



Coffee Break & Learn: Tip of the Week – June 22, 2017

Data Ownership is Extended to Business Partners

Available starting SAP Business One 9.2

Background

Customers are a valuable resource to many organizations. For this reason, many companies want to restrict access to business partner documents on a need-to-know basis. This becomes especially relevant for units such as sales and purchasing where there may be a need to restrict access to documents and even business partner master data from other users in the same company or department.

Data Ownership Authorizations

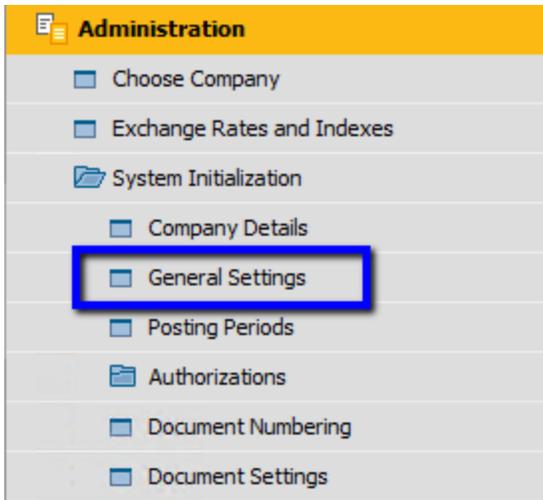
Starting in SAP Business One version 9.2, the data ownership authorizations provide a mechanism to restrict access to documents by permitting only authorized users to view or update documents. If a company enables data ownership, the data owner can access a document at any time, but other users who are not superusers must have a defined relationship with the owner.

Setup

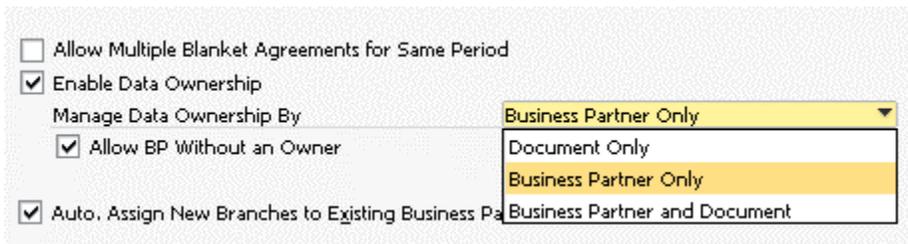
Full usage of data ownership authorizations requires setup in three modules: General Settings, Employee Master Data, and Data Ownership Authorizations

General Settings

You must first enable the use of Data Ownership Authorization. This setting can be accessed through Administration > System Initialization > General Settings.



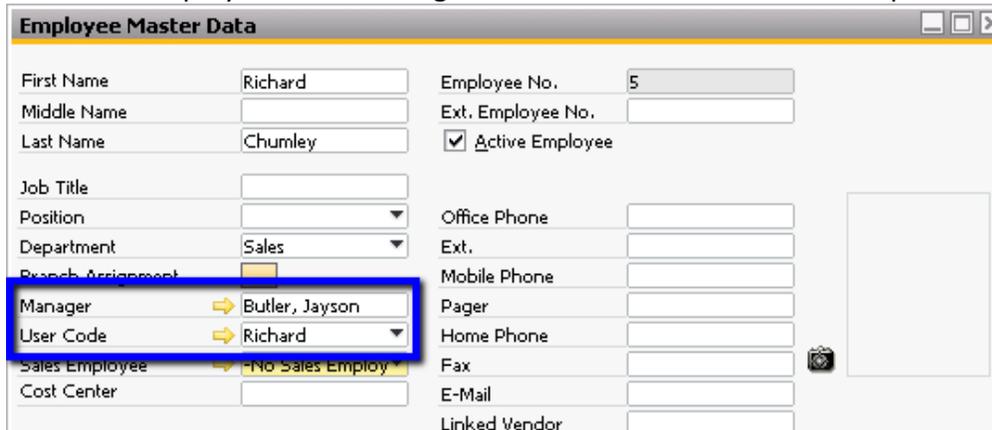
In the General Settings window, click on the BP tab and check the 'Enable Data Ownership' box. You can choose to enable data ownership at: Document Only, Business Partner Only, or Business Partner and Document. If you select 'Business Partner Only' you have the option to allow maintenance of business partners without an owner. If 'Allow BP Without an Owner' is not checked, the system will force the user to select an owner in the master data.



Employee Master Data

In order to define the relationships of authorized users, you must link the user data with employee master data records and define the relationships within the employee master data.

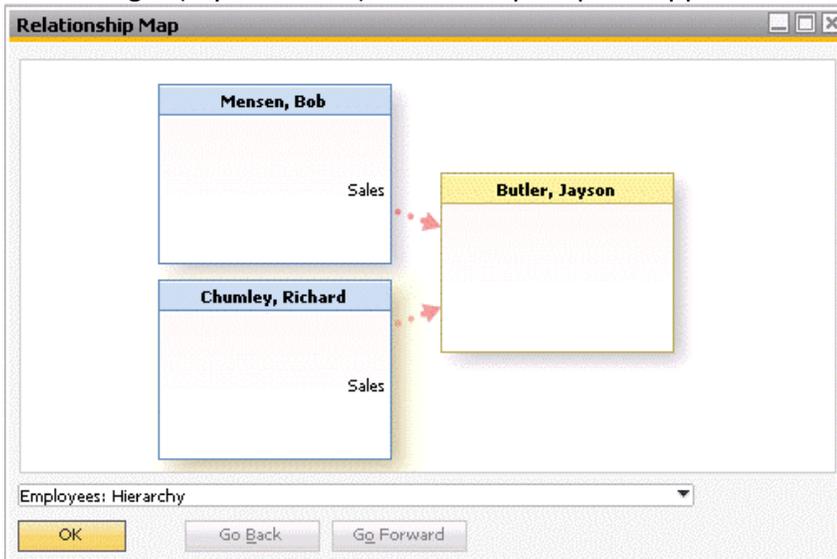
1. Ensure that the employee master data is linked to the correct user code
2. Select the employee in the Manager field to establish the relationship between employees



3. Ensure that the Manager user is also linked to the correct user code

The screenshot shows the 'Employee Master Data' form. The 'User Code' dropdown menu is highlighted with a blue box and shows 'manager' selected. Other fields include First Name (Jayson), Last Name (Butler), Employee No. (6), and a checked 'Active Employee' checkbox.

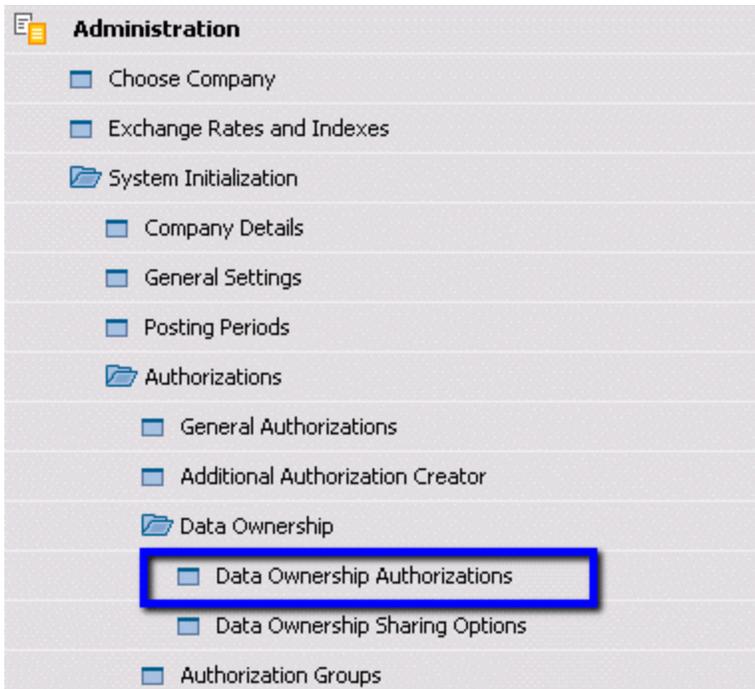
After setting up the employee master data and creating the linkages with the user codes, this is how the manager (Jayson Butler) relationship map will appear:



We will set up the Data Ownership so that a user's manager (but not peers) can see that user's business partner and documents.

Data Ownership

You can access the Data Ownership authorizations by going to Administration > System Initialization > Authorizations > Data Ownership > Data Ownership Authorizations



Data Ownership Authorizations are enabled per employee, and can be set for each relationship level.

Data Ownership Authorizations

Employees	Document	Peer	Manager	Subordinate	Department	Branch	Team	Company
Bob Mensen	Business Partner	None	Full	None	None	None	None	None
Jayson Butler	A/P Credit Memo	None	Full	None	None	None	None	None
Richard Chumley	A/P Down Payment	None	Full	None	None	None	None	None
	A/P Invoice	None	Full	None	None	None	None	None
	A/R Correction Invoice	None	Full	None	None	None	None	None
	A/R Credit Memo	None	Full	None	None	None	None	None
	A/R Down Payment	None	Full	None	None	None	None	None
	A/R Invoice	None	Full	None	None	None	None	None
	Delivery	None	Full	None	None	None	None	None
	Goods Receipt PO	None	Full	None	None	None	None	None
	Goods Return	None	Full	None	None	None	None	None
	Opportunity	None	Full	None	None	None	None	None
	Purchase Order	None	Full	None	None	None	None	None

Buttons: OK, Cancel, Full Authorization, Read Only, No Authorization

In the above example, Bob Mensen's data ownership authorizations are set so that he can view the business partners and documents owned by his manager (Jayson Butler), but not those owned by his peer (Richard Chumley).

Example

Case 1: Bob Mensen is the owner of the Parameter Technology master record.

Business Partner Master Data

Code Manual C23900 Customer Local Currency

Name Parameter Technology Account Balance 0.00

Foreign Name Deliveries 7,112.70

Group High Tech Orders 7,321.95

Currency US Dollar Opportunities 5

Federal Tax ID 10551-03705

Owner Mensen, Bob

General Contact Persons Addresses Payment Terms Payment Run Accounting Properties Remarks Attachments

Tel 1 555-0119 Contact Person Daniel Brown

Tel 2 ID No. 2

Mobile Phone

Fax 555-0120

E-Mail info@parameter.sap.com Remarks

Web Site www.parameter.sap.com

Shipping Type Fedex EM Sales Employee Brad Thompson

Password

Factoring Indicator

BP Project BP Channel Code

Industry Technician

Business Partner Type Company Territory

Language English

He and Jayson Butler are able to view and update the Parameter Technology master record. When Richard Chumley searches for the master record, however, he will receive an error message:

Main Menu

OEC Computers, Branch: Main
Richard Chumley

Modules Drag & Relate My Menu

- Administration
- Financials
- Opportunities
- Sales - A/R
- Purchasing - A/P
- Business Partners
 - Business Partner Master Data
 - Activity
 - Campaign Generation Wizard
 - Campaign
 - Internal Reconciliations
 - Business Partner Reports
- Banking
- Inventory

Business Partner Master Data

Code C23900

Name

Foreign Name

Group Orders

Currency Opport

Federal Tax ID

Owner

General Payment Terms

Tel 1 Cont

Tel 2 ID N

Mobile Phone

Fax

E-Mail Rema

Web Site

Shipping Type

Password

Factoring Indicator

BP Project BP C

Industry

Business Partner Type Company Terri
Lang

Alias Name GLN

Branch Assignment

Active

Inactive

Advanced

Find Cancel

06/15/2017

No matching records found 'Business Partner' (OCRD) (ODBC -2028) [Message 131-183]

Case 2: Richard Chumley is the owner of Sales Order 382 for Maxi-Teq

Sales Order

Customer: C20000 No. Primary: 382
Name: Maxi-Teq Status: Open
Contact Person: Max Teq Posting Date: 06/19/2017
Customer Ref. No.: Delivery Date: 06/26/2017
Local Currency: Document Date: 06/19/2017

Branch: Main Branch Reg. No.:

Contents Logistics Accounting Attachments

#	Item No.	Quantity	Unit Price	Disc...	Tax C...	Total (LC)
1	A00001	10	400.00 \$	6.250	Exempt	3,750.00 \$
2				0.000		

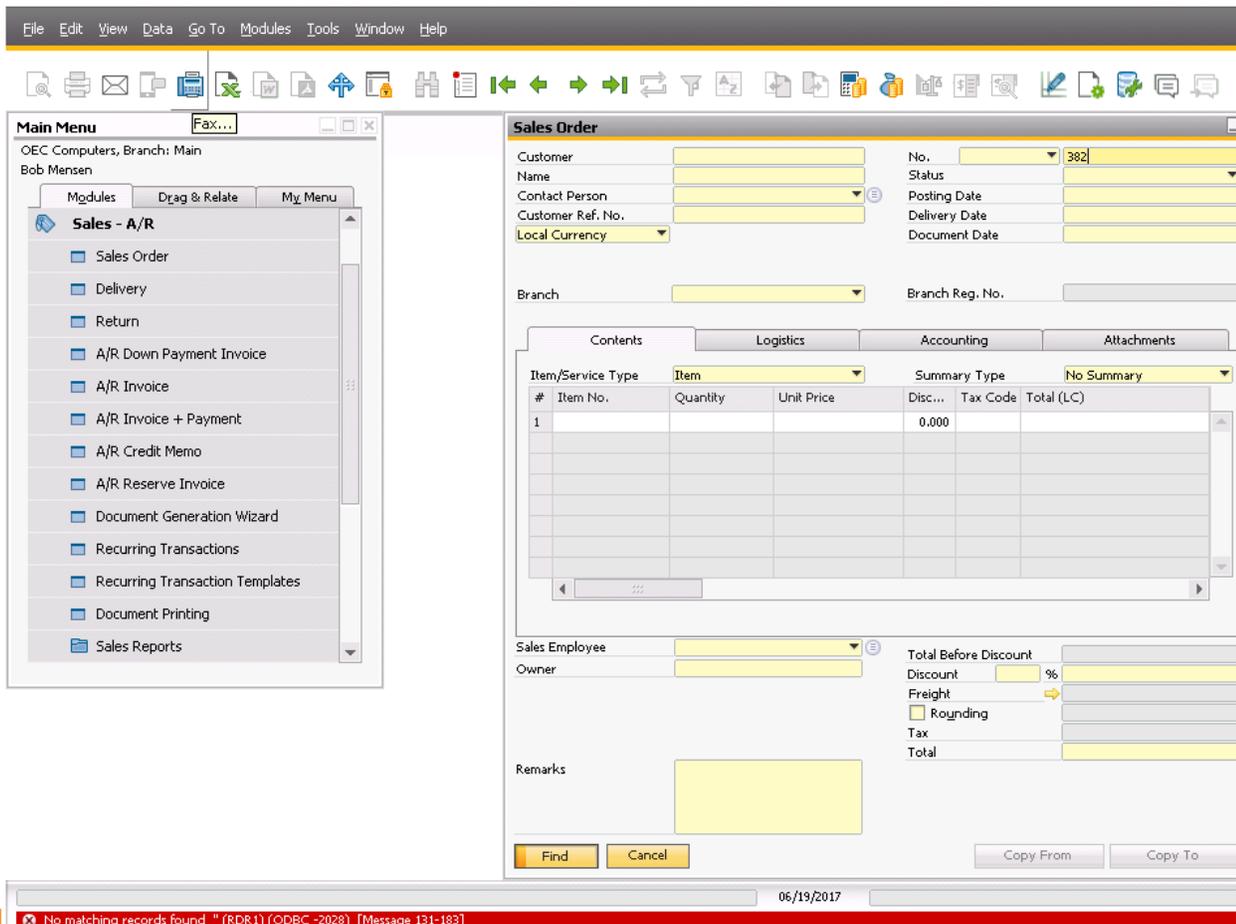
Sales Employee: Sales Manager

Owner: Chumley, Richard

Total Before Discount: 3,750.00 \$
Discount: %
Freight: Rounding:
Tax: Total: 3,750.00 \$

Remarks:

This means Richard Chumley and Jayson Butler are able to view this Sales Order. However, when Bob Mensen tries to search for this sales order, he sees the following error message:



Summary

Data ownership becomes valuable for many organizations because it provides an additional layer of authorization and security, granting certain users authorization to relevant data while denying others access to it. Users of data ownership authorizations should keep two things in mind:

1. Superusers are not subject to data ownership restrictions and, thus, continue to have full access to all business partners and documents.
2. Addition and maintenance of master records should be restricted to superusers and designated users.

softengine.com

T: 818.704.7000

F: 818.884.3900

Warner Center Towers
21800 Oxnard Street
Suite 1060
Woodland Hills, CA 91367

