

info@pinetworks.net

**\$ +960 7921199** 

# **BUSINESS UNT** User Guide



PINETWORKS | 2nd Roor, G. Pyramids | 20134, Malé, Republic of Maldives | www.pinetworks.net



# Contents

Overview	
Key functionalities2	
Benefits2	
Setting up the Business Unit Security Filter	



### **Overview**

Through our work in rolling out Enterprise Resource Planning (ERP) solutions as well as automating business processes, we had identified the need for businesses to ensure that various business units within the Organization only has access to the data that is relevant to their Unit.

To this extent, The Business Unit extension is developed by PiNETWORKS Pvt Ltd to allow an organization to manage access to business central data by ensure that users associated with one business unit only interact with the data pertinent to their business unit, when managing multiple business activities in a single Company.

The following guide will set out the steps to undertake for the user to setup and utilize the extension on the Business Central Platform.

## **Key functionalities**

- Dynamically select required tables to apply restriction based on business units
- Select specific pages to apply business unit restrictions
- Assign Users to certain business units to restrict access

## **Benefits**

#### 1. Improved Data Security

Users can only view and work with records specific to their business unit, reducing the risk of unauthorized access to sensitive information.

#### 2. Operational Efficiency

Each business unit can focus on its tasks without being overwhelmed by irrelevant data, improving task prioritization and decision-making.

#### 3. Clear Accountability

The extension enhances visibility and accountability, as users can only interact with records within their designated unit, making it easier to track activities and performance at the unit level.



## Setting up the Business Unit Security Filter

• Go to search  $\bigcirc$  icon, type in and navigate to **Business Unit Setup** page.

Tell me what you want to do		2 ×
business unit setup		
Go to Pages and Tasks		
> Business Unit Setup	Administration	
> Business Unit User Setup	Administration	
Search for 'business unit setup'		
Search company data		
⑦ Search Help		
Didn't find what you were looking for? Try explor	ing pages or exploring reports	

• At the Business Unit Setup page, select the relevant BU Dimension

D	nocc   Init	Cotup									
DUSII	ness unit	setup									
Actions	is $\sim$ . Related $\sim$	Automate $\sim$									0
Genera	al										
Microsoft	ft Entra Application	_	12df45a81_c6h2_47	4 9055 d2060bate7051		RILDimension			RII		~
	in cintra Application		[E0143001-C002-41.	34-0033-03300Delc733j		DO DIMENSION			00		
	n chira Application		leand an ease of	14-0055-035000eic/35j		DO Dimension			00		
	n citra Appication		[cureator - cook-41.	4-0033-033000etc733j					Code †	Name	Blocked
Busines	ss Unit Filters Se	etup 🔰 🎘 New Line	→ Delete Line III Re	iated Pages 🔲 Related	d Fields	Do Dimension			Code↑ → <u>BU</u>	Name BU	Blocked
Busines	ss Unit Filters Se	etup 📄 🗟 New Line	≫ Delete Line □ Re	lated Pages III Related	d Fields	20 Dimension			Code↑ → <u>BU</u> CUSTOMER SEGMENT	Name BU Customer segment	Blocked
Busines	ss Unit Filters Se Table No. †	etup - <sup>글프</sup> New Line Table Name	BU Code1	lated Pages III Related	d Fields Field No.	Field Name	Relation Field No.	Relation Fie	Code↑ → <u>BU</u> CUSTOMER SEGMENT OUTLET	Name BU Customer segment Outlet	Blocked
Busines →	ss Unit Filters Se Table No. †	tup   ∄ <sup>™</sup> New Line	BU Code 1	lated Pages III Related	d Fields Field No. 0	Field Name	Relation Field No.	Relation Fie	Code † Code † CUSTOMER SEGMENT OUTLET PETTY CASH	Name BU Customer segment Outlet Petty cash	Blocked
Busines →	ss Unit Filters Se Table No. † 0	etup   <sup>글레</sup> New Line Table Name	BU Code ↑	iated Pages III Related	d Fields Field No. 0	Field Name	Relation Field No. 0	Relation Fie	Code↑ → BU CUSTOMER SEGMENT OUTLET PETTY CASH SALESPERSON	Name BU Customer segment Outlet Petty cash Salesperson	Blocked



- Select New Line
- Select the Table No, BU Code, Field No. and Filter to apply the filter

Busi	iness Uni	t Setup									
Action	ns 🗸 🛛 Related 🛇	✓ Automate ✓									0
Gener	ral										
Aicroso	oft Entra Applicati	on	{2df45a81-c6b2-4	1734-8055-d3960befc795}	`	BU Dimension		BU			~
Busine	ess Unit Filters S	Setup 🗦 🛱 New Line	M Delete Line	Related Pages III Related Fiel	ds						6 2
Busine	ess Unit Filters S	5etup → <sup>#</sup> New Line	∋× Delete Line 🛛	Related Pages III Related Fiel	ds						iê 🖬
Busine	ess Unit Filters S Table No. †	Setup 🗦 Table Name	BU Code 1	Related Pages III Related Fiel BU Name	ds Field No.	Field Name	Relation Field No.	Relation Field Name	Filter Type	Filter	ළ ස
Busine: →	ess Unit Filters S Table No. † 17	Table Name G/L Entry	BU Code 1 BU EVE	Related Pages III Related Fiel BU Name Beverage	ds Field No. 23	Field Name Global Dimension 1 Code	Relation Field No.	Relation Field Name Entry No.	Filter Type AND	Filter BEVE	6
Busine: →	Table No. † 17 17	Table Name	BX Delete Line  BU Code  BEVE BEVE RESU	Related Pages III Related Fiel BU Name Beverage Resort Suppliers	ds Field No. 23 23	Field Name Global Dimension 1 Code Global Dimension 1 Code	Relation Field No. 1	Relation Field Name Entry No. Entry No.	Filter Type AND AND	Filter BEVE RESU	iê 5
Busine	Table No. † 17 17 17 17	Table Name G/L Entry G/L Entry G/L Entry	BX Delete Line III	Related Pages III Related Fiel BU Name Beverage Resort Suppliers Consumer Product	ds Field No. 23 23 23 23	Field Name Global Dimension 1 Code Global Dimension 1 Code Global Dimension 1 Code	Relation Field No. 1 1	Relation Field Name Entry No. Entry No. Entry No.	Filter Type AND AND AND	Filter BEVE RESU SCPD	e و

- Select **Related Pages** if you want to enable filtering for the pages related to the table
- Select the pages and go to Actions and Enable Filtering

					O						Incu Ind	- ^
Bu	siness Unit Se	up										
Act	ions $\lor$ Related $\lor$ Au	omate $\vee$										0
Gen	eral											_
												1
Micro	soft Entra Application		(2df45a81-c6b2-4	4734-8055-d3960befc795}		SU Dimension		BU				~
Busi	ness Unit Filters Setup	<sup>₽®</sup> New Line	Delete Line	4734-8055-d3960befc795} Related Pages III Related Fie	lds	BU Dimension		BU			Ċ	~
Busi	ness Unit Filters Setup Table No. † Table	<sup>⊕®</sup> New Line → Name	(2df45a81-c6b2- Delete Line	Related Pages III Related Fie	lds Field No.	BU Dimension	Relation Field No.	Relation Field Name	Filter Type	Filter	Ŀ	
Micro Busii	Table No. † Table 17 : G/L	<sup>3™</sup> New Line 3≪ Name Entry	Delete Line	Related Pages III Related Fie BU Name Beverage	lds Field No. 23	BU Dimension Field Name Global Dimension 1 Code	Relation Field No.	BU Relation Field Name Entry No.	Filter Type AND	Filter BEVE	ß	

$\leftarrow$	Related Pages			√ Sa	aved 🗅 🖉
	@⊳ ,≏ 🖪	Actions $\lor$ Automate	· ~		12 ₹
	ø	Senable Filtering	Page Type	Page Name	Filter Enabled
	<b>O</b>	Disable Filtering	ListPart	G/L Entries Part	1
	<b>S</b>	20	List	General Ledger Entries	
	$\bigcirc$	122	List	G/L Entries Preview	
	$\bigcirc$	1574	ListPart	G/L Entries Preview Flat Subf.	
	$\bigcirc$	2583	ListPart	Dim. Correct Ledger Entries	



• Select Apply Customizations to complete setup

	<ul> <li>i i i i i i i i i i i i i i i i i i i</li></ul>	√Saved 🔲 🖬 "⊀	
Business Unit Setup	_		
Actions $\sim$ Related $\sim$ Automate $\sim$		0	
Export Customizations Manifest			
Apply Customizations  (2df45a81-c6b2-4734-  (2df45a81-c6b2-4734-	8055-d3960befc795) V BU Dimension	BU 🗸	
Business Unit Filters Setup 🦻 New Line 🧚 Delete Line 🔟 Rela	ted Pages 🔟 Related Fields	년 II	

Go to search icon, type in and navigate to Business Unit User Setup page or Select
 User Setup under Related actions from Business Unit Setup Page

ousiness unit	t setup							
io to Pages	and Tasks							
Business	Unit Setup		Administration					
Business	Unit User Setup		Administration					
earch for 'b	ousiness unit setup'							
Search co	company data							
Search H	lelp							
⑦ Search H dn't find wh	lelp hat you were looking for? <sup>-</sup>	Try exploring pages o	r exploring reports					
⑦ Search He idn't find wh	telp hat you were looking for?	Try exploring pages o	r exploring reports					
⑦ Search He idn't find wh	telp hat you were looking for?	Try exploring pages o	r exploring reports	_				
Search Heidn't find wh	telp hat you were looking for?	Try exploring pages o	r exploring reports					
Search H dn't find wh	telp hat you were looking for? '	Try exploring pages o	r exploring reports	-				
Search Hi idn't find wh	telp hat you were looking for? <sup>•</sup>	Iry exploring pages o	r exploring reports			ß	+	Ē
<ul> <li>Search H</li> <li>dn't find wh</li> <li>dn't find wh</li> </ul>	hat you were looking for? hat you were looking for?	Try exploring pages o	r exploring reports			Ŕ	+	Ē
<ul> <li>Search Hi</li> <li>dn't find wh</li> <li>dn't find wh</li> </ul>	hat you were looking for? Isiness Unit international states of the second states of the secon	fry exploring pages o Setup Automate ∽	r exploring reports			Ŕ	+	Ē



 At the Business Unit User Setup page, Select New and add the User Name and BU Code to restrict the user access to the data for this Business Unit

$\leftarrow$	Business U	nit User Setup					√ Saved		С	2	
			🐯 Edit List	📋 Delete				Ŀ	7	≣	
		User Name ↑				BU Code 1					
	$\rightarrow$	BCSUPPORT			÷	SCPD					
1000	-	_	_	_	_	_	_				