



## Four-Eyes Approval

# APPROVAL SYSTEM TO PREVENT ERRORS AND FRAUD

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## INTRODUCTION

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To manage changes in a few master data tables in Microsoft Dynamics 365 Business Central, ProFacto is offering an approval management system, where changes in one or more of the included tables will be logged, and an approval has to be fulfilled before the change is ready for use.

The tables handled by approval management are:

- G/L Account
- Item
- Bank Account
- Customer
- Customer Bank Account
- Vendor
- Vendor Bank Account
- Dimension
- Dimension Value
- ECO Entry

You only need to set up the Four-Eyes Approval. Select the master data tables you want to be handled by the approval management system. Then the system is ready to use.

Changes will be detected automatically and these will be logged in the Approval Log. Get an overview of changed records in the *Four-Eyes Approval Log*.

From each master data card, you will be able to view the changes on the specific record by clicking “*Show changes*”. This action button is available on all relevant card pages.

## REQUIREMENTS

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This product can be installed as an extension in Microsoft Dynamics 365 Business Central.

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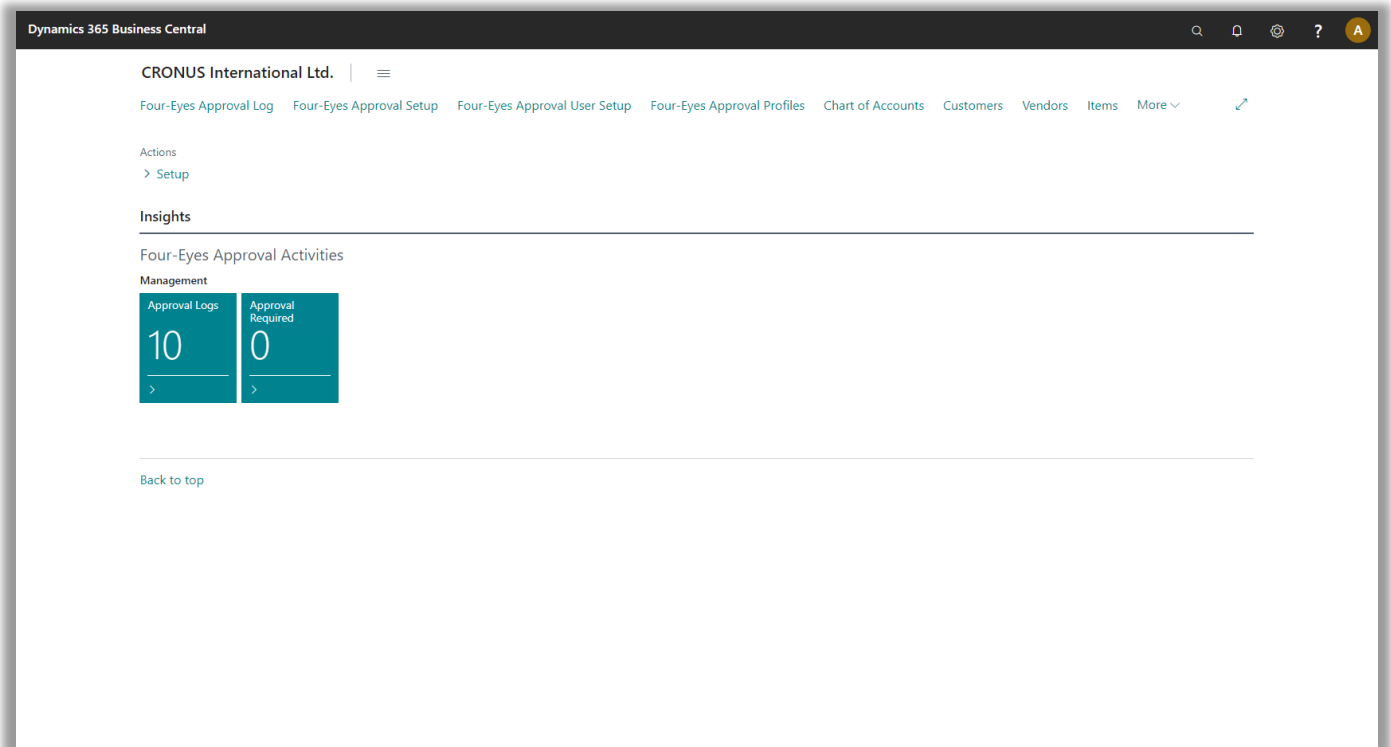
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## FOUR-EYES APPROVAL ROLE CENTER

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The best overview of the available functions in Four-Eyes Approval are present in the role center. Here you will find easy access to the Four-Eyes Approval definitions and functions.



In the navigation area you will find access to the Approval Log, Setup and master data tables.

The provided role center is not the one you will use in daily use. You will have more use of the access found through the role explorer which is holding the same access points as found in the navigation area of the role center.

Access the role explorer by clicking on the three horizontal lines right next to the company name on the role center. Here you can access all links provided by profiles which are set up with the “Show in Role Explorer” option.

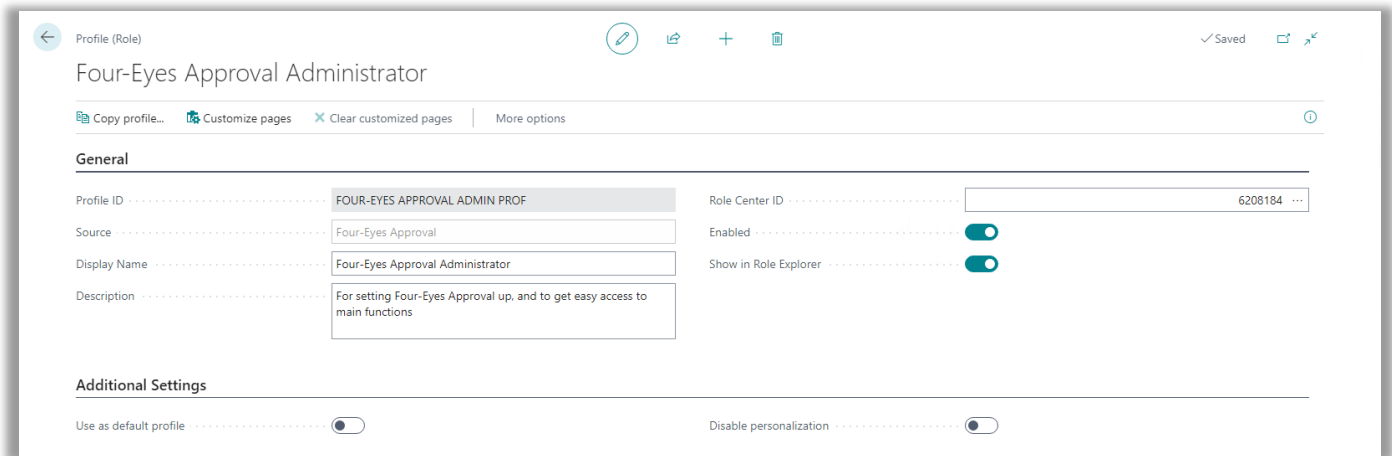
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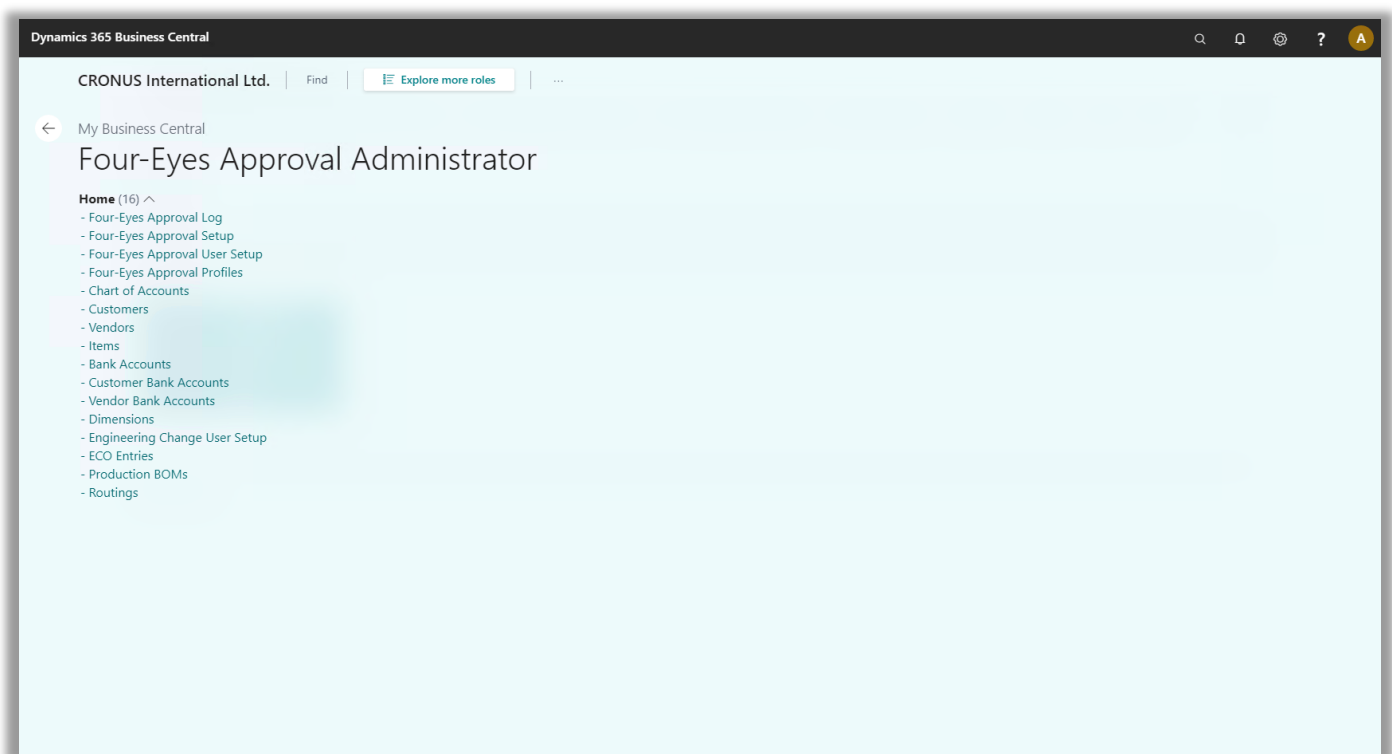
## Role Explorer

We recommend selecting the “Show in Role Explorer” option in the Four-Eyes Approval Administrator profile.



Then you will be able to access relevant pages directly from the Role Explorer. Getting to know the page names, you can search for these in the search field too.

Role Explorer access is the easy way to get an overview of main pages in Four-Eyes Approval. When the option “Show in Role Explorer” is set on the profile, the links provided are accessible whatever role center you are using.



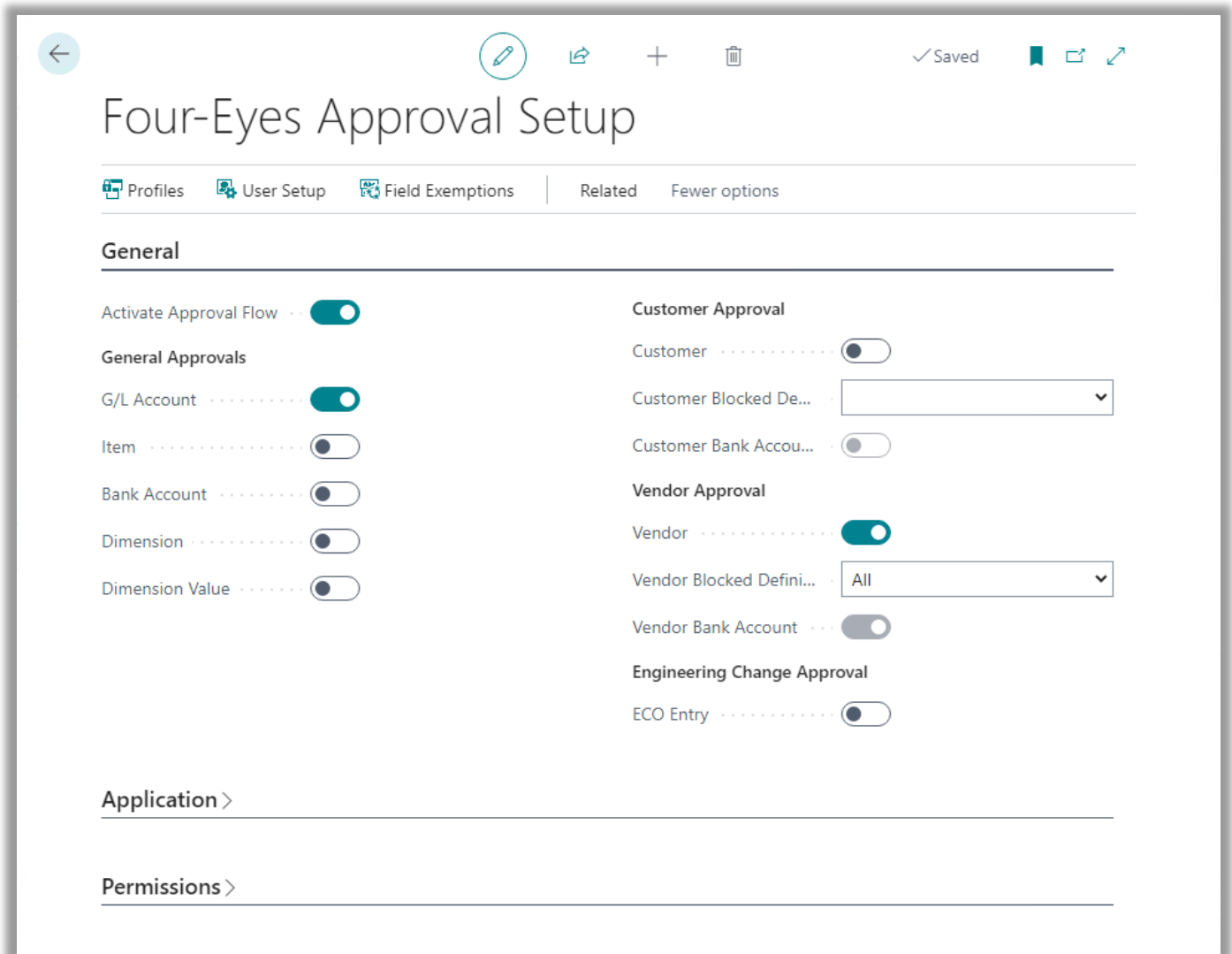
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# SETUP

## Select master table areas

Open the *Four-Eyes Approval setup* page from the role center, from Departments or search for it in the search field.



Here you select what master data to be handled by approval management.

Also mark the *“Activate Approval Flow”* field to enable approval management. Now changes in the selected tables will be logged.


*“Customer Blocked Definition”* and *“Vendor Blocked Definition”* are used to set what blocked level to use when blocking a record for pending approval. In these two tables blocked is not a simple checkbox.

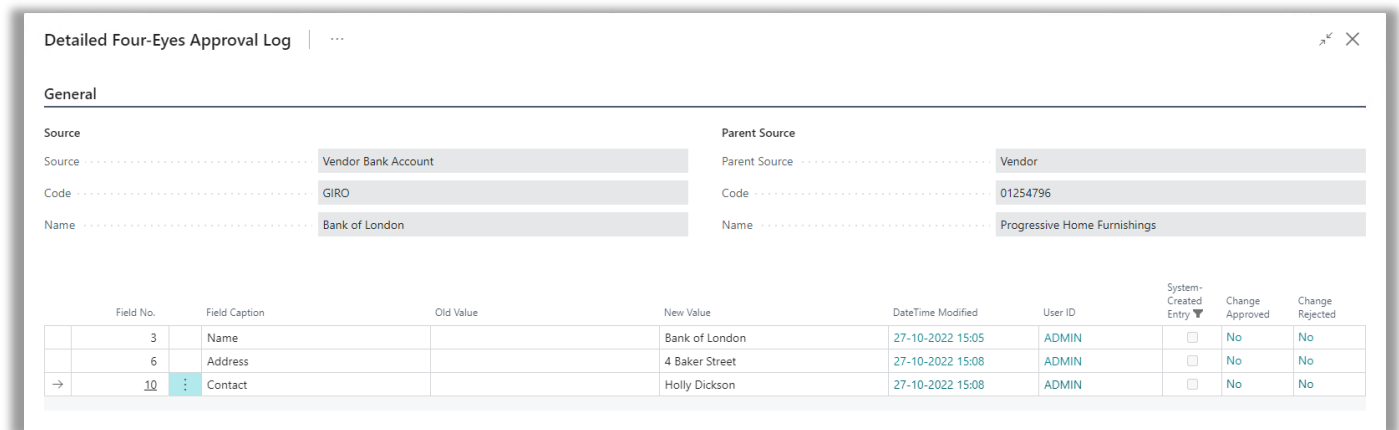
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## Changes are logged

Changing data in a Vendor Bank Account will be logged. When logging the master data card will be blocked. After the changes are logged, the user will be able to see the changes by clicking “*Show changes*” on the Bank Account Card.

 Show changes



Field No.	Field Caption	Old Value	New Value	DateTime Modified	User ID	System-Created Entry	Change Approved	Change Rejected
3	Name		Bank of London	27-10-2022 15:05	ADMIN	<input type="checkbox"/>	No	No
6	Address		4 Baker Street	27-10-2022 15:08	ADMIN	<input type="checkbox"/>	No	No
→ 10	Contact		Holly Dickson	27-10-2022 15:08	ADMIN	<input type="checkbox"/>	No	No

Here the latest changes are displayed. By default, the changes since the latest approval or rejection are shown. The user who has made changes cannot approve changes made by him or herself. This is a task for any other user. Field changes still not approved or rejected are displayed.

In the “**Show changes**” page three buttons are available.

- **Approve** Approving changes – The Blocked field will be rolled back.
- **Reject** Rejecting changes – The Blocked field will be rolled back. Changes will be rolled back.
- **Show all** Show all changes logged for the current record. Including approved and rejected changes.

When approving or rejecting, the Blocked field will be left in the state as before the approval sequence was initiated.

A similar functionality is available on all the included master data cards.

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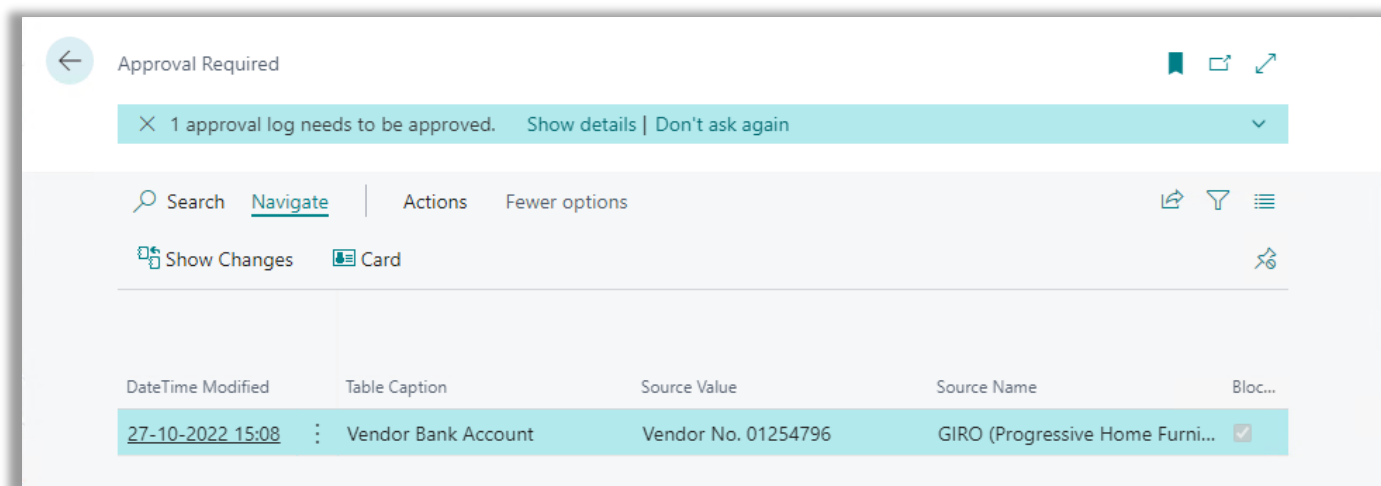
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## Overview

You will be able to get an overview of the logged changes in the *Four-Eyes Approval log*. Access this from the Four-Eyes Approval role center or from the Role Explorer or use the search field.

Here log entries for all tables included found. As a default only not processed (approved or rejected) log entries are displayed



The screenshot shows a user interface for 'Approval Required'. At the top, there is a notification bar stating '1 approval log needs to be approved.' with options to 'Show details' or 'Don't ask again'. Below this is a navigation bar with 'Search', 'Navigate', 'Actions', and 'Fewer options'. There are also buttons for 'Show Changes' and 'Card'. The main content is a table with the following data:

DateTime Modified	Table Caption	Source Value	Source Name	Bloc...
27-10-2022 15:08	Vendor Bank Account	Vendor No. 01254796	GIRO (Progressive Home Furni...	<input checked="" type="checkbox"/>

By clicking the “*Show changes*” you will access the Four-Eyes Approval log details. The same as shown from the card pages.

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The log details for the selected approval log entry will be listed in the *Detailed Four-Eyes Approval Log* page.

**Detailed Four-Eyes Approval Log**

**General**

Source: Vendor Bank Account

Code: GIRO

Name: Bank of London

Code: ...

Name: Progressive Home Furnishings

Field No.	Field Caption	Old Value	New Value	DateTime
3	Name		Bank of London	27-10-21
6	Address		4 Baker Street	27-10-21
→ 10	Contact		Holly Dickson	27-10-21

For users allowed to approve the change the *Approve* and *Reject* options are active.

Functions available in the *Detailed Four-Eyes Approval Log* page are:

- **Approve** Approving changes – The Blocked field will be rolled back.
- **Reject** Rejecting changes – The Blocked field will be rolled back. Changes will be rolled back.
- **Show all** Show all changes logged for the current record. Including approved and rejected changes.

When approving or rejecting, the Blocked field will be left in the state as before the approval sequence was initiated.

If there are no changes to be approved, a “No changes to approve” notice is displayed.

Field No.	Field Caption	Old Value	New Value	DateTime
→	⋮	< No changes to approve. >	< Last Approved By User ID ...	–

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## Field Blocked usage

### Table blocked by approval system

When changes in the master data tables included in the approval management are made, the field Blocked will be set at the time the changes are logged.

Blocked fields of type Boolean (yes/no fields) will be set to "Yes" (TRUE), and blocked fields of type option will be set to "All" during the change logging procedure.

A blocked field set by the approval system, which indicates that the changes have to be approved or rejected, can be changed by approving or rejecting only.

After approving or rejecting the Blocked field is no longer marked "Yes" or "All".

### Changing field blocked manually


A user can set the Blocked field manually. The same user who blocked the master data manually can unblock the same master data without approval. However, the change of the Blocked field will still be logged.

Unlocking a manually set blocking is possible for another user. This change has to be approved by another user before the field Blocked is cleared.

When unblocking a manually set blocking the following message appears:

It is not possible manually to unblock when the Blocked field has been set by the system during logging other changes.

Then the blocking has to be removed by either approving or rejecting the changes.

 Manually unblocking is not allowed when changes are to be approved. Please use "Show changes" to approve.

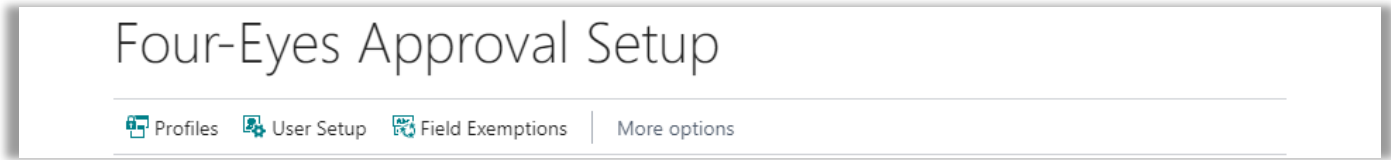
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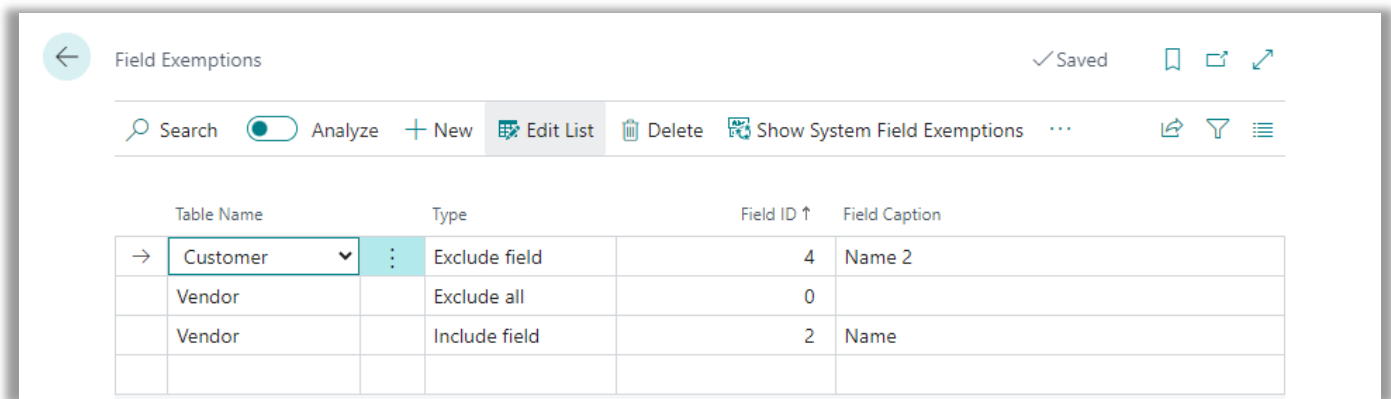
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## Field Exemptions setup

From the Four-Eyes Approval Setup page you can define fields to be excepts from approval.



You can enter several lines to define exactly what fields you want to be disregarded when the system is checking for approving changes.



Enter a line for a field you want not to be controlled, even if it is in one of the tables managed by Four-Eyes Approval. Select table, select type ‘Exclude field’ and enter the field number of the field to exclude.

Example shown above: Field No. 4 “Name 2” in table Customer is excluded.

If you want to manage only a single field or only a few fields within a table, you can select the table, then choose the type ‘Exclude all’ and leave the Field ID to be undefined: 0. After that add one line with type ‘Include field’ for each field you want to be managed by Four-Eyes Approval.

Example shown above: Table Vendor is defined to exclude all, and then a second line including field no. 2 “Name”.

It is not allowed to use types ‘Include field’ and ‘Exclude field’ within the same table ID. It is not allowed to use ‘Exclude all’ and ‘Exclude field’ or ‘Include all’ and ‘Include field’ in combination, since this is breaking the logic of the setup.

### System Field Exemptions

Some field types are not covered by the approval process and a selection of fields are excepted by default. You can see a list of these fields in “Show System Field Exemptions”.

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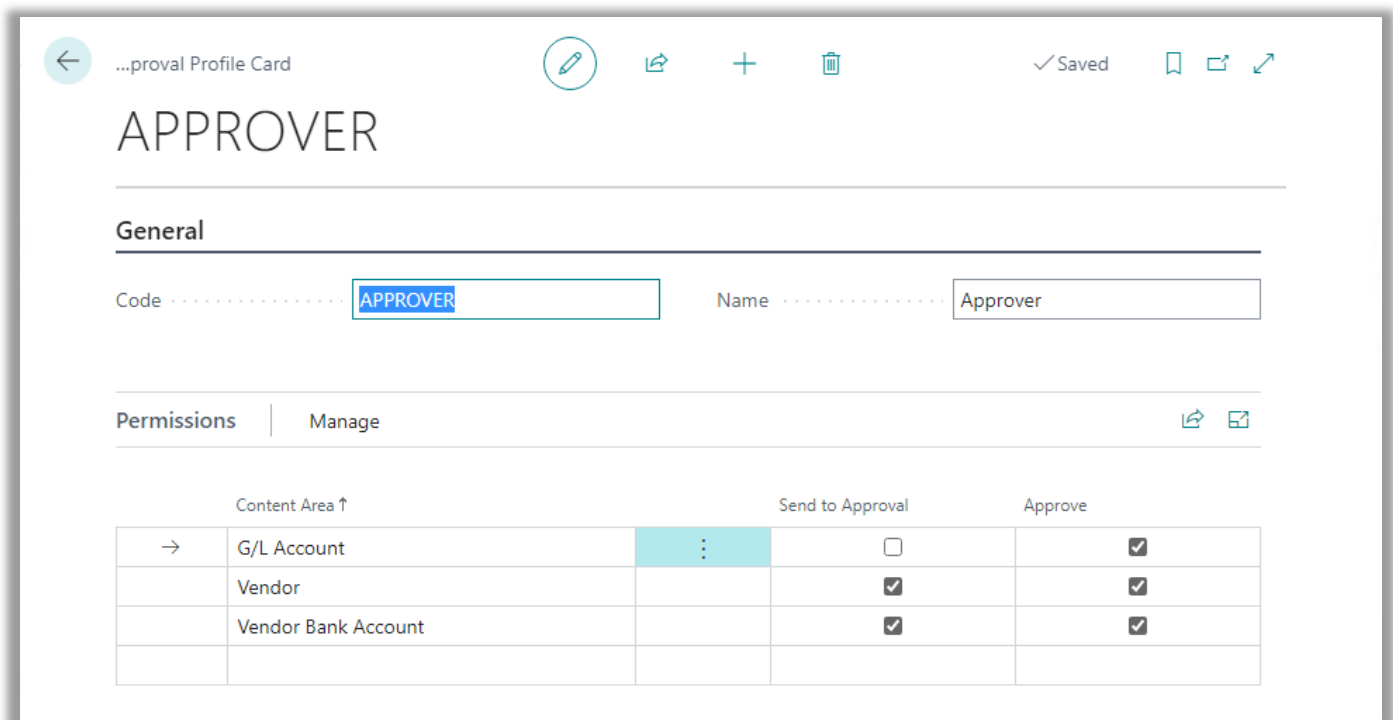
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## PROFILES AND USER SETUP

### Profile

Applying Four-Eyes Approval Profiles to Four-Eyes Approval User Setup it is possible to define if users are permitted to send changes to approval and to approve changes.

For a certain profile you can select areas to be granted permissions to and define if the permissions include “Send to Approval” and/or “Approve”.



The screenshot shows a web interface for configuring a profile named 'APPROVER'. The 'General' section contains two input fields: 'Code' with the value 'APPROVER' and 'Name' with the value 'Approver'. The 'Permissions' section features a table with columns for 'Content Area', 'Send to Approval', and 'Approve'. The table lists three content areas: 'G/L Account', 'Vendor', and 'Vendor Bank Account'. The 'G/L Account' row has a menu icon in the 'Content Area' column, an unchecked checkbox in the 'Send to Approval' column, and a checked checkbox in the 'Approve' column. The 'Vendor' and 'Vendor Bank Account' rows have checked checkboxes in both the 'Send to Approval' and 'Approve' columns.

Content Area ↑	Send to Approval	Approve
→ G/L Account	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Vendor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Vendor Bank Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Profiles are to be attached to Four-Eyes Approval User Setup, which is used to grant users a profile.

You need to have a profile for every selection of access rights meant for a single user or for a group of users having identical permissions regarding the use of Four-Eyes Approval.

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## User Setup

For every user one Four-Eyes Approval Profile can be set. Different users can have the same profile, but a user cannot have more profiles attached.

Four-Eyes Approval User Setup ✓ Saved

Search + New Edit List Delete

User Name ↑	Full Name	Profile Code ↑	Profile Name
→ ADMIN	⋮	APPROVER	Approver

Permissions ↗

Content Area ↑	Send to Approval	Approve
G/L Account	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Vendor	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
→ Vendor Bank Account	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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# ENGINEERING CHANGE

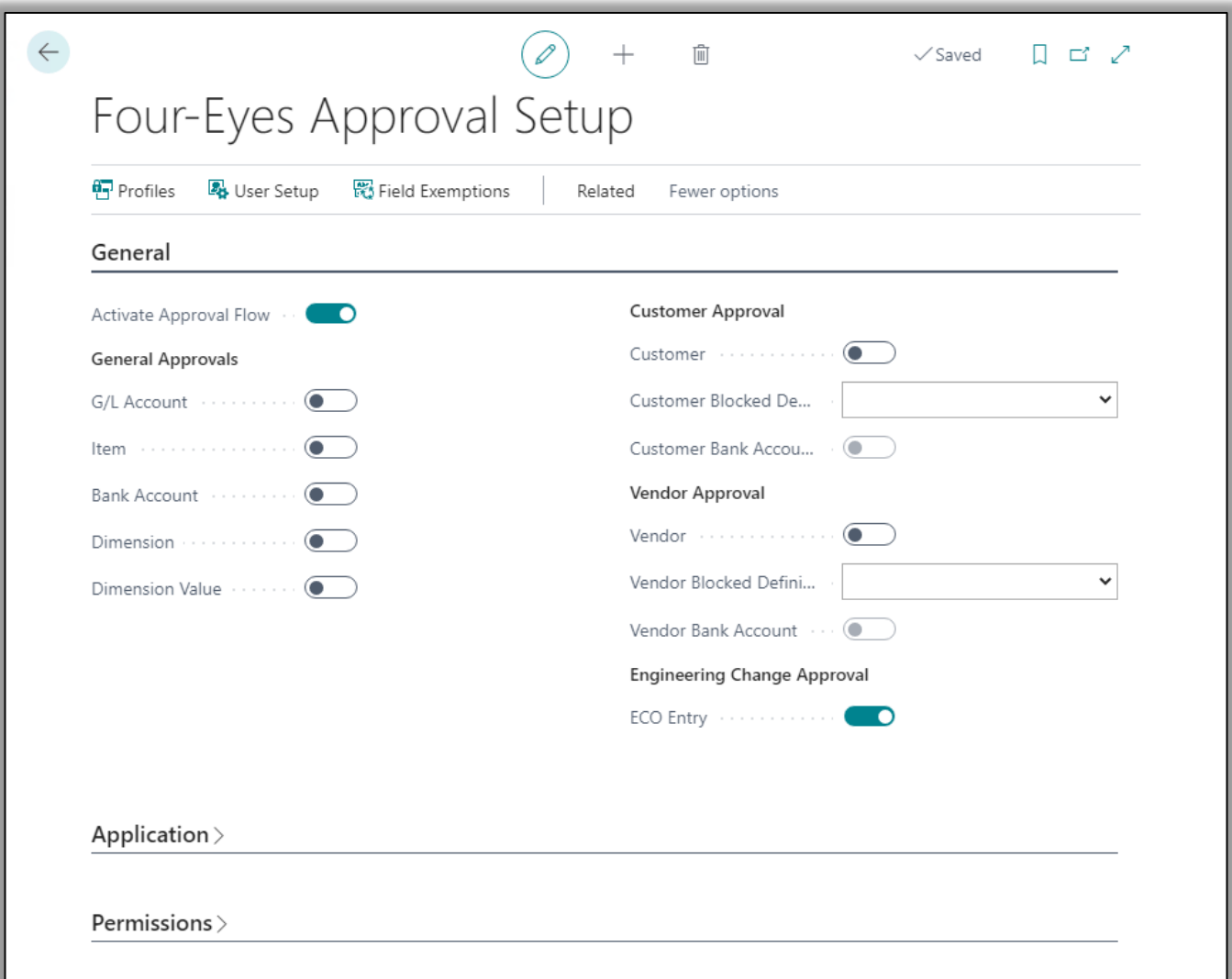
## The Engineering Change option

As an addition to Four-Eyes Approval the Engineering Change Approval offers the users a Four-Eyes Approval option securing validation of changes in Production BOM Version and in the Routing Version.

Attach the permission set EC USER “Engineering Change User” to users who have to work with Production BOM definitions and approval.

## Four-Eyes Approval Setup

Activation of the Engineering Change Approval is done by selecting “ECO Entry” in Four-Eyes Approval Setup. ECO is short for Engineering Change Order.



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## Engineering Change Management Setup

You must set up the areas to cover by the Engineering Change and also state if password is required. Search for Engineering Change Management Setup in the search field.

Engineering Change Order Nos.	Select number series to be used by Engineering Change.
Prod. BOM Version Active	Engineering Change interaction is activated for managing Production BOM Versions.
Routing Version Active	Engineering Change interaction is activated for managing Routing Versions.
Attachment Storage Type	<i>Embedded</i> : Stored inside the database. <i>Disk File</i> : Stored in external disk files. Not recommended for cloud installations.
Attachment Storage Location	Path for where files are stored.
Use Windows login	Set if Windows logins are to be used.
Domain	Domain name.
Password required	Activate this option if you want to request a password whenever a change order is to be processed.

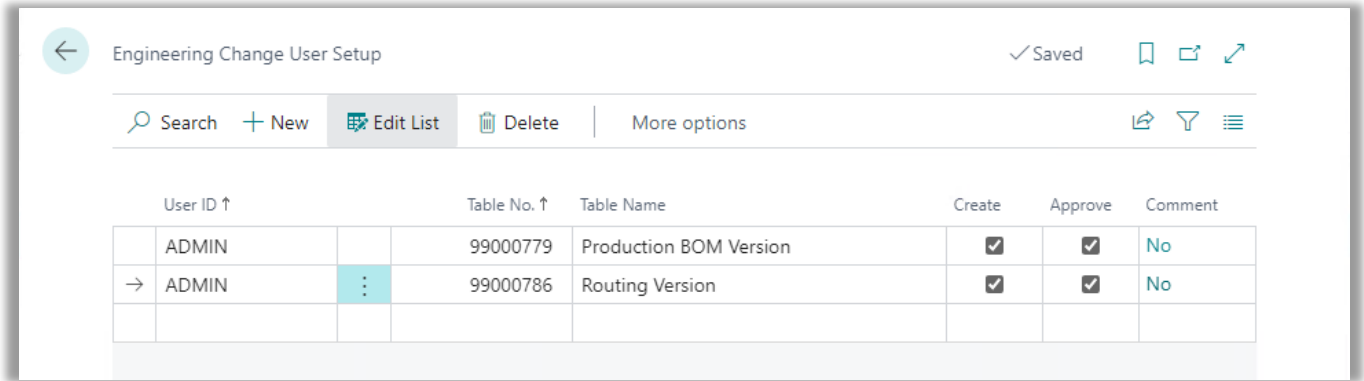
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## User setup

Define what tables the users are allowed to create and approve Engineering Change Interactions. You have to add tables according to which of the two supported tables every single user must be able to handle through Engineering Change.



User ID

Select user for which a permission is to be set up.

Table No.

Enter "Table No." for the table permission to set up.

Supported tables are:

Table 99000779 Production BOM Version

Table 99000786 Routing Version

Create

Mark "Create" field if the user should be able to create an EC Interaction.

Approve

Mark "Approve" field if th user should be allowed to approve an EC Interaction.

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## Production BOM and Production BOM Version

From the production BOM you will find the Production BOM Version card. The BOM Version is defined here. The approval of the BOM is handled through Engineering Orders. The state of an Engineering Change Order (ECO) is to be seen in attached ECO Entries.

Here there will be related ECO entries if already processed, otherwise you hit the “EC Interact” function in the Actions menu.

The screenshot shows a software interface for a Production BOM Version card. At the top, it displays the title '1000 Bicycle 8' and the work date '26-01-2023'. Below the title, there are navigation tabs: 'New', 'Process', 'Page', 'Actions', 'Related', and 'Fewer options'. The 'Actions' tab is active, showing 'EC Interact' and 'Functions' options. The 'General' section contains several input fields: 'Version Code' (8), 'Status' (Under Development), 'Description' (Bicycle), 'Starting Date', 'Unit of Measure Code' (PCS), and 'Last Date Modified'. Below this is a table with columns: Type, No., Description, Quantity per, Unit of Measure Code, Scrap %, and Routin Code. The table lists various bicycle components and their quantities.

Type	No.	Description	Quantity per	Unit of Measure Code	Scrap %	Routin Code
→ Item	1900	Frame	0	PCS	0	
Item	1100	Front Wheel	0	PCS	0	
Item	1200	Back Wheel	0	PCS	0	
Item	1800	Handlebars	0	PCS	0	
Item	1850	Saddle	0	PCS	0	
Item	1700	Brake	0	PCS	5	
Item	1310	Chain	0	PCS	0	
Item	1320	Chain Wheel Front	0	PCS	0	
Item	1330	Chain Wheel Back	0	PCS	0	

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Here you can create a new ECO Entry, or if an ECO Entry already exists the ECO Entry can be approved or rejected. If your user is set up for having password demanded, you have to enter the password to proceed.

Hint: When opening the Actions menu, pin the actions Back, Next and Finish for easier access.

## Edit - Create Engineering Change Order Entry (Wi... ↗ ✕

---

[New](#) | Manage | Actions | Fewer options

[◀ Back](#) | [▶ Next](#) | [✓ Finish](#) 🔗

---

### FirstStep

---

This wizard helps you to create a new ECO Entry.

**Actual Source Record**

Primary Key .....	Production BOM No.=1000, Version Code=8
User ID .....	ADMIN
User Name .....	
Password .....	<input type="password"/>

---

[Close](#)

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Enter Engineering Change Order code according to the given change order the change of the BOM is following. Look up the list of valid ECO codes to attach the Engineering Change Order from the list of orders.

Add comment lines if you wish. Attach a file if further documentation is needed.

**Edit - Create Engineering Change Order Entry (Wi...**

[New](#) | [Manage](#) | [Actions](#) | [Fewer options](#)

[◀ Back](#) | [▶ Next](#) | [✔ Finish](#)

---

### SecondStep

You can now specify an ECO and description.

Which ECO is the interaction link...

Description

New Status

ECO Entry Comment

Comment	
→	

Attachment

[Close](#)

When finishing the wizard, an ECO Entry with status *Ready for approval* is created.

Approving or rejecting ECO Entries are done as handling other topics that requires acceptance from Four-Eyes Approval. Browse to ECO Entries and approve or reject an entry.

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You can use the “Change Status” button to change status using a wizard if you want to examine the comments and an attached document if available.

Entry No. ↑	ECO No.	Creation Date	Created By	Status	Comm...	Attachment No.	Change Date	Chan
1	ECO000001	26-10-2022	ADMIN	Approved	Yes	0	27-10-2022	TEST
2	ECO000001	27-10-2022	TEST	Approved	Yes	0	27-10-2022	ADM
3	ECO000001	27-10-2022	ADMIN	Ready for a...	Yes	2		

**Edit - Approve Engineering Change Order Entry (...)**

[New](#) | [Manage](#) | [Page](#) | [Actions](#) | [Fewer options](#)

◀ Back | ▶ Next | ✓ Finish

**Actual ECO Entry**

You can now approve or reject an ECO Entry.

Created By ..... ADMIN

Creation Date and Time ..... 27-10-2022 12:53

Status ..... Ready for approval

Attachment .....

**ECO Entry Comment**

Comment

→ With attached file a.csv

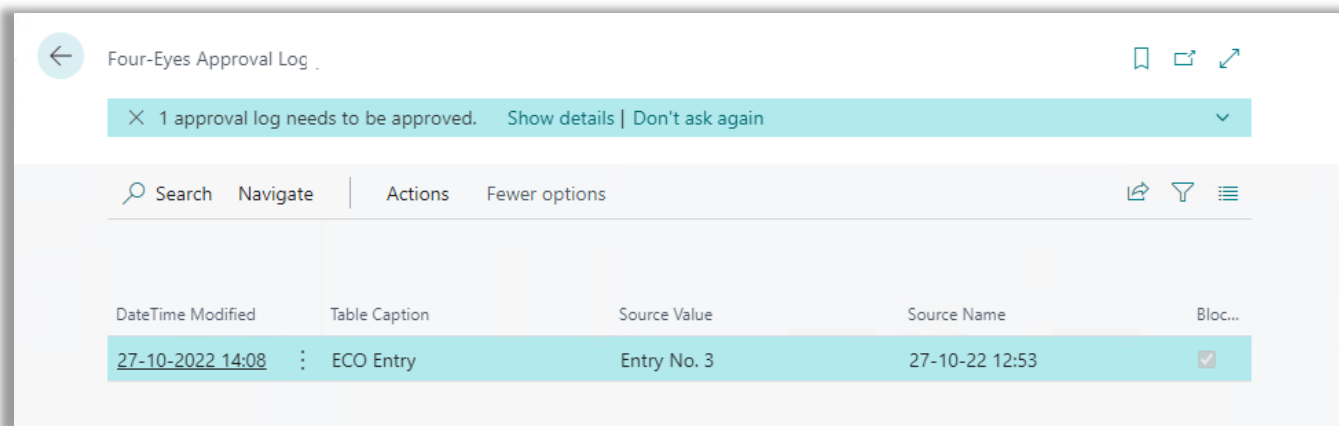
New Status ..... Approved

Set “New Status” to *Approved* if you want to approve the ECO Entry, set “New Status” to *Rejected* if not accepted. Complete your choice by clicking Finish.

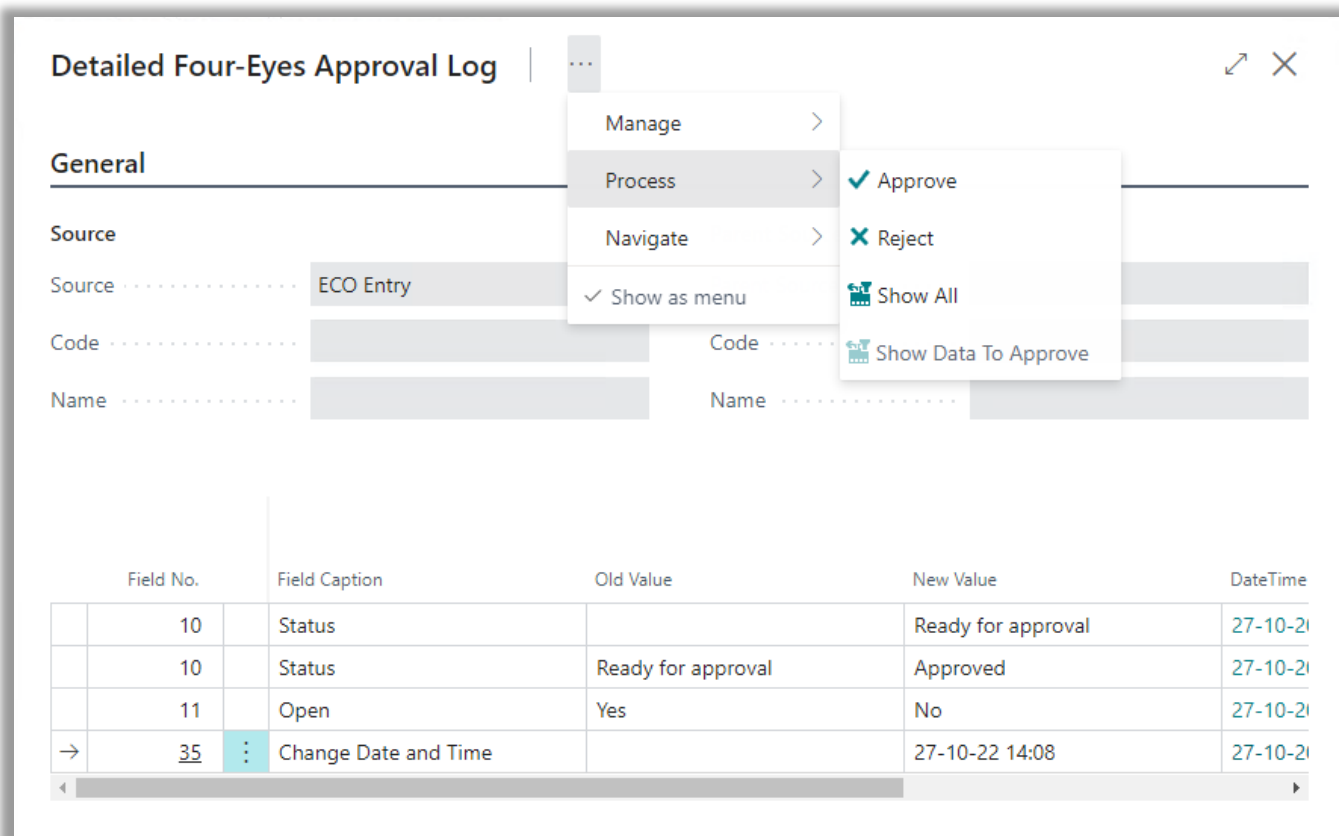
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If “ECO Entry” is set up for approval in the Four-Eyes Approval setup, the ECO Entry is still to be approved, since the change from *Ready for approval* was changed to *Approved* from the Four-Eyes Approval log.



From the Navigate select “Show Changes” to access the Approval Log page. Here you either approve or reject the changes using the normal Four-Eyes Approval verification procedure.



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# APPROVAL MANAGEMENT AND ADVANCED DATA MANAGEMENT

If Four-Eyes Approval functionality is setup for a table, the record is blocked if a user makes some changes. To unblock the record another user needs to approve or reject this. It is not possible for the user who made the change to unblock the record.

## Setting up restrictions

If we would like to set up who are allowed to unblock the record, then we need to install ProFactos **Advanced Data Management** extension. Here it is possible to set up permission on field level.

Advanced Data Management is available on AppSource. Visit our homepage for more information and documentation.

### Example:

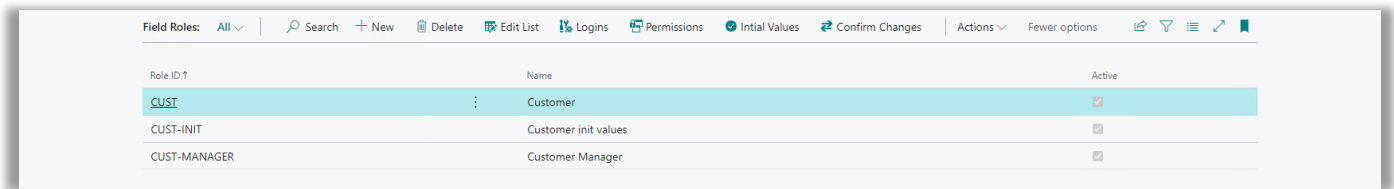
If we setup Four-eyes approval on Customer, then a customer is blocked if we make changes to this customer. Everyone, except the user who made the last change on the customer, can unblock the customer if they are allowed to modify customers.

If we have a group of people that can modify customers, but we would like to limit this further the number of people who can approve the changes, then this can be setup using Advanced Data Management.

### Field Roles

Example of setting up permission in Advanced Data Management for Customer

First, we have to create a Field Role.



Role ID ↑	Name	Active
CUST	Customer	<input checked="" type="checkbox"/>
CUST-INIT	Customer init values	<input type="checkbox"/>
CUST-MANAGER	Customer Manager	<input checked="" type="checkbox"/>

### Field Permissions

Then, we setup permission for the field Blocked on customer.

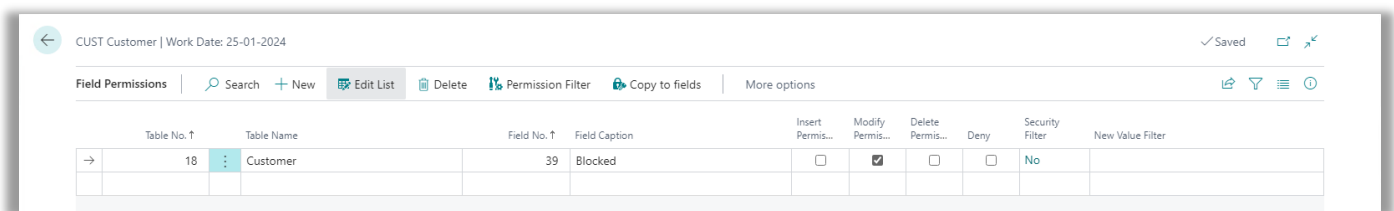


Table No. ↑	Table Name	Field No. ↑	Field Caption	Insert Permis...	Modify Permis...	Delete Permis...	Deny	Security Filter	New Value Filter
→ 18	Customer	39	Blocked	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	No	

We only want to restrict who can approve the customer changes, the one who can unblock the customer. Therefore, we need to setup a filter saying that this Field Role only applies to blocked customers. This is done by setting a filter on Blocked for All.

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## Field Permission Filters

Filter Field No. ↑	Filter Field Name	Filter Text
2	Name	<>"
5	Address	<>"
16	Global Dimension 1 Code	<>"
86	VAT Registration No.	<>"
→ 88	Gen. Bus. Posting Group	<>"

To activate this Field Role, we need to add users (can be a user group) to this Field Role.

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# TROUBLESHOOTING

In some cases, data in the database could cause unexpected locking of records, that the normal approval or rejection cannot handle. If this happens you might find a solution in this chapter.

## Approval Log Maintenance Tool

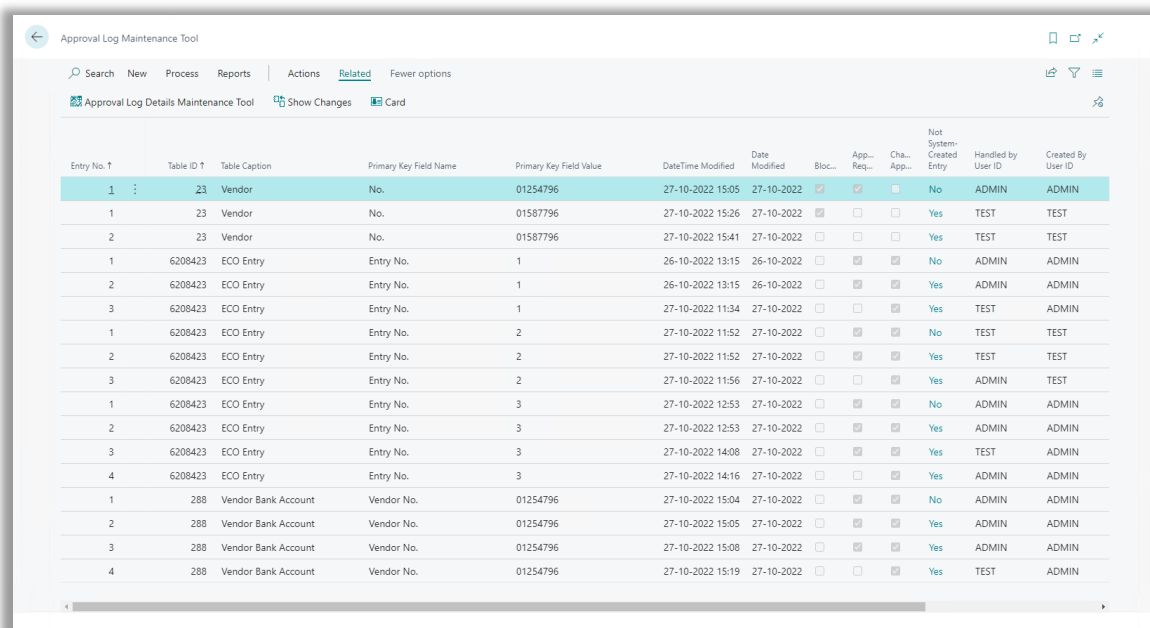
The Approval Log Maintenance Tool gives the administrator of Four-Eyes Approval a possibility to clean up invalid or unexpected data.

In short terms the two pages is granting access to delete an Approval Log entry including Detailed Approval Log entries. You find the pages by searching for *maintenance tool*.

*Important:* It is recommended to access data through “Approval Log Maintenance Tool” since here the access to Details are filtered on single Approval Log entries. From “Approval Log Details Repair Tool” you are presented all detailed entries at once with limited overview of which parent Approval Log they belong.

To enable the tool, the user profile must be set to ‘FOUR-EYES APPROVAL ADMIN’, even if it is for a short time. Else there is no access to the feature making deletion of undesired entries possible.

Even granted access, the user will be met with a warning about being careful when deleting entries.



Entry No. 1	Table ID 1	Table Caption	Primary Key Field Name	Primary Key Field Value	DateTime Modified	Date Modified	Bloc...	App... Req...	Cha... App...	Not System-Created Entry	Handled by User ID	Created By User ID
1	23	Vendor	No.	01254796	27-10-2022 15:05	27-10-2022	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	No	ADMIN	ADMIN
1	23	Vendor	No.	01587796	27-10-2022 15:26	27-10-2022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Yes	TEST	TEST
2	23	Vendor	No.	01587796	27-10-2022 15:41	27-10-2022	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Yes	TEST	TEST
1	6208423	ECO Entry	Entry No.	1	26-10-2022 13:15	26-10-2022	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No	ADMIN	ADMIN
2	6208423	ECO Entry	Entry No.	1	26-10-2022 13:15	26-10-2022	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Yes	ADMIN	ADMIN
3	6208423	ECO Entry	Entry No.	1	27-10-2022 11:34	27-10-2022	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yes	TEST	ADMIN
1	6208423	ECO Entry	Entry No.	2	27-10-2022 11:52	27-10-2022	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No	TEST	TEST
2	6208423	ECO Entry	Entry No.	2	27-10-2022 11:52	27-10-2022	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Yes	TEST	TEST
3	6208423	ECO Entry	Entry No.	2	27-10-2022 11:56	27-10-2022	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yes	ADMIN	TEST
1	6208423	ECO Entry	Entry No.	3	27-10-2022 12:53	27-10-2022	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No	ADMIN	ADMIN
2	6208423	ECO Entry	Entry No.	3	27-10-2022 12:53	27-10-2022	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Yes	ADMIN	ADMIN
3	6208423	ECO Entry	Entry No.	3	27-10-2022 14:08	27-10-2022	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Yes	TEST	ADMIN
4	6208423	ECO Entry	Entry No.	3	27-10-2022 14:16	27-10-2022	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yes	ADMIN	ADMIN
1	288	Vendor Bank Account	Vendor No.	01254796	27-10-2022 15:04	27-10-2022	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	No	ADMIN	ADMIN
2	288	Vendor Bank Account	Vendor No.	01254796	27-10-2022 15:05	27-10-2022	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Yes	ADMIN	ADMIN
3	288	Vendor Bank Account	Vendor No.	01254796	27-10-2022 15:08	27-10-2022	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Yes	ADMIN	ADMIN
4	288	Vendor Bank Account	Vendor No.	01254796	27-10-2022 15:19	27-10-2022	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Yes	TEST	ADMIN

The page is very similar to the normal Approval Log List, only two action buttons are added.

Delete Log

The log entry is deleted. Detailed entries included. Be careful. After deleting there is no regrets.

Approval Log Details Maintenance Tool

Access to the second page showing Details in the tool, but from here with a filter on the current Approval Log entry.

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