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
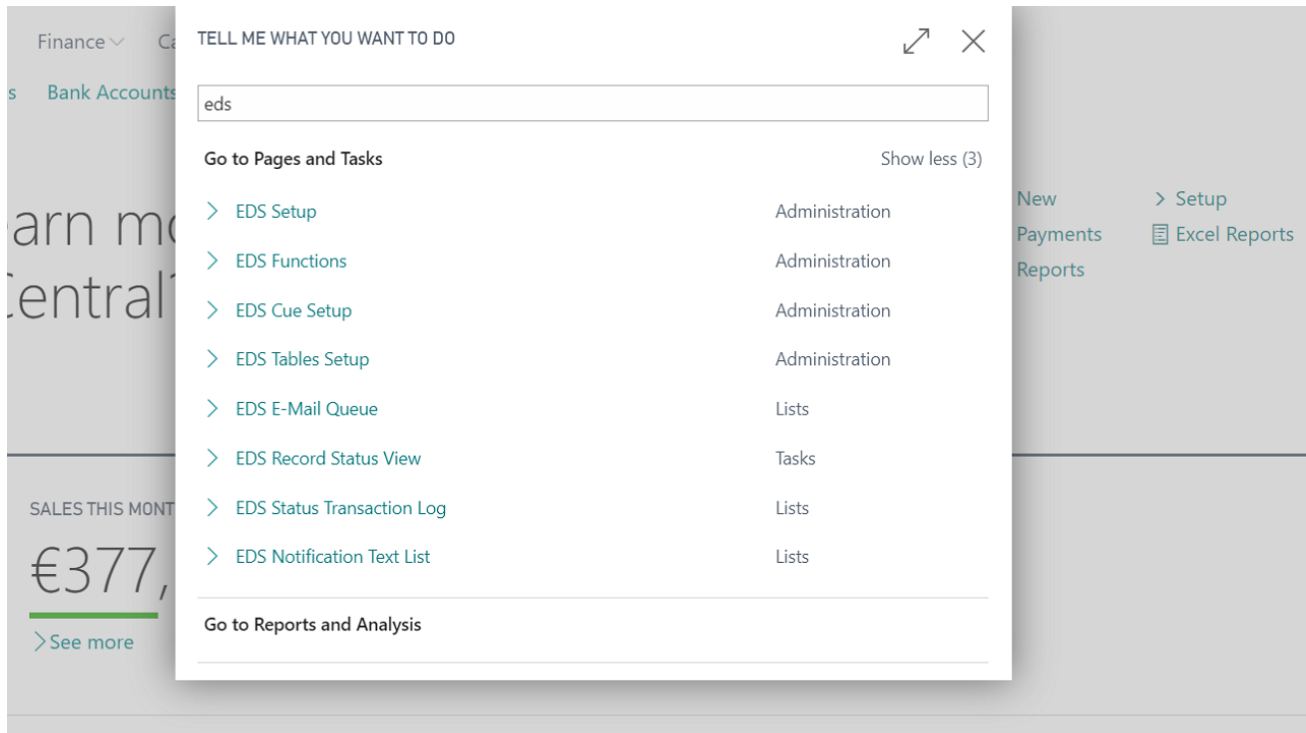
Quick Guide
Ready to go in 3 steps

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

www.eos-solutions.it

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".

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.

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

Define Mandatory fields

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

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".

Change Record Status, inherit color and permission

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

STATUS CODE		STATUS DESCRIPTION	DESCRIPTION	FIR... ST...	LA... ST...	CH... DIS...	DE... DIS...	DO... RE... DIS...	DO... PO... DIS...
CLOSED	⋮	Closed		☐	☑	☐	☑	☐	☐
EDIT		Edit		☐	☐	☐	☐	☐	☐
NEW		New		☑	☐	☐	☐	☐	☐
				☐	☐	☐	☐	☐	☐

> **Document Release disabled**
>
> *Press Ctrl+F1 to learn more*

Functions

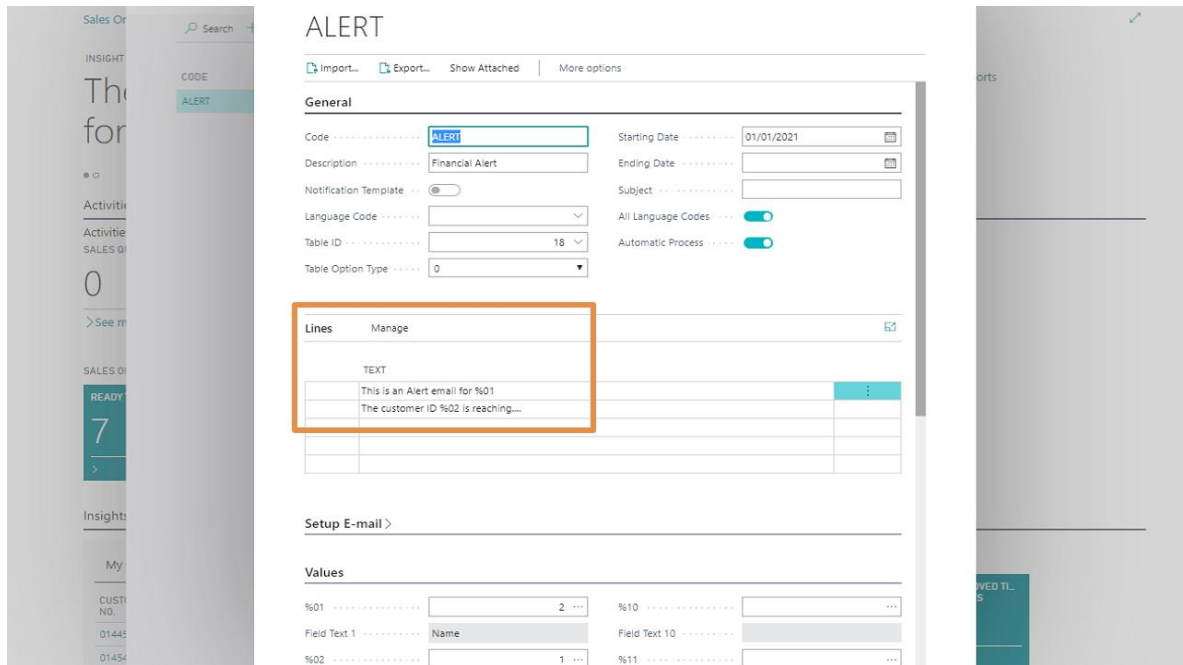For each table you can select and apply business function that comes out of the box.

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

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.

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.

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.