Wiise/BC – User Administration

Overview

Wiise/ BC User Administration
User administration in Business Central comprises of adding a new user to the system, applying user groups to the user, and modifying user permissions if required.

Adding a new user to Business Central:
Once a user has been licensed and permitted Business Central in the Office Admin Centre follow below steps to add them in users list in Business Central.

Step 1

1. Search for Users in the quick search field and select Users Administration Page.
2. Click on Process and select Update Users from Microsoft 365
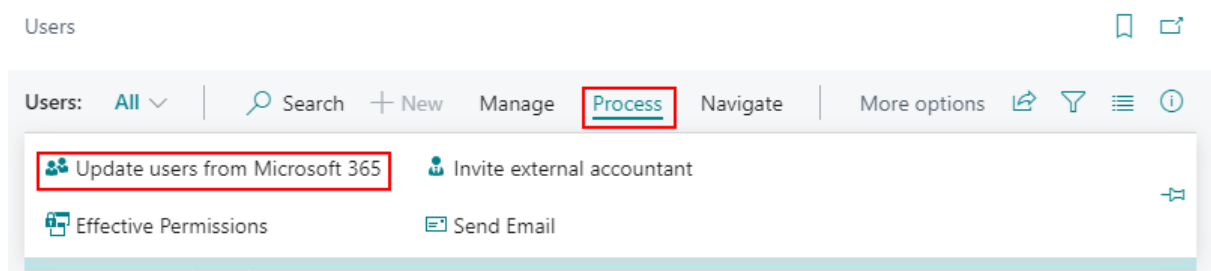
3. Click on Next in the following pop up

Update users from Microsoft 365

Bring changes to user information from your Microsoft 365 organisation to Business Central. Update licence assignments, name changes, email addresses, preferred languages, and user access.

Note:

It can take up to 72 hours for a change in Microsoft 365 to become available to Business Central.

Before you get started

You might want to configure custom permissions for each licence type to speed up how you configure users.

Configure permissions per licence

Close   Next

The information contained in this document is intended to be a guide for using your software. It is not accounting, bookkeeping or payroll advice. You should seek advice or clarification from your professional advisor in respect of these matters.

4. On the next pop up message, updates ready to be applied will be displayed which can be viewed before being applied. Updates can be cancelled or applied by clicking on Finish

Update users from Microsoft 365

Number of updates ready to be applied: 12. These can be name, email address, preferred language, and user access changes. Choose View changes to see the list.

| Cancel | View changes | Finish |

Step 2

Applying User Group Memberships:
Once a user is created User Group Memberships are applied to them based on their license and role in MS Office. User Group Memberships are made up of Permission Sets that groups of permissions to access areas within the system.

You can add or delete User Group Memberships by selecting a line and either removing or searching for a group membership in the sub section as shown below.

| Effective Permissions | Send Email | Sent Emails | Actions ⌄ | Automate ⌄ | Fewer options |

User Group Memberships | Manage

	Code ↑		Name	Company Name ↑
→	AUTOMATE ACTION	⋮	Allow action Automate	CRONUS AU
	AUTOMATE ACTION		Allow action Automate	New Company No Data

Step 3

Adding User Permission Sets

Permission Sets are added to the User Permission Sets list when User Groups are added to the User. User Permission Sets are groups of granulated access rules to different areas of the system. You can add a User Permission Set to the list even if they are not part of User Group Membership:

1. In the User Card go to the bottom of the page where User Permission Sets are located and select the last line click on the 3 dots in the field to open up the permission set Lookup

2. Once in the Permission Set Lookup, we will select the D365 Assembly View Permission Set and click on OK.

3. Once we have clicked on OK, we can see the permission set added to the User's Permission sets list
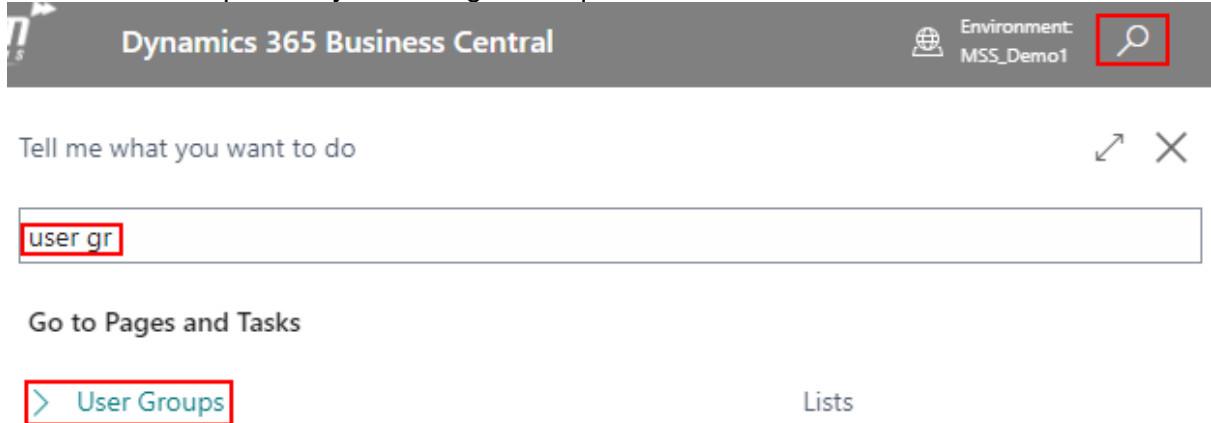
Step 4

Creating New User Groups

You can change a User Group by adding permissions to it but we do not suggest doing so, instead create new user groups and add permission sets to it so that they can be added to a user and MS System Pre-set User Groups are kept in original form. To Copy and change a User Group:

1. Go to User Groups List by searching in the quick search bar
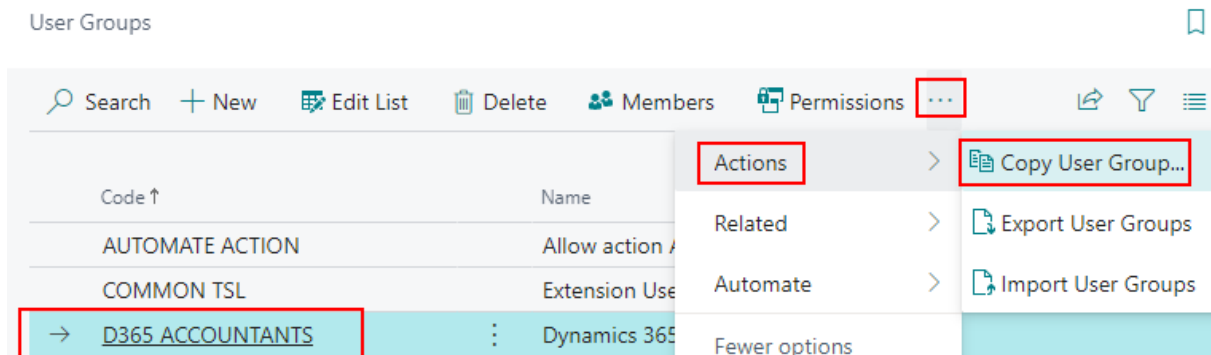
2. Select a User Group, click on the 3 dots in the ribbon and select actions then Copy User Group.

3. Enter a New User Group Code and Click on OK.

4. Select the new User Group Code and click on Permissions

5. Select the last empty line if you want to add a new line or you can delete and change any line above. Click on the 3 Dots

User Group Permission Sets

6. A list of Permission Sets will be displayed. Select the permission set you want to add and click on OK.

The permission set will be added to the User Group and all users in that group should be able to access the area within the system accordingly.

The same process can be applied to Permission Sets if they are required to be created and modified.

Step 5

Recording Permissions:

Within the permission Set there is a Record Permissions function that tracks the actions of a user and creates permission sets for them in a Permission Set. We do not recommend changing any system Pre-set permissions therefore please copy a permission set if you want to modify or record permissions.

Please let a Momentum Support Consultant know If you have any questions or face an error.