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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.

mission Sets				0 4
COne or more System nermission sets	that you have conied to create your own have o	hanned. You may want to review t	the changed permission set in case the changes are relevant for your user-define	ad narmission sats Show more I. Don't show again
b - シ 🗈 + New 🕸 Ec	lit List 🍵 Delete 🛛 📅 Permissions 🔒 Cop	ay Permission Set 🛛 🕻 Import P	Permission Sets 🔹 Export Permission Sets More options	iê 🖓 🔳
Permission Set 1	Name	Type †	Extension Name	
→ NO RELEASE	NO RELEASE	User-Defined		Permissions ∨
PS LICENSE TEST	PS with no License	User-Defined		
SCOTT123		User-Defined		Object Type † Object ID † Object Name
TEST123455	Cavallo Workflow	User-Defined		
TEST2	COREGENPERMISSION	User-Defined		(There is nothing to show in this view)
EBIZCHARGE	EbizChargeUser	Extension	EBizChargeBC	
IWORKS COMMON	IWorks Common	Extension	Works Common	
SUPER	SUPER	Extension	EBizChargeBC	
WHI - ALL	WHI - All Objects	Extension	Warehouse Insight Advanced WMS	
WHX - ALL	WMS Express - All Objects	Extension	WMS Express	Included Permission Sets ~
ADMINISTRATOR	Create and set up companies	System	Base Application	
AUDIT EXPORT - EDIT	AUDIT EXPORT - EDIT	System	Audit File Export	Permission Set 1 Name
AUDIT EXPORT - READ	AUDIT EXPORT - READ	System	Audit File Export	
AUTOMATE - EXEC	Automate - Exec	System	System Application	(There is nothing to show in this view)
AVA AVATAX POST	AvaTax Post	System	Avalara AvaTax	
AVA AVATAX SETUP	AvaTax Setup	System	Avalara AvaTax	
AVA AVATAX VIEW	AvaTax View	System	Avalara AvaTax	
BUS. FOUND ADMIN	Business Foundation - Admin	System	Business Foundation	
BUS. FOUND EDIT	Business Foundation - Edit	System	Business Foundation	Users ~
BUS. FOUND OBJ.	Business Foundation - Objects	System	Business Foundation	
BUS. FOUND READ	Business Foundation - Read	System	Business Foundation	User Name Company †
BUS, FOUND, - VIEW	Business Foundation - View	System	Business Foundation	SCOTLEARNOUIST : Scott's Company

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

RESTRICTIONS (lenant)

		iancy			
🔁 View all permis	ssions More	options			
General					
Permission Set			RESTRICTIONS		
Permissions	Manage All	ow Read Allow	v Insert Allow Modify	Allow Delete Allow Execute	Allow All
B [#] New Line	× Delete Line	Select Object	s 🖻 🖻 Add Read Permis	ssion to Related Tables	
Туре	Object Type ↑	Object ID ↑	Object Name	Object Caption	Read Permi
Include	Codeunit	414	Release Sales Document	Release Sales Documen	t
Include	Codeunit	815	Sales Post Invoice	Sales Post Invoice	
\rightarrow Include	Codeunit	5763	WhsePost Shipment	WhsePost 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:

'ermiss	ion Sets	✓ Saved 🔲 🖬 🍃							
×о	K One or more System permission sets that you have copied to create your own have changed. You may want to review the changed permission set in case the changes are relevant for your user-defined permission sets. Show more Don't show again v								
¢	🔎 🖪 🕴 + New 🐺 Edit List	🔋 🔋 Delete 🛛 📅 Permissions 🖓 Copy	Permission Set 📑 Import Pe	rmission Sets 🔹 Export Permission Sets More options	ê 7 = (
	₽								
	Permission Set † 🗸 🗸	Name	Type †	Extension Name					
	NO RELEASE	NO RELEASE	User-Defined		 Permissions ∨				
	PS LICENSE TEST	PS with no License	User-Defined						
\rightarrow	RESTRICTIONS	Sales Restrictions	User-Defined		Object Type † Object ID † Object Name				
	SCOTT123		User-Defined		- objection objectivene				
	TEST123455	Cavallo Workflow	User-Defined		(There is nothing to show in this view)				
	TEST2	COREGENPERMISSION	User-Defined						
	EBIZCHARGE	EbizChargeUser	Extension	EBizChargeBC					
	IWORKS COMMON	IWorks Common	Extension	Works Common					
	SUPER	SUPER	Extension	EBizChargeBC					
	WHI - ALL	WHI - All Objects	Extension	Warehouse Insight Advanced WMS	Included Permission Sets ~				
	WHX - ALL	WMS Express - All Objects	Extension	WMS Express					
	ADMINISTRATOR	Create and set up companies	System	Base Application	Permission Set † Name				
	AUDIT EXPORT - EDIT	AUDIT EXPORT - EDIT	System	Audit File Export					
	AUDIT EXPORT - READ	AUDIT EXPORT - READ	System	Audit File Export	(There is nothing to show in this view)				
	AUTOMATE - EXEC	Automate - Exec	System	System Application					
	AVA AVATAX POST	AvaTax Post	System	Avalara AvaTax					
	AVA AVATAX SETUP	AvaTax Setup	System	Avalara AvaTax					
	AVA AVATAX VIEW	AvaTax View	System	Avalara AvaTax					
	BUS. FOUND ADMIN	Business Foundation - Admin	System	Business Foundation	Users \lor				
	BUS. FOUND EDIT	Business Foundation - Edit	System	Business Foundation					
	BUS, FOUND, - OBJ.	Business Foundation - Objects	System	Business Foundation	User Name Company †				

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.

Permission Set \dotsb			SALES PERMISSIONS		
Permissions	Manage Allow	/ Read Allow I	nsert Allow Modify Allow D	elete Allow Execute Allow All	
≩ [#] New Line	🔁 Delete Line	🗿 Select Object	ts 🖻 Add Read Permission to	o Related Tables	
Туре	Object Type ↑	Object ID ↑	Object Name	Object Caption	Read Permissi
→ Include	Table Data	0	All objects of type Table Data	All objects of type Table Data	Yes
4					

Type↑ Include → Exclude	2		Permission Set 1 🗸	Name	Scope
	2				
N Evaluate			D365 BUS FULL ACCESS	Dyn. 365 Full Business Acc.	System
-> Exclude	2	÷	RESTRICTIONS	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.

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	ms Bank Accounts Chart of Acco		Your access will ex You have succesfully insta	illed Mobile WMS in a sandbox en Ca	wallo Profit Scan has successfully in
Headline	rning, Colin (Actions	ote > Find entries > Report der > New 🔄 Excel R	s
େ Cavallo Mission Control	/				
Mission Control	All Needs Approval 185				
Activities ∨					
\$2,002	Amount \$102,904	\$555,425	Sales Invoices Predicted Overdue		
>See more	> See more	> See more	>See more		

The user now has the new sales role permission set:

er	Permission Sets	* Nev	v Line 🛛 🔭 Delete Line 🛛 🖶	Permissions		
	Permission Set 1		Description	Company 1	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	- 8	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.