




Fusion5 Security Utility

Form button and data entity security made easy




Introducing the Fusion5 Security Utility

The purpose of the Fusion5 (F5) Security Utility is to assist users with identifying security associated to form buttons and data entities (for data management and OData). For instance, when you are troubleshooting a user security issue of missing access to a specific button on a form, you can use this tool to easily identify which security objects have access to the button, and take further actions to fix the issue. Another example would be, for integration purposes, you may want to find out security objects with access to a specific data entity, with this tool you can achieve it just by one click.

Key Features

-  Form buttons security
-  Data entity security - Data Management
-  Data entity security - OData

Key Benefits

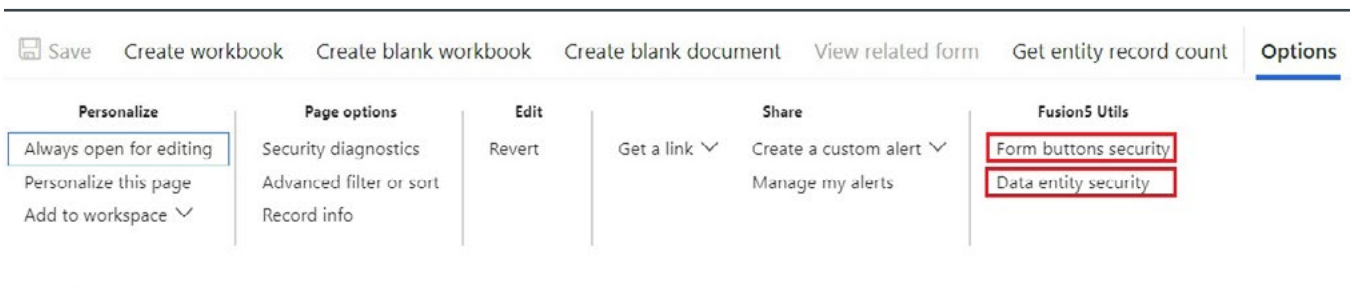
-  Display and maintain roles, duties and privileges
-  Display data entity security access points
-  Maintain form buttons security

Form buttons security

- The Form buttons security is enabled on most forms.
- The Form buttons security displays all security access points (role, duty, privileges) required to view and click the button.
- If no security is displayed, this means no existing security is configured.
- The Form buttons security dialog will allow:
 - ✓✓ roles to be added to users.
 - ✓✓ duties to be added to standard and custom roles.
 - ✓✓ privileges to standard duties only (Limitation of standard functionality, it won't allow for a privilege to a custom duty).

Data entity security - Data Management/OData

- The Data entity security will display the security access points for the selected entities (role, duty, privileges).
- If no security access points are displayed, this means no existing security has been configured for the data entity.
- The Data entity security dialog will display the security. The security configuration tool must be used to add and identify security to roles, duties and users.



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Form buttons security - Security access points: role, duty and privilege

Finance and Operations Accounts payable > Purchase orders > All purchase orders

Edit + New Delete Workflow Purchase order Purchase Manage Receive Invoice Retail Warehouse Transportation General **Options**

Personalize: Always open for editing, Personalize this page, Add to workspace
 Page options: Security diagnostics, Record info, Advanced filter or sort, Go to
 Share: Get a link, Create a custom alert, Manage my alerts
Fusion5 Utils: Form buttons security

All purchase orders
Standard view

Filter

Purchase order	Vendor account	Invoice account	Vendor name	Purchase type	Approval status
00000427	104	104	Best Supplier - Europe	Purchase order	Draft
00000451	1001	1001	Acme Office Supplies	Purchase order	Confirmed
00000475	104	104	Best Supplier - Europe	Purchase order	Draft
00000476	104	104	Best Supplier - Europe	Purchase order	Draft
000005	CN-001	CN-001	Contoso Asia	Purchase order	Confirmed

Standard view Form buttons security

Add roles to user

Filter

Label: Confirm, Finalize, Distribute amounts

Object type: Role

Role	Label
Retail service	Retail service
Retail store manager	Retail store manager
Buying agent	Buying agent
Purchasing agent	Purchasing agent
Purchasing Agent - Public Sector	Purchasing Agent - Public Sector
Duty	Maintain purchase orders
Privilege	Maintain purchase order details

Close

Standard view Form buttons security

Add duty to roles

Filter

Label: Confirm, Finalize, Distribute amounts

Object type: Duty

Duty	Label
Maintain purchase orders	Maintain purchase orders
Maintain purchase order details	Maintain purchase order details

Close

Standard view Form buttons security

Add privilege to duties

Filter

Label: Confirm, Finalize, Distribute amounts

Object type: Privilege

Privilege	Label
Maintain purchase orders	Maintain purchase orders
Maintain purchase order details	Maintain purchase order details

Close

2 Data entity security - Data Management

Finance and Operations

Standard view

Entity	Staging table	Target entity	Entity type
Sales order entry deadlines	SalesOrderEntryDeadlineStaging	SalesOrderEntryDeadlineEntity	Entity
Sales order header document at...	SalesOrderHeaderDocumentAtt...	SalesOrderHeaderDocumentAtt...	Entity
Sales order headers V2	SalesOrderHeaderV2Staging	SalesOrderHeaderV2Entity	Entity
Sales order headers V2 readonly...	SalesOrderHeaderV2ExistAddr...	SalesOrderHeaderV2ExistAddr...	Entity
Sales order hold codes	MCRSalesOrderHoldCodeStaging	MCRSalesOrderHoldCodeEntity	Entity
Sales order line charges	SalesOrderLineChargeStaging	SalesOrderLineChargeEntity	Entity
Sales order line charges V2	SalesOrderLineChargeV2Staging	SalesOrderLineChargeV2Entity	Entity
Sales order line documents atta...	SalesOrderLineDocumentAttach...	SalesOrderLineDocumentAttach...	Entity
Sales order line transaction tax i...	TaxSalesOrderTransTaxinformati...	TaxSalesOrderTransTaxinformati...	Entity
Sales order line update paramet...	SalesOrderUpdateLinesParamet...	SalesOrderUpdateLinesParamet...	Entity

Standard view

Data entity security

Securable object name	Label
SalesOrderHeaderV2Entity	Sales order headers V2

Object type	Label
None	None
Role	Sales manager
Role	Sales representative
Duty	Cash flow position details drill d...
Duty	Inquire into collections status
Duty	Maintain Document entity data ...
Duty	View Document entity data for ...
Duty	Maintain sales return order
Duty	Maintain sales order
Duty	Inquire into sales order progress
Privilege	Export sales orders
Privilege	Import sales orders
Privilege	Maintain sales order details
Privilege	View sales order details

Close

3 Data entity security - OData

Finance and Operations

Common > Common > Office integration > Excel workbook designer

Standard view

Excel workbook designer

Entity name: SalesOrderHeaderV2 | Description: Sales order headers V2 | Entity collection: SalesOrder...

Fields:

AVAILABLE FIELDS	SELECTED FIELDS
Company	
Sales order	
Address	
Address	
Apply residual method	
AreTotalsCalculated	
Associated payment attachment on custome...	
Auto batch reservation	

Standard view

Data entity security

Securable object name	Label
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Duty	Maintain sales return order
Duty	Maintain sales order
Duty	Inquire into sales order progress
Privilege	Export sales orders
Privilege	Import sales orders
Privilege	Maintain sales order details
Privilege	View sales order details

Close

Why choose Fusion5 for your Microsoft Dynamics 365 Solution?

Fusion5 has a proven track record of delivering Microsoft Dynamics ERP solutions that offer the ability to personalise your approach to enterprise resource planning with business apps that are built on Azure and tightly integrated with Office 365 and the Microsoft Power Platform.

As a member of the Microsoft Dynamics Inner Circle, we are recognised as being an expert and trusted pair of hands for your implementation. In addition, Fusion5 offers advance access to product updates, licensing changes, and the ability to take our customers' feedback to the source of Microsoft innovation, to help bring solutions that really make a difference to our clients.

For more information on whether this solution is right for you, or to find out more about Dynamics 365 for Finance and Operations, please contact D365FOSolutions@Fusion5.co.nz

Fusion5 provides business solutions and services that support you and your business in making potential reality.

Working with global technology leaders such as Microsoft, Oracle, IBM, and Workday, we partner with our customers to help increase operational efficiency, create people-centric cultures, strengthen customer relationships, and plan better for the future. By modernising and optimising the tools, systems, and processes your company uses, we can help you thrive.

When we work with you, we don't recommend technology for technology's sake. What drives us is delivering outcomes that genuinely improve your

business. Our business experience and insights from multiple industry sectors, advanced understanding of the solutions we offer, together with innovative technology that can be wrapped around them, means we can offer 'fit for you' solutions that deliver tangible results for your business.

We realise adopting new technology is not just a one-off activity — it requires change management, support, and continuous improvement to ensure your digital journey evolves with your business. We're here to partner with you through all aspects of the journey.

#makingpotentialreality