User Guide

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About BEYOND Certificates

About this extension

BEYOND Certificates is an extension for Microsoft Dynamics 365 Business Central.
It is developed by:

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BEYOND Certificates allows you to track the validity of instructions, trainings, advanced trainings as well as certificates or proofs of your employees in Business Central. The following use cases showcase multiple possible ways how you can benefit from this extension.

Use Cases

- **COVID-19 vaccination and test documentation**
  As an employer, you may be required to document/track negative test results or employee vaccination status/protection. The app allows you to store and track the validity for the test/expiration of the vaccination protection on the employee card. For example, you can store the test result with a validity of one day, so that the next morning it will be displayed as invalid in the employee certificate matrix or reports.
- **Driver's Licenses Check**
  If your employees drive company cars, you should check at regular intervals whether they have a valid driver's license to avoid problems with the car insurance in case of an accident. Via the extension, they can see immediately whether you need to check if the driver has to show the driver's license or if the employee has already done it.
- **Safety Trainings for Employees**
  As part of workplace safety, you should periodically make your employees aware of workplace hazards and risks. In addition to hazard and risk education, rehearse how to evacuate the building in the event of a fire or emergency. You can setup an interval to have your employees complete a safety training once a year.
- **Training of First Aiders**
  As part of workplace safety, the employer should train and educate company first aiders so that they can provide first aid in an emergency and save lives. To track the training and continuing education of first responders, you can store a certificate and interval in Business Central. Expired certificates are highlighted in red, indicating that training or re-verification is required.

As sensitive data is processed, we have created permission sets in Business Central. These permission sets control who can view and edit this data. Please note that the "Super" role overrides all permissions. Users with the "Super" role will see all data.

In the following, the proofs, trainings and all other mentioned documents from the previous section are summarized as certificates.

Version	Date	Author	Comment
1.0	03.09.2022	Jannic Weidel	Initial version of the documentation
Document Access		public	

Assign User Permission Set

The following description showcases how to assign user permissions for the extension BEYOND Certificates. The provided permission sets are:

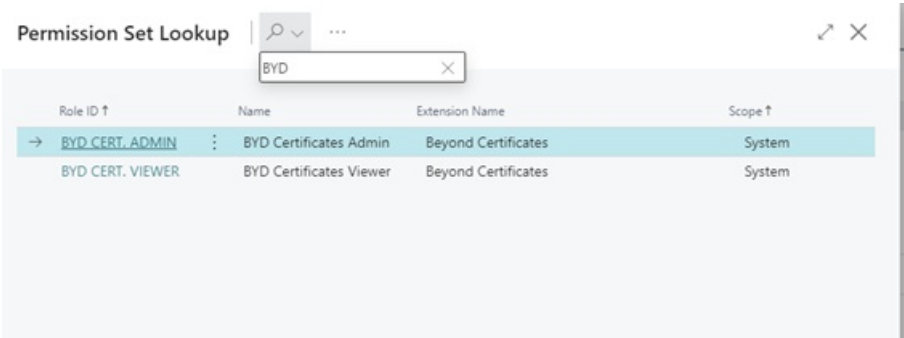| Permission Set	Description
BYD CERT. ADMIN	• Create, view, and modify certificates and proofs on the Certificates page. • Assign, view, and modify certificates on the Employee card. • View and use the Employee Certificate Matrix.
BYD CERT. VIEWER	• View the Certificates page. • View certificates on the Employee card.

To assign a user permission to a user, do the following:

1. From the **Role Center**, click on the search icon ▢ in the upper right corner of the screen or press **ALT+Q** to open the search directly.
2. Search for **Users**.
3. The **Users** page is displayed.
4. Mark the user for whom you want to add the permission.
5. In the menu bar, click on **Manage > Edit**. The corresponding **User Card** is displayed.
6. In the **User Permission Sets** tab, click in a free line under the **Permission Set** column.
7. Press **ALT + down arrow** to open the lookup (**Permission Set Lookup**) and choose one of the previously mentioned permissions for the user. Please note the following:

> **ℹ NOTE**
>
> **Privacy and User Permission Sets**
>
> All personal data should be treated confidential. Users who were granted "**SUPER**" user permission set can see all data. We recommend granting access (**BYD CERT. ADMIN** or **BYD CERT. VIEWER**) to those people who really need to have access to it.

You have assigned a permission for BEYOND Certificates to a user.

Next chapter

Create Certificate

The following description showcases how to create a certificate to track first aid trainings for employees in Business Central.

To create a certificate, do the following:

1. From the **Role Center**, click on the search icon ☐ in the upper right corner of the screen or press **ALT+Q** to open the search directly.
2. Search for **Certificates**.
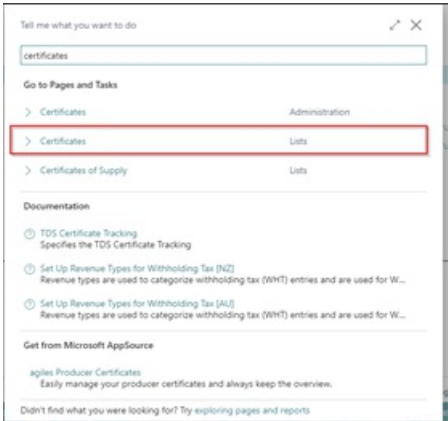
3. Click on **Certificates** (Lists) in the displayed search results. The **Certificates** list is displayed.
4. In the menu bar, click on **New** to create a new certificate. A new line is created.
5. In the **Code** column, enter a code for the certificate (e.g. „FIRST AID").
6. In the **Description** column, enter a description for the certificate (e.g. „First Aid Training").
7. In the **Valid to Formula** column, enter a time interval. From a safety perspective the first aid training for your employees should be repeated every year, so the time interval would be set to **1Y** (1 year).
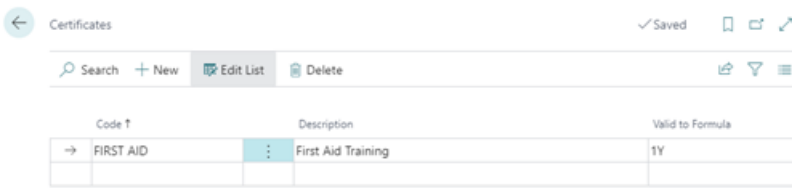

You have successfully created a certificate in Business Central. The certificate created in these steps can be added to employees now. For more information about adding a certificate to employees refer to Add Certificate to Employee.

Next Chapter

Add Certificate to Employee

To add a certificate to an employee, do the following:

1. From the **Role Center**, click on the search icon ☐ in the upper right corner of the screen or press **ALT+Q** to open the search directly.
2. Search for **Employees**.
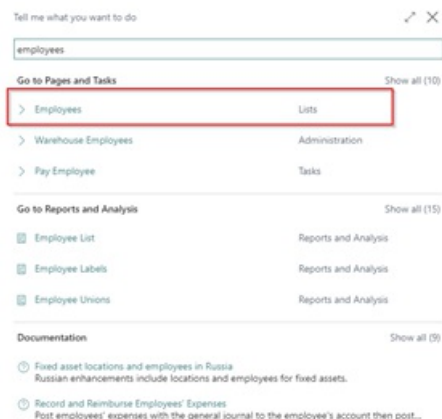
3. Click on **Employees** in the displayed search results. The **Employees** list is displayed.
4. From the list, choose an employee who has completed the first aid training. The corresponding employee card is displayed.
5. On the employee card, scroll down to the **Employee Certificates** register.
6. To add the certificate to the employee, click in the **Certificate Code** column ad enter the code of the certificate („**FIRST AID**"). The information in the **Description** column and **Created By** column are added by the system.
7. Next information to add is the date of the certification. Enter the date of the certification (in this case the date when the first aid training was completed) in the **Date** column. The date in the **Valid to** column is added by the system. The information in the **Created at** column is also added by the system.

You have successfully added a certification to an employee. When the certificate is expired the line will be highlighted in red. You can also filter for valid or expired (invalid) certificates.

Print Certificate Report

The following description showcases how to print a report which shows valid and expired (invalid) certifications for an employee. You can also print a report with all employees.

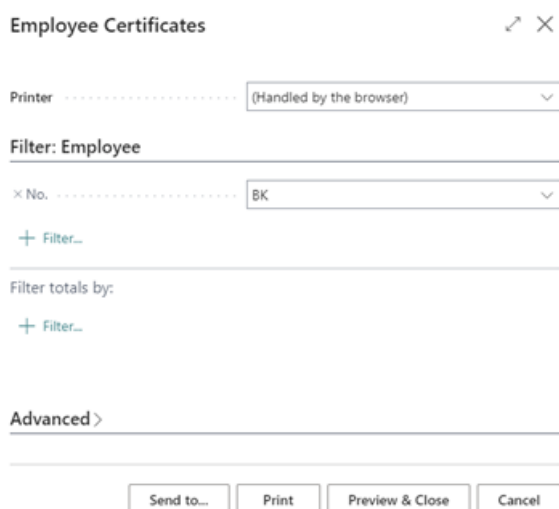To print a report which shows all valid and expired certificates, do the following:

1. From the **Role Center**, click on the search icon ⬜ in the upper right corner of the screen or press **ALT+Q** to open the search directly.
2. Search for **Employees**.
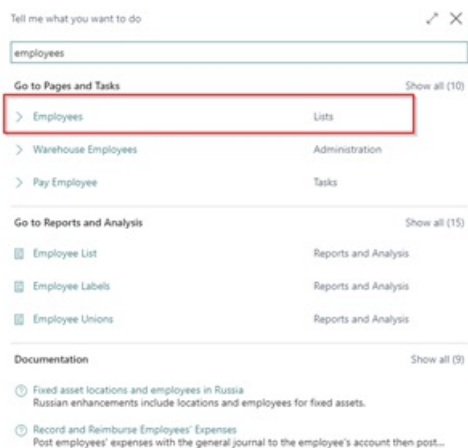
3. Click on **Employees** in the displayed search results. The **Employees** list is displayed.
4. From the list, choose an employee who has completed the first aid training. The corresponding employee card is displayed.
5. On the employee card, scroll down to the **Employee Certificates** register.
6. In the menu bar of the **Employee Certificates** register, click **Manage > Print**.
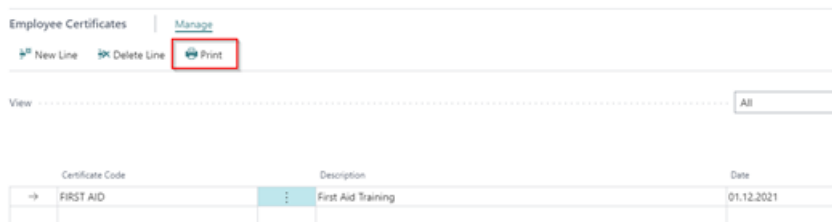
7. A window is displayed. Choose the printer (if you want to print the report) from the **Printer** dropdown. If you don't want to print the report leave this field blank.
8. The system automatically adds the corresponding code of the employee in the **No.** field of the window. You can delete the employee no. if you want to print a report which shows all certificates for all employees.

9. Click on one of the following options at the bottom of the window:

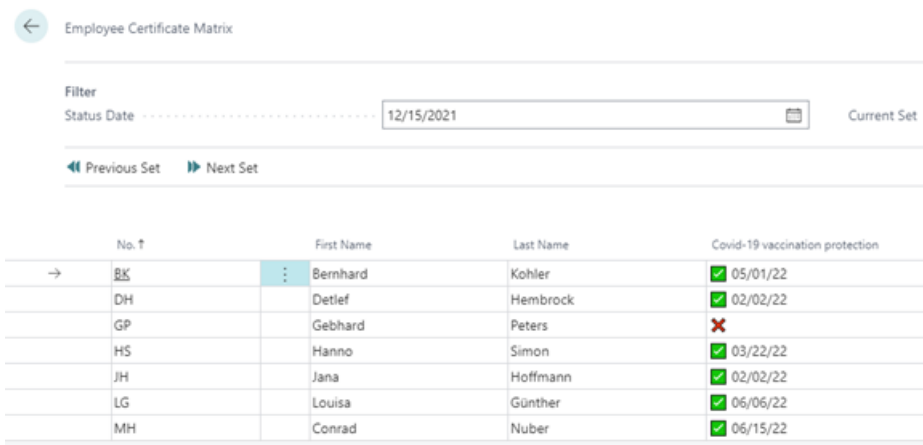| Action	Description
Send to…	Saves the report as word or pdf file on your local hard drive.
Print	Sends the report to the selected printer.
Preview & Close	Creates a preview of the report in the browser and automatically displays it.
Cancel	Cancels the printing of the report. You will return to the employee card.
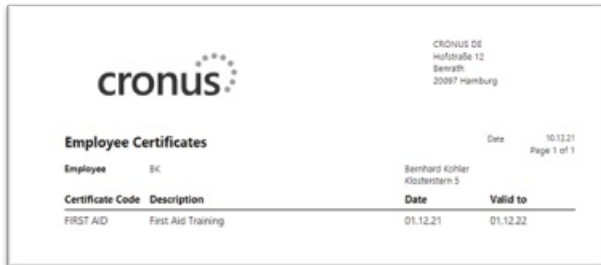
The report is displayed. If certificates are highlighted in red, this means that the **Valid to** date has expired and the certificates are regarded as invalid.

Employee Certificate Matrix

A good method for checking certificates and proofs is the **Employee Certificate Matrix**. The matrix displays up to 16 certificates or data records for your employees. The graphical representation allows you to get the needed information at first glance:

- For which employee further training has not yet taken place,
- For which employee the certificate/proof has expired.

In the example shown, the **COVID-19 vaccination protection** certificate has expired for the employee **Gebhard Peters** and is therefore highlighted by a red cross.

The **Employee Certificate Matrix** is automatically extended by the certificates you have created in the section Create Certificate. To display the **Employee Certificate Matrix**, do the following:

1. From the **Role Center**, click on the search icon ⌕ in the upper right corner of the screen or press **ALT+Q** to open the search directly.
2. Search for **Employee Certificate Matrix**.
3. The **Employee Certificate Matrix** page is displayed.

On this page you can enter a date in the **Status Date** field to identify expired certificates.
The standard page only allows to track 16 certificates at once. If you got more than 16 certificates to track, you can click on **Next Set** switch to another page with other certificates.