

The Largest Independent Gathering
of the Microsoft User Ecosystem



| All About BC/NAV Permissions



Decrease Complexities,
Deliver Results.

@ 2022 Dynamic Communities

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Decrease Complexities,
Deliver Results.



MARS

The world we
want tomorrow
starts with how we
do business today

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BC/NAVUG Advisory Board
BC/NAVUG Planning Committee



2016 RUBY AWARD

2017 EMERALD AWARD

2018 EMERALD AWARD

2019 EMERALD AWARD



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 **COMMUNITY
SUMMIT**

For Users, By Users

@ 2022 Dynamic Communities

| Agenda

- Creating New Users
- Roles & Permissions
- User Groups
- Best Practices
- Troubleshooting Permissions Errors
- Permissions Recorder



For Users, By Users

The Largest Independent Gathering of
the Microsoft User Ecosystem

Decrease Complexities,
Deliver Results.

Why Set Up Permissions?



For Users, By Users

@ 2022 Dynamic Communities

Why Set Up Permissions?

- Hide Sensitive/Private Data
 - Payroll, Personal, Sales, etc.
- Protect from accidental changes
- SOX Compliance/Segregation of Duty (protect from fraud)

Decrease Complexities,
Deliver Results.

Creating A New User



For Users, By Users

@ 2022 Dynamic Communities

Create A New BC/NAV User

1. Create Active Directory Account
2. Create BC/NAV User or User Group
3. Assign Permissions
4. User Personalization
 - A. Profile ID (Role)
 - B. Language
 - C. Company
5. User Setup
 - A. Posting Dates
 - B. Registering Time
 - C. Salesperson/Purchasing Codes
 - D. Responsibility Centers
 - E. Time Sheet Admin
 - F. E-Mail
6. Warehouse Employees



Windows Authentication

Windows User Name



Access Control Service Authentication >

Disabled



Business Central Password Authentication

Password

User must change password ...



Web Service Access >



Office 365 Authentication >

- Access Control Service Authorization – (ACS Access)
 - A cloud authentication service that offers an easy way to authenticate and authorize users for access to your web applications and services
 - Primarily used by developers and architects of Microsoft .NET clients, ASP.NET web applications, and Windows Communication Foundation (WCF) web services.

- Access Control Service Authorization - (ACS Access)

<https://docs.microsoft.com/en-us/azure/active-directory/azuread-dev/active-directory-acm-migration>



- Business Central Password Authentication
 - Instead of Active Directory ID and password
 - Requires an SSL Certificate
 - MS Dynamics NAV 2017+
 - Changes Required to ClientUserSettings file
- <https://docs.microsoft.com/en-us/dynamics365/business-central/dev-itpro/administration/authenticating-users-with-navuserpassword?tabs=admintool>



- **Web Service Access**

- If your solution is configured for BC or NavUserPassword or AccessControlService authentication, then you can configure Microsoft Dynamics NAV user accounts to include a web service access key that can be used instead of a password to authenticate SOAP and OData web service requests



[https://docs.microsoft.com/en-us/previous-versions/dynamicsnav-2016/jj672864\(v=nav.90\)?redirectedfrom=MSDN](https://docs.microsoft.com/en-us/previous-versions/dynamicsnav-2016/jj672864(v=nav.90)?redirectedfrom=MSDN)

- **Office 365 Authentication**

- Business Central/NAV supports federated user authentication with Microsoft Azure Active Directory (Azure AD)



- <http://help2016.eos-solutions.it/help/en/tskSetUpNAVForSingleSignOnWithOffice365UsingWindowsPowershell.htm>

← User Card | Work Date: 1/25/2024

Bart Simpson

ACS Setup Change Password Effective Permissions Send Email Actions Related Fewer options

General Show more

User Name	BART	Microsoft 365	
Full Name	Bart Simpson	Authentication Email	
License Type	External User	Application ID	
Status	Enabled	Authentication Status	Disabled
Expiry Date		Web Service	
Contact Email	bart@navug.com	Web Service Access Key	*****

Windows Authentication

Windows User Name

Access Control Service Authentication Disabled

Assigning Permissions

User Card | Work Date: 1/25/2024

Bart Simpson




ACS Setup | Change Password | Effective Permissions | Send Email | Actions | Related | Fewer options











User Group Memberships | Manage

Code ↑	Name	Company Name ↑
→ CUSTOMER SERVICE	Customer Service Group	BCUG-NAVUG



User Permission Sets | Manage

Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
→ BASIC	Basic User (All Inclusive)		OnPrem Permissions	System
NAVUG-CUSTOMER-F	Customer-Full Access	BCUG-NAVUG		Tenant
NAVUG-SO-CREATE	Create Sales Orders	BCUG-NAVUG		Tenant
NAVUG-SO-RELEASE	Release Sales Orders	BCUG-NAVUG		Tenant

User Groups | Work Date: 1/25/2024 ✓ Saved   

 Search  New  Edit List  Delete  Members  Permissions More options    

Code ↑	Name	Default Profile
→ CUSTOMER SERVICE	Customer Service Group	
D365 ACCOUNTANTS	Dynamics 365 for Account...	
D365 ADMINISTRATOR	Create and set up compani...	BUSINESS MA...
D365 AUTOMATION	Dynamics 365 Automation	BUSINESS MA...
D365 BACKUP/RESTORE	Backup or restore database	BUSINESS MA...
D365 BASIC ISV	D365 Basic ISV Access	BUSINESS MA...
D365 BUS FULL ACCESS	Full business access excludi...	BUSINESS MA...
D365 BUS PREMIUM	D365 Premium Business Ac...	BUSINESS MA...
D365 COMPANY HUB	Dyn. 365 Company Hub	BUSINESS MA...
D365 DIM CORRECTION	D365 Dimension Correction	BUSINESS MA...
D365 EXT. ACCOUNTANT	External Accountant	ACCOUNTANT
D365 EXTENSION MGT	Dynamics 365 Extension m...	BUSINESS MA...
D365 FIN. & PURCH.	Finance and purchase data	ACCOUNTANT
D365 FINANCE	Dynamics 365 Finance	ACCOUNTANT

 Details  Attachments (0)

Permission Sets ▾

Permission Set ↑

- NAVUG-CUSTOMER-E
- NAVUG-SO-CREATE
- NAVUG-SO-RELEASE

Members ▾

User Name Company Name ↑

Review User Groups and Permissions

The screenshot shows a user management interface. At the top, there is a navigation bar with a back arrow, the text "Users | Work Date: 1/25/2024", and several utility icons. Below this is a secondary navigation bar with tabs for "Users: All", "Search", "+ New", "Manage", "Process", "Navigate", "Actions", and a "Related" button which is circled in red. A dropdown menu is open under "Users: All", showing "User Groups" (selected), "User Task Groups", and a list of users including CLANCY, HERSCHEL, HOMER, LISA, MAGGIE, MARGE, MARS-AD\NAVUSE, MARS-AD\ROSENLEW, and MOE. A second dropdown menu is open under "User Groups", showing "Permissions" (selected), "History", and "User Email Policies". The "Permissions" dropdown is also circled in red, with arrows pointing to "Effective Permissions", "Permission Sets", "Permission Set by User", and "Permission Set by User Group". The main content area displays a table of users with columns for name, email, and status. On the right side, there are two panels: "Permission Sets" and "User Group Memberships", both showing "(There is nothing to show in this view)".

User	Full Name	Status	Company
CLANCY		Enabled	
HERSCHEL		Enabled	
HOMER	Homer Simpson	Enabled	
LISA	Lisa simpson	Enabled	
MAGGIE	Maggie Simpсом	Enabled	
MARGE	Marge Simpson	Enabled	
MARS-AD\NAVUSE	Test User	Enabled	MARS-AD\navuse
MARS-AD\ROSENLEW	Lewis Rosenberg	Enabled	MARS-AD\rosenlew
MOE	Moe Szyslak	Enabled	

Review User Groups and Permissions

BCUG-NAVUG (BC2022-Wave1)

Sales ▾

Purchasing ▾

Inventory ▾

Posted Documents ▾



User Groups: All ▾

Search

+ New

Delete

Edit List

Members

Permissions

More options



Code ↑

Name

Default Profile

CUSTOMER SERVICE

Customer Service Group

D365 ACCOUNTANTS

Dynamics 365 for Accountants

D365 ADMINISTRATOR

Create and set up companies BUSINESS MAN...

D365 AUTOMATION

Dynamics 365 Automation BUSINESS MAN...

D365 BACKUP/RESTORE

Backup or restore database BUSINESS MAN...

D365 BASIC ISV

D365 Basic ISV Access BUSINESS MAN...

D365 BUS FULL ACCESS

Full business access excluding ... BUSINESS MAN...

D365 BUS PREMIUM

D365 Premium Business Access BUSINESS MAN...

D365 COMPANY HUB

Dyn. 365 Company Hub BUSINESS MAN...

D365 DIM CORRECTION

D365 Dimension Correction BUSINESS MAN...

D365 EXT. ACCOUNTANT

External Accountant ACCOUNTANT

D365 EXTENSION MGT

Dynamics 365 Extension mana... BUSINESS MAN...

D365 FIN. & PURCH.

Finance and purchase data ACCOUNTANT

D365 FINANCE

Read and write finance data ACCOUNTANT

D365 FULL ACCESS

Dynamics 365 Full access BUSINESS MAN...

Details

Attachments (0)

Permission Sets ▾

Permission Set ↑

NAVUG-CUSTOMER-E

NAVUG-SO-CREATE

NAVUG-SO-RELEASE

Members ▾

User Name

Company Name ↑

BART

BCUG-NAVUG

MARS-AD\NAV...

BCUG-NAVUG



User Settings | Work Date: 1/25/2024



✓ Saved



BART

✕ Clear Personalized Pages

More options

General

User ID BART



Region English (United States)



Role Sales Order Processor



Time Zone (UTC-12:00) International ...



Language English (United States)



Company BCUG-NAVUG



User Personalization: Profiles

Profiles (Roles) | Work Date: 1/25/2024



Profiles (Roles):

All ▾



Search

+ New

Manage



Use as default profile



Copy profile...



Customize pages



Profile ID	Display Name ↑	Source	Role Center ID	Enabled	Use as default profile	Show in Role Explorer
ACCOUNTANT	: Accountant	Base Application	9027	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ACCOUNTING MANAGER	Accounting Manager	Base Application	9001	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AP COORDINATOR	Accounts Payable Coordinator	Base Application	9002	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AR ADMINISTRATOR	Accounts Receivable Administrator	Base Application	9003	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SECURITY ADMINISTRATOR	Administration of users, user groups an...	Base Application	9024	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BLANK	Blank Profile	System Application	8999	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BOOKKEEPER	Bookkeeper	Base Application	9004	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BUSINESS MANAGER	Business Manager	Base Application	9022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BUSINESS MANAGER EVA...	Business Manager Evaluation	Base Application	9022	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
COMPANYHUB	Company Hub	Company Hub	1151	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CREDIT MANAGER	Credit and Collections Manager	Base Application	36603	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Sales Order Processor

 Copy profile...  Customize pages  Clear customized pages | More options 

General

Profile ID ORDER PROCESSOR

Role Center ID 9006 ...

Source Base Application

Enabled

Display Name Sales Order Processor

Show in Role Ex... ..

Description Full functionality for order processors in the Sales department.

Notes +

(There is nothing to show in this view)

Additional Settings

Use as default pr... ..

Disable personal... ..

Available Role Centers | 🔍 ⌵ ...

Object ID ↑	Object Name	App Name
9002	Acc. Payables Coordinator RC	Base Application
9003	Acc. Receivables Adm. RC	Base Application
9004	Bookkeeper Role Center	Base Application
9005	Sales Manager Role Center	Base Application
→ 9006 ⋮	Order Processor Role Center	Base Application
9007	Purchasing Agent Role Center	Base Application
9008	Whse. Basic Role Center	Base Application
9009	Whse. Worker WMS Role Center	Base Application
9010	Production Planner Role Center	Base Application
9011	Shop Supervisor Mfg Foundation	Base Application
9012	Shop Supervisor Role Center	Base Application
9013	Machine Operator Role Center	Base Application
9014	Job Resource Manager RC	Base Application



User Setup | Work Date: 1/25/2024

✓ Saved



Search

+ New



Edit List



Delete



User ID ↑	Allow Posting From	Allow Posting To	Allow Deferral Posting From	Allow Deferral Posting To	Regi... Time	Salespers./Pu... Code	Sales Resp. Ctr. Filter	Purchase Resp. Ctr. Filter	Service Resp. Ctr. Filter	Time Sheet Ad...	E-Ma
BART	11/1/2022	11/30/2022			<input type="checkbox"/>					<input type="checkbox"/>	
MARGE	11/1/2022	11/30/2022			<input type="checkbox"/>					<input type="checkbox"/>	
→ RALPH	11/1/2022	11/30/2022			<input type="checkbox"/>					<input type="checkbox"/>	

Warehouse Employees



Warehouse Employees | Work Date: 1/25/2024

✓ Saved



Search

+ New



Edit List



Delete



	User ID ↑		Location Code ↑	Default
	BART		BLUE	<input type="checkbox"/>
	MAGGIE		GREEN	<input type="checkbox"/>
→	HERSCHEL	⋮	RED	<input checked="" type="checkbox"/>
	HERSCHEL		BLUE	<input type="checkbox"/>

Demonstration

- Create a new Business Central User



For Users, By Users

The Largest Independent Gathering of
the Microsoft User Ecosystem

Decrease Complexities,
Deliver Results.

All About Roles and Permission Sets



For Users, By Users

@ 2022 Dynamic Communities

Roles/Permission Sets

Dynamics 365 Business Central

← Permission Sets | Work Date: 1/25/2024 Press F11 to exit full screen

Search + New Edit List Delete Permissions Copy Permission Set... Import Permission Sets

Permission Set ↑	Name	Type ↑	Extension Name
NAVUG-CUSTOMER-F	Customer-Full A...	User-Defined	
NAVUG-CUSTOMER-R	Customer-Read ...	User-Defined	
NAVUG-SO-CREATE	Create Sales Ord...	User-Defined	
NAVUG-SO-RELEASE	Release Sales Or...	User-Defined	
BC PERF. TOOLKIT	Businss Central ...	Extension	Performance Toolkit
TESTRUNNER	TestRunner Per...	Extension	Test Runner
ADCS ALL	ADCS User	System	OnPrem Permissions
ADCS SETUP	ADCS Set-up	System	OnPrem Permissions
ALL OBJECTS	All Objects	System	Permissions Mock
→ <u>BANKDEC-EDIT</u>	Edit Bank Recs	System	OnPrem Permissions (N...
BANKDEPOSIT-EDIT	Edit Bank Depos...	System	OnPrem Permissions (N...
BANKDEPOSIT-POST	Post Bank Depo...	System	OnPrem Permissions (N...
BANKDEPOSIT-POSTED	Read Posted Ba...	System	OnPrem Permissions (N...
BANKREC-POST	Post Bank Recs	System	OnPrem Permissions (N...
BANKREC-POSTED	Read Posted Ba...	System	OnPrem Permissions (N...
BASIC	Basic User (All In...	System	OnPrem Permissions
CASHFLOW	Cash Flow Total	System	OnPrem Permissions

System Permissions ▾

Object Type ↑	Object ID ↑	Object Name
Table Data	277	Bank Account
Table Data	352	Default Dim
Table Data	10120	Bank Rec. H
Table Data	10121	Bank Rec. Li
Table Data	10122	Bank Comm

Custom Permissions ▾

(There is nothing to show in this view)

- BASIC *(Everything to Sign On)*
- SUPER *(Full Access)*
- SUPER (DATA) *(Full Data Access)*
- SYSTEM APP – ADMIN
- SYSTEM APP – BASIC
- TROUBLESHOOT TOOLS

Roles/Permission Sets: Basic

Dynamics 365 Business Central

Permissions | Work Date: 1/25/2024

✓ Saved

× Permission sets of type System and Extension cannot be changed. Only permission sets of type User-Defined can be changed. Don't show again

General

Permission Set: BASIC

Actions

Object Type ↑	Object ID ↑	Object Name	Read Permission	Insert Permission	Modify Permission	Delete Permission	Execute Permission	Security Filter
→ Table Data	3	Payment Terms	Yes					-
Table Data	4	Currency	Yes	Indirect	Indirect			-
Table Data	5	Finance Charge Terms	Yes					-
Table Data	6	Customer Price Group	Yes					-
Table Data	7	Standard Text	Yes	Yes	Yes	Yes		-
Table Data	8	Language	Yes	Yes	Yes	Yes		-
Table Data	9	Country/Region	Yes	Yes	Yes	Yes		-
Table Data	10	Shipment Method	Yes					-

The values for table permission are **Yes**, **Indirect**, or blank, which indicates no permission. You can use indirect permission **to use an object only through another object**.

For example, a user can have permission to run **codeunit 80, Sales-Post**. The Sales-Post codeunit performs many tasks, including **modifying table 39, Purchase Line**. When the user runs the Sales-Post codeunit, BC/NAV checks whether the user has permission to modify the Purchase Line table.

- If not, then the codeunit cannot complete its tasks, and the user receives an error message.
- If so, the codeunit runs successfully.

However, the user does not need to have full access to the Purchase Line table to run the codeunit. If the user has indirect permission for the Purchase Line table, then the Sales-Post codeunit runs successfully because of the combination of MODIFY=INDIRECT for TABLE 39 and EXECUTE=YES for Code Unit 80.

When a user has indirect permission, that user can only modify the Purchase Line table by running the Sales-Post codeunit or another object that has permission to modify the Purchase Line table. The user can only modify the Purchase Line table when doing so from supported application areas. The user cannot run the feature inadvertently or maliciously by other methods.

Indirect Permissions

The screenshot displays the Microsoft Dynamics NAV Development Environment. The 'Object Designer' window shows a list of tables, with '80 Sales-Post' selected and highlighted with a red box. A red arrow points from this table to the 'Sales-Post - Properties' window. In the 'Properties' window, the 'Permissions' property is highlighted with a red box, showing the value: 'TableData Sales Line=imd,TableData Purchase Header=m,TableData Purchase Line=m,Table...'. A second red arrow points from this property to the 'Permissions' dialog box. The dialog box contains a table of permissions for various object IDs and names. The '39 Purchase Line' row is highlighted with a red box. The 'Modify Permission' column for this row is circled in blue.

Object ID	Object Name	Read Permission	Insert Permission	Modify Permission	Delete Permission
37	Sales Line		✓	✓	✓
38	Purchase Header		✓	✓	✓
39	Purchase Line		✓	✓	✓
49	Invoice Post. Buffer		✓	✓	✓
110	Sales Shipment Header		✓	✓	✓
111	Sales Shipment Line		✓	✓	✓
112	Sales Invoice Header		✓	✓	✓
113	Sales Invoice Line		✓	✓	✓
114	Sales Cr.Memo Header		✓	✓	✓
115	Sales Cr.Memo Line		✓	✓	✓
120	Purch. Rcpt. Header		✓	✓	✓
121	Purch. Rcpt. Line		✓	✓	✓

Roles/Permission Sets: Super

Dynamics 365 Business Central

Permissions | Work Date: 1/25/2024

✓ Saved

✕ Permission sets of type System and Extension cannot be changed. Only permission sets of type User-Defined can be changed. Don't show again

General

Permission Set SUPER

Actions

Object Type ↑	Object ID ↑	Object Name	Read Permission	Insert Permission	Modify Permission	Delete Permission	Execute Permission	Security Filter
→ Table Data	0	All objects of type Table Data	Yes	Yes	Yes	Yes		-
Table	0	All objects of type Table					Yes	-
Report	0	All objects of type Report					Yes	-
Codeunit	0	All objects of type Codeunit					Yes	-
XMLport	0	All objects of type XMLport					Yes	-
Page	0	All objects of type Page					Yes	-
Query	0	All objects of type Query					Yes	-
System	0	All objects of type System					Yes	-

Roles/Permission Sets: Super Data

Dynamics 365 Business Central

Permissions | Work Date: 1/25/2024

✓ Saved

× Permission sets of type System and Extension cannot be changed. Only permission sets of type User-Defined can be changed. Don't show again

General

Permission Set 'SUPER (DATA)'

Actions

Object Type ↑	Object ID ↑	Object Name	Read Permission	Insert Permission	Modify Permission	Delete Permission	Execute Permission	Security Filter
→ Table Data	0	All objects of type Table Data	Yes	Yes	Yes	Yes		-

Decrease Complexities,
Deliver Results.

Best Practices



For Users, By Users

@ 2022 Dynamic Communities

Is Everyone A Super User?



- Create your own permission sets
- Don't modify standard permission sets
 - Copy and then modify
- Naming convention:
 - NAVUG-SO-Create Order
 - NAVUG-PO-Create Order
- Keep It Simple – One function per permission set
- Use **User Groups** for each Job Role.
- Work with your users and let them test

Dynamics 365 Business Central

User Card | Work Date: 1/25/2024

Bart Simpson

ACS Setup | Change Password | Effective Permissions | Send Email | Actions | Related | Fewer options

User Permission Sets | Manage

Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
→ <u>BASIC</u>	Basic User (All Inclusive)		OnPrem Permissions	System
NAVUG-CUSTOMER-F	Customer-Full Access	BCUG-NAVUG		Tenant
NAVUG-SO-CREATE	Create Sales Orders	BCUG-NAVUG		Tenant
NAVUG-SO-RELEASE	Release Sales Orders	BCUG-NAVUG		Tenant

- Starting From Scratch? Think and plan an approach:
 - Create Permission Set: NAVUG-ALL
 - Execute All Tables, Pages, Reports, CodeUnits
 - As you determine what you want to restrict, remove the permission from this set.
- Update/Create permissions sets for new objects

- Read All Tables

Dynamics 365 Business Central

Permissions | Work Date: 1/25/2024

General

Permission Set: NAVUG-ALL TABLE-READ

Show: Only In Permission Set

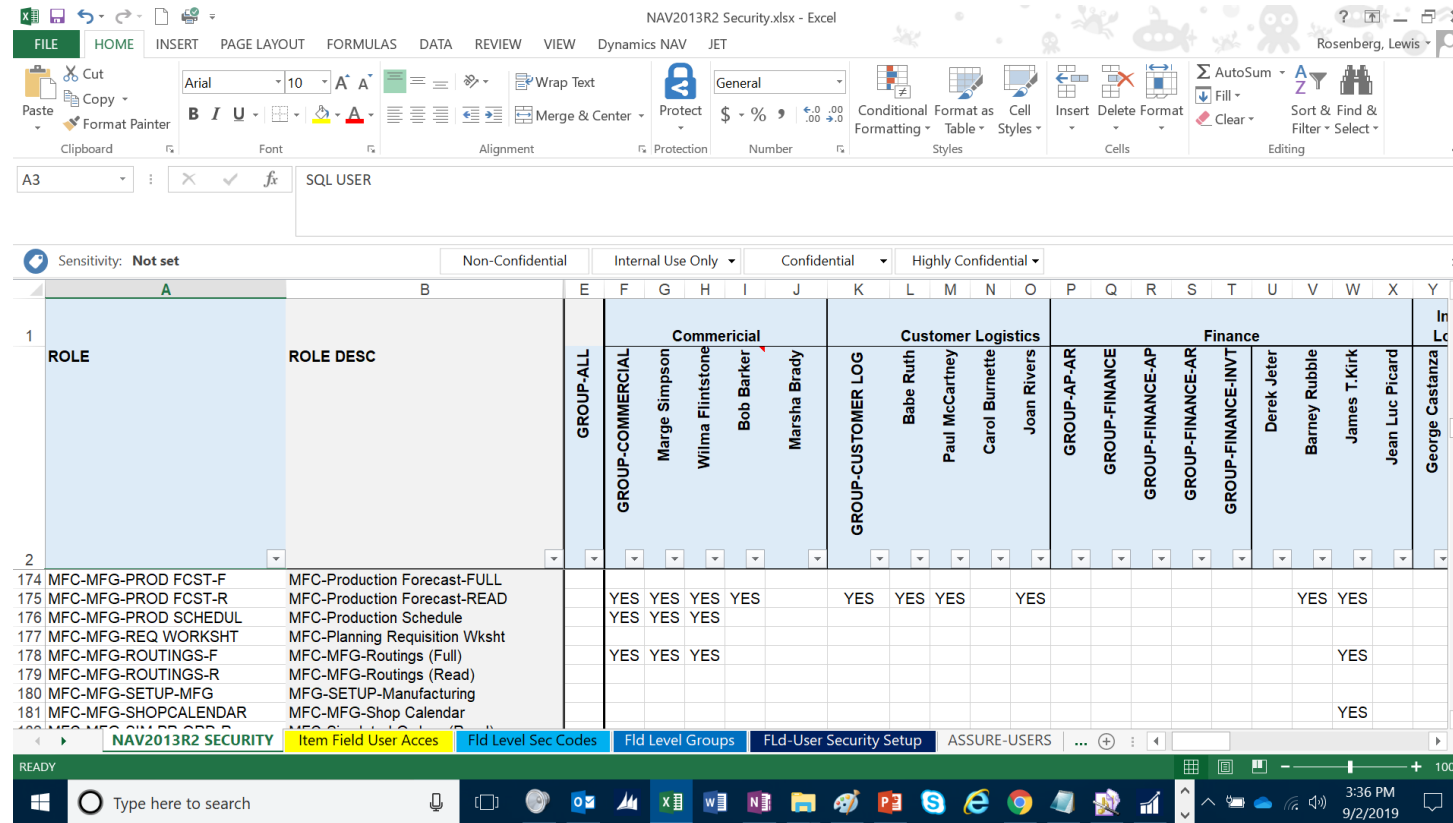
Add Read Permission to Relate...

Copied from System Permissio...

Manage Start Stop Actions Fewer options

Object Type ↑	Object ID ↑	Object Name	Read Permission	Insert Permission	Modify Permission	Delete Permission	Execute Permission	Security Filter
→ Table Data	0	All objects of type Table Data	Yes	Yes	Yes	Yes		
Report	0	All objects of type Report					Yes	
Page	0	All objects of type Page					Yes	

- Document:



ROLE	ROLE DESC	GROUP-ALL	GROUP-COMMERCIAL	GROUP-CUSTOMER LOG	GROUP-FINANCE	GROUP-FINANCE-AP	GROUP-FINANCE-AR	GROUP-FINANCE-INV	GROUP-FINANCE-INV
174	MFC-MFG-PROD FCST-F	MFC-Production Forecast-FULL							
175	MFC-MFG-PROD FCST-R	MFC-Production Forecast-READ	YES	YES	YES	YES			
176	MFC-MFG-PROD SCHEDULE	MFC-Production Schedule	YES	YES	YES				
177	MFC-MFG-REQ WORKSHT	MFC-Planning Requisition Wksht							
178	MFC-MFG-ROUTINGS-F	MFC-MFG-Routings (Full)	YES	YES	YES				
179	MFC-MFG-ROUTINGS-R	MFC-MFG-Routings (Read)							
180	MFC-MFG-SETUP-MFG	MFG-SETUP-Manufacturing							
181	MFC-MFG-SHOPCALENDAR	MFC-MFG-Shop Calendar							

Decrease Complexities,
Deliver Results.

Who Can Do That?



For Users, By Users

@ 2022 Dynamic Communities

Users | Work Date: 1/25/2024

Users: All | Search | + New | Manage | Process | Navigate | Actions | **Related** | Fewer options

User Groups | **Permissions** | History | User Email Policies

User	Effective Permissions	Permission Sets	Permission Set by User	Permission Set by User Group
ABE	Enabled			
<u>BART</u>		Enabled		
CLANCY			Enabled	
HERSCHEL				Enabled
HOMER				Homer Simpson
LISA				Lisa simpson
MAGGIE				Maggie Simpсом
MARGE				Marge Simpson
MARS-AD\NAVUSE				Test User

Permission Sets

Permission Set	Company
BASIC	
NAVUG-CUSTO...	BCUG-NAVUG
NAVUG-SO-CRE...	BCUG-NAVUG
<u>NAVUG-SO-RELE...</u>	<u>BCUG-NAVUG</u>

User Group Memberships

Effective Permissions

Dynamics 365 Business Central

Effective Permissions | Work Date: 1/25/2024

General

User BART Show All Objects

Company BCUG-NAVUG

Permission Sets | Permission Set by User | More options

Permissions

	Object Type ↑	Object Name	Read Permission	Insert Permission	Modify Permission	Delete Permission	Execute Permission	In User-Defined Permissi... Set
	Table Data	G/L Account	Indirect					<input type="checkbox"/>
	Table Data	G/L Entry	Indirect					<input type="checkbox"/>
→	<u>Table Data</u>	Customer	Yes	Yes	Yes	Yes		<input checked="" type="checkbox"/>
	Table Data	Vendor	Yes	Indirect	Indirect			<input type="checkbox"/>
	Table Data	Item	Yes	Indirect	Indirect			<input type="checkbox"/>
	Table Data	Item Translation	Yes	Indirect	Indirect			<input type="checkbox"/>

By Permission Set

Permission Set	Type	Read Permission	Insert Permission	Modify Permission	Delete Permission
----------------	------	-----------------	-------------------	-------------------	-------------------

Where Used – Permission Set By User

Dynamics 365 Business Central

Permission Set by User | Work Date: 1/25/2024

Company Name: BCUG-NAVUG

Show Domain Name:

Process Browse More options

Users.....

Permission Set ↑	Name	Extension Name	All Users	ABE	BART	CLA...	HER...	HC
INTELLIGE...	D365 Intelligent...	Base Application	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LOCAL	Country/region-...	Base Application	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LOCAL READ	Country/region-...	Base Application	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
M365 COL...	Microsoft 365 C...	Base Application	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MERGE DU...	Merge Duplicates	Base Application	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TEST TOOL	Test Tool	Base Application	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NAVUG-AL...	Read All Tables		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NAVUG-CU...	Customer-Full A...		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NAVUG-CU...	Customer-Read ...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NAVUG-SO...	Create Sales Or...		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NAVUG-SO...	Release Sales Or...		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BC PERF. T...	Businss Central ...	Performance Toolkit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TESTRUNN...	TestRunner Per...	Test Runner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Permissions ▾

Object Type ↑	Object ID ↑	Object Name
Table Data		Language
Table Data	79	Company In
Table Data	98	General Led
Table Data	140	License Agre
Table Data	405	Change Log

Tenant Permissions ▾

Object Type ↑	Object ID ↑	Object Name
---------------	-------------	-------------

Where Used – Permission Set By Group

Dynamics 365 Business Central

Permission Set by User Group | Work Date: 1/25/2024

Process Browse | More options

Permissions

Tenant Permissions

Permission Set ↑	Name	Extension Name	All User Gro...	CUSTOMER SERVICE	D365 ACC...	D3 AD
M365 COLLABORATI...	Microsoft 365 C...	Base Application	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
MERGE DUPLICATES	Merge Duplicates	Base Application	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
TEST TOOL	Test Tool	Base Application	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
NAVUG-ALL TABLE-RE...	Read All Tables		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
NAVUG-CUSTOMER-F	Customer-Full A...		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
NAVUG-CUSTOMER-R	Customer-Read ...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
NAVUG-SO-CREATE	Create Sales Or...		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
NAVUG-SO-RELEASE	Release Sales Or...		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
BC PERF. TOOLKIT	Businss Central ...	Performance Toolkit	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
TESTRUNNER	TestRunner Per...	Test Runner	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Object Type ↑ Object ID ↑ Object Name

(There is nothing to show in this view)

Object Type ↑ Object ID ↑ Object Name

Table Data 27012 SAT Use Coc

Permission Set Types

Dynamics 365 Business Central



← Permission Sets | Work Date: 1/25/2024

✓ Saved

Search New Edit List Delete Permissions Copy Permission Set... Import Permission Sets ...

Permission Set ↑	Name	Type ↑	Extension Name
NAVUG-ALL TABLE-READ	Read All Tables	User-Defined	
NAVUG-CUSTOMER-F	Customer-Full Access	User-Defined	
NAVUG-CUSTOMER-R	Customer-Read Only	User-Defined	
NAVUG-SO-CREATE	Create Sales Orders	User-Defined	
NAVUG-SO-RELEASE	Release Sales Orders	User-Defined	
BC PERF. TOOLKIT	Businss Central Performance To	Extension	Performance Toolkit
→ <u>TESTRUNNER</u>	⋮ TestRunner Permissions	Extension	Test Runner
ADCS ALL	ADCS User	System	OnPrem Permissions
ADCS SETUP	ADCS Set-up	System	OnPrem Permissions
ALL OBJECTS	All Objects	System	Permissions Mock
BANKDEC-EDIT	Edit Bank Recs	System	OnPrem Permissions (NA)

Where Used - Using Dev Tools

Object Designer

Table

Page

Report

Codeunit

Query

XMLport

MenuSuite

All

Type	ID	Name	Caption	Modified	Version List	Date	Time	Compiled	Locked
•	9002	User Group Access Control	User Group Access Control	←	NA/W113.00	09/19/18	12:00:00 PM	✓	
•	9003	User Group Permission Set	User Group Permission Set	←	NA/W113.00	09/19/18	12:00:00 PM	✓	
•	2000000004	Permission Set	Permission Set			08/07/06	12:00:00 PM	✓	
•	2000000005	Permission	Permission			08/07/06	12:00:00 PM	✓	
•	2000000053	Access Control	Access Control	←		08/07/06	12:00:00 PM	✓	
•▶	2000000165	Tenant Permission Set	Tenant Permission Set			03/24/19	12:00:00 PM	✓	
•	2000000166	Tenant Permission	Tenant Permission			03/24/19	12:00:00 PM	✓	

Where Used Permissions – User List

← → ↻ 🏠 ⓘ <http://localhost:8080/BC200/?Company=BCUG-NAVUG&dc=0&Table=2000000053> ⏴ ⏵ ☆ ? ⚙️ □ 🔴

Dynamics 365 Business Central 🔍 🔔 ⚙️ ?

← Access Control | Work Date: 1/25/2024 ⏴ ⏵ ↻ ⏴ ⏵ ↻

Filters ✕

Filter list by:

✕ Role ID

NAVUG-CUSTOMER-F ▾

+ Filter...

User Security ID	Role ID ↑ ▼	Company Name ↑	User Name	Role Name	Scope ↑
{12e8163c-d8e0-428c-8386-052...}	NAVUG-CUST...	BCUG-NAVUG	BART	Customer-Full A...	
{5dc5415c-9afa-4a12-bf4d-68a0...}	NAVUG-CUST...	BCUG-NAVUG	LISA	Customer-Full A...	
{61a85794-b167-4a4e-b325-ebc...}	NAVUG-CUST...	BCUG-NAVUG	NED	Customer-Full A...	

Run Table: 2000000053 (2,000,000,053) Access

Where Used Object / Tenant Permissions

← → ↻ 🏠 ⓘ http://localhost:8080/BC200/?Company=BCUG-NAVUG&dc=0&Table=2000000166

Dynamics 365 Business Central

Tenant Permission | Work Date: 1/25/2024

Filters ✕

Filter list by:

- ✕ Object Type
Table Data
- ✕ Object ID
18

+ Filter...

App ID	Role ID ↑	Role Name	Object Type	Object ID ↑	Object Name
{00000000-0000-0000-0000-00...}	NAVUG-CUST...	Customer-Full A...	Table Data	18	Customer
{00000000-0000-0000-0000-00...}	NAVUG-CUST...	Customer-Read ...	Table Data	18	Customer

Run Table: 2000000166 (2,000,000,166) Tenant Permissions

Where Used Object/Permissions

http://localhost:8080/BC200/?Company=BCUG-NAVUG&dc=0&Table=2000000005

Dynamics 365 Business Central

Permission | Work Date: 1/25/2024

Filters

Filter list by:

- Object Type: Table Data
- Object ID: 18

Role ID ↑	Role Name	Object Type ↑	Object ID ↑	Object Name	Read Permission	Inser Perr
BANKDEPOSI...	Post Bank Depo...	Table Data	18	Customer	Indirect	
BANKREC-PO...	Post Bank Recs	Table Data	18	Customer	Indirect	
BASIC	Basic User (All In...	Table Data	18	Customer	Yes	l
CASHFLOW	Cash Flow Total	Table Data	18	Customer	Yes	
D365 ACC. RE...	Dyn. 365 Accou...	Table Data	18	Customer	Yes	Y
D365 ACCOU...	Dynamics 365 fo...	Table Data	18	Customer	Yes	Y
D365 AUTOM...	Dynamics 365 A...	Table Data	18	Customer	Yes	Y
D365 BASIC	Dynamics 365 B...	Table Data	18	Customer	Yes	l
D365 BASIC I...	Dyn. 365 Basic I...	Table Data	18	Customer	Yes	Y
D365 BUS FU...	Dyn. 365 Full Bu...	Table Data	18	Customer	Yes	Y
D365 BUS PR...	Dyn. 365 Prem. ...	Table Data	18	Customer	Yes	Y
D365 CUSTO...	Dynamics 365 C...	Table Data	18	Customer	Yes	Y

Run Table: 2000000005 (2,000,000,005) Permissions

Decrease Complexities,
Deliver Results.



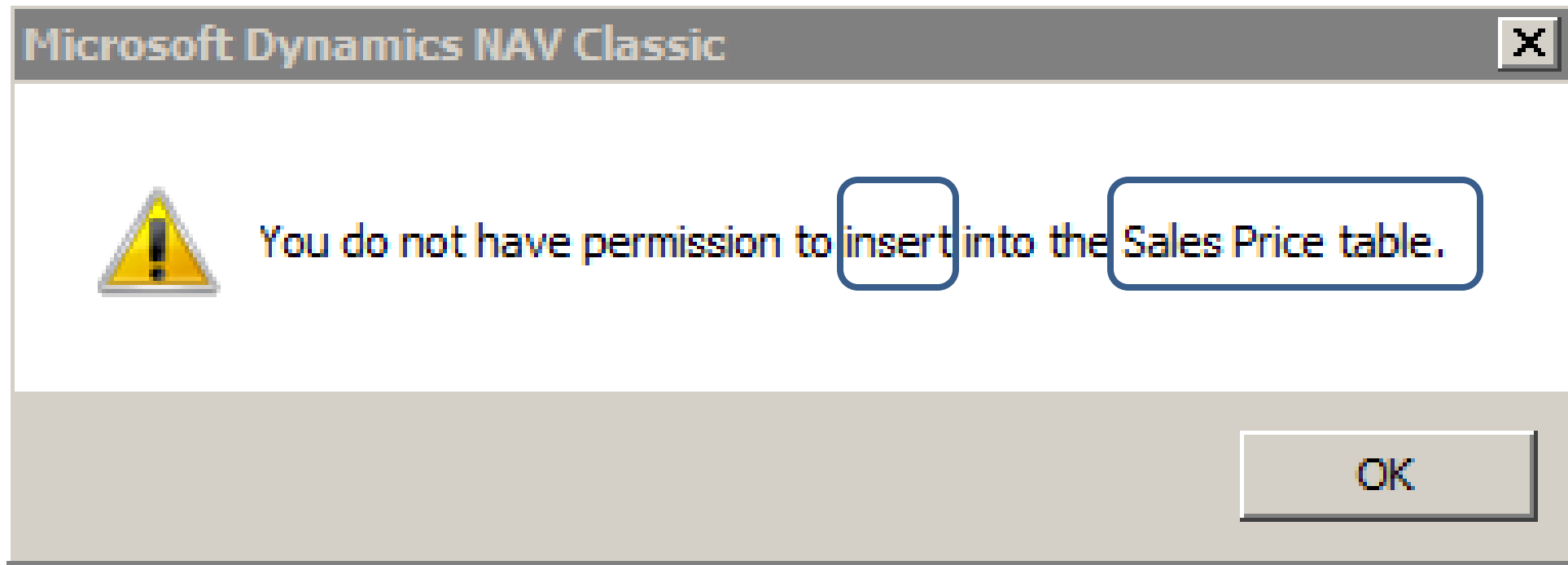
Troubleshooting Permissions Errors



For Users, By Users

@ 2022 Dynamic Communities

Troubleshooting Errors



Demonstration

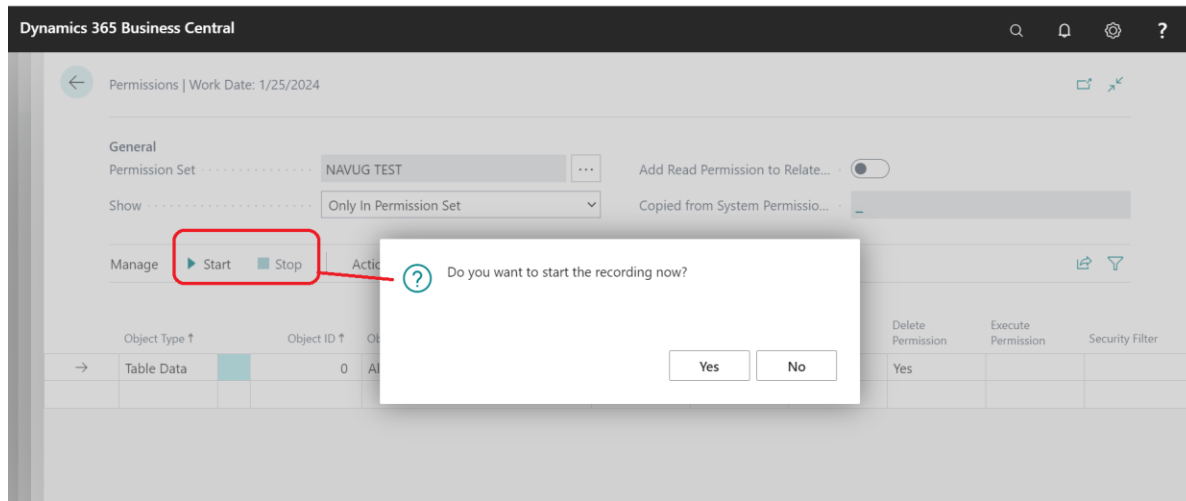
- Who Can Do That?



For Users, By Users

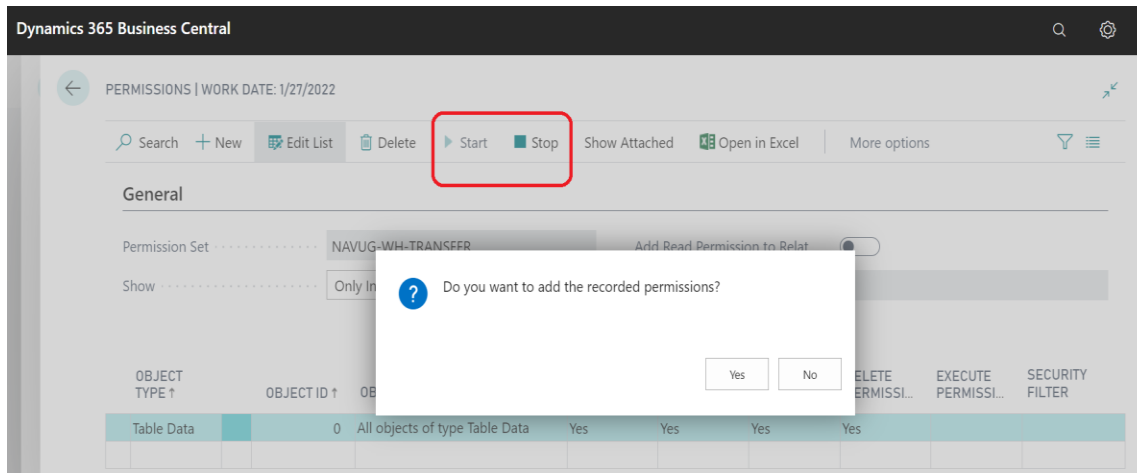
The Largest Independent Gathering of
the Microsoft User Ecosystem

Recording Permissions



1. Works well when you open two sessions.
2. In first session **SEARCH Permission Sets**
3. **+New**
4. Enter Name and Description
5. Select it and click **Permissions** in the ribbon
6. Click **START** – Do you want to start the recording now? - YES
7. In second session, perform the actions to record
8. Back to first session, click **STOP** – Do You want to add the recorded permissions? - YES

Recording Permissions



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Demonstration

- Recording Permission



The Largest Independent Gathering of
the Microsoft User Ecosystem

Decrease Complexities,
Deliver Results.

Managing Permissions



For Users, By Users

@ 2022 Dynamic Communities

- Policies
 - How Requests are Submitted
 - Approvals (Who?)
 - Documentation
 - Existing Security
 - Changes
 - Approvals/Rejections
- Creating custom Permission Sets (Roles)
- Best Practices
- Troubleshooting Permissions Errors
- Segregation of Duty

Requesting Permissions

NAV-Security Form.xlsx - Read-Only - Last Modified: September 10

Sensitivity: Not set

Please list any Dynamics NAV Permission Sets to add or remove OR Describe the Functions Required and check the appropriate box to the right (When describing access required, providing detail or the description from the NAV menu including the menu path can be helpful)

Add/Remove	Permission Set (optional)	Description of function or access
ADD	MFC-All	MFC-ALL required objects
Add	GROUP-CUSTOMER LOG	Customer Logistics Permissions
ADD	MFC-SM-SLS PRICE	MFC-SM-Sales Prices (F)
	GROUP-SHIPPING GROUP-TECHNICAL SERV GROUP-WRIGLEY REG MFC-ADMIN-USER SETUP MFC-AFP MFC-AFP-MASS MODIFY MFC-AFP-READ MFC-ALL	

Form-General NAV Access Request | Form-Item Card Field Access Req | Form-UK NAV Access Request | Permission Set List | GROUP-COMMERCIAL

Suggested Resources

- User Group and Group Permissions NAV2016 (ArcherPoint Blog, Saurav Dhyani): <https://www.archerpoint.com/blog/Posts/microsoft-dynamics-nav-2016-user-group-and-group-permissions>
- Recording Permissions in NAV2016 (Video: FastPath, Kim Congleton): <https://youtu.be/n3l1E-E4dmY>
- License Types: <https://docs.microsoft.com/en-us/dynamics-nav/license-types>



Decrease Complexities,
Deliver Results.

Q&A



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<https://www.linkedin.com/in/rosenbergl/>



For Users, By Users

**Thank you for
attending!**

**Please complete
session surveys:**



Decrease Complexities,
Deliver Results.

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