

Acumens Security Functionality Document

Prepared & developed by

SBC

Document History

Revision History:

VERSION	DATE	SECTIONS REVISED	DESCRIPTION
1.0	05-24-2024		Document Prepared
2.0	09-23-2024		Added Data Security

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1. FIELD & PAGE LEVEL SECURITY

Acumens Field and Page level security is an app that allows users to control the use and view of various features on pages and its fields.

The security levels are defined on page and fields for tables included in setup.

1.1. Page Level Security:

1.1.1. Read only:

This option sets the page to read only mode.

It deactivates all fields from modification and disables all page actions.

Dynamics 365 Business Central

HSM PROFILE CODE | WORK DATE: 1/27/2022

Customer · CUSTOMER

Assign Users Show Attached

General

Code: CUSTOMER Description: Customer Profile

Table No: 18 Table Caption: Customer

Lines Manage

PAGE NO	PAGE CAPTION	READ ONLY	NON-EDITABLE
21	Customer Card	<input checked="" type="checkbox"/>	<input type="checkbox"/> Configure
22	Customers	<input type="checkbox"/>	<input checked="" type="checkbox"/> Configure
151	Customer Statistics	<input type="checkbox"/>	<input checked="" type="checkbox"/> Configure
		<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>

Notes +

(There is nothing to show in this view)

Dynamics 365 Business Central

CUSTOMER CARD | WORK DATE: 1/27/2022

10000 · The Cannon Group PLC New

ProcessNew DocumentApproveRequest ApprovalNavigateCustomerShow AttachedActionsNavigateReportFewer options

Sales QuoteSales InvoiceSales OrderSales Credit MemoSales QuoteSales InvoiceSales OrderSales Credit MemoReminder

No.10000

NameThe Cannon Group PLC New

Search NameTHE CANNON GROUP PLC NEW

IC Partner Code

Balance (\$)266,007.71

Balance Due (\$)−3,842.54

Credit Limit (\$)0.00

Blocked

Privacy Blocked

Salesperson CodePS

Responsibility CenterBIRMINGHAM

Service Zone CodeM

Document Sending Profile

Total Sales37,120.08

Costs (\$)10,462.51

Profit (\$)25,986.57

Profit %71.3

CFDI Purpose

CFDI Relation

Last Date Modified5/20/2024

Disable Search by Name

Address & Contact

ADDRESS

Address192 Market Square

Address 2

Country/Region CodeUS

CityAtlanta

StateGA

ZIP Code31772

CONTACT

Contact CodeCT000008

Contact NameMr. Andy Teal

Phone No.

Email

Fax No.

Home Page

Language CodeENU

Show on Map

Show less

1.1.2. Block Execution:

Using the “Block execution” feature, user access to certain pages can be blocked.

Profile Codes Setup:

←

HSM Profile Code

✓ Saved

CST · Customer

Home

More options

General

Code

CST

Description

Customer Profile

Table No

18

Table Caption

Customer

Lines

New Line

Delete Line

	Page No ↑	Page Caption	Read Only	Non-editable	Block Execution	
→	21	Customer Card	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Configure
	22	Customers	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Configure
	33	Customers	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Configure

On trying to open customer card and execute any of the following actions, user gets an error message:

Customers

Customers: All

+ New Manage Home New Document

Edit View Delete

No. ↑	Name	Name 2	Responsibility Center	Location Code	ZIP Code	
10000	Adatum Corporation		CA		31772	
20000	Trey Research				61236	
30000	School of Fine Art				37125	
40000	Alpine Ski House				31772	
50000	Relecloud				31772	

Customers

Customers: All

+ New Manage Home New Document

No. ↑	Name	Name 2	Responsibility Center	Location Code	ZIP Code	
10000	Adatum Corporation		CA		31772	
20000	Trey Research				61236	
30000	School of Fine Art				37125	
40000	Alpine Ski House				31772	
50000	Relecloud				31772	

! You do not have permission to execute Page. Please contact your administration.

Share details

Share details if requesting support.

Was this information helpful? Yes No

OK

1.2. Field Level Security

This applies to Fast Tabs, Fields, List Parts, and page actions.

1.2.1. Fast Tabs:

Example Customer Card.

Dynamics 365 Business Central

CUSTOMER CARD | WORK DATE: 1/27/2022

10000 · The Cannon Group PLC New

Process New Document Approve Request Approval Navigate Customer Show Attached Actions Navigate Report Fewer options

General Show less

No.	10000	Service Zone Code	M
Name	The Cannon Group PLC New	Document Sending Profile	
Search Name	THE CANNON GROUP PLC NEW	Total Sales	37,120.08
IC Partner Code		Costs (\$)	10,462.51
Balance (\$)	266,007.71	Profit (\$)	25,986.57
Balance Due (\$)	-3,842.54	Profit %	71.3
Credit Limit (\$)	0.00	CFDI Purpose	
Blocked		CFDI Relation	
Privacy Blocked	<input type="checkbox"/>	Last Date Modified	5/20/2024
Salesperson Code	PS	Disable Search by Name	<input type="checkbox"/>
Responsibility Center	BIRMINGHAM		

Address & Contact Show less

ADDRESS		CONTACT	
Address	192 Market Square	Contact Code	CT000008
Address 2		Contact Name	Mr. Andy Teal
Country/Region Code	US	Phone No.	
City	Atlanta	Email	
State	GA	Fax No.	
ZIP Code	31772	Home Page	
Show on Map		Language Code	ENU

Configuration

The screenshot shows the 'CUSTOMER PAGE 21 CUSTOMER CARD' configuration window in Dynamics 365 Business Central. The window is titled 'CUSTOMER PAGE 21 CUSTOMER CARD | WORK DATE: 1/27/2022'. The 'Manage' tab is active, displaying a table with columns: CONTENT TYPE, CAPTION, PERMISSION, and DETAILS. The table lists various fields and their permissions. The 'General' tab is selected, and the 'Address & Contact' tab is highlighted with a red box. The 'PERMISSION' column for the 'Address & Contact' tab is set to 'Hide'.

CONTENT TYPE	CAPTION	PERMISSION	DETAILS
FastTab	General	Read	
Field	No.		
Field	Name		
Field	Search Name		
Field	IC Partner Code		
Field	Balance (LCY)		
Field	Balance Due (LCY)		
Field	Credit Limit (LCY)		
Field	Blocked		
Field	Privacy Blocked		
Field	Salesperson Code		
Field	Responsibility Center		
Field	Service Zone Code		
Field	Document Sending Profile		
Field	Total Sales		
Field	Costs (\$)		
Field	Profit (\$)		
Field	Profit %		
Field	CFDI Purpose		
Field	CFDI Relation		
Field	Last Date Modified		
Field	Disable Search by Name		
FastTab	Address & Contact	Hide	
Field	Address		
Field	Address 2		
Field	Country/Region Code		
Field	City		
Field	County		
Field	Post Code		
Field	ShowMap		
Field	Contact Code		

General Tab is inactive, and Address & Contact is hidden.

The screenshot shows the 'CUSTOMER CARD' for '10000 - The Cannon Group PLC New' in Dynamics 365 Business Central. The card is titled '10000 · The Cannon Group PLC New' and has a 'Show less' button. The 'General' tab is active, displaying various fields and their values. The 'Invoicing' tab is also visible, showing fields for customer information and posting details.

General

Field	Value
No.	10000
Name	The Cannon Group PLC New
Search Name	THE CANNON GROUP PLC NEW
IC Partner Code	
Balance (\$)	266,007.71
Balance Due (\$)	-3,842.54
Credit Limit (\$)	0.00
Blocked	
Privacy Blocked	<input type="checkbox"/>
Salesperson Code	PS
Responsibility Center	BIRMINGHAM
Service Zone Code	M
Document Sending Profile	
Total Sales	37,120.08
Costs (\$)	10,462.51
Profit (\$)	25,986.57
Profit %	71.3
CFDI Purpose	
CFDI Relation	
Last Date Modified	5/20/2024
Disable Search by Name	<input type="checkbox"/>

Invoicing

Field	Value
Customer	
Tax Registration No.	789456278
GLN	8712345000004
Use GLN in Electronic Documents	<input type="checkbox"/>
Tax Liable	<input type="checkbox"/>
Tax Area Code	ATLANTA, GA
Tax Identification Type	Legal Entity
Tax Exemption No.	
Invoice Copies	0
POSTING DETAILS	
Gen. Bus. Posting Group	DOMESTIC
VAT Bus. Posting Group	
Customer Posting Group	DOMESTIC
PRICES AND DISCOUNTS	
Currency Code	
Customer Price Group	
Customer Disc. Group	

1.2.2. Fields

Dynamics 365 Business Central

CUSTOMER CARD | WORK DATE: 1/27/2022

10000 · The Cannon Group PLC New

Process New Document Approve Request Approval Navigate Customer Show Attached Actions Navigate Report Fewer options

Invoicing

Customer: [Field]
Tax Registration No.: 789456278
GLN: 871234500004
Use GLN in Electronic Documents: [Toggle]
Copy Sell-to Addr. to Qte From: Company
Tax Liable: [Toggle]
Tax Area Code: ATLANTA, GA
Tax Identification Type: Legal Entity
Tax Exemption No.: [Field]
RFC No.: [Field]
CURP No.: [Field]
State Inscription: [Field]
Invoice Copies: 0
POSTING DETAILS
Gen. Bus. Posting Group: DOMESTIC
VAT Bus. Posting Group: [Field]
Customer Posting Group: DOMESTIC
PRICES AND DISCOUNTS
Currency Code: [Field]
Customer Price Group: [Field]
Customer Disc. Group: [Field]
Allow Line Disc.: [Toggle]
Invoice Disc. Code: 10000
Prices Including Tax: [Toggle]

Payments

Prepayment %: 15
Application Method: Manual
Partner Type: [Field]
Payment Terms Code: 1M(BD)
Payment Method Code: [Field]
Reminder Terms Code: DOMESTIC
Print Statements: [Toggle]
Last Statement No.: 0
Block Payment Tolerance: [Toggle]
Preferred Bank Account Code: [Field]
Bank Communication: E English
Check Date Format: [Field]

Configuration

Dynamics 365 Business Central

CUSTOMER PAGE 21 CUSTOMER CARD | WORK DATE: 1/27/2022

Manage

CONTENT TYPE	CAPTION	PERMISSION	DETAILS
Field	Home Page		
Field	Language Code		
FastTab	Invoicing		
Field	Customer		
Field	VAT Registration No.		
Field	GLN		
Field	Use GLN in Electronic Document		
Field	Copy Sell-to Addr. to Qte From	Hide	
Field	Tax Liable	Read	
Field	Tax Area Code	Read	
Field	Tax Identification Type		
Field	Tax Exemption No.		
Field	RFC No.		
Field	CURP No.		
Field	State Inscription		
Field	Invoice Copies		
Field	Gen. Bus. Posting Group		
Field	VAT Bus. Posting Group		
Field	Customer Posting Group		
Field	Currency Code		
Field	Customer Price Group		
Field	Customer Disc. Group		
Field	Allow Line Disc.		
Field	Invoice Disc. Code		
Field	Prices Including VAT		
FastTab	Payments		
Field	Prepayment %		
Field	Application Method		
Field	Partner Type		
Field	Payment Terms Code		

Notes +
(There is nothing to show in this view)

Dynamics 365 Business Central

CUSTOMER CARD | WORK DATE: 1/27/2022

10000 · The Cannon Group PLC New

Process New Document Approve Request Approval Navigate Customer Show Attached Actions Navigate Report Fewer options

General > The Cannon Group PLC New

Invoicing Show less

Customer
Tax Registration No. 789456278
GLN 871234500004
Use GLN in Electronic Documents
Tax Liab.
Tax Area Code ATLANTA, GA
Tax Identification Type Legal Entity
Tax Exemption No.
RFC No.
CURP No.
State Inscription
Invoice Copies 0
POSTING DETAILS
Gen. Bus. Posting Group DOMESTIC
VAT Bus. Posting Group
Customer Posting Group DOMESTIC
PRICES AND DISCOUNTS
Currency Code
Customer Price Group
Customer Disc. Group
Allow Line Disc.
Invoice Disc. Code 10000
Prices Including Tax
Payments Show less
Prepayment % 15
Application Method Manual
Partner Type
Payment Terms Code 1M(8D)
Payment Method Code
Reminder Terms Code DOMESTIC
Print Statements
Last Statement No. 0
Block Payment Tolerance
Preferred Bank Account Code
Bank Communication E English
Check Date Format

1.2.3. List Parts

Example Sales Order:

Dynamics 365 Business Central

SALES ORDER | WORK DATE: 1/27/2022

1026 · The Cannon Group PLC New

Process Report Approve Release Posting Prepare Order Request Approval Print/Send Navigate Show Attached Actions Navigate Report Fewer options

General > 1/27/2022 1/27/2022 2/27/2022

Lines | Manage Line Order Fewer options

TYPE	TYPE	NO.	DESCRIPTION	LOCATION CODE	QUANTITY	QTY TO ASSEMBLE TO ORDER	RESERVED QUANTITY	UNIT OF MEASURE CODE	UNIT PRICE EXCL. TAX	TAX LIA.	TACC
Item		1001	Touring Bicycle	BLUE	2			PCS	223.00	<input checked="" type="checkbox"/>	ATI
Item		1920-S	ANTWERP Conference Table	BLUE	1			PCS	647.80	<input checked="" type="checkbox"/>	ATI
										<input type="checkbox"/>	
										<input type="checkbox"/>	

Subtotal Excl. Tax (USD) 1,093.80 Total Excl. Tax (USD) 1,093.80
Inv. Discount Amount Excl. Tax (USD) 0.00 Total Tax (USD) 38.87
Invoice Discount % 0 Total Incl. Tax (USD) 1,132.67

Invoice Details Show more

Currency Code Department Code SALES
Payment Terms Code 1M(8D) Project Code
Tax Liab. Payment Discount % 2
Tax Area Code ATLANTA, GA Direct Debit Mandate ID
Payment Service Demo Sandbox Account - PayPal Payments Standard

Configuration:

Dynamics 365 Business Central

SALES HDR PAGE 42 SALES ORDER | WORK DATE: 1/27/2022

Manage

CONTENT TYPE	CAPTION	PERMISSION	DETAILS
Field	No. of Archived Versions		
Field	Document Date		
Field	Posting Date		
Field	Order Date		
Field	Due Date		
Field	Requested Delivery Date		
Field	Promised Delivery Date		
Field	External Document No.		
Field	Your Reference		
Field	Salesperson Code		
Field	Campaign No.		
Field	Opportunity No.		
Field	Responsibility Center		
Field	Assigned User ID		
Field	Job Queue Status		
Field	Status		
Field	CFDI Purpose		
Field	CFDI Relation		
Field	WorkDescription	Hide	
Subpages	Lines	Hide	Page 46 Lines
FastTab	Invoice Details		
Field	Currency Code		
Field	Payment Terms Code		
Field	Payment Method Code		
Field	Tax Liabile		
Field	Tax Area Code		
Field	Payment Service		
Field	Department Code		
Field	Project Code		
Field	Payment Discount %		

Notes +

(There is nothing to show in this view)

Dynamics 365 Business Central

SALES ORDER | WORK DATE: 1/27/2022

1026 · The Cannon Group PLC New

Process Report Approve Release Posting Prepare Order Request Approval Print/Send Navigate Show Attached Actions Navigate Report Fewer options

General > 1/27/2022 1/27/2022 2/27/2022

Invoice Details Show more

Currency Code		Department Code	SALES
Payment Terms Code	1M(8D)	Project Code	
Tax Liabile	<input checked="" type="checkbox"/>	Payment Discount %	2
Tax Area Code	ATLANTA, GA	Direct Debit Mandate ID	
Payment Service	Demo Sandbox Account - PayPal Payments Standard		

Shipping and Billing Show more

Ship-to	Default (Sell-to Address)	Location Code	BLUE
Contact	Mr. Andy Teal	Shipment Date	1/27/2022
Bill-to	Default (Customer)		

1.2.4. Page Actions:

Dynamics 365 Business Central

SALES ORDER | WORK DATE: 1/27/2022

1026 · The Cannon Group PLC New

Process Report Approve Release **Posting** Prepare Order Request Approval Print/Send Navigate Show Attached Actions Navigate Report Fewer options

Post... Post and New... Post and Send... Preview Posting

Invoice Details Show more

Currency Code		Department Code	SALES
Payment Terms Code	1M(8D)	Project Code	
Tax Liabile	<input checked="" type="checkbox"/>	Payment Discount %	2
Tax Area Code	ATLANTA, GA	Direct Debit Mandate ID	
Payment Service	Demo Sandbox Account - PayPal Payments Standard		

Configuration:

Dynamics 365 Business Central

SALES HDR PAGE 42 SALES ORDER | WORK DATE: 1/27/2022

Manage

CONTENT TYPE	CAPTION	PERMISSION	DETAILS
Action	Create incoming document from file		
Action	Remove Incoming Document		
Action	Order Promising		
Action	Demand Overview		
Action	Planning		
Action	Send Approval Request		
Action	Cancel Approval Request		
Action	Create a Flow		
Action	See my Flows		Page 6401 Manage Flows
Action	Create Inventory Put-away/Pick		
Action	Create Warehouse Shipment		
Action	Post		
Action	Post and New	Disable	
Action	Post and Send	Hide	
Action	Test Report		
Action	Remove From Job Queue		
Action	Preview Posting		
Action	Pro Forma Invoice		
Action	Prepayment Test Report		
Action	Post Prepayment Invoice		
Action	Post and Print Preprint. Invoice		
Action	Preview Preprint. Invoice Posting		
Action	Post Prepayment Credit Memo		
Action	Post and Print Preprint. Cr. Memo		
Action	Preview Preprint. Cr. Memo Posting		
Action	Work Order		
Action	Pick Instruction		
Action	Email Confirmation		
Action	Print Confirmation		
ActionGroup	Reports		

SALES ORDER | WORK DATE: 1/27/2022



SAVED

1026 · The Cannon Group PLC New

Process Report Approve Release Posting Prepare Order Request Approval Print/Send Navigate Show Attached Actions Navigate Report Fewer options

Post... **Post and New...** Preview Posting

Invoice Details

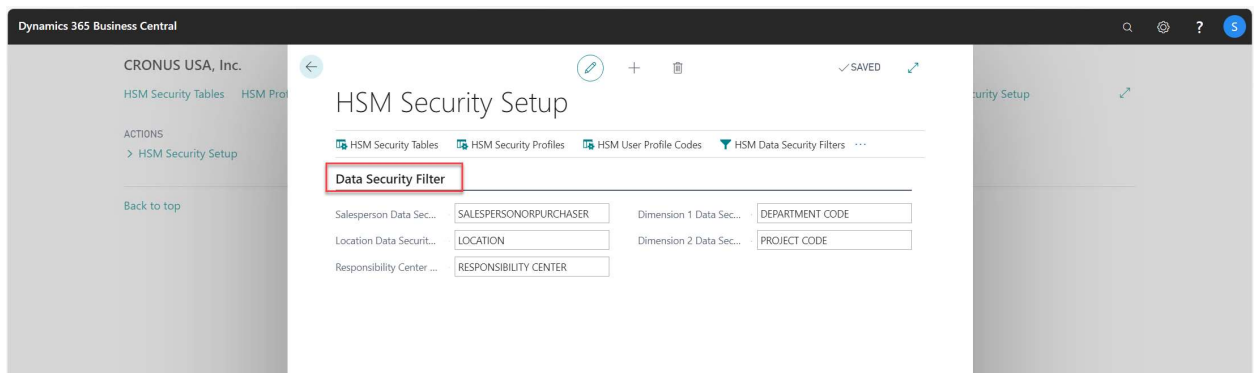
Show more

Currency Code	<input type="text"/>	Department Code	<input type="text" value="SALES"/>
Payment Terms Code	<input type="text" value="1M(8D)"/>	Project Code	<input type="text"/>
Tax Liabile	<input checked="" type="checkbox"/>	Payment Discount %	<input type="text" value="2"/>
Tax Area Code	<input type="text" value="ATLANTA, GA"/>	Direct Debit Mandate ID	<input type="text"/>
Payment Service	<input type="text" value="Demo Sandbox Account - PayPal Payments Standard"/>		

2. DATA SECURITY

2.1. Data Security Setup:

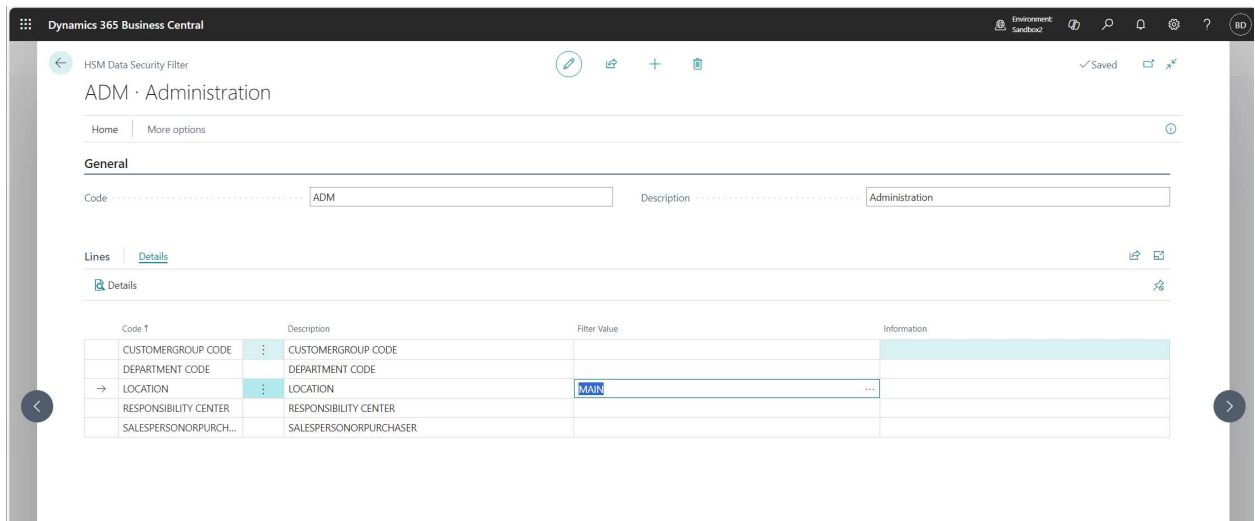
Default Data Security filters are Salesperson, Location, Responsibility Center, Global Dimension 1 & 2 and are automatically updated when Security Management setup is initialized.



2.2. Data Security:

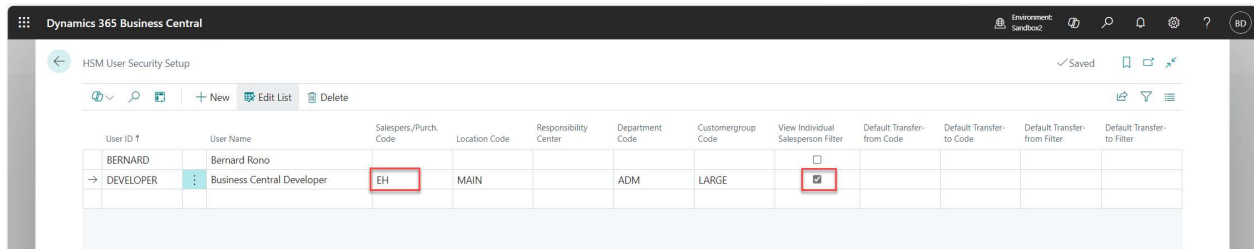
2.2.1. Data Security Filters Setup

Based on Data Security filters defined on Security setup, Data Security filters is defined as below:



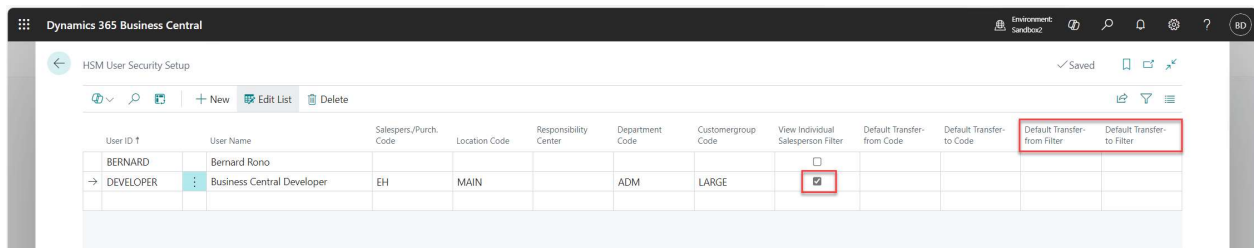
2.2.2. User Security Setup

Salesperson code on user setup can be used for Data Security filters if the user is marked to use “View Individual Salesperson Filter”.



User ID ↑	User Name	Salespers/Purch. Code	Location Code	Responsibility Center	Department Code	Customergroup Code	View Individual Salesperson Filter	Default Transfer-from Code	Default Transfer-to Code	Default Transfer-from Filter	Default Transfer-to Filter
BERNARD	Bernard Rono	EH	MAIN		ADM	LARGE	<input type="checkbox"/>				
→ DEVELOPER	Business Central Developer						<input checked="" type="checkbox"/>				

Default Transfer Documents locations filters are defined on user setup

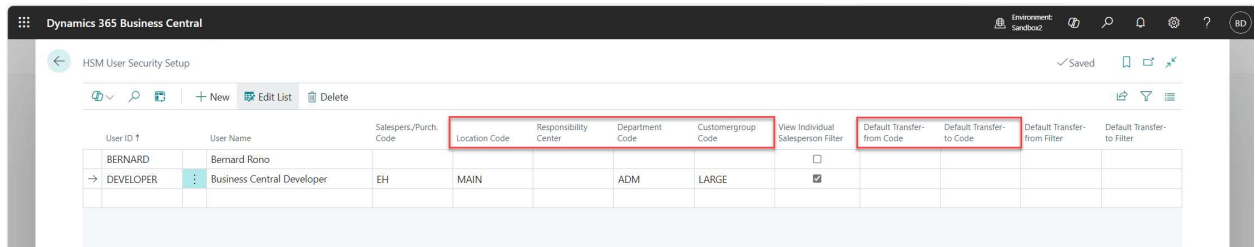


User ID ↑	User Name	Salespers/Purch. Code	Location Code	Responsibility Center	Department Code	Customergroup Code	View Individual Salesperson Filter	Default Transfer-from Code	Default Transfer-to Code	Default Transfer-from Filter	Default Transfer-to Filter
BERNARD	Bernard Rono						<input type="checkbox"/>				
→ DEVELOPER	Business Central Developer	EH	MAIN		ADM	LARGE	<input checked="" type="checkbox"/>				

Data Security filter fields (Location Code, Responsibility Center, Global Dimension 1 and Global Dimension 2) can also be defined on User Setup to be used as default values when user creates a Customer, Vendor, Sales Document, Purchase Document or Service Document.

For Transfer Documents, the default values that are updated from user setup are Default Transfer-from Code, Default Transfer-to Code, Global Dimension 1 and Global Dimension 2.

This feature is implemented the same way as Salesperson on user setup in Standard Business Central.



User ID ↑	User Name	Salespers/Purch. Code	Location Code	Responsibility Center	Department Code	Customergroup Code	View Individual Salesperson Filter	Default Transfer-from Code	Default Transfer-to Code	Default Transfer-from Filter	Default Transfer-to Filter
BERNARD	Bernard Rono						<input type="checkbox"/>				
→ DEVELOPER	Business Central Developer	EH	MAIN		ADM	LARGE	<input checked="" type="checkbox"/>				

2.2.3. Data Security on Documents

With the setup example below, with filter on location MAIN, all users assigned the data security profile will only view documents related to the specified location.

The screenshot shows the 'HSM Data Security Filter' configuration page in Dynamics 365 Business Central. The filter is named 'ADM - Administration'. The 'General' tab is active, showing the 'Code' as 'ADM' and the 'Description' as 'Administration'. The 'Lines' tab is also visible, showing a table of filter lines. The first line is selected, showing the 'Code 1' as 'CUSTOMERGROUP CODE', the 'Description' as 'CUSTOMERGROUP CODE', and the 'Filter Value' as 'MAIN'. The 'Information' column is empty.

Code 1	Description	Filter Value	Information
CUSTOMERGROUP CODE	CUSTOMERGROUP CODE		
DEPARTMENT CODE	DEPARTMENT CODE		
LOCATION	LOCATION	MAIN	
RESPONSIBILITY CENTER	RESPONSIBILITY CENTER		
SALESPERSONORPURCH...	SALESPERSONORPURCHASER		

Customer list without the filter:

The screenshot shows the 'Customers' list view in Dynamics 365 Business Central. The list displays a table of customer records. The first record is highlighted, showing the number 10000, the name 'Adatum Corporation', the responsibility center 'CA', the location code 'MAIN', and the ZIP code 31772. The other records are not highlighted.

No. ↑	Name	Name 2	Responsibility Center	Location Code	ZIP Code	Cc
10000	Adatum Corporation		CA	MAIN	31772	U
20000	Trey Research				61236	U
30000	School of Fine Art			MAIN	37125	U
40000	Alpine Ski House				31772	U
50000	Relecloud				31772	U

Customer List when filter is applied:

←

Customers

🔖

📄

↗

Customers: All ▾

🔗 ▾

🔍

📄

+ New

Manage

Home

New Document

⋮

🔗

🔍

☰

ⓘ

No. ↑	Name	Name 2	Responsibility Center	Location Code	ZIP Code	Cc
10000	⋮ Adatum Corporation		CA	MAIN	31772	U
30000	School of Fine Art			MAIN	37125	U