

Wiise/BC – User Administration

Overview

Wiise/ BC User Administration

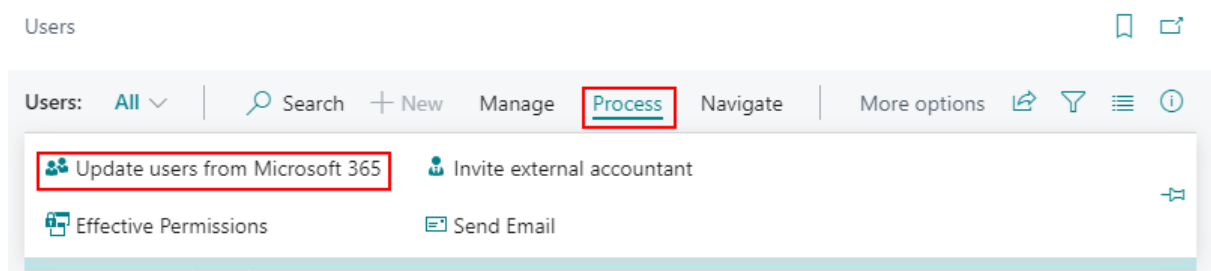
User administration in Business Central comprises of adding a new user to the system, applying user groups to the user, and modifying user permissions if required.

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

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.

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

User Card ✓ Saved

Wiise

✕ Web Service Access Key is no longer supported in Business Central online. Integrations... Don't show m... | Show ...

Effective Permissions Send Email Sent Emails | Actions Automate Fewer options

→	AUTOMATE ACTION	⋮	Allow action Automate	
	COMMON TSL		Extension User	
	D365 BUS PREMIUM		D365 Premium Business Access	
	D365 FULL ACCESS		Dynamics 365 Full access	
	D365 INTERNAL ADMIN		Export data	
	EXCEL EXPORT ACTION		D365 Excel Export Action	

User Permission Sets Manage

Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
D365 BASIC	Dynamics 365 B...		Base Application	System
D365 BUS PR...	Dyn. 365 Prem. ...		Base Application	System
D365 FULL A...	Dynamics 365 F...		Base Application	System
D365 READ	Dyn. 365 Read a...		Base Application	System
EDIT IN EXCE...	Edit in Excel - Vi...		System Application	System
EXPORT REP...	Export Report D...		System Application	System
LOCAL	Country/region-...		Base Application	System
SECURITY	Assign permissi...			System
SUPER	This role has all ...			System

→ ⋮

Choose a value for Permission Set

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

Permission Set Lookup | 🔍 ⌵ ... ↗ ✕

Permission Set ↑	Name	Extension Name	Scope ↑
→ AUTOMATE - EXEC	Automate - Exec	System Application	System
CONTOSO COFFE...	Contoso Coffee Admin	Contoso Coffee Demo Dataset	System
CONTOSO COFFE...	Contoso Coffee Read	Contoso Coffee Demo Dataset	System
D365 ACC. PAYABLE	Dynamics 365 Accounts ...	Base Application	System
D365 ACC. RECEIV...	Dyn. 365 Accounts receiv...	Base Application	System
D365 ACCOUNTA...	Dynamics 365 for Accou...	Base Application	System
D365 ADCS, EDIT	Dynamics 365 Create AD...	Base Application	System
D365 ADCS, VIEW	Dynamics 365 View ADCS	Base Application	System
D365 ASSEMBLY, ...	Dynamics 365 Create ass...	Base Application	System
D365 ASSEMBLY, ...	Dynamics 365 Setup asse...	Base Application	System
D365 ASSEMBLY, ...	Dynamics 365 View asse...	Base Application	System
D365 AUTOMATI...	Dynamics 365 Automation	Base Application	System
D365 BACKUP/RE...	Backup or restore databa...	System Application	System
D365 BANKING	Dynamics 365 Banking	Base Application	System
D365 BASIC	Dynamics 365 Basic access	Base Application	System
D365 BASIC ISV	Dyn. 365 Basic ISV Acc...	Base Application	System

OK
Cancel

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

User Permission Sets | Manage ↗ ✕

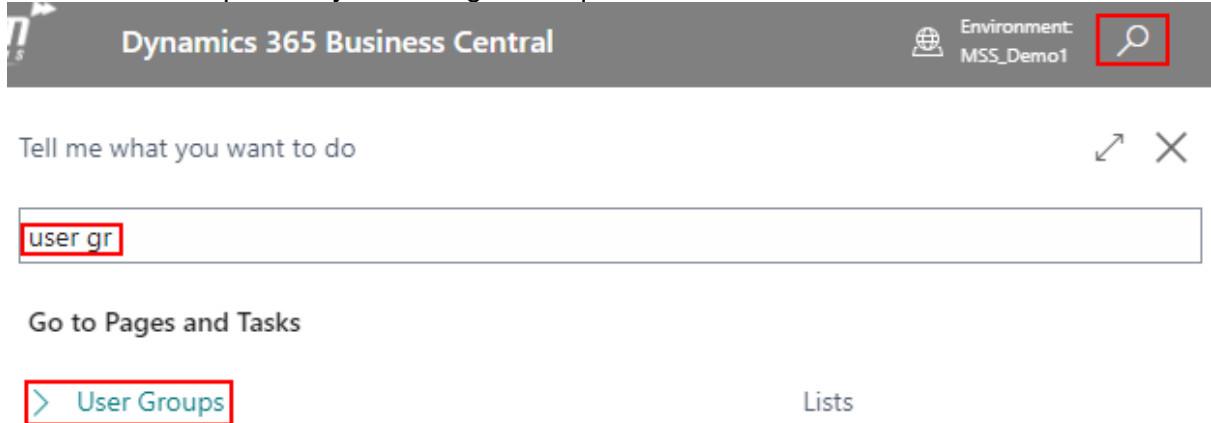
Permission Set ↑	Description	Company ↑	Extension Name	Permission Scope
D365 BUS PR...	Dyn. 365 Prem. ...		Base Application	System
D365 FULL A...	Dynamics 365 F...		Base Application	System
D365 READ	Dyn. 365 Read a...		Base Application	System
EDIT IN EXCE...	Edit in Excel - Vi...		System Application	System
EXPORT REP...	Export Report D...		System Application	System
LOCAL	Country/region-...		Base Application	System
SECURITY	Assign permissi...			System
SUPER	This role has all ...			System
→ D365 ASSI ...	Dynamics 365 V...		Base Application	System

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



Dynamics 365 Business Central Environment: MSS_Demo1

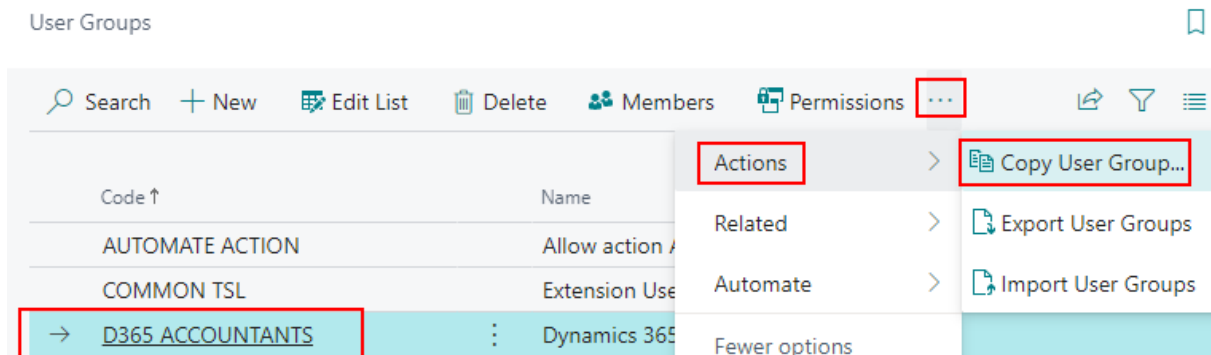
Tell me what you want to do

user gr

Go to Pages and Tasks

User Groups Lists

2. Select a User Group, click on the 3 dots in the ribbon and select actions then Copy User Group.



User Groups

Code ↑	Name
AUTOMATE ACTION	Allow action /
COMMON TSL	Extension Use
→ D365 ACCOUNTANTS	Dynamics 365

Search + New Edit List Delete Members Permissions ...

Actions > Copy User Group...

Related > Export User Groups

Automate > Import User Groups

Fewer options

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

Copy User Group

Options

New User Group Code D365 ACCOUNTANTS MSS

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

Search + New Edit List Delete Members **Permissions**

Code ↑	Name
AUTOMATE ACTION	Allow action Automate
COMMON TSL	Extension User
D365 ACCOUNTANTS	Dynamics 365 for Accountants
→ D365 ACCOUNTANTS MSS	: Dynamics 365 for Accountants

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

Search + New Edit List Delete

Permission Set ↑	Name	Extension Name
D365 ACCOUNTANTS	Dynamics 365 for Accounta...	Base Application
D365 BASIC	Dynamics 365 Basic access	Base Application
D365 JOBS, EDIT	Dynamics 365 Create Jobs	Base Application
LOCAL	Country/region-specific func.	Base Application
→		

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

Permission Sets | Search + New Edit List ...

Permission Set ↑	Name	Type ↑	Extension Name
D365 ASSEMBLY, EDIT	Dynamics 365 Create ass...	System	Base Application
D365 ASSEMBLY, SE...	Dynamics 365 Setup ass...	System	Base Application
→ D365 ASSEMBLY, VIE...	: Dynamics 365 View asse...	System	Base Application

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.