



Houdini Security - Record Classification

QUICK START GUIDE



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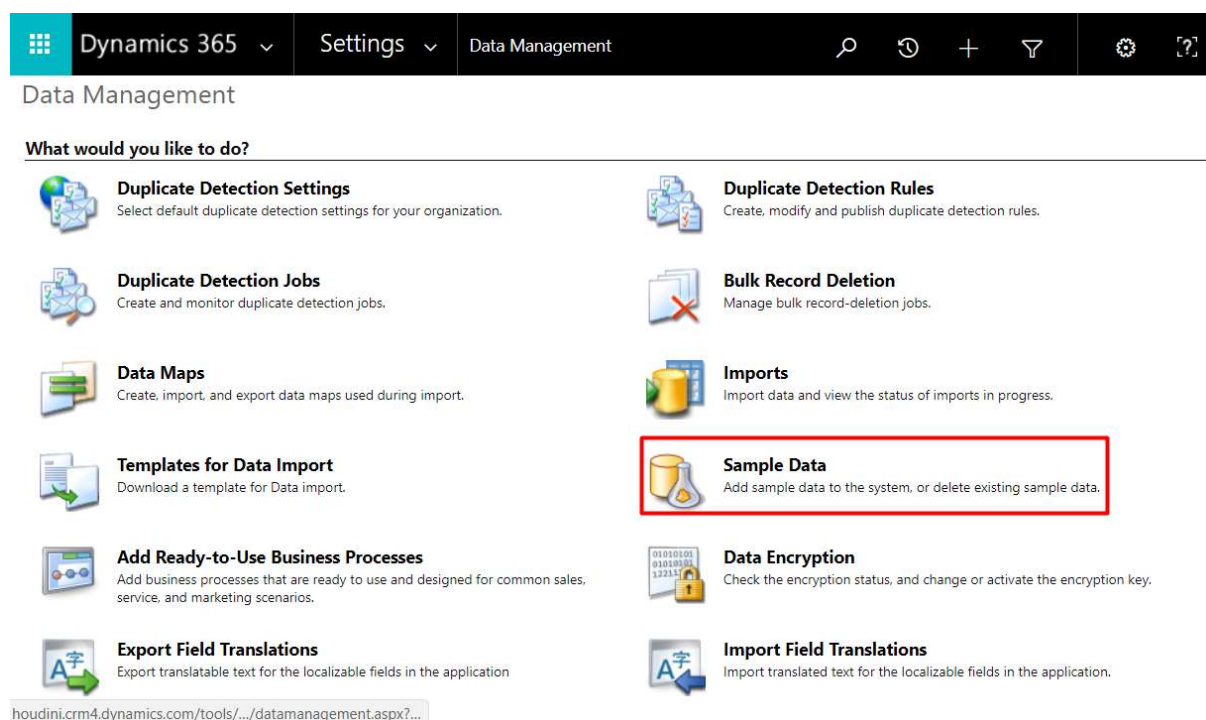
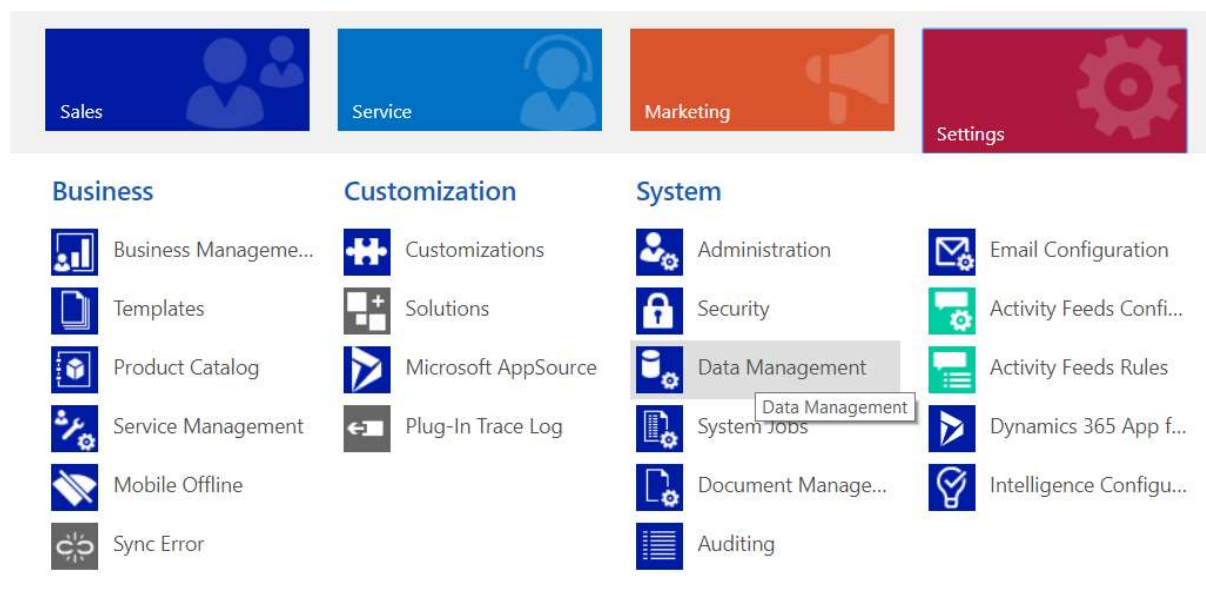


Quick Start Guide

Introduction

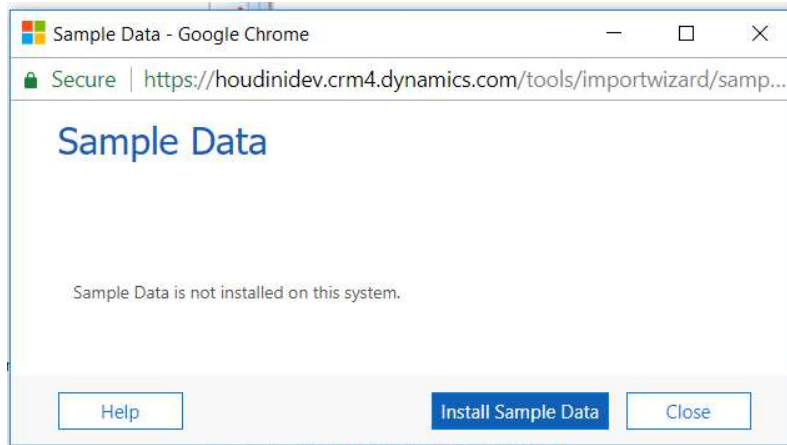
This document provides a quick 5 minute start up guide to Houdini's Record Classification solution to show you how the solution works and to confirm it has been installed correctly.

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





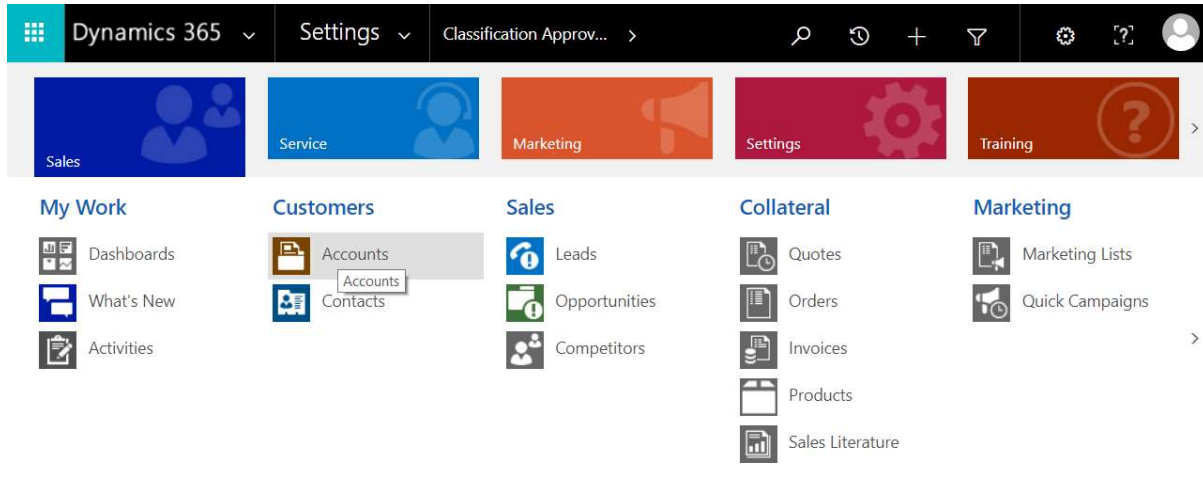
If the data has not already been installed you will see the following



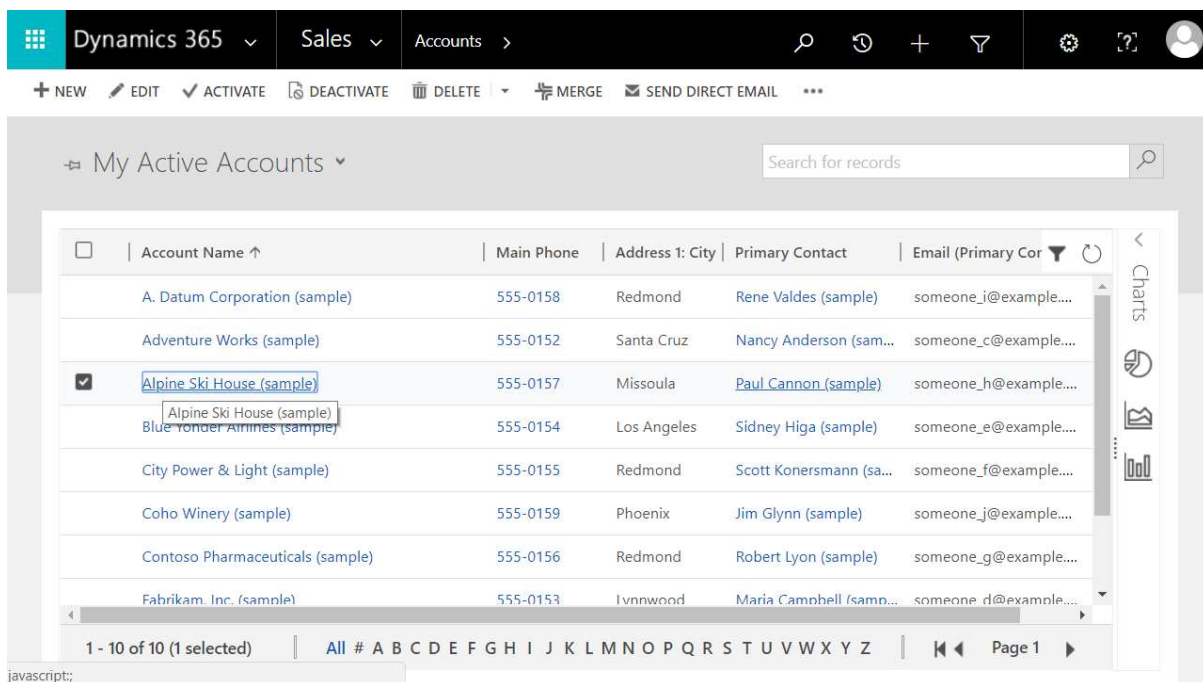


Classifying Records

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.

The screenshot shows the Dynamics 365 interface for an Account record titled "Alpine Ski House (sample)". The record is active and owned by Ben Thompson. The Record Classification section is expanded, showing a dropdown menu for Classification 1. The dropdown is open, and "Germany" is selected. The record is currently unsaved.

Topic	Est. Revenue
Very likely will order ...	\$30,000

The screenshot shows the Dynamics 365 interface for an Account record titled "Alpine Ski House (sample)". The record is active and owned by Ben Thompson. The Record Classification section is expanded, showing a dropdown menu for Classification 1. The dropdown is open, and "Germany" is selected. The record is currently unsaved.

Topic	Est. Revenue
Very likely will order ...	\$30,000

Finally save the record.

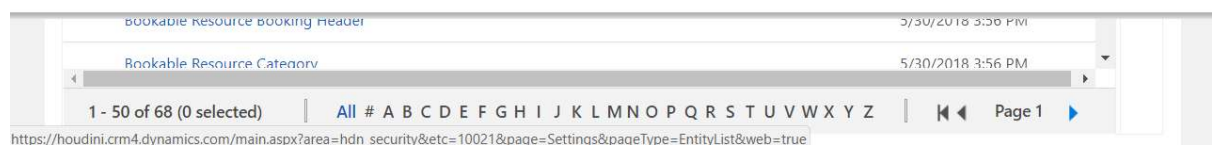
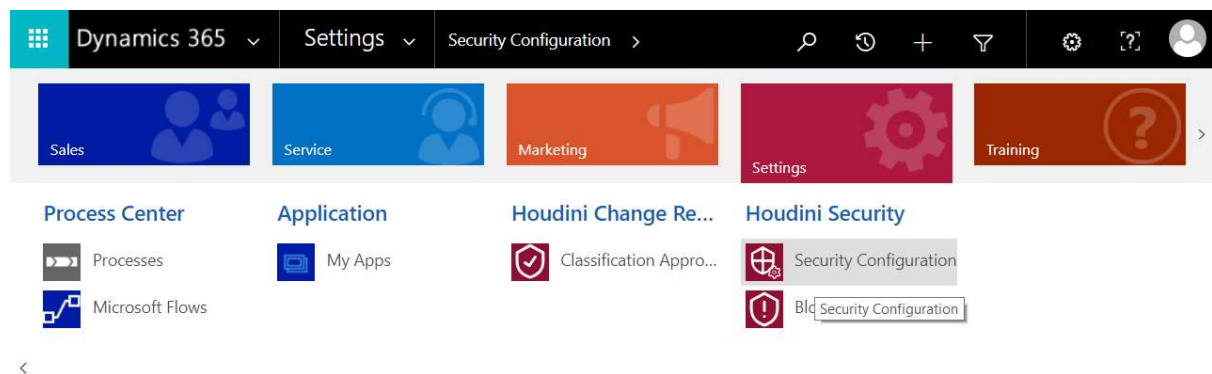
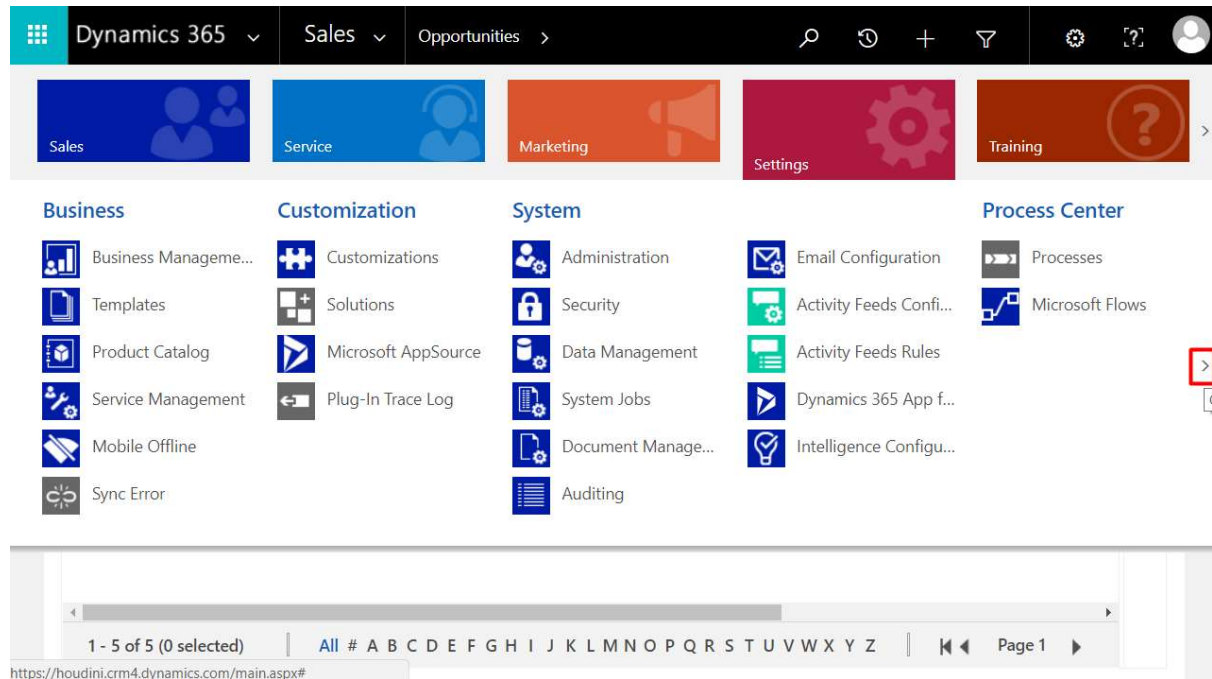
Next, navigate back to the list of Accounts, select Blue Yonder Airlines (Sample) and choose France within the Classification 1 field. Save the record.



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*.

The screenshot shows the Dynamics 365 interface with the 'Security Configuration' tab selected. The main area displays a table titled 'Active Houdini Security Configurations'. The table has columns for 'Name', 'Classification Filtering', 'Classification Parent', and 'Created On'. The 'Name' column is sorted ascending. The table lists several records, including 'Account', 'Address', 'Appointment', 'Article', 'Bookable Resource', 'Bookable Resource Booking', 'Bookable Resource Booking Header', and 'Bookable Resource Category'. The 'Created On' column shows the date '5/30/2018 3:56 PM' for all records. A search bar is located at the top right of the table. The bottom of the table shows '1 - 50 of 68 (0 selected)' and a list of letters for filtering.

Name	Classification Filtering	Classification Parent	Created On
Account			5/30/2018 3:56 PM
Address			5/30/2018 3:56 PM
Appointment			5/30/2018 3:56 PM
Article			5/30/2018 3:56 PM
Bookable Resource			5/30/2018 3:56 PM
Bookable Resource Booking			5/30/2018 3:56 PM
Bookable Resource Booking Header			5/30/2018 3:56 PM
Bookable Resource Category			5/30/2018 3:56 PM

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.

The screenshot shows the Dynamics 365 interface with the 'Security Configuration' tab selected and the 'Account' record open. The record is titled 'HOUDINI SECURITY CONFIGURATION : INFORMATION' and 'Account'. The 'Filter Settings' section is expanded, showing a 'Filter' dropdown menu set to 'On this Record'. Below this, there is a section titled 'Require all changes to record classifications to be approved and audited' with a checkbox labeled 'Approve Changes (Classification)' set to 'No'. The record status is 'Active' at the bottom.

HOUDINI SECURITY CONFIGURATION : INFORMATION

Account

Houdini Record Classification

Filter Settings

Filter: On this Record

Require all changes to record classifications to be approved and audited

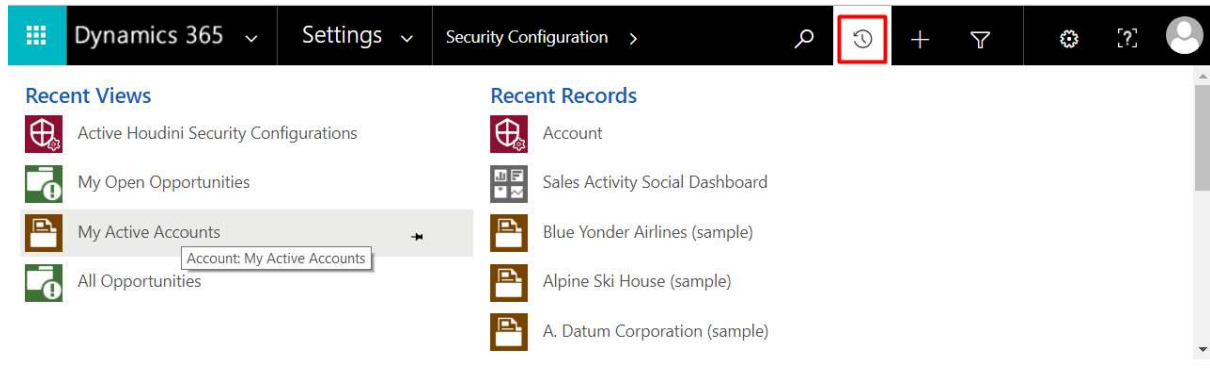
Approve Changes (Classification): No

Active

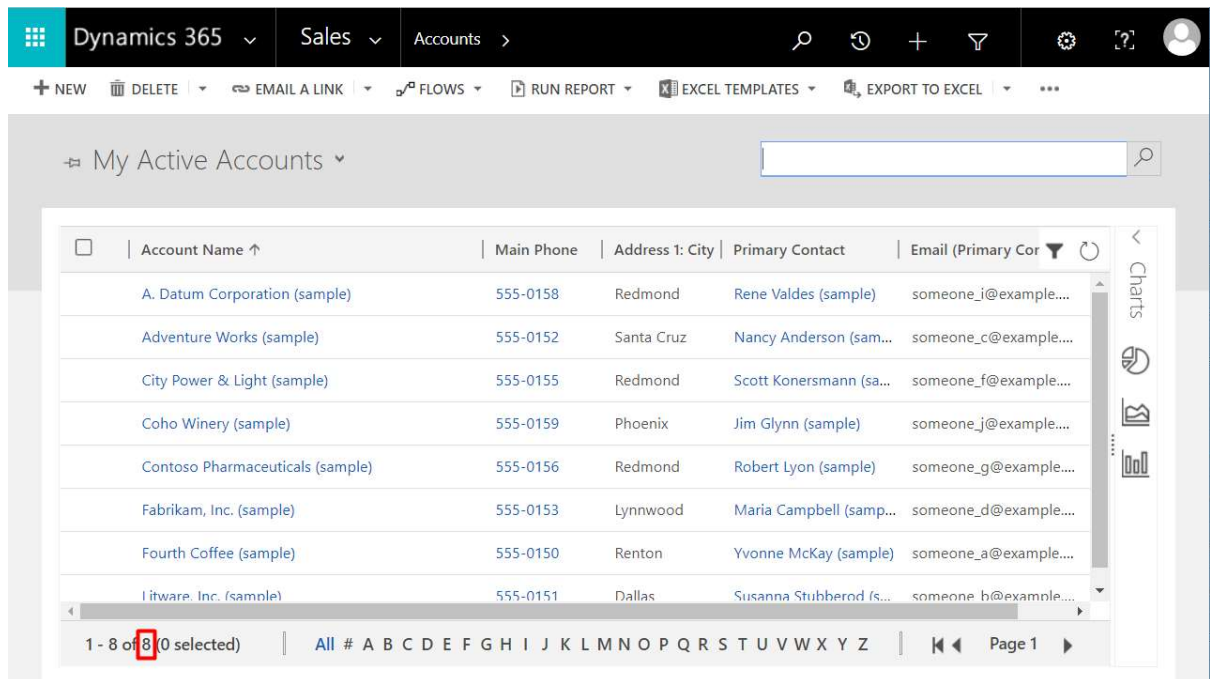


Test the Classifications

Open the recently viewed records menu

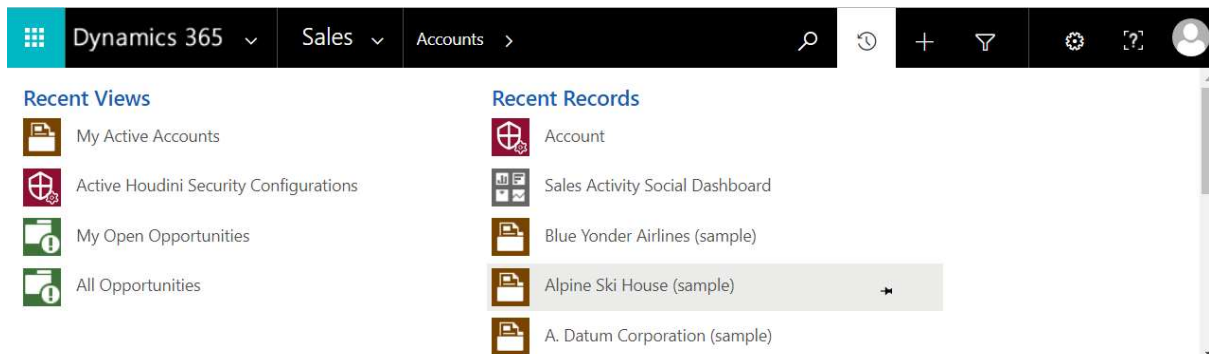


And select *My Active Accounts*. This will once again open up the list of Active Accounts we saw before but it will now show only 8 records. The two classified records (*Blue Yonder Airlines* and *Alpine Ski House*) are filtered from the results.

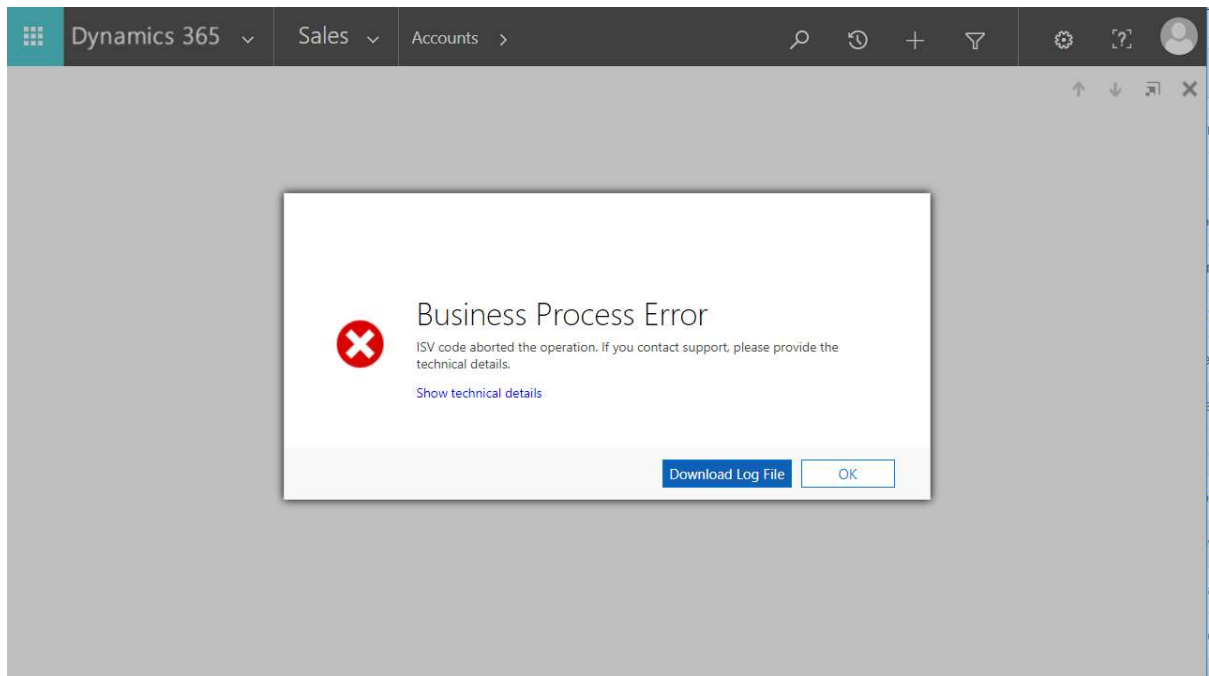




Next open the recently viewed Records menu and try to open the *Alpine Ski House (Sample)* record.



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.

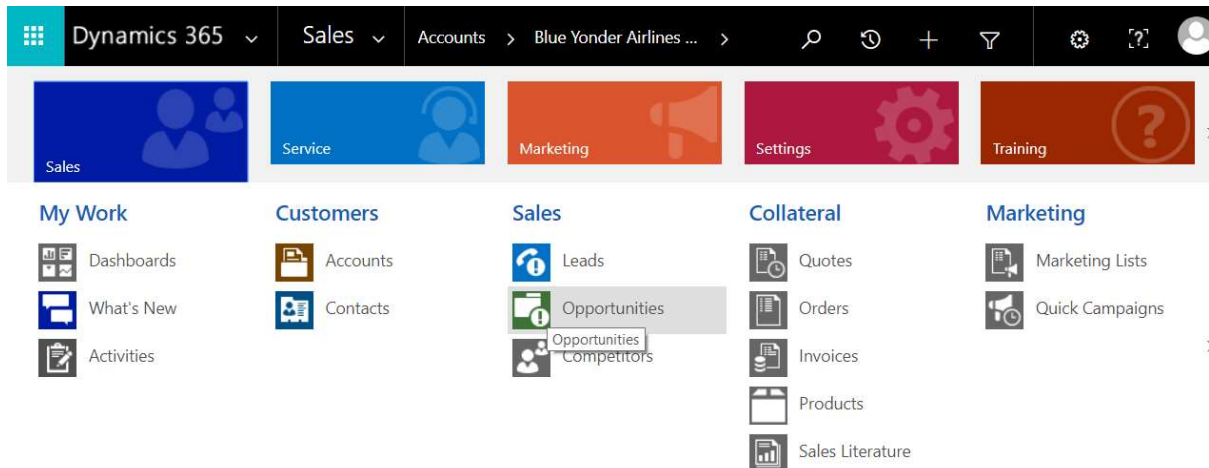




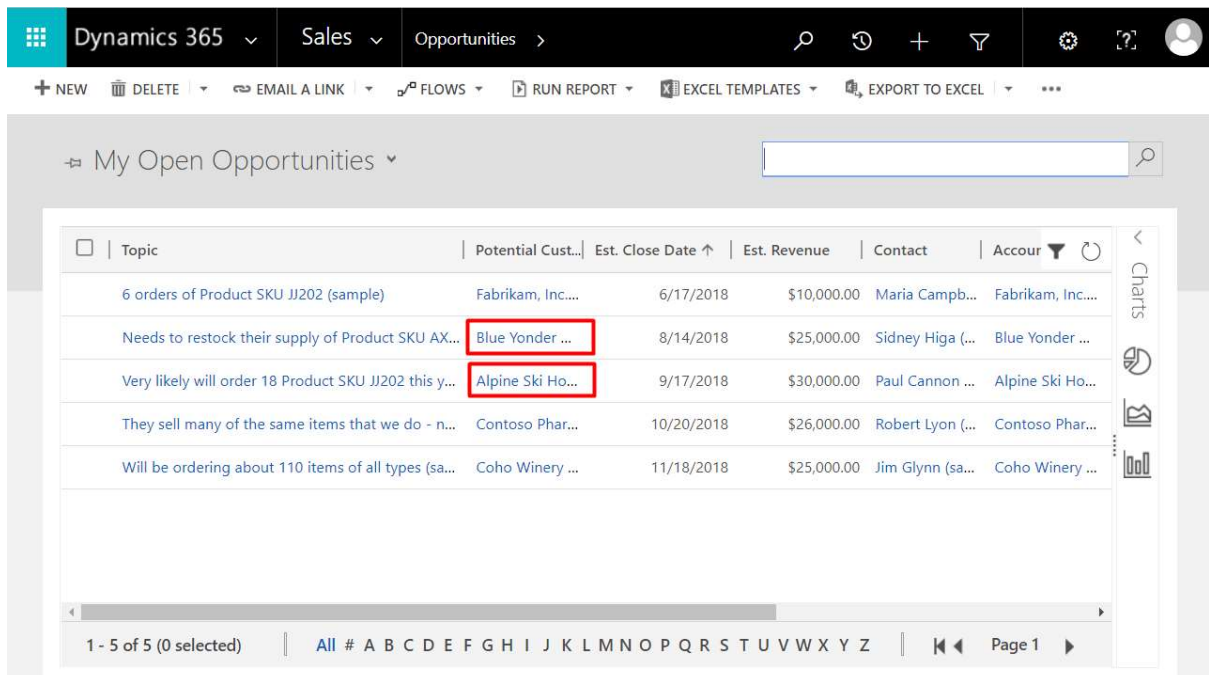
Filtering on a Parent Record

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.

The screenshot shows the Dynamics 365 interface for an Opportunity record. The top navigation bar includes 'Dynamics 365', 'Sales', 'Opportunities', and the record name 'Needs to restock the...'. Below the navigation bar, there are tabs for 'NEW', 'CLOSE AS WON', 'CLOSE AS LOST', 'RECALCULATE OPPORTU...', 'FORM', 'PROCESS', 'ASSIGN', and more. The main content area displays the Opportunity details: 'Needs to restock their supply of Product S...', 'Est. Close Date: 8/14/2018', 'Est. Revenue: \$25,000.00', 'Status: In Progress', and 'Owner: Ben Thompson'. A progress bar shows the stages: 'Qualify' (completed), 'Develop (Active for 14 da...)' (current stage), 'Propose', and 'Close'. Below the progress bar, there are sections for 'Customer Need', 'Proposed Solution', and 'Identify Stakeholders'. The 'Summary' tab is selected, showing a 'Topic' section with the text 'Needs to restock their supply of Product S...' and a 'Contact' section with the text 'Open'.

Configure Security

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

The screenshot shows the Dynamics 365 Security Configuration list page. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Security Configuration'. Below the navigation bar, there are tabs for 'REFRESH RECORDS', 'NEW', 'EDIT', 'ACTIVATE', 'DEACTIVATE', 'DELETE', 'ASSIGN', 'SHARE', 'EMAIL A LINK', and more. The main content area displays the 'Active Houdini Security Configurations' list. The list has columns for 'Name', 'Classification Filtering', 'Classification Parent', and 'Created On'. The 'Opportunity' record is selected, and its details are shown in a pop-up window. The pop-up window shows the 'Opportunity' record with a 'Classification Parent' of 'Opportunity' and a 'Created On' date of '5/30/2018 3:56 PM'. The 'Opportunity' record is highlighted in blue. The bottom of the pop-up window shows '1 - 50 of 68 (1 selected)' and a list of letters 'A B C D E F G H I J K L M N O P Q R S T U V W X Y Z'.



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

The screenshot shows the Dynamics 365 interface for configuring record classification for an Opportunity record. The top navigation bar includes 'Dynamics 365', 'Settings', 'Security Configuration', and 'Opportunity'. Below the navigation bar, the page title is 'HOUDINI SECURITY CONFIGURATION : INFORMATION' and the record name is 'Opportunity'. The main section is titled 'Houdini Record Classification'. Under 'Filter Settings', the 'Filter' dropdown is open, showing two options: 'On this Record' and 'On Parent / Connected Record', with the latter selected. Below the dropdown, there is a checkbox for 'Require all changes to record classifications to be approved and audited' which is checked. Under 'Approve Changes (Classification)', the value is set to 'No'. At the bottom, the status is 'Active'.

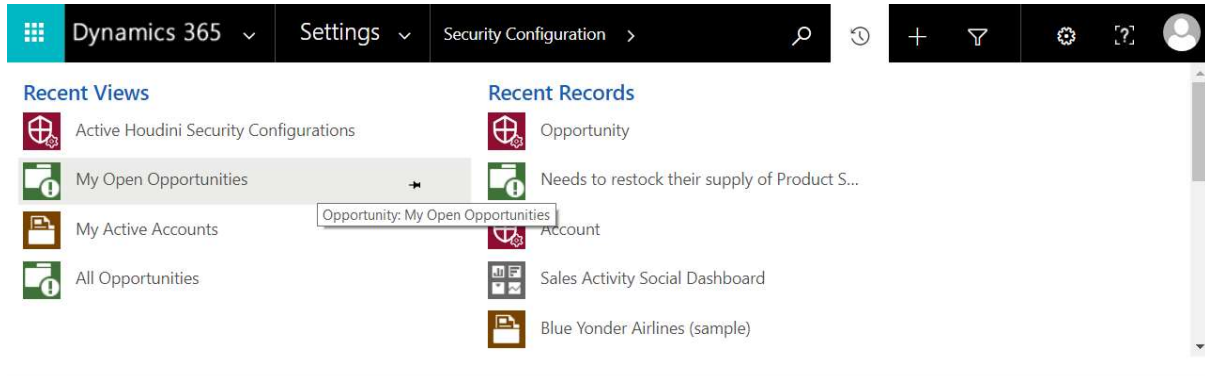
On selecting that option a mandatory lookup field *Connected Record Type* will appear. Select the Account option and save the record.

The screenshot shows the Dynamics 365 interface after selecting 'On Parent / Connected Record' from the filter dropdown. The 'Filter' dropdown now shows 'On Parent / Connected Record'. A new mandatory lookup field, 'Connected Record Type', has appeared. The dropdown for this field is open, showing 'Account' as the selected option. Below the dropdown, there is a checkbox for 'Field of connected record' which is checked. Below the checkbox, there is a link 'Look Up More Records'. Below the link, there is a message '1 result' and a '+ New' button. Below the message, there is a checkbox for 'Require all changes to record classifications to be approved and audited' which is checked. Under 'Approve Changes (Classification)', the value is set to 'No'. At the bottom, the status is 'Active'. A message at the bottom right of the page states 'You must provide a value for Connected Record Type.'.

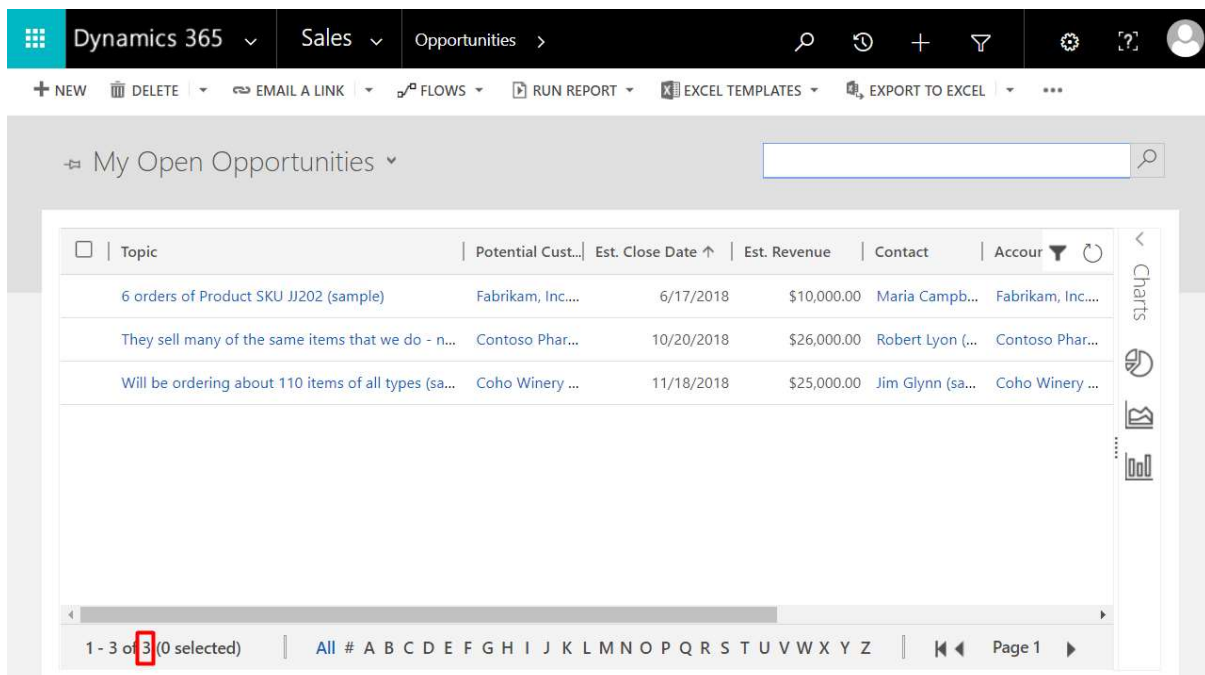


Test Parent / Connected Record Security

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



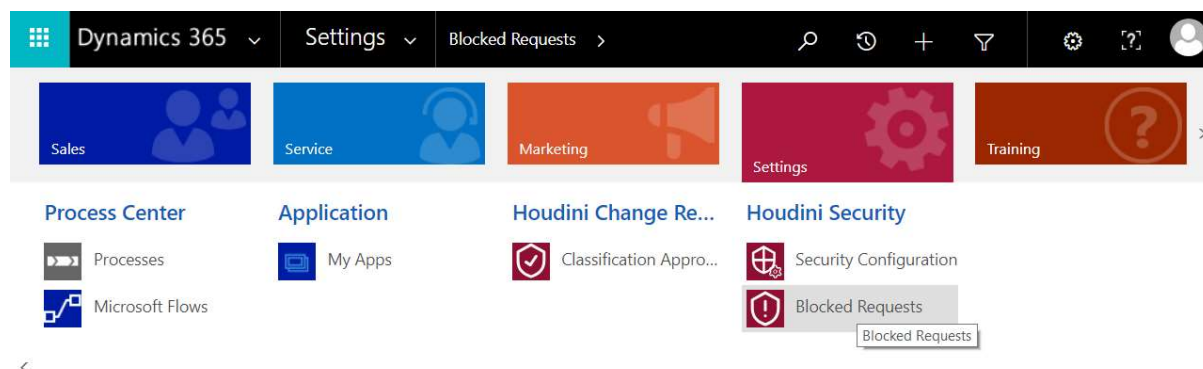
This will open up the “My Open Opportunities” list page with a list of 3 results. The two opportunities that belong to the Accounts we do not have permission to see are now filtered from view.



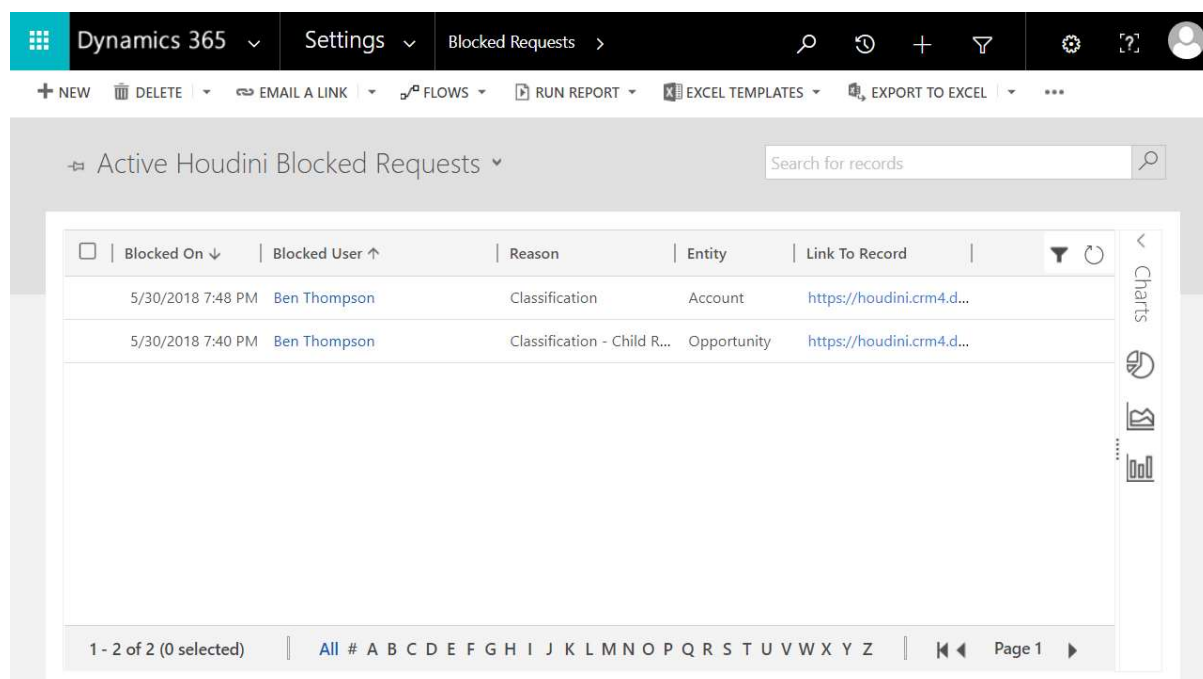
To confirm this, open the Recently viewed items menu again and try to open the “Needs to restock their supply of” Opportunity and you will see another Business Process Error message screen. Clicking OK will once again return you to the last page you accessed, the “My Open Opportunities” list.

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.

The screenshot shows the Dynamics 365 user record page for Ben Thompson. The page has a top navigation bar with 'Dynamics 365', 'Settings', and 'Blocked Requests > Ben Thompson'. Below the navigation bar is a toolbar with buttons: CONNECT, PROCESS, APPROVE EMAIL, REJECT EMAIL, DEV ERRORS ON, and REASSIGN RECORDS. The main content area shows the user's profile with a 'USER' dropdown and 'Ben Thompson' name. A yellow banner contains two messages: 'The information provided in this form is viewable by the entire organization.' and 'This user's information is managed by Office 365. To edit this information visit the User Administration section of the Office 365 Portal.' The form is divided into several sections: 'Primary Email', 'Mobile Phone', 'Main Phone', 'Record Classification', 'Shipping time information (sample)', 'Shipment question (sample)', and 'Organization Information'. The 'Record Classification' section is highlighted with a yellow background and contains a note: 'Note: Changes made here will appear after they have been approved.' The 'Organization Information' section includes fields for Territory, Site, Business Unit (set to 'houdini'), and Manager. The 'Status' field is set to 'Enabled'.

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

This screenshot shows the same Dynamics 365 user record page for Ben Thompson, but with the 'Record Classification' section expanded. A dropdown menu is open for 'Classification 1', showing a list of countries: 'Sel... 4 l...', 'France', 'Germany' (which is selected with a checkmark), 'United Ki...', and 'Ireland'. Below the dropdown is an 'Enter text here' field. The 'Status' field remains 'Enabled'. The 'Organization Information' section is also visible, showing 'Territory', 'Site', 'Business Unit' (set to 'houdini'), and 'Manager'.

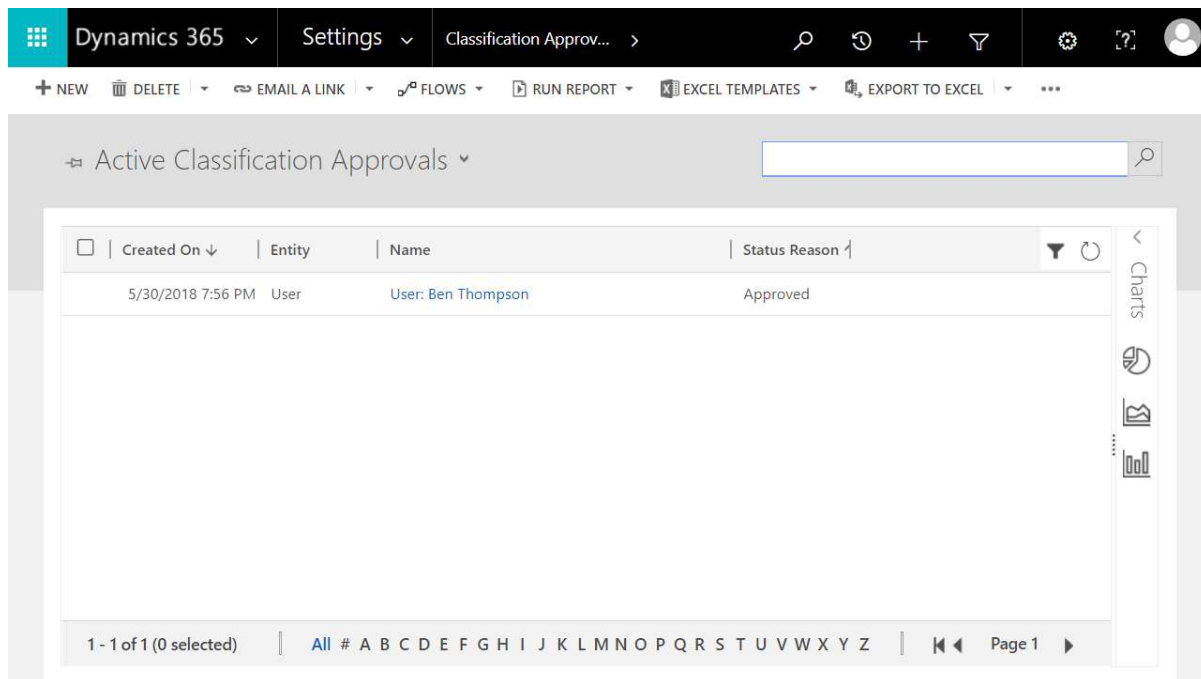
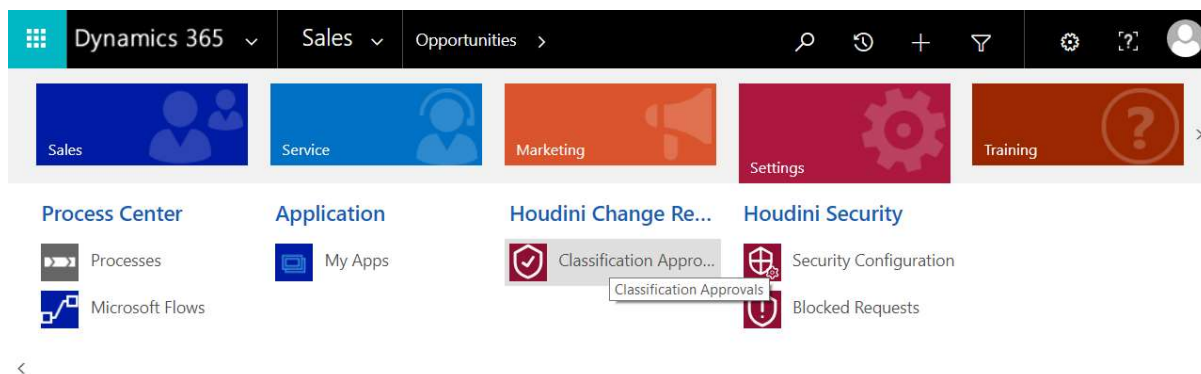
When the record is saved and the page reloaded the classification 1 field will not be immediately populated. This is because changes are sent to a separate *Classification Approval* process for approval.

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.



Dynamics 365 Settings Classification Approv... User: Ben Thompson

+ NEW DEACTIVATE DELETE APPROVE CHANGE REJECT CHANGE PROCESS ASSIGN SHARE ...

HOUDINI CLASSIFICATION APPROVAL : INFORMATION

User: Ben Thompson

Entity: User Requested By: Ben Thompson Status Reason: Pending Approval 2

Approve Change
Approve this Change in Classification / Access

Requested Change

Entity	Previous Classification	Requested Classifications
Entity: User	Classification 1	Classification 1: Germany
System User: Ben Thompson	Classification 2	Classification 2
Created On: 5/30/2018 7:56 PM	Classification 3	Classification 3

Approval History

Active

Dynamics 365 Settings Classification Approv... User: Ben Thompson

+ NEW DEACTIVATE DELETE APPROVE CHANGE REJECT CHANGE PROCESS ASSIGN SHARE ...

HOUDINI CLASSIFICATION APPROVAL : INFORMATION

User: Ben Thompson

Entity: User Requested By: Ben Thompson Status Reason: Pending Approval 2

Approve Change
Houdini Classification Approval

Are you sure you want to APPROVE this change?

OK Cancel

Requested Change

Entity	Previous Classification	Requested Classifications
Entity: User	Classification 1	Classification 1: Germany
System User: Ben Thompson	Classification 2	Classification 2
Created On: 5/30/2018 7:56 PM	Classification 3	Classification 3

Approval History

Active



Dynamics 365 Settings Classification Approv... > User: Ben Thompson >

Navigate to other applications

+ NEW DEACTIVATE DELETE PROCESS ASSIGN SHARE EMAIL A LINK RUN WORKFLOW

HOUDINI CLASSIFICATION APPROVAL : INFORMATION

User: Ben Thompson

Entity User	Requested By Ben Thompson	Status Reason Approved
----------------	------------------------------	---------------------------

Requested Change

Entity	Previous Classification	Requested Classifications
Entity User	Classification 1	Classification 1 Germany
System User Ben Thompson	Classification 2	Classification 2
Created On 5/30/2018 7:56 PM	Classification 3	Classification 3

Approval History

javascript;

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

Reload this page Dynamics 365 Settings Classification Approv... > Ben Thompson >

CONNECT PROCESS APPROVE EMAIL REJECT EMAIL DEV ERRORS ON REASSIGN RECORDS

USER Ben Thompson

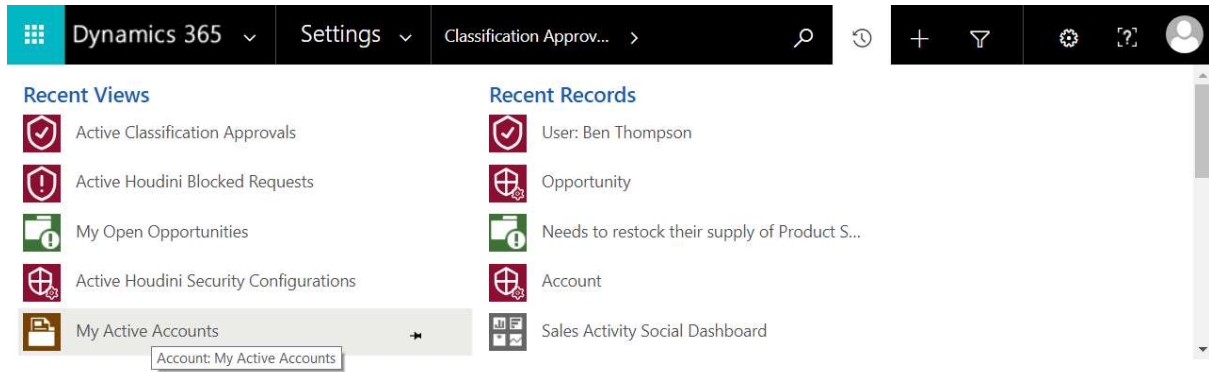
The information provided in this form is viewable by the entire organization.
This user's information is managed by Office 365. To edit this information visit the User Administration section of the Office 365 Portal.

Main Phone	Ontoso Pharmaceuticals (sample), On Shipping time information (sample)'s wall 16/05/2018 08:50:47	Territory
Record Classification	Shipment question (sample) Case: Created by Ben Thompson for Account Coho Winery (sample). On Shipment question (sample)'s wall 16/05/2018 08:50:47	Site
Note: Changes made here will appear after they have been approved.		Business Unit houdini
Classification 1 Germany		Manager
Classification 2		Position
Classification 3		
Status Enabled		Queue Information

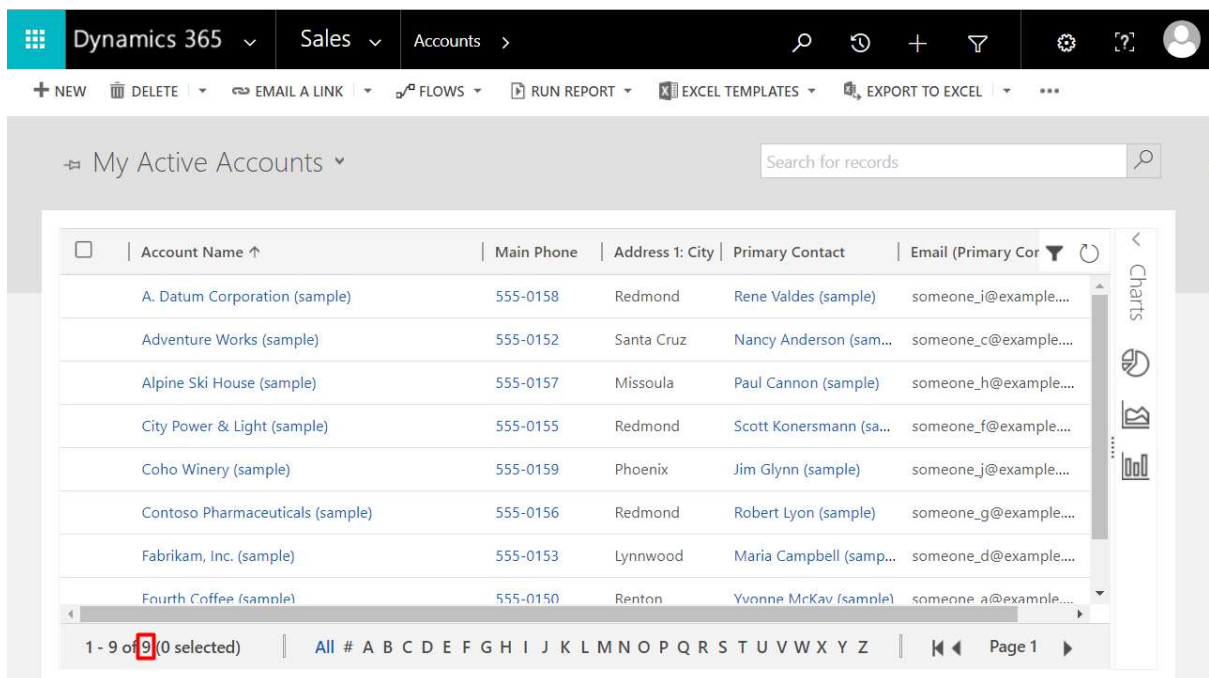


Accounts

Next open the “My Active Accounts” list via the Recently viewed record menu

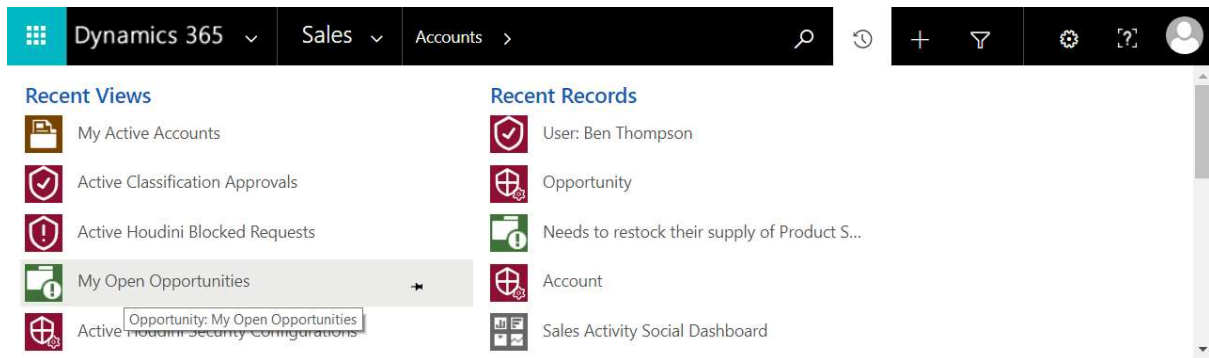


And you will see that 9 accounts are now listed within the system

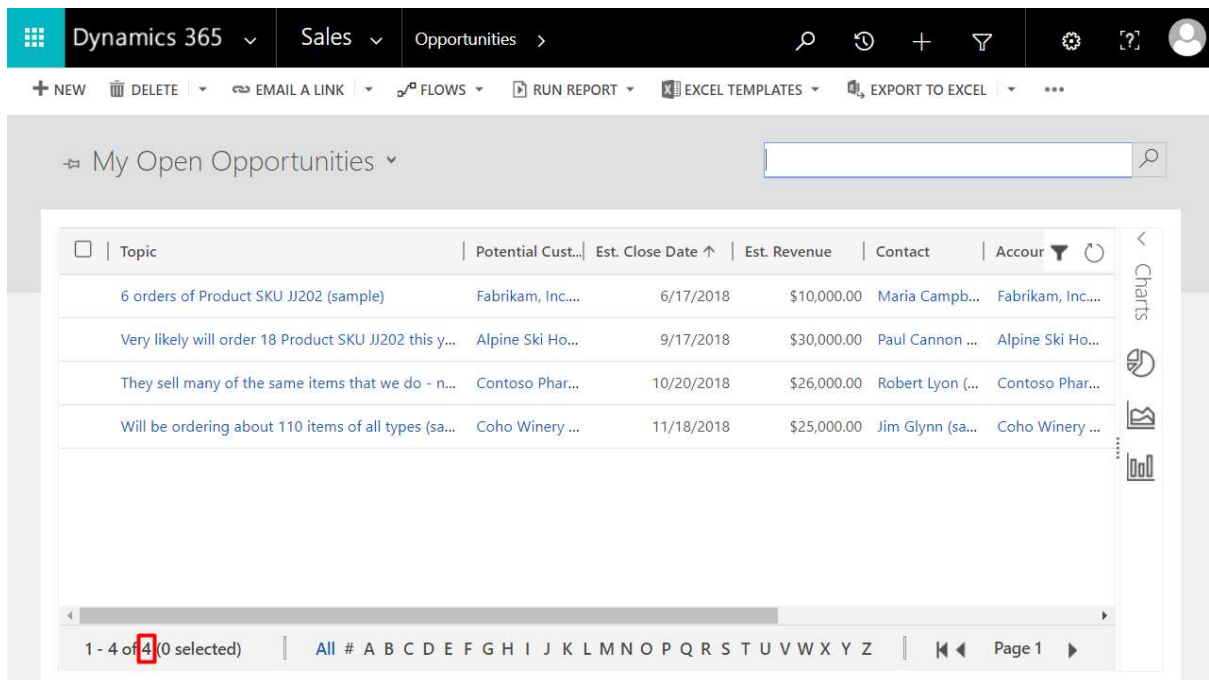


Opportunities

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

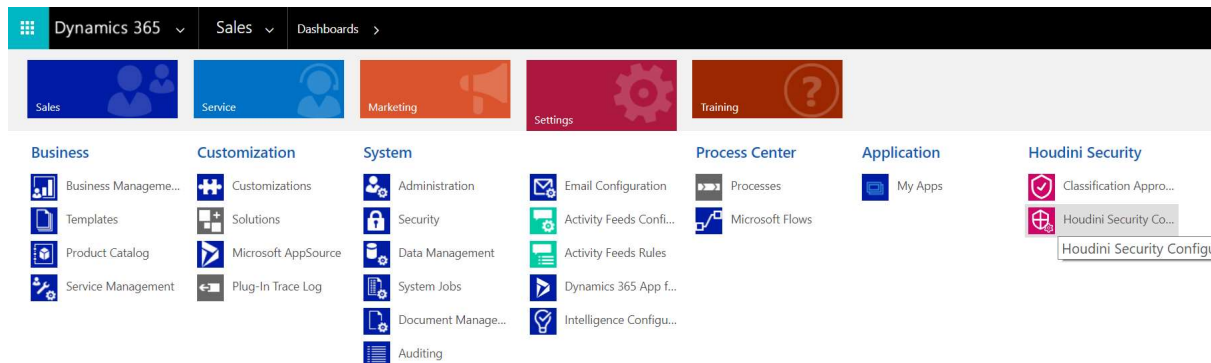
For more details on the solution see the User Guide.

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.

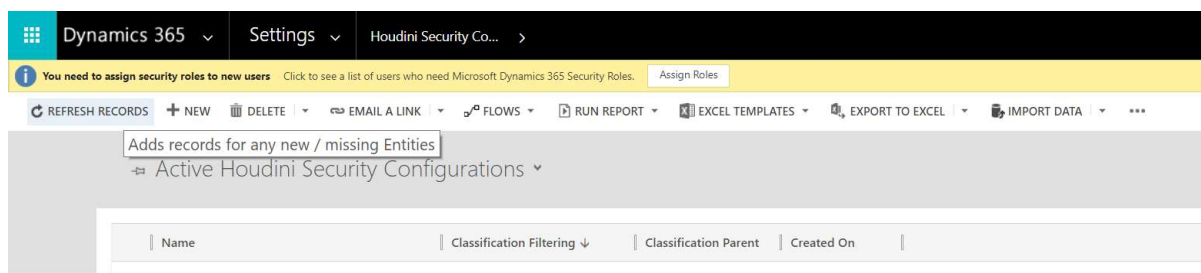


Appendix A - Populate Houdini Security Configuration records

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



Dynamics 365

Settings

Houdini Security Co...>

You need to assign security roles to new users

Click to see a list of users who need Microsoft Dynamics 365 Security Roles.

Assign Roles

REFRESH RECORDS

+ NEW

DELETE

EMAIL A LINK

FLows

RUN REPORT

EXCEL TEMPLATES

EXPORT TO EXCEL

Active Houdini Security Configurations

<input type="checkbox"/>	Name ↑	Classification Filtering	Classification Parent	Created On
	Account			25/04/2018 10:42
	Address			25/04/2018 10:42
	Appointment			25/04/2018 10:42
	Article			25/04/2018 10:42
	Bookable Resource			25/04/2018 10:42
	Bookable Resource Booking			25/04/2018 10:42
	Bookable Resource Booking Header			25/04/2018 10:42
	Bookable Resource Category			25/04/2018 10:42
	Bookable Resource Category Assn			25/04/2018 10:42
	Bookable Resource Characteristic			25/04/2018 10:42