Microsoft Dynamics® NAV 2018

Advanced Data Management – Quick Guide





Table of Contents

itroduction
nowing standard permissions
etting up Field Roles
Logins
Permissions
Initial Values
Confirm Changes12
Setup Change Log 12

Introduction

Advanced Data Management (ADM) is a tool offering more detailed security on access at enter or change data in your Dynamics solution.

On top of the standard permission sets which are granting users access to entire tables, ADM can ensure a rather specific write access on field level. ADM can also point out exactly what value or values the user can enter in a field.

Setting up the ADM permissions can be on either table level or on field level.

This Quick Guide is meant as a help getting experience and understanding on Advanced Data Management.

Knowing standard permissions

Permissions in Dynamics NAV has since the childhood of NAV been defined as access rights for data on a table level.

Found under Departments, Administration, IT Administration, General you will find access to Permission Sets.

Permission Sets - Microsoft Dyna	amics NAV								- 🗆 X
G 🕞 🔻 🔳 Advanced Data N	Management - Dev 🔸 Departments	Administration + IT Administra	tion 🕨 General	 Permission Sets 				o s	earch (Ctrl+F3)
HOME ACTIONS NA	WIGATE					Δ	Ivanced Data Management -	Dev -	ADM-Nav2018-CU21 - qt103.pfhq.local 🕜
1	issions User Groups User Vser Group Process	Jser Group	Notes Links Show Attached	Refresh Clear Filter Page	Find				
Departments D Object Manager Financial Management	Permission Sets *					Type to filter (F3)	Permission Set ▼ → No filters applied	~	Permissions
 Sales & Marketing Purchasing 		lame Extension Name						^	Ta 4 Currency Ta 7 Standard Text
Warehouse		DCS-bruger						-11	Ta 11 Country/Region
Manufacturing Jobs		DCS-opsætning						- 11	Ta 14 Location
Resource Planning		e anlægsaktiver							Ta 18 Customer
Service		edigere anlægs							Ta 23 Vendor
Human Resources		e forsikringsjou							Ta 27 Item
 Administration 		prette poster i							Ta 30 Item Translation
 IT Administration 		ogføre forsikrin							
Data Deletion Contact Creation		e anl.forsikring							Tenant Permissions
General		edigere anlægs							C Object Name
Reports		e anlægsjourna							T
Services		prette poster i							There is nothing to show in this view.
Extensions 🗸		ogføre anlægs							······
A Home		nlægsaktiver,							
		nlægsaktiver, P							
Posted Documents	L	asisbruger (alt i							
Self-Service		psætning af br							
		e kampagner o							
Departments		ed. kampagner							
+		e kontakt, post							
Advand Date Management, Dav	CRM-KONT RED R	edigere kontakt							

To every permission set a number of tables are attached. Click Permissions to lookup what tables.

🚮 Edit - Pe	ermissions									- (×
- но	ME ACTIONS						Ad	vanced Data Ma	nagement - De	v - ADM-I	Nav201	. 6
Delete Manage	Include/Exclude Permission Set Process	Refresh Pag	Find									
General Role ID: Show:	BASIS Only In Permissi	on Set		~	Add Read Permissio	n to Related Tab	oles:					
Objec Type		ct 🔺 Ob D	oject Name		Read	Insert Permission	Modify Permission	Delete Permission	Execute Permission	Securit	ty Filter	^
Table [Data	4 Cu	rrency		Yes	Indirect	Indirect					
Table [Data	7 Sta	ndard Text		Yes							
Table [Data	11 Co	untry/Region Translat	ion	Yes	Yes	Yes	Yes				
Table [Data	14 Loc	ation		Yes	Indirect	Indirect					
Table [Data	18 Cu	stomer		Yes	Indirect	Indirect					
Table [Data	23 Ver	dor		Yes	Indirect	Indirect					~
											ОК	

These tables do have access rights set up. Permissions can be fully granted with a "Yes" or "Indirect" meaning that the access is allowed when the access is required by a function performed by the user.

Setting up Field Roles

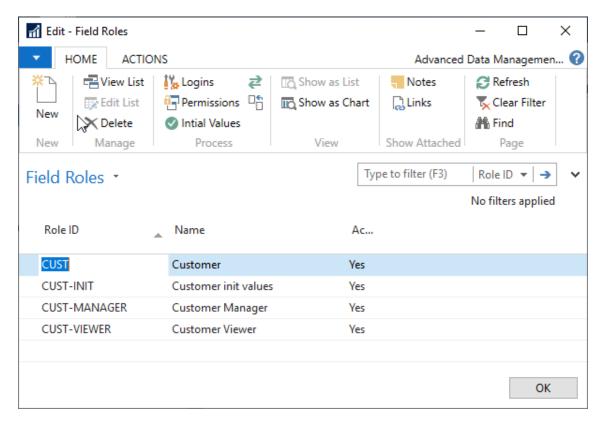
In the Departments section under Administration, Application Setup, Advanced Data Management the Field Roles can be defined. Field Roles are what ADM is using as rules for access to tables and fields.

Advanced Data Management

Administration

Field Roles Permission Card

For every role there is a set of permissions, defining exactly what access a user granted the role is becoming.



Note that more Field Roles can be referring to the same table. With different roles for one table, different users can have granted different access rights to the one and same table.

Actions

Logins	Define logins to the current field role.
Permissions	Define permissions for specific fields.
Initial Values	Define initial values to be set when creating a new record.
Confirm Changes	Define what changes have to be confirmed.
Setup Change Log	Access to Change Log setup

Logins Defining what logins to be granted the access rules belonging to the current Field Role.

📶 Edit - N	Member Of - CUST Custor	ner				_		×
- но	OME				Advanced	l Data M	anageme	n 🕜
New New	View List Manage	Show Show as as List Chart View	Notes Show Att	Links	Refresh	Clear Filter Page	Find	
Membe		Type Type	to filter (F3) User ID	1	Users	F	▾│→	
Users	Code		010.10					*
							ОК	

All Users	Selecting "All Users" activates the role for all users in Microsoft Dynamics NAV.
User Group Code	Setting User Group when the permissions in the Field Role has to be attached to a group of users. An employee assigned to the User Group is inheriting permissions belonging to this group.
User Group Description	Description of selected User Group. Not editable.
User ID	Assign a specific user to the role.
Company	Leave this field empty if the role has to affect all companies. Entering a company makes the Field Role to be used in a single company.

Permissions

To every Field Role a number of permissions must be defined. Permissions are applying to a given field within a selected table.

Set up permissions for a given field in a chosen table. The permission is linked to a Field Permission Code.

Table T	Image: Permission S Image: Permission Copy to Setup Filter Field Scharge Log Process Image: Pro	HOME	ACTIONS								Advance	ed Data Man	ageme	ent - Dev - ADM-Nav2018-CU21 -	qt1
Table Table name Field No. Field Caption Insert Mo Delete Deny Se New Value Filter There is nothing to show in this view.	Table a Table name Field No. Field Caption Insert Mo Delete Deny Se New Value Filter There is nothing to show in this view.	lew Viev List	v Edit Delete	Filter fields	Setup Change Log	Show Show as as List Chart	Notes Li	nks R	efresh Clea Filte	er Find					
No. Per Per Filt Filt There is nothing to show in this view.	No. Per Per Per Filt There is nothing to show in this view.			Field No.	Field Car	ntion	Insert	L			I	Filter: CUST	*	Click here to create a new note.	
		No.					Per								IS

The permission is granting modify permission for field 39 Blocked in table 18 Customer.

Table No.	Enter number of the table for which the permissions are applying to.
Table Name	Name of the selected table. Not editable.
Field No.	Select the field number to define the field to be set up.
Field Caption	Name of the selected field. Not editable.
Block Zoom	Not used
Insert permission	Applying insert access rights on the selected field.
Modify permission	Applying modify access rights on the selected field.
Delete permission	Applying delete access rights on the selected field.
Deny	Denying any kind of change access, including insert, modify and delete actions.
Security Filter	Yes is displayed if a Permission Filter has been defined.
New Value Filter	Showing if filter was set

Permission Filter

Setting up rules for when a field can be changed is possible using "Permission Filters".

🚮 Edit - Field Perm	nission Filters				_		×
HOME				Advanc	ed Data	Manage	0
New View List		Show as List View	Notes Show A	Links	A Fir	ear Filter	
Field Permissi	ion Filters 🔹	Type to filt Filter: CUST-		Filter Fiel		▼ → • 18 • 39	~
Filter 🔒 Field No.	Filter Field Name	I	Filter				
2 N	Name	~	(>"				
5 A	Address	~	(>"				
16 G	Global Dimension 1 (Code <	(>"				
86 V	/AT Registration No.	~	(>"				
88 G	Gen. Bus. Posting Gro	oup	<>"				~
						ОК	

A few fields have to be filled in before modification of field 39 Blocked on table 18 Customer is possible. Otherwise the change will be denied.

You can refer to specific values to be present in a given field or more loosely specified criterias like <>" meaning not blank. Filters are as normally used in Dynamics NAV/Dynamics 365 Business Central.

Copy to fields

The "Copy to fields" action button makes it easy to copy a permissions definition already set to one or more fields.

📊 Edit	- Field Pe	rmissions -	CUST-M	IANAGER Cu	istomer M	anager														-		×
▼ +	IOME	ACTIONS													Advanc	ced D	ata Ma	nagem	ent - Dev - ADM-Na	av2018-0	CU21 - qt	t1 🕜
New New	View		Delete	Permission Filter		Change Log	Show as List	Show as Chart	Notes Show A	F		Clear Filter Page	Find									
Field I	Permis	sions 🔹									Type to	filter (F	3)	Table F	e No. Filter: CUST		→ →	~	Notes Click here to cre	ate a nev		^ ^
	able 🔺 No.	Table nam	ne		Field No.	🔔 Field Ca	ption		lns Pe	lo er	Delete Per	Deny	Se Filt.		ew Value Fi	ilter			There is nothin	g to sho ew.	w in this	
	18 ~	Customer				5 Address			[\checkmark			No						VI	ew.		
	18	Customer				39 Blocked			[Yes									
<																		>				~
																					Ok	(

An example is if you have set up Modify Permissions for one field and you want to grant the same permission to other fields.

Press "Copy to fields" and select one or more fields before clicking OK. Then the new Field Permission lines are inserted for every selected field.

Initial Values

Besides granting or denying access to tables and fields, ADM can ensure that a new record in a table will have specified initial values set, when a record is created.

Enter what new value a given field in a chosen table should be filled in with on creation of a brand-new record.

🚮 Edit - Init Valu	es			- 0	×
HOME	ACTIONS		Advanced Data	Management - Dev - AD	M-N 🕜
New View New List	Edit List Delete Manage	Filter Setup Change Log Process View	Notes Links Refresh Clear Find Show Attached Page		
Init Values -	Table name	Field No. 🔔 Field Caption	Type to filter (F	3) Table No. 💌 Filter: CUST Vali	·INIT Filt
No.		····· ▲ ····			
18 ~	Customer	39 Blocked	All		No
					ОК

The initial value displayed her, is ensuring that field 39 Blocked in table 18 Customer will be initialized with new value "All" when inserting a new customer record.

Table No.	Enter number of the table for which the initial value is applying to.
Table Name	Name of the selected table. Not editable.
Field No.	Select the field number to define the field to be set up.
Field Caption	Name of the selected field. Not editable.
New Value	The value being the initial value.
Validate	Select this check box if the validation code on the field has to be activated when entering the "New Value" into the field.
Filter	Showing if a filter has been defined. Not editable.

Filter

You can set up a filter limiting the current Initial Value rule to a certain group of data. Select one or more fields, then set the desired filter on the field.

Confirm Changes

Helping to make sure the correct value is entered in a specific field, a field change can be notified with a confirm statement, making the user aware of what change he or she is making. First when confirming the change, the new value is written into the field.

📶 Edit - Field - C	onfirm Changes									_		×
HOME	ACTIONS					A	Advanced	Data M	anagement	t - Dev - A	DM-Nav	🕜
* 🗖	v X	17 <u>.</u>			-		B	T _x	<u>A</u>			
New View List	Edit Delete List	Filter Show Change Log Entries	Setup Change Log	Show Show as as List Chart	Notes	Links	Refresh	Clear Filter	Find			
New	Manage	Process		View	Show At	tached		Page				
Field - Confi	rm Changes	•			Ту	/pe to filt	ter (F3)	Tabl	e No.	Filt	▼ →	•
Table 🔺 No.	Table name	Field No.	Field Capti	ion	Filt	Con Cha	Allow cha	Force Log	Object Ty	/pe	Object	ID
18 ~	Customer	3	9 Blocked		No	\checkmark			Codeunit			0
										[ОК	

Setting "Confirm Change" on field 39 Blocked on table 18 Customer is making a confirm statement occur when changing the field.

Microsof	't Dynamics NAV X					
0	There are unsaved changes on the page. Do you want to discard these changes?					
	Yes No					

The user has to confirm the change before it is committed.

Table No. Enter number of the table for which the permissions are applying to. Table Name Name of the selected table. Not editable. Field No. Select the field number to define the field to be set up. **Field Caption** Name of the selected field. Not editable. Filter Showing if a filter has been defined. Not editable. **Confirm Change** Select this field to activate the confirm statement. Allow change from blank Select this field to allow any changes when the field is not filled in yet. ? Force Log Change Object Type ? **Object ID** ?

Filter

You can set up a filter limiting the current Confirm Change rule to a certain group of data. Select one or more fields, then set the desired filter on the field.

Show Change Log Entries

Easy access to watch Change Log Entries when you want to track changes already performed in the field you have selected.

Setup Change Log

Here you are provided an easy access to Change Log setup for the current Role ID. Clicking this action, you will be met with a confirm statement, where you will have to accept setting Change Log up.

Microsof	t Dynamics NAV		×				
?	You are about to setup Change Log for all fields belonging to Role ID CUST-INIT. Do you want to proceed?						
		Yes	No				

Selecting Yes will set up the change log to track changes on fields belonging to the current Field Role.