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Mission Control - Using Permission Sets to protect Workflow Actions in BC

Megan De Freitas - 2024-11-22 - [Mission Control Documentation](#)

When using Mission Control Workflow within Business Central, it may be preferable to restrict the actions accessible to a user in Business Central and enable Mission Control to automate those actions. The most effective way to achieve this goal is by utilizing Business Central permission sets to control the actions that a user can take.

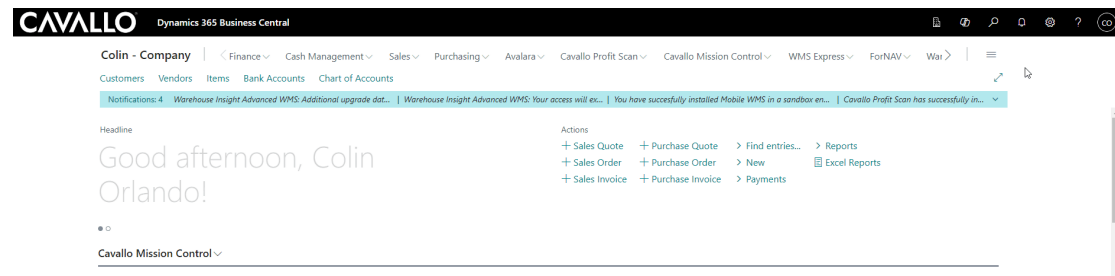
Official Microsoft Documentation:

- [Developer Level Documentation](#)
- [User Level Documentation](#)

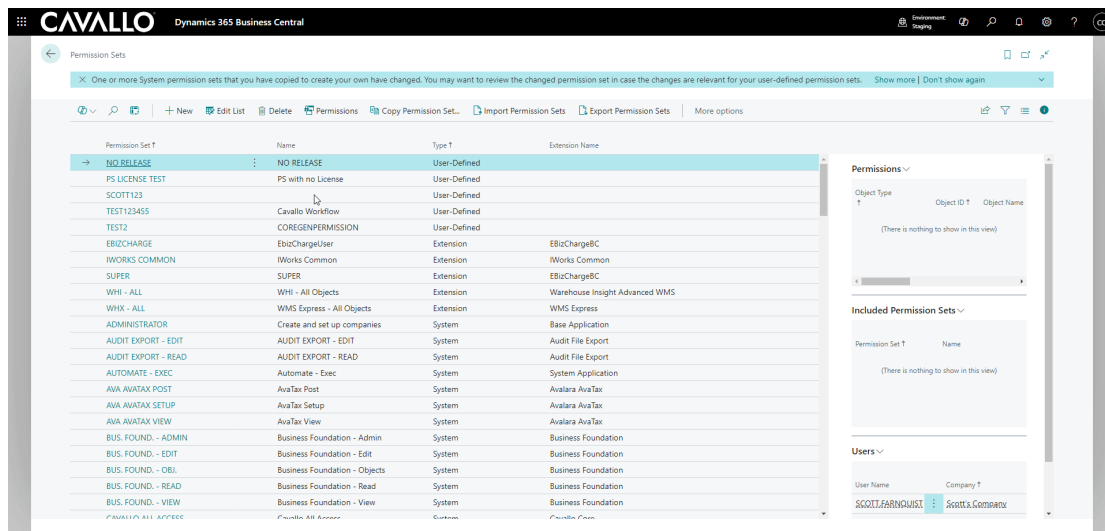
Building Reusable Exclusionary Permission Sets

Business Central's permissions are grouped together using "OR" statements meaning if one of the permission sets (D365 Bus Full Access) gives access to a feature and another permission set removes it, the feature will be included because at least one of the permission sets assigned to the user has access to the feature. The correct way to revoke permissions is to build 2 new permission sets. The first will be a reusable list of restrictions and the second will contain our base Business Central permissions while including the restrictions set. By building restrictions out in this way, the restriction set can be modified and reused over time and eliminate the need to add restrictions to every new permission set. The below steps are an example of how to build this functionality out within Business Central:

1. Search Permission Sets in Business Central's global navigation



2. Select "New" and proceed to give the permission set a unique name. For this first example, we are building out a restrictions set containing all permissions we wish to revoke from a specific role.



In the above example, the restrictions set contains the following codeunits:

RESTRICTIONS (tenant)

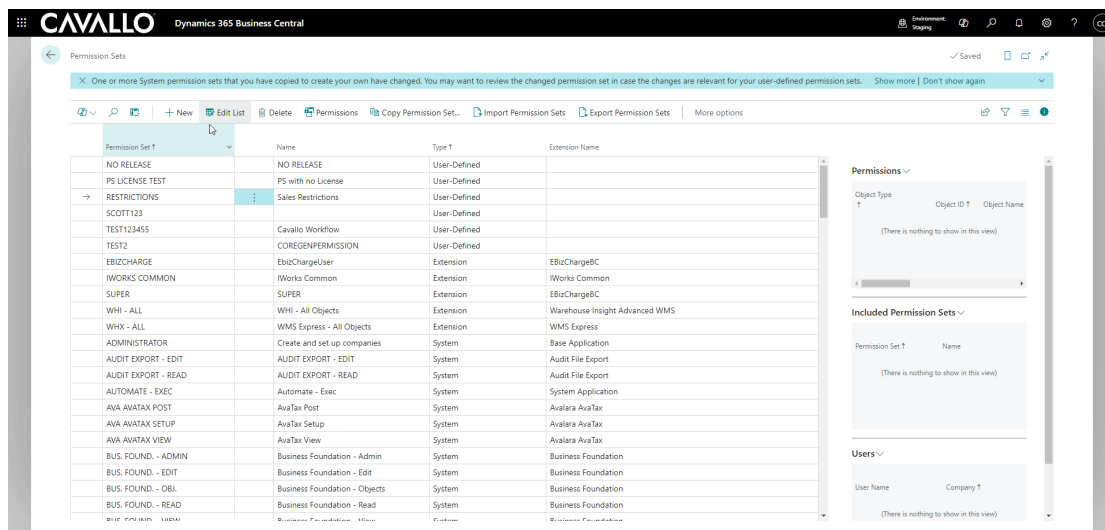
[View all permissions](#) | [More options](#)

General

Permission Set: **RESTRICTIONS**

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 Permis	
Include	Codeunit	414	Release Sales Document	Release Sales Document		
Include	Codeunit	815	Sales Post Invoice	Sales Post Invoice		
→ Include	Codeunit	5763	Whse.-Post Shipment	Whse.-Post Shipment		
Include	Codeunit	5778	Whse. Create Pick	Whse. Create Pick		

3. Once the restrictions set is in place, create another new permission set and give it a unique name. In the below example, we will name the permission sets according to the role of the user:



The below example is the finished permission set that will allow my user access to D365 full access with the

exception of the ability to release documents, post sales invoices and run warehouse actions.

General

Permission Set : SALES PERMISSIONS

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	
→ Include	Table Data	0	All objects of type Table Data	All objects of type Table Data	Yes	

Permission Sets ▾					
Type ↑	Permission Set ↑ ▾	Name		Scope	
Include	D365 BUS FULL ACCESS	Dyn. 365 Full Business Acc.		System	
→ Exclude	RESTRICIONS	Sales Restrictions		Tenant	

4. To assign these permissions to a user, navigate to the global search and type "users". Select a user to edit, then add the newly created permission set to any of the users in the company and remove their old base Business Central permission set (D365 Bus Full Access in this case). Failure to remove the base permission set will still allow the user to complete all restricted actions due to conflicting sets being in place.

CAVALLO

Dynamics 365 Business Central

Environment: Testing

Colin - Company

< Finance Sales Purchasing Avalara Cavallo Profit Scan Cavallo Mission Control WMS Express ForNAV War

Customers Vendors Items Bank Accounts Chart of Accounts

Notifications: 4 Warehouse Insight Advanced WMS: Additional upgrade dat... Warehouse Insight Advanced WMS: Your access will ex... You have successfully installed Mobile WMS in a sandbox en... Cavallo Profit Scan has successfully in...

Headline

Good morning, Colin Orlando!

Actions

+ Sales Quote

+ Sales Order

+ Sales Invoice

+ Purchase Quote

+ Purchase Order

+ Purchase Invoice

> Find entries...

> New

> Payments

> Reports

Excel Reports

Cavallo Mission Control ▾

Mission Control

Needs My Approval

All Needs Approval

258

185

185

Activities ▾

Sales This Month

Overdue Sales Invoice Amount

Overdue Purch. Invoice Amount

Sales Invoices Predicted Overdue

\$2,002

\$102,904

\$555,425

0

> See more

> See more

> See more

> See more

Ongoing Sales

Ongoing Purchases

Payments

The user now has the new sales role permission set:

Permission Set ↑		Description	Company ↑	Extension Name	Permission Scope
NODUS PF INTEGRATI...		PayFabric Receivables/ePa...	Thanh's Company	PayFabric - Secure Credit Card Processing	System
NODUS PF MGT		PayFabric Management Ac...	Justin's Company	PayFabric - Secure Credit Card Processing	System
NODUS PF MGT	⋮	PayFabric Management Ac...	Scott's Company	PayFabric - Secure Credit Card Processing	System
NODUS PF MGT		PayFabric Management Ac...	Thanh's Company	PayFabric - Secure Credit Card Processing	System
NODUS PF PROCESSI...		PayFabric Processing Access	Justin's Company	PayFabric - Secure Credit Card Processing	System
NODUS PF PROCESSI...		PayFabric Processing Access	Scott's Company	PayFabric - Secure Credit Card Processing	System
NODUS PF PROCESSI...		PayFabric Processing Access	Thanh's Company	PayFabric - Secure Credit Card Processing	System
NODUS PF VIEW		PayFabric View Access	Justin's Company	PayFabric - Secure Credit Card Processing	System
NODUS PF VIEW		PayFabric View Access	Scott's Company	PayFabric - Secure Credit Card Processing	System
NODUS PF VIEW		PayFabric View Access	Thanh's Company	PayFabric - Secure Credit Card Processing	System
→ SALES PERMISSIONS		Sales Permissions	Matt - Directions NA		Tenant

For a more in depth review of permission sets, please contact your Microsoft Partner or refer the links at the top of this page.