



DATA SECURITY

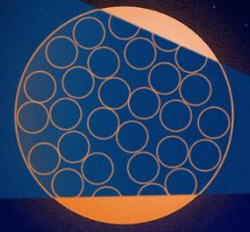
ADD WORKFLOWS AND MANDATORY FIELDS
IN MICROSOFT DYNAMICS 365 BUSINESS CENTRAL



1st worldwide Publisher on
Microsoft AppSource

www.eos-solutions.it/en/data-security-en.html





Data Security

App for Microsoft Dynamics 365 Business Central

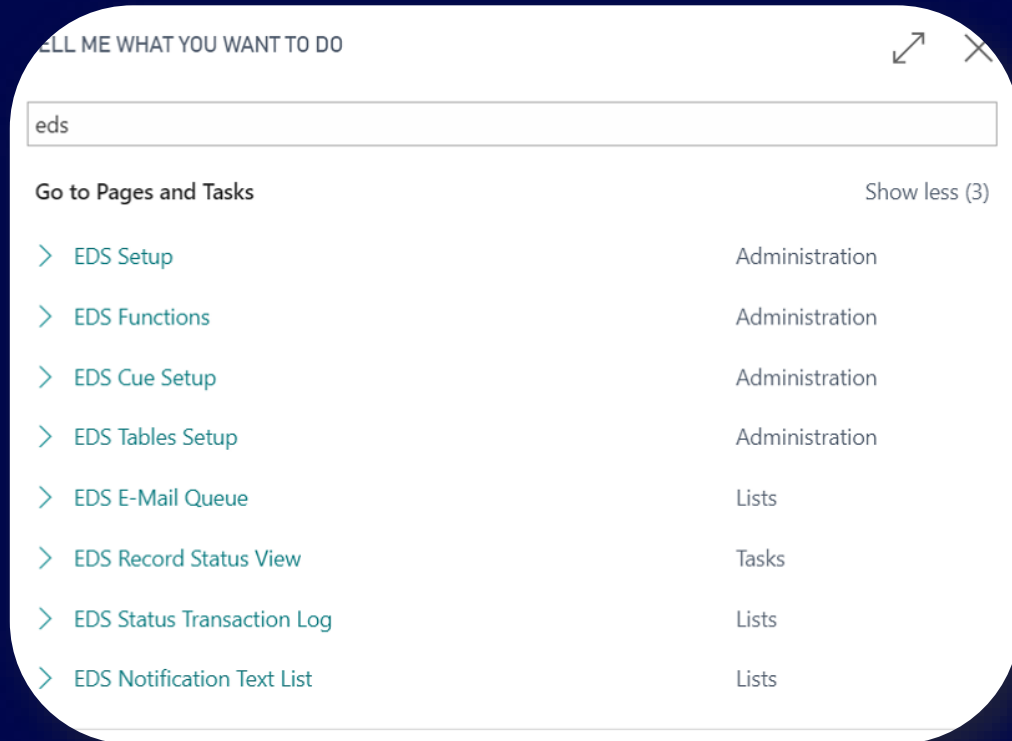
DO YOU NEED TO IMPROVE CONTROL AND ACCURACY WITH RECORD-LEVEL VALIDATION AND APPROVAL?

ARE YOU LOOKING FOR A SIMPLE WAY TO ENABLE ONLY CERTAIN USERS TO MODIFY CERTAIN RECORDS?

Data Security EOS Solutions app helps you **protecting important information from accidental modification**. Data Security is the simplest way to add Workflows to master data or document approvals in Microsoft Dynamics 365 Business Central.



Here is a list of the features involved



ALT + Q and EDS

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



Table Setup

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		

Customer | WORK DATE: 28/01/2021 ✓ SAVED

EDS Table Status List

STATUS CODE	STATUS DESCRIPTION	DESCRIPTION	FR... ST...	LA... ST...	CH... DIS...	DE... DIS...	DO... RE... DIS...	DO... DIS...
CLOSED	Closed							
EDIT	Edit							
NEW	New							

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

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
NEW	NEW	<input checked="" type="checkbox"/>
EDIT	EDIT	<input checked="" type="checkbox"/>
CLOSED	CLOSED	<input checked="" type="checkbox"/>
NEW	CLOSED	<input checked="" type="checkbox"/>
CLOSED	NEW	<input type="checkbox"/>

Details

From Status Description: Edit To Status Description: Closed

From Description: To Description:

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 and mandatory fields

EDS Setup

Actions

General

Delete Processed Mail

Skip Permission Checks

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				

EDS Status Field Mandatory

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

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

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.

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



Watch Data Security in action

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	0,00
1008	OPEN	30000	Rotadent Ingranaggi S.r.l.				28/01/2021	Open	No	0,00
1010	RELEASED	30000	Rotadent Ingranaggi S.r.l.				28/01/2021	Released	Yes	0,00
101005	OPEN	30000	Rotadent Ingranaggi S.r.l.				14/01/2021	Released	Yes	2.474,00
101009	OPEN	38128456	MEMA Ljubljana d.o.o.		ROSSO		22/01/2021	Released	No	1.245,00
101011	EDIT	43687129	Designstudio Gmunden		ROSSO		15/01/2021	Released	No	0,00
101013	OPEN	46897800	Englunds Kontorsmöbler AB		GIALLO		21/01/2021	Released	No	0,00
101015	OPEN	49633663	Autohaus Mielberg KG		VERDE		24/01/2021	Released	No	9.604,60
101016	OPEN	10000	Cannon Group SpA		BLU		28/01/2021	Released	Yes	651,00
101017	OPEN	20000	Grafiche magiche 2000		BLU		29/01/2021	Open	No	0,00
101018	RELEASED	01454545	New Concepts Furniture							0,00
101019	OPEN	31987987	Candoxy Nederland BV							2.590,00
101020	OPEN	32789456	Lovina Contractors							0,00
101022	OPEN	38128456	MEMA Ljubljana d.o.o.							0,00
101023	OPEN	30000	Rotadent Ingranaggi S.r.l.							0,00
1011	OPEN	30000	Rotadent Ingranaggi S.r.l.							0,00
1012	OPEN	30000	Rotadent Ingranaggi S.r.l.							0,00
1013	RELEASED									0,00
104001	OPEN									0,00
104002	OPEN									0,00

Change Record Status, inherit color and permission

EDS Record Status
Status [Change Status](#)

EDS Status Log

STATUS CODE	CHANGE DATE	USER ID
OPEN	12/08/2019	EOS\ADICEG...

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

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".



Easily Check and Block business activities

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

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

1. Modify record data
2. Delete record
3. Print (on documents)
4. Posting (on documents)
5. Release (on documents)

Functions



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	

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

CODE	DESCRIPTION
BLOCK_CUSTOMER	Block Customer
BLOCK_GLACCOUNT	Block G/L Account
BLOCK_ITEM	Block Item
BLOCK_JOB	Block Job
BLOCK_VENDOR	Block Vendor
CHECKDIM_CUSTOMER	Check Customer Dimensions
CHECKDIM_ITEM	Check Item Dimensions
CHECKDIM_JOB	Check Job Dimensions
CHECKDIM_VENDOR	Check Vendor Dimensions
ECHKVATREG_CONT	VAT Registration check block
ECHKVATREG_CUST	VAT Registration check block
ECHKVATREG_VEND	VAT Registration check block
MESSAGE_ITEM	Item Message
UNBLOCK_CUSTOMER	Unblock Customer
UNBLOCK_GLACCOUNT	Unblock G/L Account
UNBLOCK_ITEM	Unblock Item
UNBLOCK_JOB	Unblock Job
UNBLOCK_VENDOR	Unblock Vendor
WCHKVATREG_CONT	VAT Registration check warning
WCHKVATREG_CUST	VAT Registration check warning
WCHKVATREG_VEND	VAT Registration check warning

Bulk updates and monitoring



EDS RECORD STATUS VIEW | WORK DATE: 28/01/2021

GENERAL

Table ID 18 ...

Document Type 0

FILTERS

DS Status Filter Filter Field 5

Filter Field 1 Filter Field 6

Filter Field 2 Filter Field 7

Filter Field 3 Filter Field 8

Filter Field 4 Filter Field 9

Change Status | Show | Synchronization | More options

STATUS CODE	STATUS DESCRIPTION	FIELD 1	FIELD 2	FIELD 3
NEW	New	01121212	Spotsmeyer's Furnishings	SPOTSMYER'S FURNISHINGS
NEW	New	01445544	Progressive Home Furnishings	PROGRESSIVE HOME FURNISH...
NEW	New	01454545	New Concepts Furniture	NEW CONCEPTS FURNITURE
NEW	New	01905893	Candoxy Canada Inc.	CANDOXY CANADA INC.
NEW	New	01905899	Elkhorn Airport	ELKHORN AIRPORT
NEW	New	01905902	London Candoxy Storage Cam...	LONDON CANDOXY STORAGE...
NEW	New	10000	Cannon Group SpA	CANNON GROUP SPA
NEW	New	20000	Grafiche magiche 2000	GRAFICHE MAGICHE 2000
NEW	New	20309920	Metatorad Malaysia Sdn Bhd	METATORAD MALAYSIA SDN B...
NEW	New	20312912	Highlights Electronics Sdn Bhd	HIGHLIGHTS ELECTRONICS SD...
NEW	New	20339921	TraxTonic Sdn Bhd	TRAXTONIC SDN BHD
NEW	New	21233572	Somadis	SOMADIS
NEW	New	21245278	Maronegoce	MARONEGOCE

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.

Data Security

App for Microsoft Dynamics 365 Business Central

SUBSCRIPTION

Some features of the Data Security app require a subscription. The subscription can be activated from Subscription control panel or directly from the notification messages that the system proposes, by clicking on the link that allows you to start the subscription wizard.

Contact us for more info:

www.eos-solutions.it/en/contact-support.html

