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BUSINESS UNIT

User Guide



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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

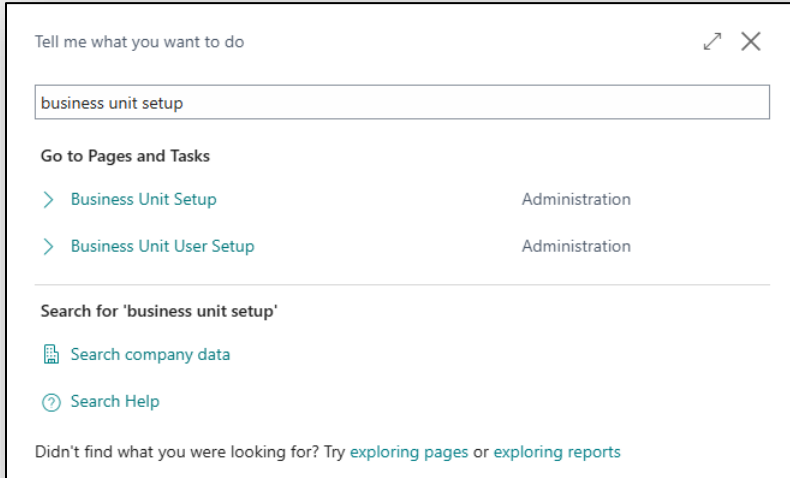
Each business unit can focus on its tasks without being overwhelmed by irrelevant data, improving task prioritization and decision-making.

3. Clear Accountability

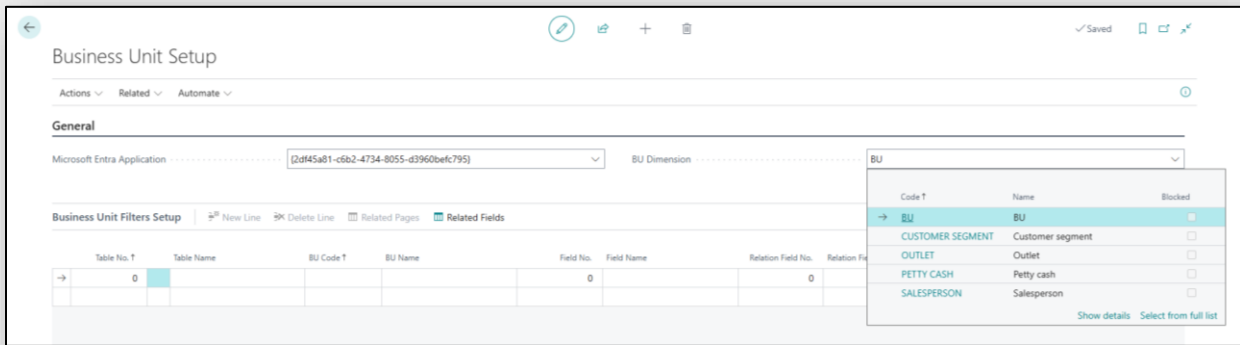
The extension enhances visibility and accountability, as users can only interact with records within their designated unit, making it easier to track activities and performance at the unit level.

Setting up the Business Unit Security Filter

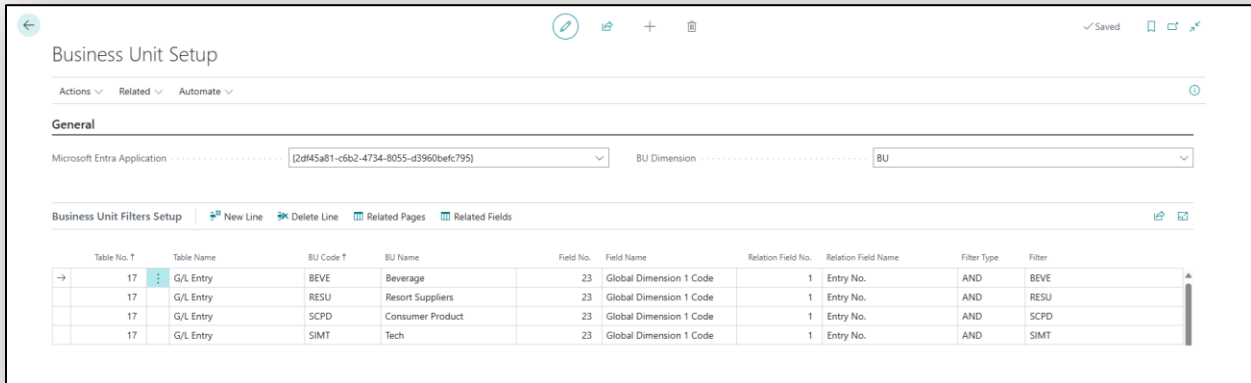
- Go to search  icon, type in and navigate to **Business Unit Setup** page.



- At the **Business Unit Setup** page, select the relevant **BU Dimension**



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



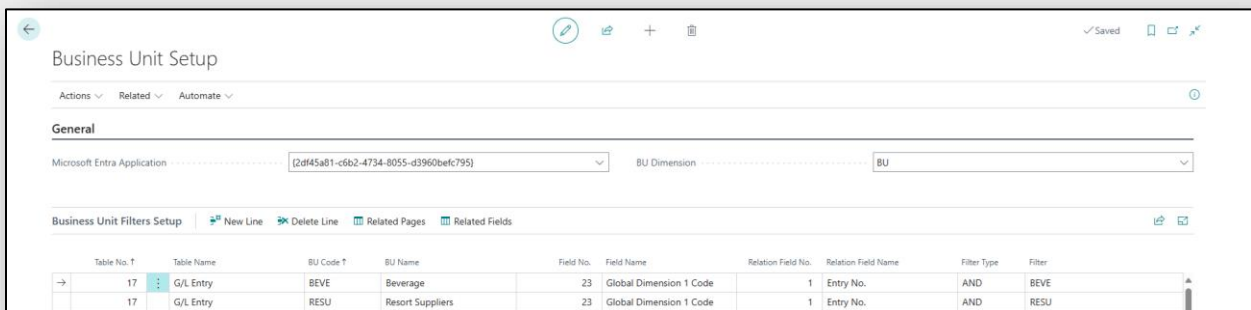
Business Unit Setup

Microsoft Entra Application: [2df45a81-c6b2-4734-8055-d3960befc795] BU Dimension: BU

Business Unit Filters Setup

Table No. ↑	Table Name	BU Code ↑	BU Name	Field No.	Field Name	Relation Field No.	Relation Field Name	Filter Type	Filter
17	G/L Entry	BEVE	Beverage	23	Global Dimension 1 Code	1	Entry No.	AND	BEVE
17	G/L Entry	RESU	Resort Suppliers	23	Global Dimension 1 Code	1	Entry No.	AND	RESU
17	G/L Entry	SCPD	Consumer Product	23	Global Dimension 1 Code	1	Entry No.	AND	SCPD
17	G/L Entry	SIMT	Tech	23	Global Dimension 1 Code	1	Entry No.	AND	SIMT

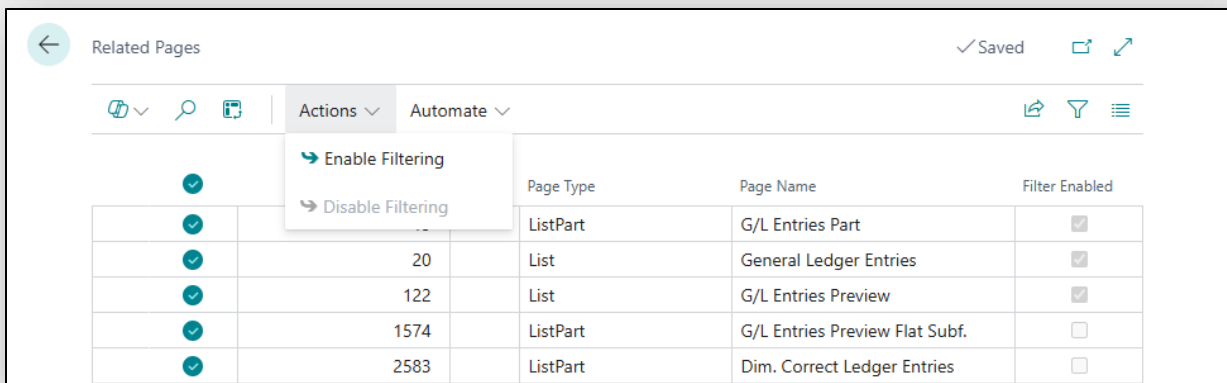
- Select **Related Pages** if you want to enable filtering for the pages related to the table
- Select the pages and go to **Actions and Enable Filtering**



Business Unit Setup

Business Unit Filters Setup

Table No. ↑	Table Name	BU Code ↑	BU Name	Field No.	Field Name	Relation Field No.	Relation Field Name	Filter Type	Filter
17	G/L Entry	BEVE	Beverage	23	Global Dimension 1 Code	1	Entry No.	AND	BEVE
17	G/L Entry	RESU	Resort Suppliers	23	Global Dimension 1 Code	1	Entry No.	AND	RESU



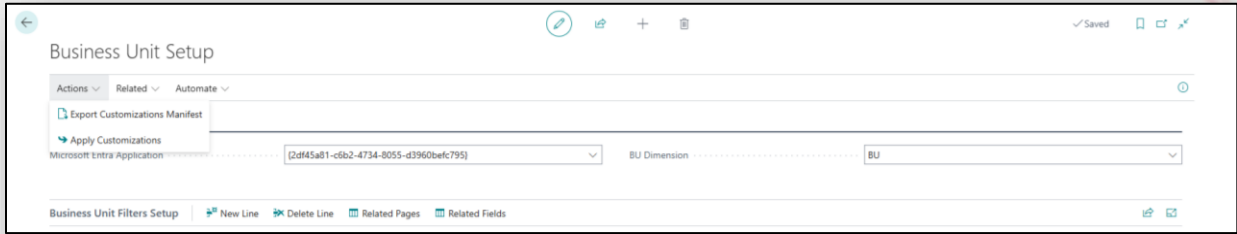
Related Pages


Actions Automate

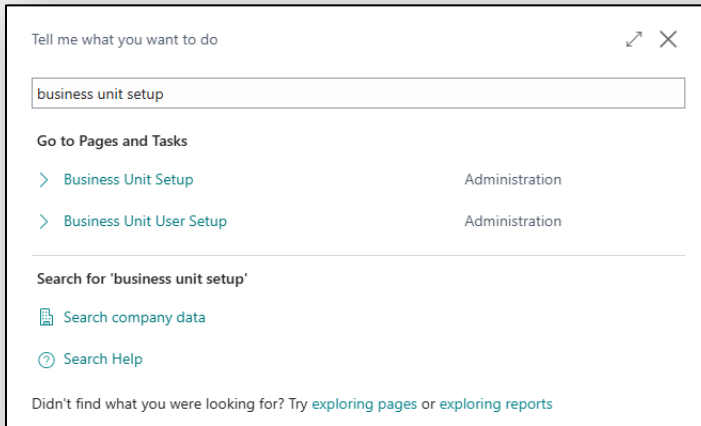
- Enable Filtering
- Disable Filtering

Page Type	Page Name	Filter Enabled
ListPart	G/L Entries Part	<input checked="" type="checkbox"/>
List	General Ledger Entries	<input checked="" type="checkbox"/>
List	G/L Entries Preview	<input checked="" type="checkbox"/>
ListPart	G/L Entries Preview Flat Subf.	<input type="checkbox"/>
ListPart	Dim. Correct Ledger Entries	<input type="checkbox"/>

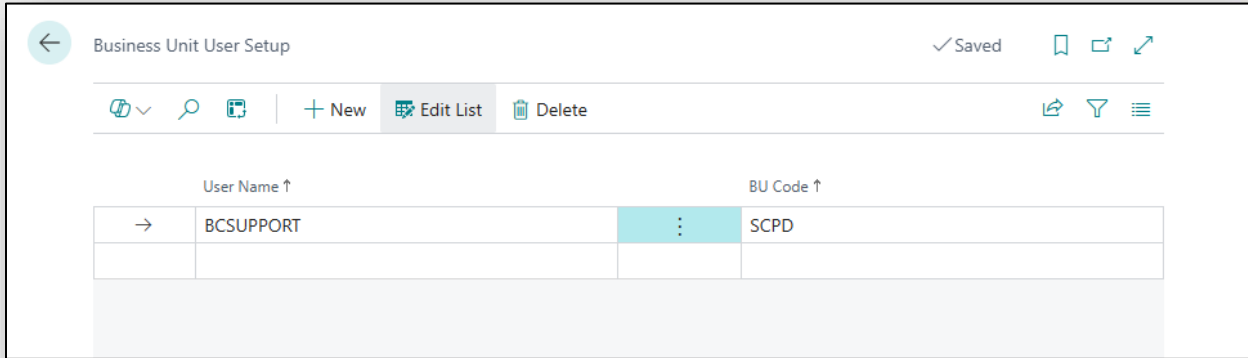
- Select **Apply Customizations** to complete setup



- 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



- 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



The screenshot shows the 'Business Unit User Setup' interface. At the top, there is a back arrow, the page title 'Business Unit User Setup', a 'Saved' status, and icons for bookmark, share, and refresh. Below the title is a toolbar with icons for refresh, search, and a '+ New' button. The main content area contains a table with two columns: 'User Name ↑' and 'BU Code ↑'. The table has one row with the following data:

	User Name ↑		BU Code ↑
→	BCSUPPORT	:	SCPD