

# Data Security

Add Workflows and Mandatory fields  
in Microsoft Dynamics 365 Business Central



## Data Security

### App for Microsoft Dynamics 365 Business Central

*The Data Security app allows you to protect important information into the Microsoft Dynamics 365 Business Central ERP from accidental modification.*



Do you need to improve control and accuracy with record-level validation and approval in Dynamics 365 Business Central? Are you looking for a simple way to enable only certain users to modify certain records?

### How it works

Data Security is the simplest way to add Workflows to master data or document approvals. The app helps you filtering record based on admin defined status, for instance you can easily filter customer or order not approved or in obsolete status.

Data Security allows you to:

- Block records that are not completely qualified (I.E. Customer without VAT No)
- Manage user or group policy and permit to change record status only to granted people
- Send emails when a record changes status, include context info, (very easily, without coding)
- Create different approval path for a certain entity. For example: order quick approval or detailed approvals



### Quick Guide

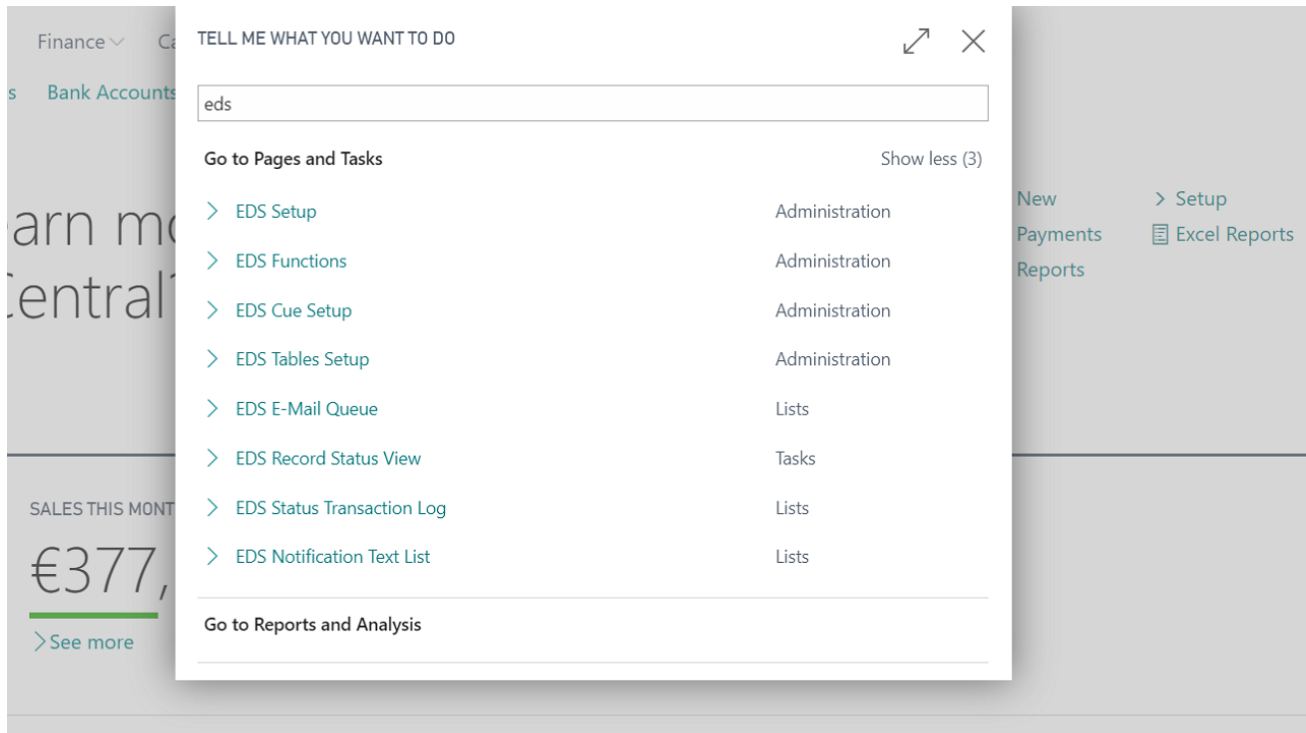
Ready to go in 3 steps

1. Go to "EDS Table Setup" and certify a Vendor record
2. In "EDS Setup" set "Skip Permission Checks" On
3. Go to Vendor List and click on the upper right "EDS Record Status" - Change Status



## Application menu list (ALT+Q)

“Data security” administrators can see all pages and setup in the “Tell me what you want to do” page (ALT+Q)



Data security end user will manage status on defined tables.

Administrator and end user are set through appropriate authorization set (included).

## Table Setup

Starting from the "EDS Table setup" page administrators can setup workflows states and paths. For instance, you can simply define that a record can pass from "NEW" to "CERTIFIED" to "OBSOLETE".

ess Central

EDS TABLES SETUP | WORK DATE: 28/01/2021

Search + New Edit List Delete Card Status Functions Status Transactions Show Attached Open in Excel More options

TABLE ID	DOCUMENT TYPE	TABLE NAME	DESCRIPTION	PATH IN STATUS CHANGE
18	0	Customer	Certified	
23	0	Vendor		
36	1	Sales Header		
36	2	Sales Header		
38	1	Purchase Header		
38	2	Purchase Header		

EDS Table Status List

CUSTOMER | WORK DATE: 28/01/2021

STATUS CODE STATUS DESCRIPTION DESCRIPTION FIR ST. LA ST. CHL DIS. DE DIS. DO RE. DS. DIS.

CLOSED	Closed									
EDIT	Edit									
NEW	New									

EDS FUNCTIONS | WORK DATE: 28/01/2021

TYPE CODE DESCRIPTION NOTIFICATION TEXT HEADER CODE

Exec	BLOCK_CUSTOMER	Block Customer	
Exec	CHECKDIM_CUSTO...	Check Customer Dimensions	
Exec	ECHKVATREG_CUST	VAT Registration check block	
Exec	UNBLOCK_CUSTOMER	Unblock Customer	
Exec	WCHKVATREG_CUST	VAT Registration check warning	

EDIT - EDS STATUS TRANSACTION LIST - CUSTOMER

FROM STATUS TO STATUS SKIP PERMISSION CHECKS

CLOSED	NEW	
EDIT	EDIT	
NEW	CLOSED	
	CLOSED	

Details

From Status Description Edit To Status Description Closed

From Description To Description

On each status change you can apply predefined functions to check business rules or define mandatory fields or fields rules.

## Define Permissions

During the setup phase (or in demo environment) you can skip all permission check for all tables.

←
✎
+
🗑
✓ SAVED
↗

### EDS Setup

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Actions

**General**

---

Delete Processed Mail ☐

**Skip Permission Checks** ☒

After status are set, you can apply permission for each status change to single users or groups.

## EDS Status User Permissions

🔍 Search
+ New
📝 Edit List
🗑 Delete
👥 All Users
📊 Open in Excel
More options
🔍
☰

PERMISSION TYPE	USER ID	USER NAME	EDS RECORD STATUS INFO TO-	CREATE USER NOTE
User			<input type="checkbox"/>	<input type="checkbox"/>
User			<input type="checkbox"/>	<input type="checkbox"/>
Group				

## Define Mandatory fields

On Status change you can define mandatory fields and fields rules.



VENDOR FROM STATUS TO STATUS NEW | WORK DATE: 28/01/2021

✓ SAVED



## EDS Status Field Mandatory

Search + New Edit List Delete Open in Excel

FIELD NO.	FIELD CAPTION	CONDITI...	VALUE 1	VALUE 2
5	Address			

equal  
 maior  
 maior or equal  
 minor  
 minor or equal  
 between (extreme included)  
 between (extreme excluded)  
 not equal  
 filter

## Watch Data Security in action

Certify the Vendor record in "EDS Table Setup", go to Vendor list and start managing the status.

You can change the record status clicking on the upper right "EDS Record Status" factbox and then "Change Status".

Dynamics 365 Business Central

Test Paolo C. | Sales | Purchasing | Inventory | Posted Documents | Setup & Extensions

Sales Orders: All | Search | + New | Delete | Process | Report | Order | Release | Posting | Print/Send | Navigate | Show Attached

NO.	EDS STATUS CODE	SELL-TO CUSTOMER NO.	SELL-TO CUSTOMER NAME	EXTERNAL DOCUME... NO.	LOCATION CODE	ASSIGNED USER ID	DOCUME... DATE	STATUS	COM... SHIP...	AMOUNT SHIPPED NOT INVOICED (LCY)
1004	OPEN	01121212	Spotsmeyer's Furnishings	1111111	GIALLO		28/01/2021	Released	No	0
1008	OPEN	30000	Rotadent Ingranaggi S.r.l.				28/01/2021	Open	No	0
1010	RELEASED	30000	Rotadent Ingranaggi S.r.l.				28/01/2021	Released	Yes	0
101005	OPEN	30000	Rotadent Ingranaggi S.r.l.				14/01/2021	Released	Yes	2,474
101009	OPEN	38128456	MEMA Ljubljana d.o.o.		ROSSO		22/01/2021	Released	No	1,245
101011	EDIT	43687129	Designstudio Gmunden		ROSSO		15/01/2021	Released	No	0
101013	OPEN	46887889	Englunds Kontorsmöbler AB		GIALLO		21/01/2021	Released	No	0
101015	OPEN	49633663	Autohaus Mielberg KG		VERDE		24/01/2021	Released	No	9,604
101016	OPEN	10000	Cannon Group SpA		BLU		28/01/2021	Released	Yes	651
101017	OPEN	20000	Grafiche magiche 2000		BLU		29/01/2021	Open	No	0
101018	RELEASED	01454545	New Concepts Furniture							0
101019	OPEN	31987987	Candoxy Nederland BV							2,590
101020	OPEN	32789456	Lovalina Contractors							0
101022	OPEN	38128456	MEMA Ljubljana d.o.o.							0
101023	OPEN	30000	Rotadent Ingranaggi S.r.l.							0
1011	OPEN	30000	Rotadent Ingranaggi S.r.l.							0
1012	OPEN	30000	Rotadent Ingranaggi S.r.l.							0
1013	RELEASED									0
104001	OPEN									0,00
104002	OPEN									0,00

EDS Record Status

Status Change Status

EDS Status Log

STATUS CODE	CHANGE DATE	USER ID
OPEN	12/08/2019	EOSVADICEG...

Power BI Reports

Get started with Power BI

Customer Statistics

Customer No.	49633663
Balance (LCY)	15.816,45
SALES	
Outstanding Orders (LCY)	100.818,58
Shipped Not Invd. (LCY)	9.604,60
Outstanding Invoices (LCY)	0,00

Status Change Order, 101015?

Current Status: OPEN

New Status: RELEASED

Yes No

**Change Record Status, inherit color and permission**



[www.eos-solutions.it](http://www.eos-solutions.it)



## Easily Check and Block business activities

For each status you can act on simple checkbox to disable business action like:

- Modify record data
- Delete record
- Print (on documents)
- Posting (on documents)
- Release (on documents)

### EDS Table Status List

Search + New Edit List Delete Open in Excel

STATUS CODE	STATUS DESCRIPTION	DESCRIPTION	FIR... ST...	LA... ST...	CH... DIS...	DE... DIS...	DO... RE... DIS...	DO... PO... DIS...
CLOSED	Closed		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EDIT	Edit		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NEW	New		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Document Release disabled  
Press Ctrl+F1 to learn more

## Functions

For each table you can select and apply business function that comes out of the box.

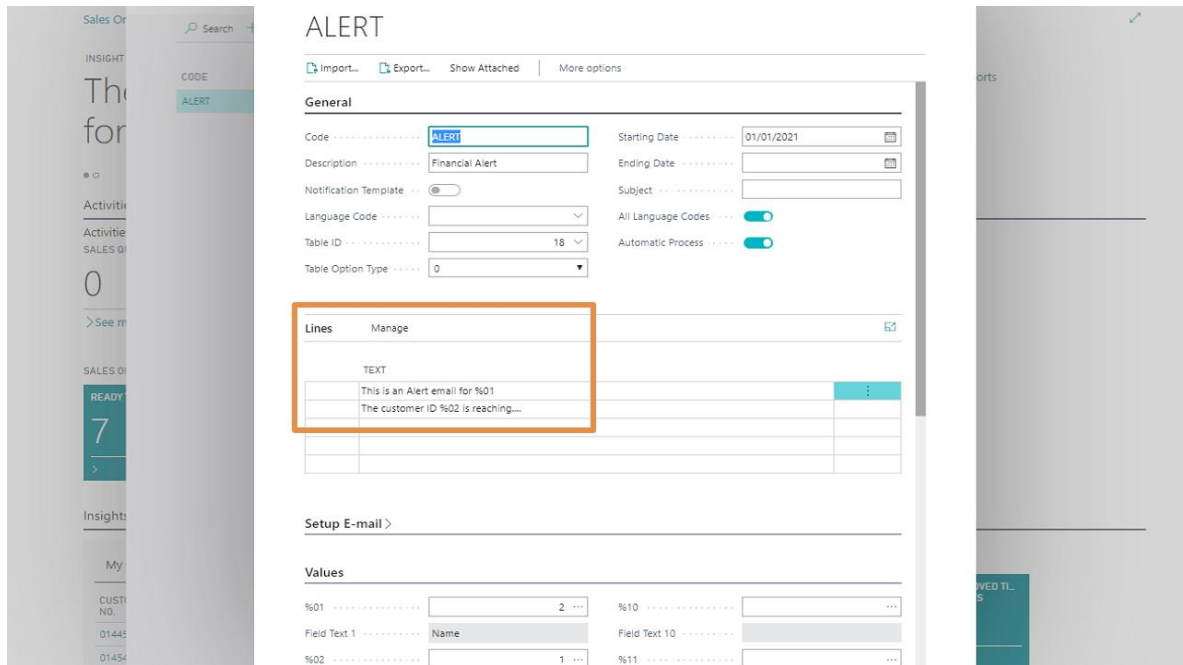
← EDS FUNCTIONS | WORK DATE: 28/01/2021 ✓ SAVED ↗

Search + New Edit List Delete Open in Excel

TYPE	CODE	DESCRIPTION	NOTIFICATION TEXT HEADER CODE
Mail	ALERT		ALERT
Exec	BLOCK_CUSTOMER	Block Customer	
Exec	CHECKDIM_CUSTO...	Check Customer Dimensions	
Exec	ECHKVATREG_CUST	VAT Registration check block	
Exec	UNBLOCK_CUSTOMER	Unblock Customer	
Exec	WCHKVATREG_CUST	VAT Registration check warning	

## Notification

Email notifications can be set when changing a status. Contextual info can be added in a very simple way using field placeholders.



The screenshot shows the 'ALERT' configuration page in the EOS SOLUTIONS system. The page is divided into several sections:

- General:** Contains fields for Code (ALERT), Description (Financial Alert), Notification Template (radio button), Language Code (dropdown), Table ID (18), Table Option Type (0), Starting Date (01/01/2021), Ending Date, Subject, All Language Codes (toggle), and Automatic Process (toggle).
- Lines:** A table with a 'Manage' button. It contains a row with the text 'This is an Alert email for %01' and 'The customer ID %02 is reaching...'. The text is highlighted with an orange box.
- Setup E-mail:** A section for configuring email values.
- Values:** A section for defining field placeholders. It includes fields for %01 (2), %02 (1), %10, %11, Field Text 1 (Name), and Field Text 10.

## Bulk updates and monitoring

Administrators can filter and update record massively using a specific page.


Use this page also to perform the starting synchronization and set the pre-existing records to "NEW" or a more appropriate status.



## Extend and customize the app

You can get all the specification to extend this app with custom function or custom tables and pages by accessing the online documentation. Workflows can be applied to every table or page with very small extensions, that you can easily build copying the provided sample.

Technical documentation for developers is available on the web for registered customer and partner.


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### EOS DS Synch

Version: 2319\_EX003\_DataSecurity\_1.0.42

CodeunitObject 18122142

### Methods

#### SynchSingleDSTable

```
procedure SynchSingleDSTable(DataSecurityTablesSetup: Record "EOS DS Tables Setup")
```

#### Parameters

- DataSecurityTablesSetup Record "EOS DS Tables Setup"

#### CountTableIDRecordStatus

```
procedure CountTableIDRecordStatus(iIntTableID: Integer; iOptTableOptionType: Option): Integer
```

#### Parameters

- iIntTableID Integer
- iOptTableOptionType Option

#### Return Value

Type: Integer

#### CountTableIDRecord

```
procedure CountTableIDRecord(TableID: Integer; TableOptionType: Option) Result: Integer
```

## Subscription

You can download and install "Data security" for free. Free activation includes all features limited to the vendor table.

Activating a subscription, you can access the full experience that includes 13 Tables out of the box, gives you access to online documentation and sample extensions to support custom tables and custom pages.

