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DYNAMICS CON LIVE

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Business Central User Permissions & Access



PRESENTER



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- 1 year at Stoneridge in BC Security, Telemetry, Power Platform and Azure
- 12 years at Microsoft working with GP and Business Central
- 5 years as a Microsoft vendor with Excel and Office Project Server
- 20+ years of supporting the Microsoft ecosystem



AGENDA

Users and Permission Sets \ Entitlement

User group deprecation \ Nested Permission sets

Record Permissions

Permissions Based on Licenses

Effective Permissions

Security Groups





DEMO

Users and Permission Sets

- Users are added and managed through Entra\M365 Admin Center
- Users can be synched into BC if they have a BC license assigned
- Assign Permission sets to users to control access to areas of BC
- Access to BC is 2-tier: both Entitlement and Permissions needed
- User Groups are deprecated – Time to plan (Fall 2024?)



User Group Deprecation

- Enable Feature 'Convert user group permissions'
- Launches the 'User Groups Migration Guide'
- Recommend using the 'Convert to a permission set'
- How does a 'User Group' get converted into a Permission Set?

The screenshot displays the Dynamics 365 Business Central interface. At the top, the title bar reads "Dynamics 365 Business Central". Below it, the "Feature Management" section is visible, with a red box highlighting the "Feature Management" header. A notification banner states: "You must sign out and then sign in again to make the changes take effect." Below the notification, there are search and action buttons: "Search", "Analyze", and "Edit List". A list of features is shown, with a red box highlighting the feature "Feature: Convert user group permissions".

Overlaid on the right side of the screen is the "User Groups Migration Guide" dialog box. It contains the following text:

- Specify how to convert the permissions that are assigned to each user group.**
- Assign permissions to members**
Assign permissions directly to the users and remove their user group assignments. This is the recommended option in most cases.
- Convert to a permission set**
Continue to use the same group of permissions that you'd specified for your user group. Combine the permissions from the user groups into a new permission set. The new permission set is assigned to all members of the user group.

At the bottom of the dialog, there is a table with the following columns: "User Group Code", "User Group Name", and "Action". The table contains one row with the following data:

User Group Code	User Group Name	Action
→ AR SPECIALIST 2	Finance and Accounts Receiva...	Assign permi...

Below the table are two buttons: "Previous" and "Next".



Nested Permission sets

- Permission sets are user groups now but better
- You can nest permission sets within each other
- Permission sets inherit all the permissions within a nested set
- Can be nested multiple levels deep



Anatomy of a Permission Set

PS Name (Type)

Permission Set: DYNAMICSCON (Tenant)

View all permissions | More options

Include/Exclude permissions

Permission Set: DYNAMICSCON Name: DYNAMICSCON

Permissions: Manage Allow Read Allow Insert Allow Modify Allow Delete Allow Execute Allow All

New Line Delete Line Select Objects... Add Read Permission to Related Tables

Type	Object Type	Object ID	Object Name	Object Caption	Read Permission	Insert Permission	Modify Permission	Delete Permission	Execute
Exclude	Table Data	15	G/L Account	G/L Account	Exclude				
Include	Table Data	472	Job Queue Entry	Job Queue Entry	Yes				

Permission Sets

Type	Permission Set	Name	Scope
Include	D365 BASIC	Dynamics 365 Basic access	System
Include	D365 BUS FULL ACCESS	Dyn. 365 Full Business Acc.	System
Include	JOBS - EDIT	Edit jobs	System
Include			System

Result

Permission Set	Name	Scope	Inclusion Status
D365 BASIC	Dynamics 365 Basi...	System	Partial
D365 BUS FULL ACCESS	Dyn. 365 Full Busi...	System	Partial
JOBS - EDIT	Edit jobs	System	Full

Included permissions sets (nested)

Result of included permission sets and hierarchy





DEMO

Permission Sets

- Old way – Copy system permission set and modify it. ☹️
- New way – Create new permission set, nest system permission sets and use exclusions. 😊
- Exclusions only work within the permission set they are put in
- Microsoft changes to system permissions sets included by default
- Use permission sets just like User Groups – Only better!
- Permission Error - **Object Type** – **Object ID** – **Object Name** - RIMD

Sorry, the current permissions prevented the action. (TableData|5777|Item Reference|Read| Base Application).





more **DEMO**

Record Permissions

- Can be used to see permissions for a specific task
- Best for adding very specific tasks\actions to a permission set
- Need to keep window open while performing all actions
- Records EVERYTHING that is 'touched' behind the scenes
- Recommend using in a Sandbox and then Exporting\Importing to Production



Permissions Based on License Type

- 'License Configuration' window
- Default permission sets added to users based on their license
- Team Member license will be different than Essentials license
- Automatically added for the first company they sign into – Cronus Sample company is the default (usually)



Effective Permissions

- Best source of 'truth' for seeing a user's access
- Will show you which Permission set is giving access to an object
- Will show you if a user has Permissions and Entitlement
- Will show you if there are security filters
- Best place to go to troubleshoot specific access issues\errors



Security Groups

- Not a replacement for User Groups
- Use Entra security groups to automatically assign BC permissions
- Easier to manage for Admins – Add permissions to other cloud apps
- Can use nested security groups
- Permissions added in addition to license added permissions – Does not replace or over-ride in any way.
- Can be used to restrict access to specific BC environments
 - Will only synch in users that are in the environment security group





Questions?



Resources

- [Manage Access to Business Central - Business Central | Microsoft Learn](#)
- [Deprecated Features in the Base App - Business Central | Microsoft Learn](#)
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THANK YOU!

