Classification section, select Germany in the Classification 1 field and save the record.
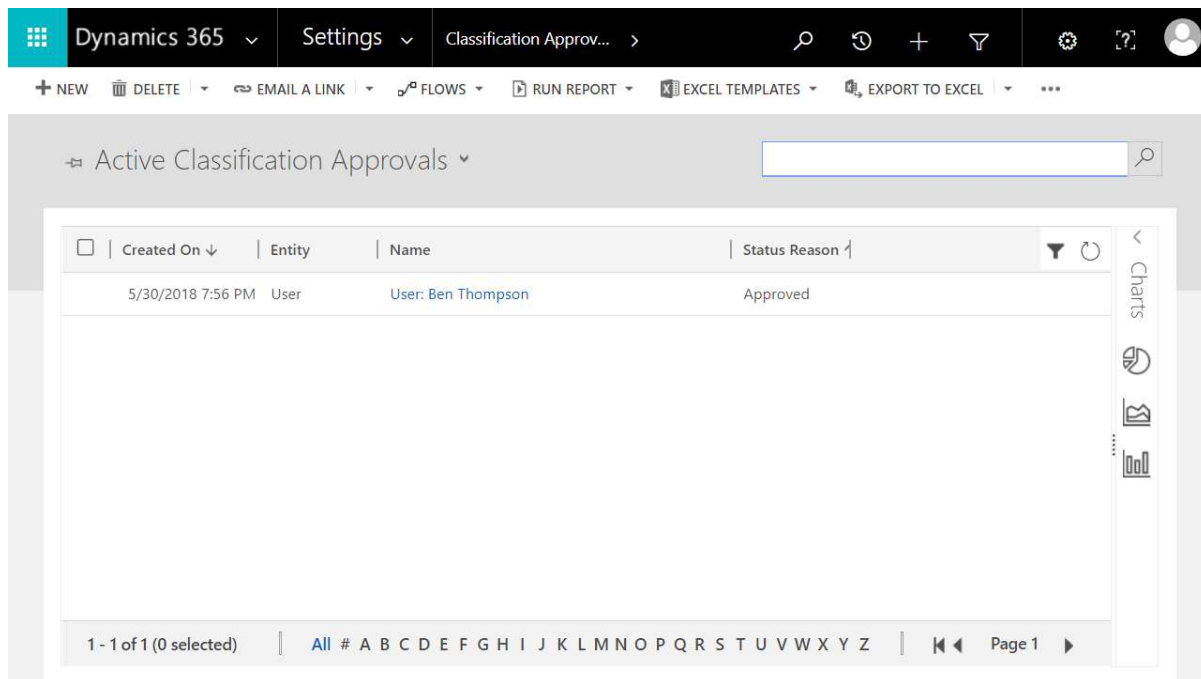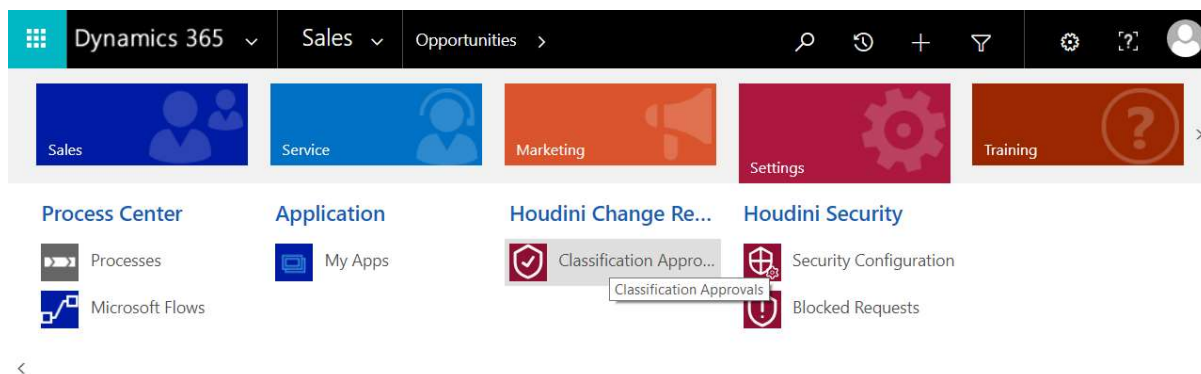


When the record is saved and the page reloaded the classification 1 field will not be immediately populated. This is because changes are sent to a separate *Classification Approval* process for approval.

Only after the change approval process has been completed will the changes be applied to the user record.

> NOTE:
>
> OUT OF THE BOX THE CLASSIFICATION APPROVAL PROCESS IS AUTOMATIC. TWO WORKFLOWS ASYNCHRONOUSLY APPROVE THE REQUEST RESULTING IN CHANGES BEING IMPLEMENTED WITHIN A MINUTE OF THE CHANGE BEING MADE. THESE WORKFLOWS ARE DESIGNED TO ENSURE ALL RECORDS ARE APPROVED WHILST PROVIDING A BUILDING BLOCK DEVELOPERS CAN START ON.

*Classification Approval* Requests can be found in the Change Request section of the Settings Menu.





From here you can either wait for the automated approval process record to complete or open the record and "Approve" the request.

Once the record is approved let's confirm it works.

## Final Checks

### User Account Record

Return to the User Account record and you will see that now the Classification Request has been approved the changes are visible on the Account Record

## Accounts
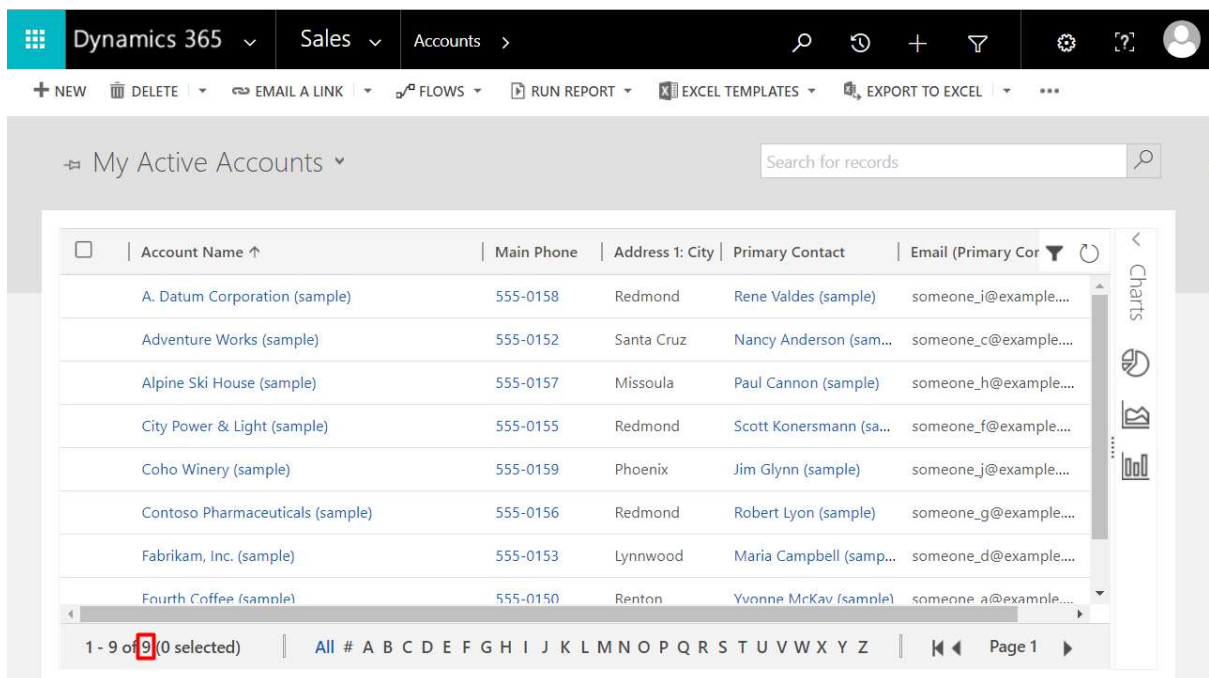
Next open the "My Active Accounts" list via the Recently viewed record menu
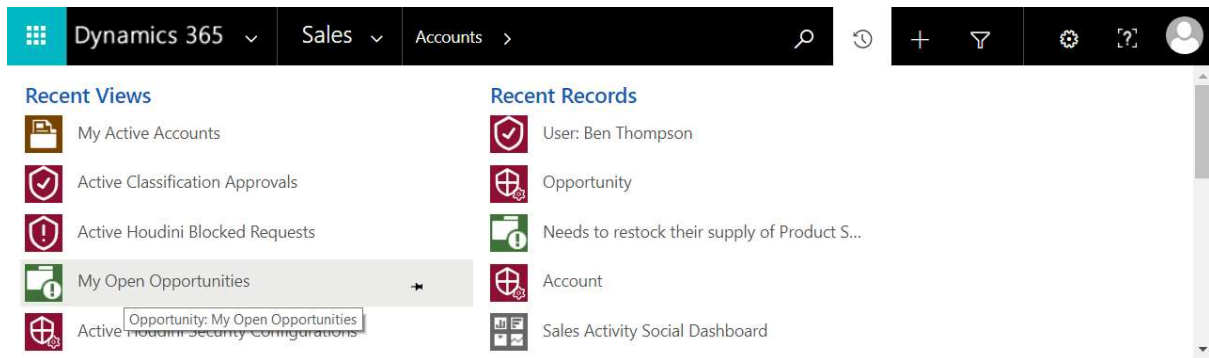


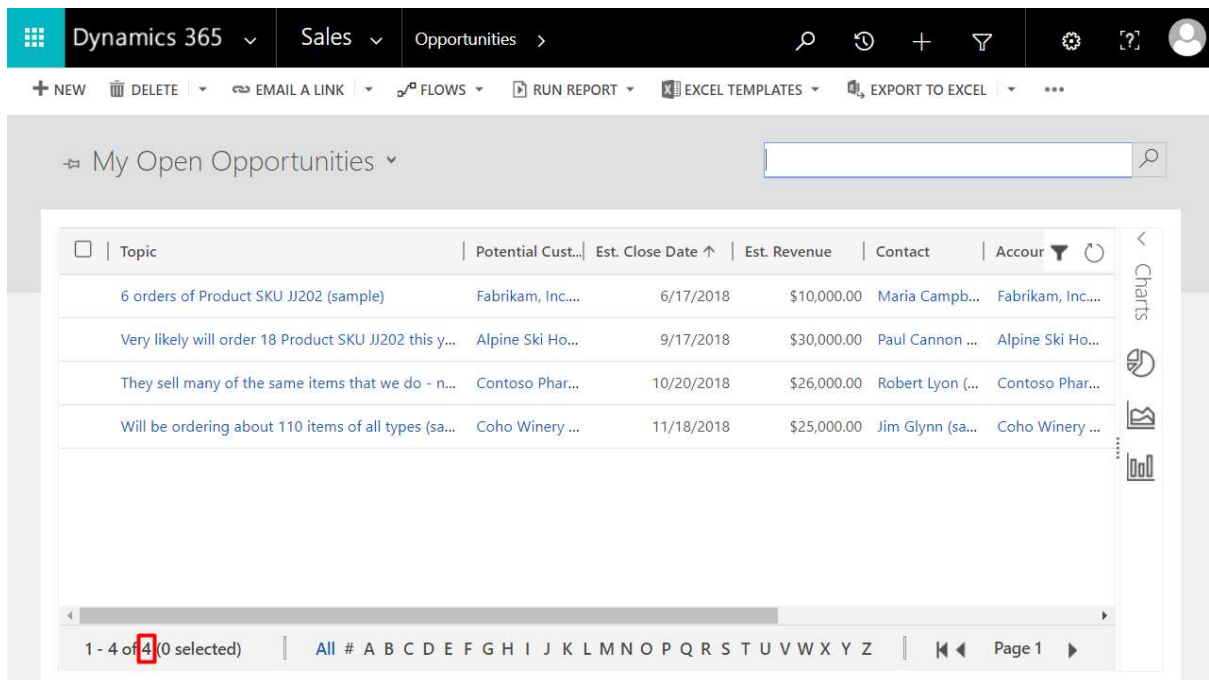And you will see that 9 accounts are now listed within the system



## Opportunities

Next let's open "My Open Opportunities" and confirm that 4 records are now visible (the 3 opportunities belonging to unclassified accounts and the opportunity belonging to the account classified as Germany.

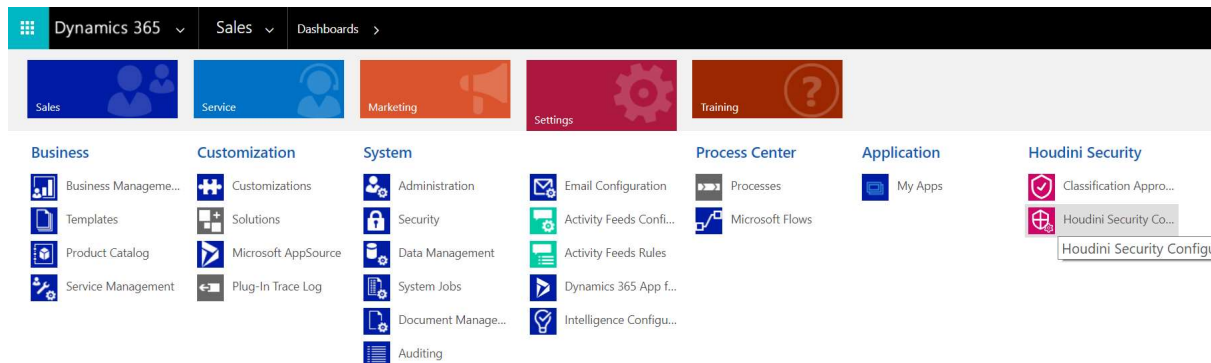And we can see that only 4 opportunities are visible.



Next Steps

For more details on the solution see the User Guide.

For details on how to Configure the system including adding restrictions, customising the classification categories the classification approval process and how external systems can change records in real time see  the Administration Guide.
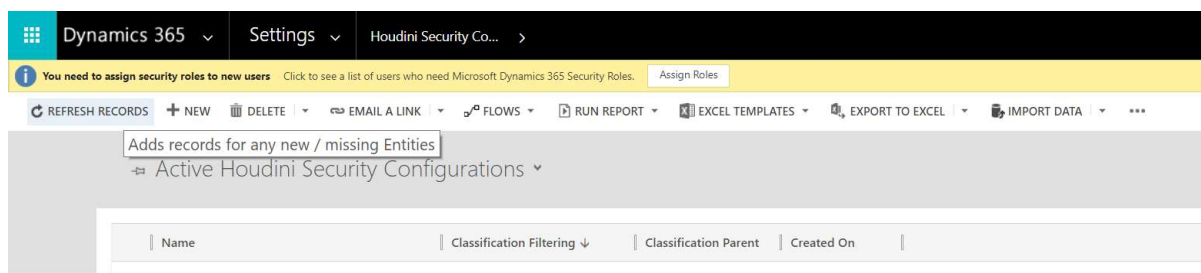
# Appendix A - Populate Houdini Security Configuration records

To configure the system, navigate to the Houdini Security Classification Records



On the empty grid click the Refresh Records button – this will trigger a workflow to update all the records



After a minute or 2 refresh the grid as the system will have created security configuration records for the appropriate entities within your solution