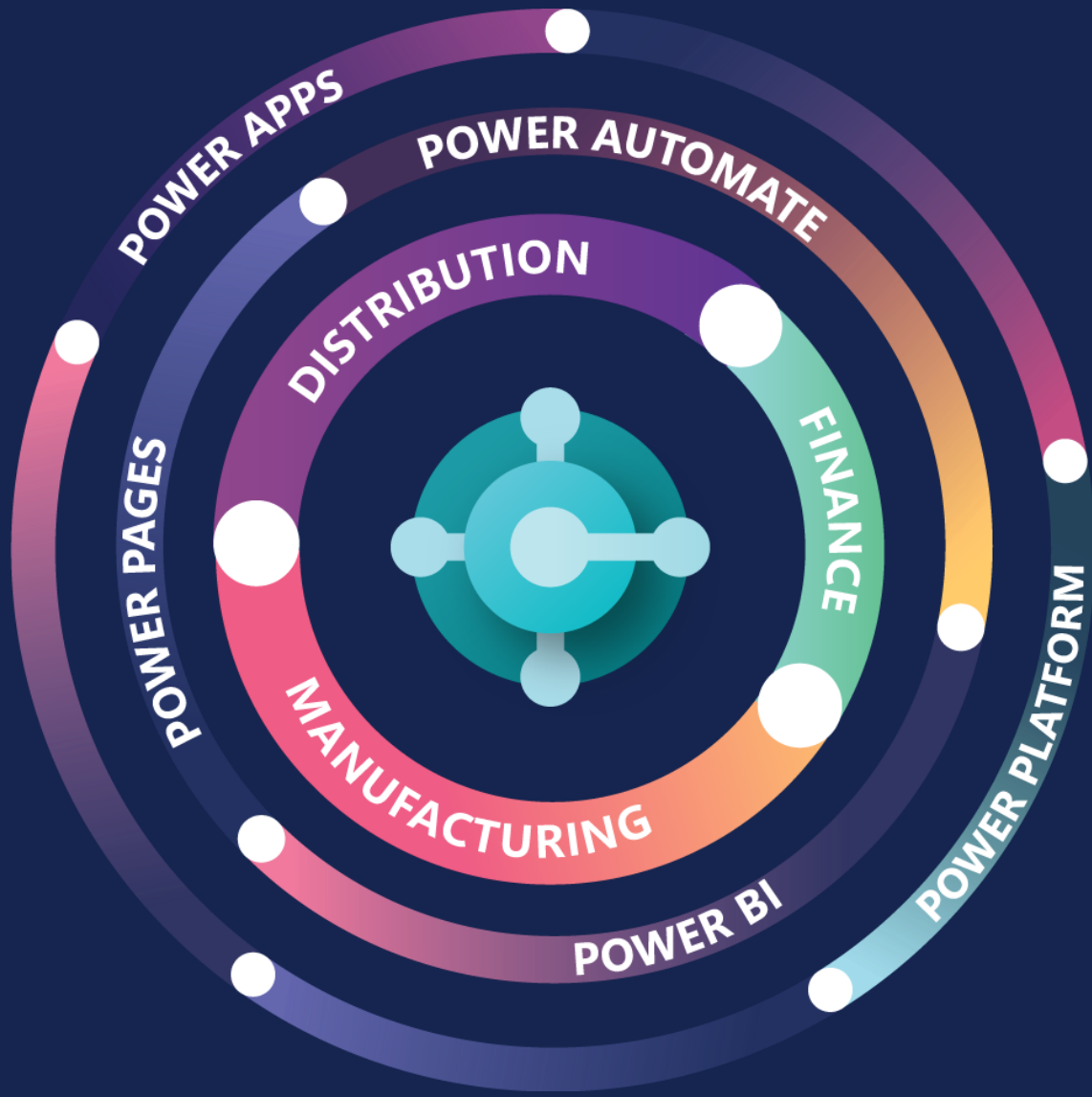
tecman

BUSINESS CENTRAL connect

Do you leave your doors unlocked? Well don't do that with your data!
(Permissions/Security Strategy)



15th & 16th OCTOBER 2024

Can you hear me?

Is everything clear?

~ 45 mins

Q & A

Hi!

Edward Gardiner + George Murcott

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What we'll cover

Agenda:

1. What you get out of the box & the issues
2. Strategies for managing Permissions
3. Making sure Apps are accounted for
4. Lock down further with Security Filters
5. License Configuration to prevent initial issues
6. Next steps?
7. Resources!

Permissions out of the box

Default Permissions:

Dynamics 365 Business Central Essential

Permission Set	Description	Company	Extension Name	Permission Sco
AUTOMATE - EXEC	Automate - Exec	(first company sign-in)	System Application	System
D365 BUS FULL ACCESS	Dyn. 365 Full Business Acc.	(first company sign-in)	Base Application	System
EXCEL EXPORT ACTION	D365 Excel Export Action	(first company sign-in)	System Application	System
LOCAL	Country/region-specific func.	(first company sign-in)	Base Application	System
LOGIN	Login access	(first company sign-in)	System Application	System

Dynamics 365 Business Central Premium

Permission Set	Description	Company	Extension Name	Permission Sco
AUTOMATE - EXEC	Automate - Exec	(first company sign-in)	System Application	System
D365 BUS PREMIUM	Dyn. 365 Prem. Bus. Full Acc.	(first company sign-in)	Base Application	System
EXCEL EXPORT ACTION	D365 Excel Export Action	(first company sign-in)	System Application	System
LOCAL	Country/region-specific func.	(first company sign-in)	Base Application	System
LOGIN	Login access	(first company sign-in)	System Application	System

Dynamics 365 Business Central Team Member

Permission Set	Description	Company	Extension Name	Permission Sco
AUTOMATE - EXEC	Automate - Exec	(first company sign-in)	System Application	System
D365 READ	Dyn. 365 Read access all	(first company sign-in)	Base Application	System
D365 TEAM MEMBER	Dynamics 365 Team Member	(first company sign-in)	Base Application	System
EXCEL EXPORT ACTION	D365 Excel Export Action	(first company sign-in)	System Application	System
LOCAL	Country/region-specific func.	(first company sign-in)	Base Application	System
LOGIN	Login access	(first company sign-in)	System Application	System

What's good/bad about out the box permission?

Good:

- Let users do everything they need to do on the system without errors
- Has a small degree of lock down
  - Users
  - Company Creation
  - Permissions
- Some out the box permission sets are self-explanatory and easy to use

Bad:

- Users can do EVERYTHING, including what they shouldn't do
  - Setup Pages
  - Edit Master data
  - See everything
  - Bank Details, Balance & Entries
  - All GL Balances & Entries
- Can *technically* delete companies
- No Apps/extensions! So can cause errors
- Even the more 'restrictive' out the box sets tend to give more permissions than wanted

The Historical issues & ‘Fixes’

- **Users can’t access pages because of lack of app/extension permissions?**

Give them Super!

- **Not sure what the user needs to do on the system?**

Give them Super!!

- **Need to completely lock down the system?**

Spend hours using Recordings, copied permission sets, testing, getting errors, scaling back, realising you have overlap between permission sets!!

- **An upgrade means a permission set you’ve copied has changed/broken!**

A small notification *MIGHT* be present, and you will have to fix the ‘missing’ permissions!

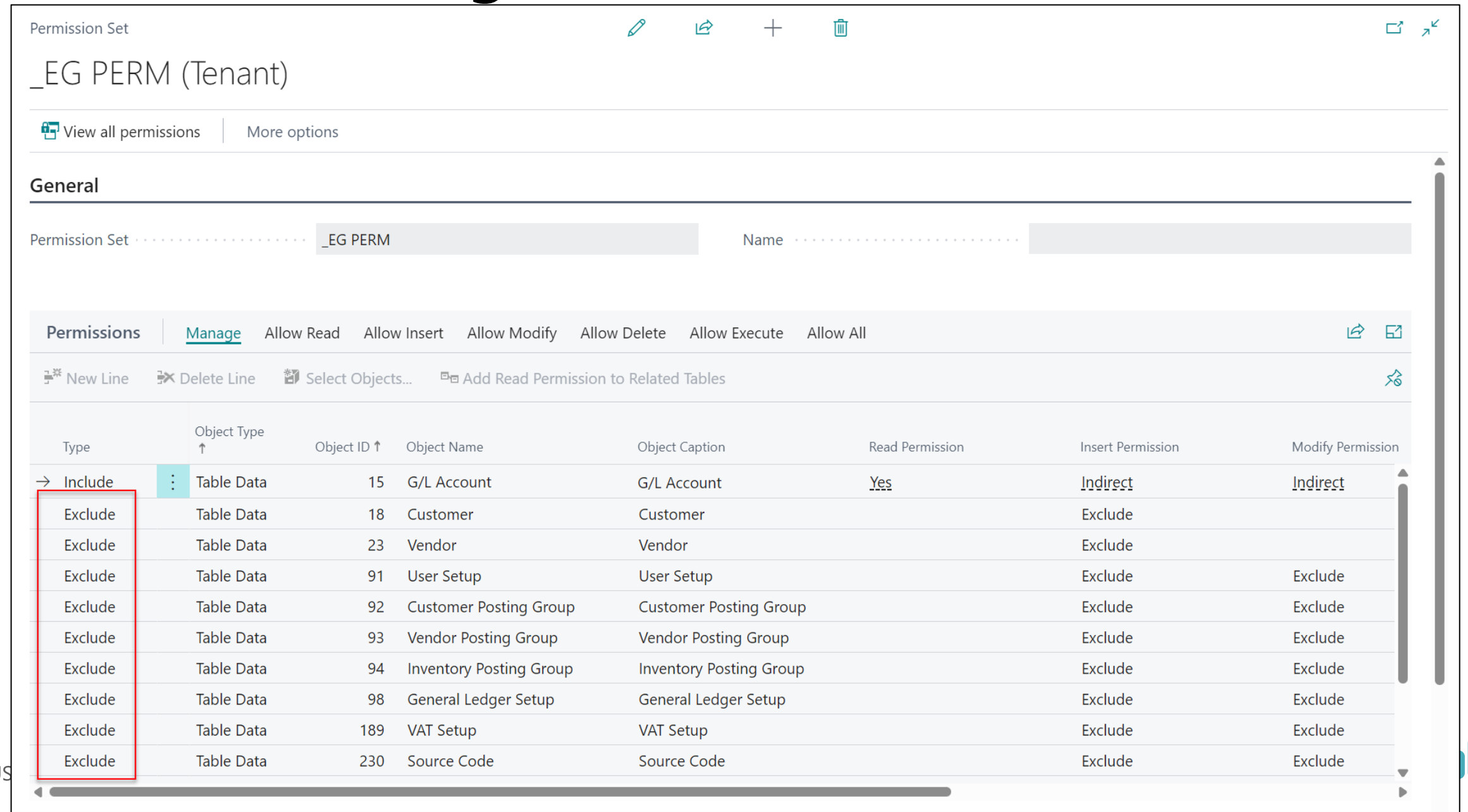
How do we better manage this?

Permission Strategies

There are sweet spots between time to implement vs the achieved effect, a **Sliding Scale of Involvement:**

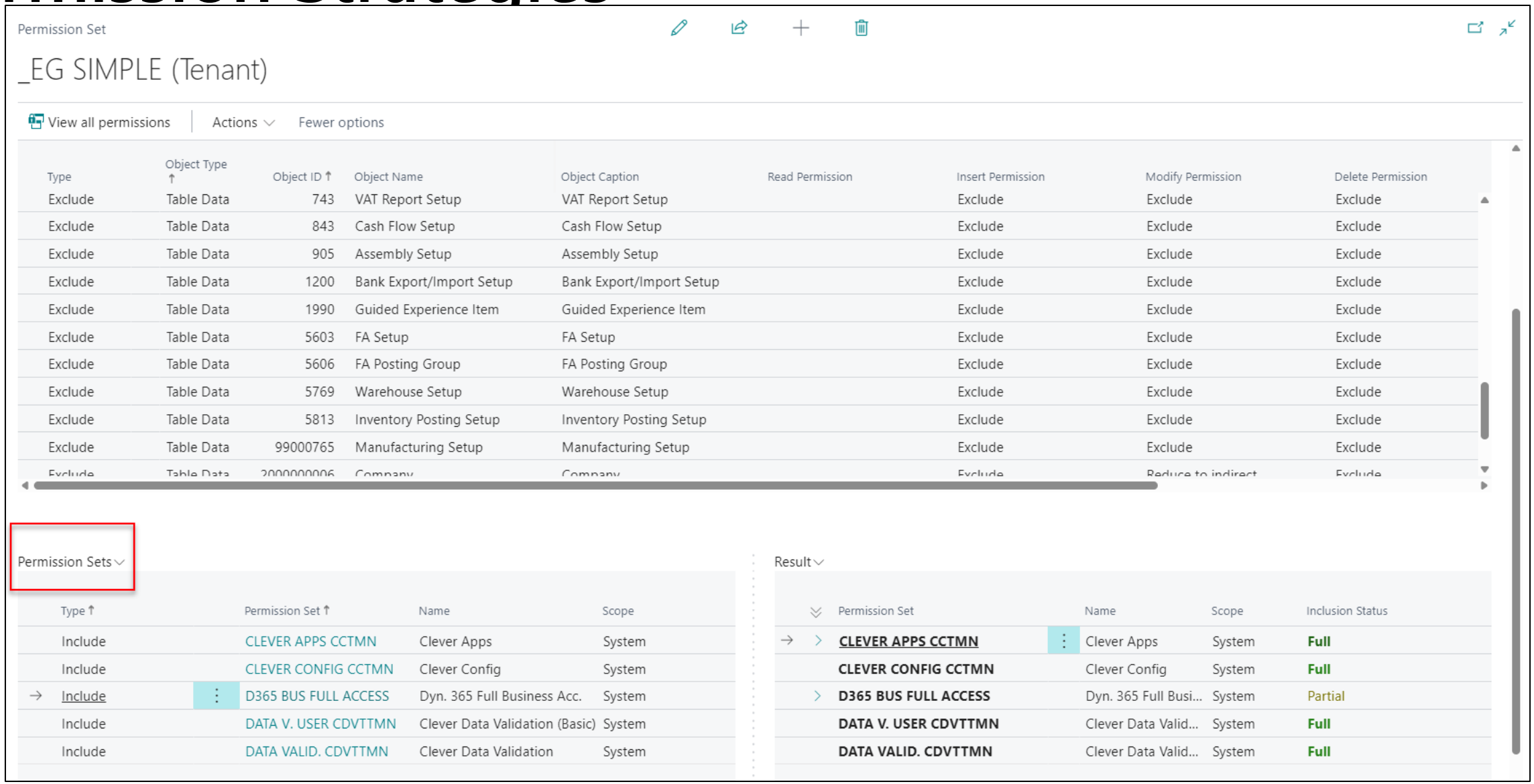
- Everyone is SUPER (not great for business security or GDPR compliance)
- (Too) many Super users that aren't really that Super.
- Permission sets applied manually to users.
- Users granted standard Permission Sets
- **Users granted company created Permission Sets delivering mostly standard Permissions.**
- **Users granted company created Role/Scenario focused Permission Sets with bespoke Permission sets using Include/Exclude**
- **Use of Security Filters to limit access to specific areas of the system that are otherwise available from the standard permission sets**
- Additional use of Security Groups if relevant to 'automate' new user enrolment from Active Directory/Entra ID.
- Completely bespoke Permission Sets (manually or using the Recorder)

Permission Strategies



Type	Object Type	Object ID	Object Name	Object Caption	Read Permission	Insert Permission	Modify Permission
Include	Table Data	15	G/L Account	G/L Account	Yes	Indirect	Indirect
Exclude	Table Data	18	Customer	Customer		Exclude	
Exclude	Table Data	23	Vendor	Vendor		Exclude	
Exclude	Table Data	91	User Setup	User Setup		Exclude	Exclude
Exclude	Table Data	92	Customer Posting Group	Customer Posting Group		Exclude	Exclude
Exclude	Table Data	93	Vendor Posting Group	Vendor Posting Group		Exclude	Exclude
Exclude	Table Data	94	Inventory Posting Group	Inventory Posting Group		Exclude	Exclude
Exclude	Table Data	98	General Ledger Setup	General Ledger Setup		Exclude	Exclude
Exclude	Table Data	189	VAT Setup	VAT Setup		Exclude	Exclude
Exclude	Table Data	230	Source Code	Source Code		Exclude	Exclude

Permission Strategies

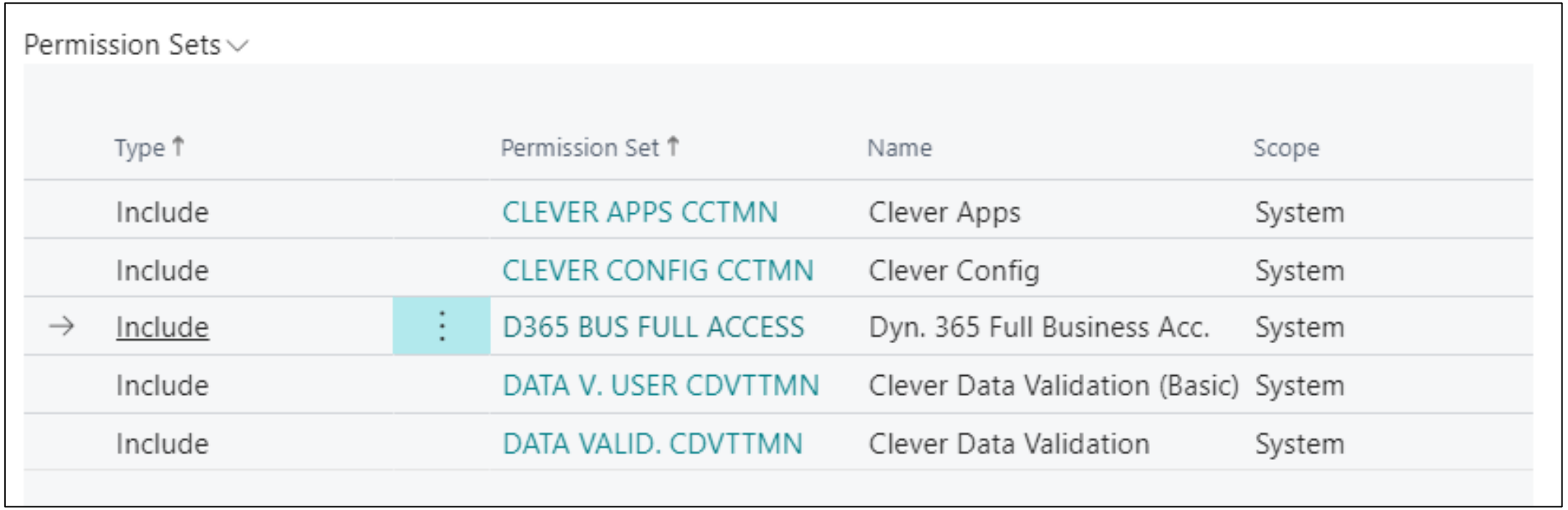


Type	Object Type	Object ID	Object Name	Object Caption	Read Permission	Insert Permission	Modify Permission	Delete Permission
Exclude	Table Data	743	VAT Report Setup	VAT Report Setup		Exclude	Exclude	Exclude
Exclude	Table Data	843	Cash Flow Setup	Cash Flow Setup		Exclude	Exclude	Exclude
Exclude	Table Data	905	Assembly Setup	Assembly Setup		Exclude	Exclude	Exclude
Exclude	Table Data	1200	Bank Export/Import Setup	Bank Export/Import Setup		Exclude	Exclude	Exclude
Exclude	Table Data	1990	Guided Experience Item	Guided Experience Item		Exclude	Exclude	Exclude
Exclude	Table Data	5603	FA Setup	FA Setup		Exclude	Exclude	Exclude
Exclude	Table Data	5606	FA Posting Group	FA Posting Group		Exclude	Exclude	Exclude
Exclude	Table Data	5769	Warehouse Setup	Warehouse Setup		Exclude	Exclude	Exclude
Exclude	Table Data	5813	Inventory Posting Setup	Inventory Posting Setup		Exclude	Exclude	Exclude
Exclude	Table Data	99000765	Manufacturing Setup	Manufacturing Setup		Exclude	Exclude	Exclude
Exclude	Table Data	2000000006	Company	Company		Exclude	Reduce to indirect	Exclude

Type	Permission Set	Name	Scope
Include	CLEVER APPS CCTMN	Clever Apps	System
Include	CLEVER CONFIG CCTMN	Clever Config	System
Include	D365 BUS FULL ACCESS	Dyn. 365 Full Business Acc.	System
Include	DATA V. USER CDVTTMN	Clever Data Validation (Basic)	System
Include	DATA VALID. CDVTTMN	Clever Data Validation	System

Permission Set	Name	Scope	Inclusion Status
CLEVER APPS CCTMN	Clever Apps	System	Full
CLEVER CONFIG CCTMN	Clever Config	System	Full
D365 BUS FULL ACCESS	Dyn. 365 Full Busi...	System	Partial
DATA V. USER CDVTTMN	Clever Data Valid...	System	Full
DATA VALID. CDVTTMN	Clever Data Valid...	System	Full

Permission Strategies



Three Methods

Simple:

- Base Permission Set
  - D365 Bus Full Access
  - D365 Bus Premium
- Any Required app/extension permission sets
- Excludes used within the main area to prevent access to key setup pages and areas the user should not have access to.

Focused:

- Multiple 'Base' permission sets relevant to the users job role to better lock down the system compared to the Simple method
- D365 Basic included as a minimum
- App/extension sets
- Excludes to prevent access to key setup pages & undesired areas.

Recorded:

- Uses a secondary Permission Set as a recording area
- Record EXACTLY what the user(s) need to do
- Still include relevant app-based permission sets/Excludes as a security measure.
- The most time intensive for both creation and testing.

_EG SIMPLE (Tenant)

View all permissions | Actions | Fewer options

Type	Object Type	Object ID	Object Name	Object Caption	Read Permission	Insert Permission	Modify Permission
Exclude	Table Data	18	Customer	Customer		Exclude	
Exclude	Table Data	23	Vendor	Vendor		Exclude	
Exclude	Table Data	91	User Setup	User Setup		Exclude	Exclude
Exclude	Table Data	92	Customer Posting Group	Customer Posting Group		Exclude	Exclude
Exclude	Table Data	93	Vendor Posting Group	Vendor Posting Group		Exclude	Exclude
Exclude	Table Data	94	Inventory Posting Group	Inventory Posting Group		Exclude	Exclude
Exclude	Table Data	98	General Ledger Setup	General Ledger Setup		Exclude	Exclude
Exclude	Table Data	189	VAT Setup	VAT Setup		Exclude	Exclude
Exclude	Table Data	230	Source Code	Source Code		Exclude	Exclude
Exclude	Table Data	242	Source Code Setup	Source Code Setup		Exclude	Exclude

Permission Sets

Type	Permission Set	Name	Scope
Include	CLEVER APPS CCTMN	Clever Apps	System
Include	CLEVER CONFIG CCT...	Clever Config	System
Include	D365 BUS FULL ACCE...	Dyn. 365 Full Business ...	System
Include	DATA V. USER CDVTT...	Clever Data Validation ...	System
Include	DATA VALID. CDVTT...	Clever Data Validation	System

Result

Permission Set	Name	Scope	Inclusion Status
CLEVER APPS CCTMN	Clever Apps	System	**Full**
CLEVER CONFIG CCTMN	Clever Config	System	**Full**
D365 BUS FULL ACCESS	Dyn. 365 Full Bu...	System	Partial
DATA V. USER CDVTTMN	Clever Data Vali...	System	**Full**
DATA VALID. CDVTTMN	Clever Data Vali...	System	**Full**

_EG FOCUSED (Tenant)

View all permissions | Actions | Fewer options

Type	Object Type	Object ID	Object Name	Object Caption	Read Permission	Insert Permission	Modify Permission
Include	Table Data	15	G/L Account	G/L Account	Yes	Indirect	Indirect
Exclude	Table Data	18	Customer	Customer		Exclude	
Exclude	Table Data	23	Vendor	Vendor		Exclude	
Exclude	Table Data	91	User Setup	User Setup		Exclude	Exclude
Exclude	Table Data	92	Customer Posting Group	Customer Posting Group		Exclude	Exclude
Exclude	Table Data	93	Vendor Posting Group	Vendor Posting Group		Exclude	Exclude
Exclude	Table Data	94	Inventory Posting Group	Inventory Posting Group		Exclude	Exclude
Exclude	Table Data	98	General Ledger Setup	General Ledger Setup		Exclude	Exclude
Exclude	Table Data	189	VAT Setup	VAT Setup		Exclude	Exclude
Exclude	Table Data	230	Source Code	Source Code		Exclude	Exclude

Permission Sets

Type	Permission Set	Name	Scope
Include	D365 ACC. RECEIVAB...	Dyn. 365 Accounts rec...	System
Include	D365 BASIC	Dynamics 365 Basic ac...	System
Include	D365 CASH FLOW	Dynamics 365 Cash Fl...	System
Include	D365 CUSTOMER, ED...	Dynamics 365 Create ...	System
Include	D365 DIM CHANGE ...	D365 Change Global ...	System
Include	D365 DIM CORRECTI...	D365 Dimension Corr...	System
Include	D365 FA, SETUP	Dyn. 365 Fixed Assets ...	System

Result

Permission Set	Name	Scope	Inclusion Status
CLEVER APPS CCTMN	Clever Apps	System	**Full**
CLEVER CONFIG CCTMN	Clever Config	System	**Full**
D365 ACC. PAYABLE	Dynamics 365 A...	System	Partial
D365 ACC. RECEIVABLE	Dyn. 365 Accou...	System	Partial
D365 BASIC	Dynamics 365 B...	System	Partial
D365 CASH FLOW	Dynamics 365 C...	System	Partial

_EG RECORDED (Tenant)

View all permissions | Actions | Fewer options

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	Insert Permission	Modify Permission
Include	Table Data	15	G/L Account	G/L Account	Yes	Indirect	Indirect
Exclude	Table Data	18	Customer	Customer		Exclude	
Exclude	Table Data	23	Vendor	Vendor		Exclude	
Exclude	Table Data	91	User Setup	User Setup		Exclude	Exclude
Exclude	Table Data	92	Customer Posting Group	Customer Posting Group		Exclude	Exclude
Exclude	Table Data	93	Vendor Posting Group	Vendor Posting Group		Exclude	Exclude
Exclude	Table Data	94	Inventory Posting Group	Inventory Posting Group		Exclude	Exclude
Exclude	Table Data	98	General Ledger Setup	General Ledger Setup		Exclude	Exclude
Exclude	Table Data	189	VAT Setup	VAT Setup		Exclude	Exclude
Exclude	Table Data	230	Source Code	Source Code		Exclude	Exclude

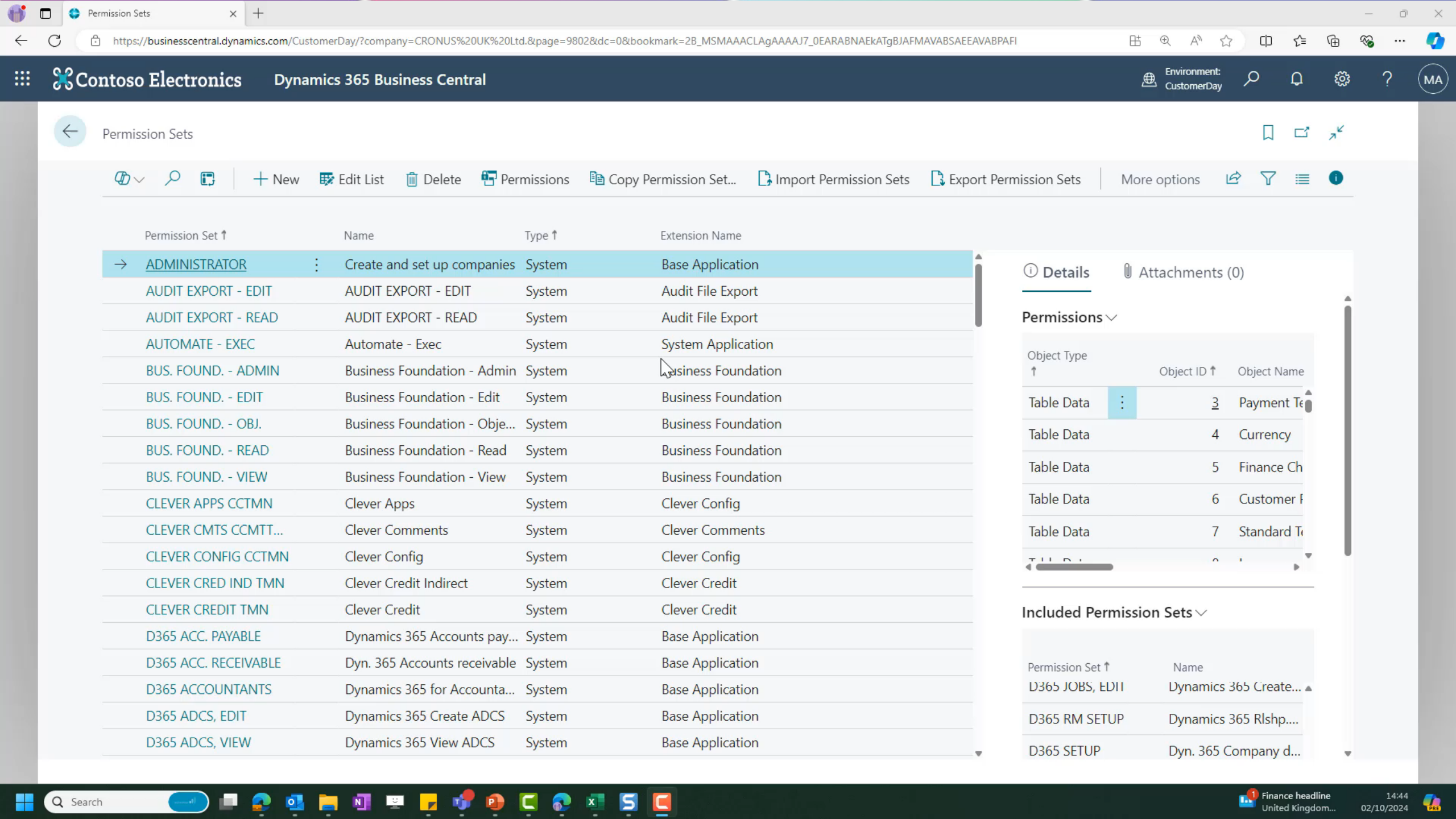
Permission Sets

Type	Permission Set	Name	Scope
Include	_EG RECORDING	Recording Area	Tenant
Include	CLEVER APPS CCTMN	Clever Apps	System
Include	CLEVER CONFIG CCT...	Clever Config	System

Result

Permission Set	Name	Scope	Inclusion Status
_EG RECORDING	Recording Area	Tenant	**Full**
CLEVER APPS CCTMN	Clever Apps	System	**Full**
CLEVER CONFIG CCTMN	Clever Config	System	**Full**

Giving it a go!


Permission Sets
https://businesscentral.dynamics.com/CustomerDay/?company=CRONUS%20UK%20Ltd.&page=9802&dc=0&bookmark=2B_MSMAAACLAgAAAAJ7_0EARABNAEkATgBJAFMAVABSAEEAVABPAFI
Contoso Electronics
Dynamics 365 Business Central
Environment: CustomerDay
MA
Permission Sets
New
Edit List
Delete
Permissions
Copy Permission Set...
Import Permission Sets
Export Permission Sets
More options
Permission Set
Name
Type
Extension Name
ADMINISTRATOR
Create and set up companies
System
Base Application
AUDIT EXPORT - EDIT
AUDIT EXPORT - EDIT
System
Audit File Export
AUDIT EXPORT - READ
AUDIT EXPORT - READ
System
Audit File Export
AUTOMATE - EXEC
Automate - Exec
System
System Application
BUS. FOUND. - ADMIN
Business Foundation - Admin
System
Business Foundation
BUS. FOUND. - EDIT
Business Foundation - Edit
System
Business Foundation
BUS. FOUND. - OBJ.
Business Foundation - Obje...
System
Business Foundation
BUS. FOUND. - READ
Business Foundation - Read
System
Business Foundation
BUS. FOUND. - VIEW
Business Foundation - View
System
Business Foundation
CLEVER APPS CCTMN
Clever Apps
System
Clever Config
CLEVER CMTS CCMTT...
Clever Comments
System
Clever Comments
CLEVER CONFIG CCTMN
Clever Config
System
Clever Config
CLEVER CRED IND TMN
Clever Credit Indirect
System
Clever Credit
CLEVER CREDIT TMN
Clever Credit
System
Clever Credit
D365 ACC. PAYABLE
Dynamics 365 Accounts pay...
System
Base Application
D365 ACC. RECEIVABLE
Dyn. 365 Accounts receivable
System
Base Application
D365 ACCOUNTANTS
Dynamics 365 for Accounta...
System
Base Application
D365 ADCS, EDIT
Dynamics 365 Create ADCS
System
Base Application
D365 ADCS, VIEW
Dynamics 365 View ADCS
System
Base Application
Details
Attachments (0)
Permissions
Object Type
Object ID
Object Name
Table Data
3
Payment Te
Table Data
4
Currency
Table Data
5
Finance Ch
Table Data
6
Customer F
Table Data
7
Standard T
Included Permission Sets
Permission Set
Name
D365 JOBS, EDIT
Dynamics 365 Create...
D365 RM SETUP
Dynamics 365 Rlshp....
D365 SETUP
Dyn. 365 Company d...
Search
Finance headline
United Kingdom...
14:44
02/10/2024

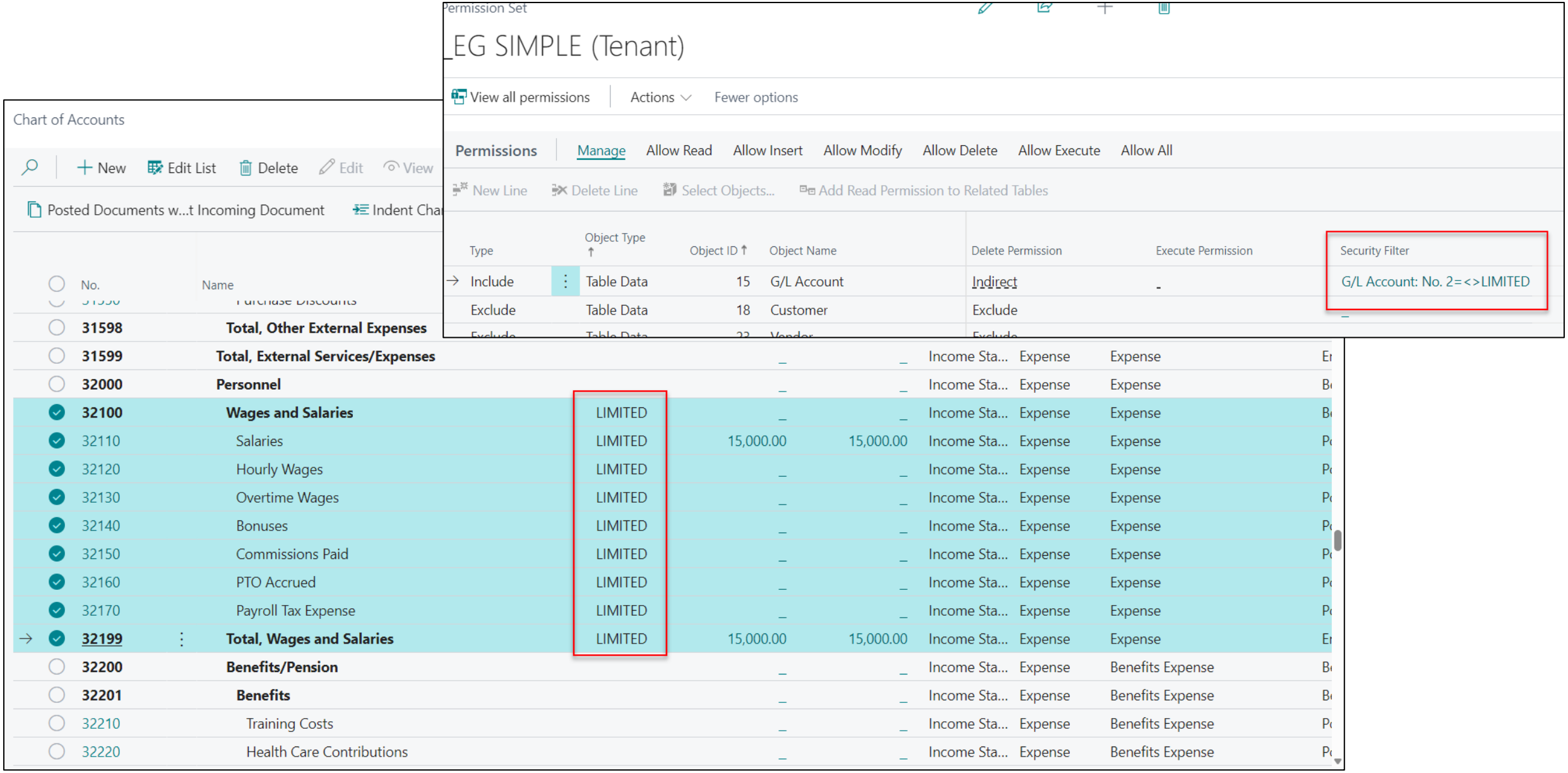
Tying up loose ends?

Security Filters:

- Further lock down a page
- Think of it as filtering to ‘What data a user can see on a page’
- Requires Testing AND review to ensure no other permissions against the user's name give access to the filtered tables without a filter (this will render it useless!)

Testing:

- Requires you to work with the user who you have applied the permissions to
- Best done on a sandbox so they can try posting/process’ without issue
- Test
- Test!
- Test!!


Permission Set
EG SIMPLE (Tenant)
View all permissions
Actions
Fewer options
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
Delete Permission
Execute Permission
Security Filter
Include
Table Data
15
G/L Account
Indirect
G/L Account: No. 2=<>LIMITED
Exclude
Table Data
18
Customer
Exclude
Chart of Accounts
New
Edit List
Delete
Edit
View
Posted Documents w...t Incoming Document
Indent Cha
No.
Name
31598 Total, Other External Expenses
31599 Total, External Services/Expenses
32000 Personnel
32100 Wages and Salaries LIMITED
32110 Salaries LIMITED 15,000.00 15,000.00
32120 Hourly Wages LIMITED
32130 Overtime Wages LIMITED
32140 Bonuses LIMITED
32150 Commissions Paid LIMITED
32160 PTO Accrued LIMITED
32170 Payroll Tax Expense LIMITED
32199 Total, Wages and Salaries LIMITED 15,000.00 15,000.00
32200 Benefits/Pension
32201 Benefits
32210 Training Costs
32220 Health Care Contributions
Income Sta... Expense Expense
Income Sta... Expense Benefits Expense

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Review User Permissions:

- Ensure no overlap
- Remember, if 50 permissions say a user can't edit something, but the 51st does, they WILL be able to edit that data
- Less is more!

License Configuration:

- What permissions a user gets out of the box
- Perfect way to prevent the high-level access permissions sets (Full access/premium) from ever being added to a user
- Could be used to roll out a collective Apps permission set.

40000 · Alpine Ski House

Customer Card - 40000 · Alpine Ski House: Sorry, the current permissions prevented the action. (TableData 36 Sales Header Read: Base Application)

Home | Request Approval | New Document | Prices & Discounts | Customer | Report | More options

Sales Quote | Sales Order | Sales Invoice | Sales Credit Memo | Reminder

General

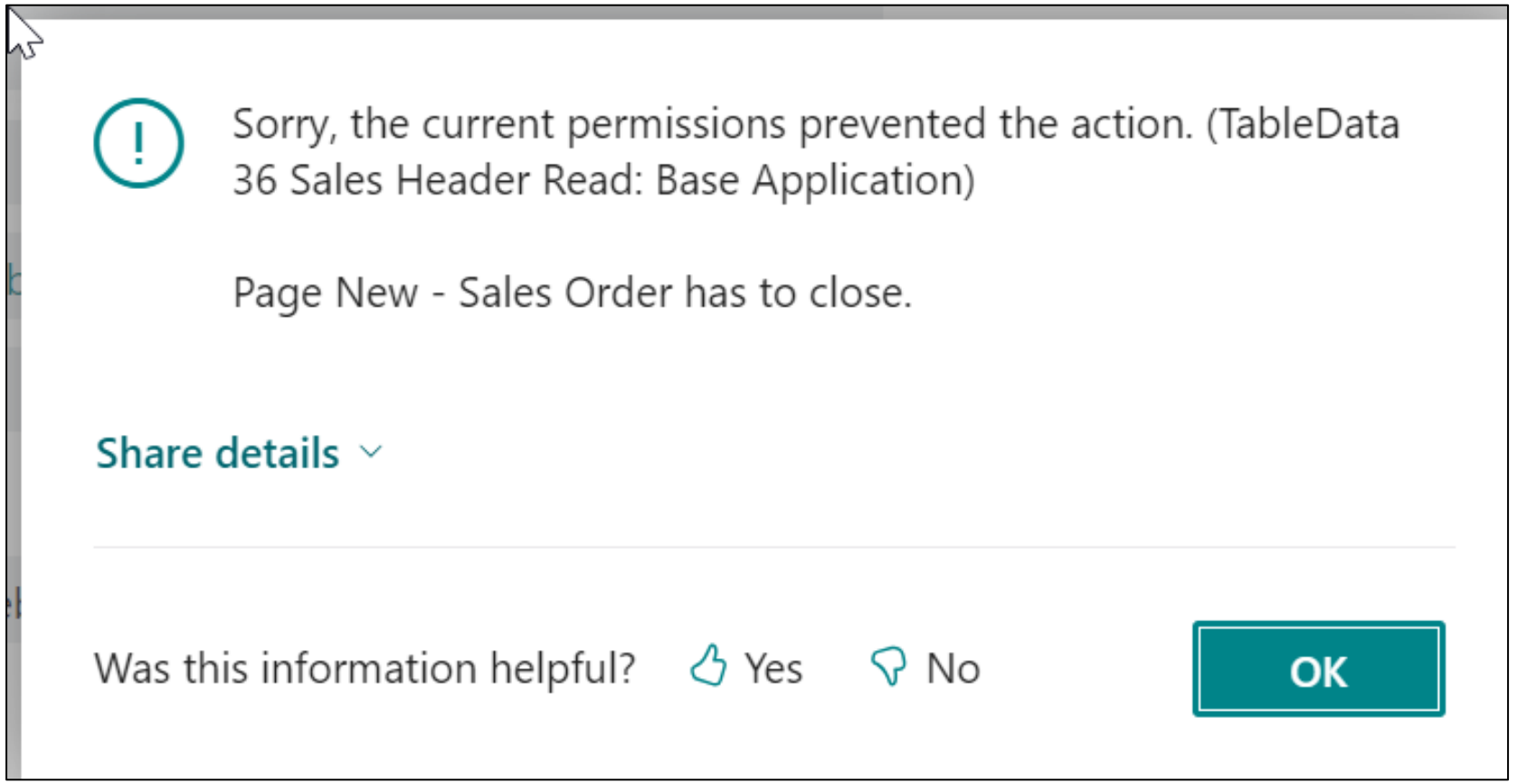
Show more

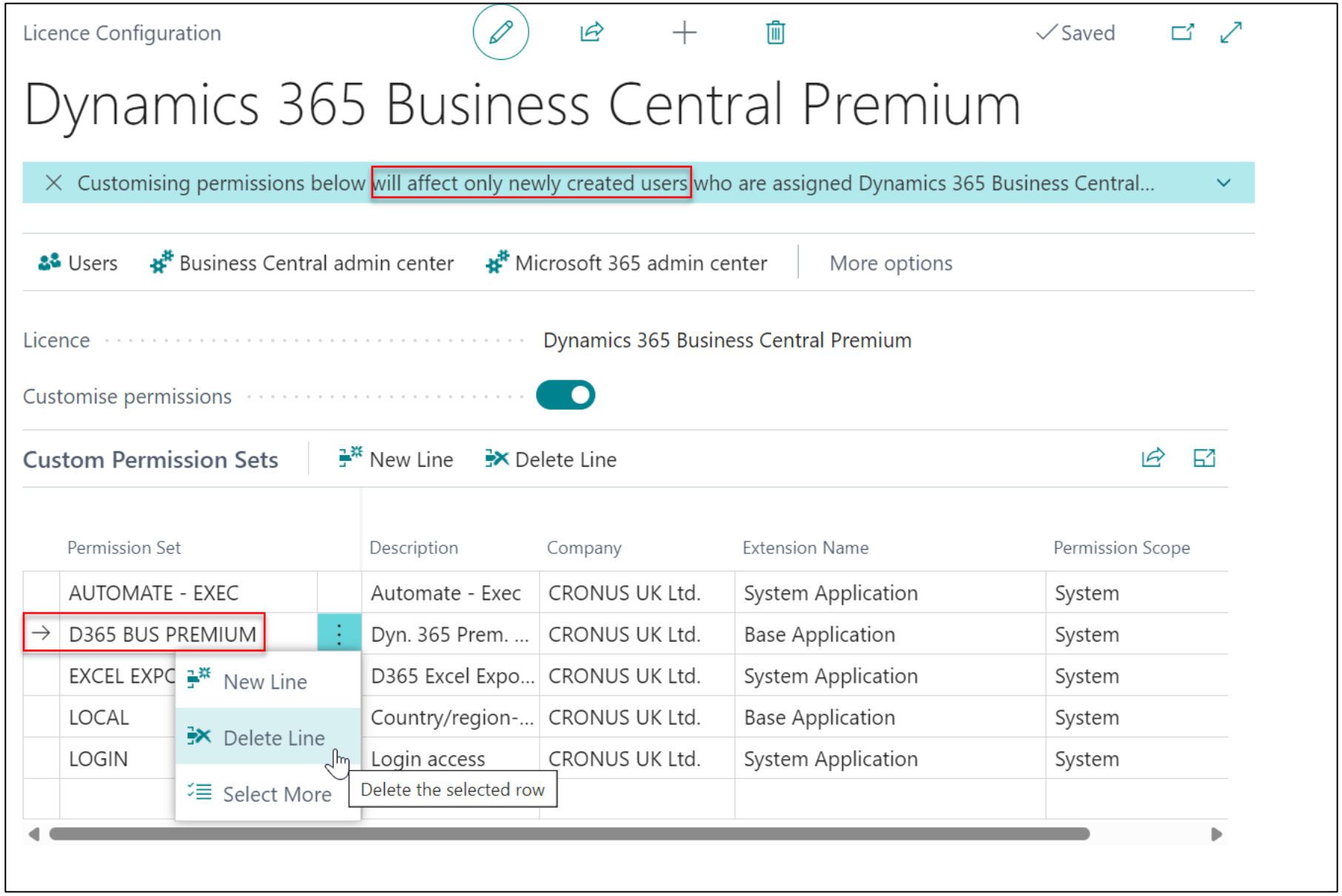
No.	40000	Credit Limit (LCY)	0.00
Name	Alpine Ski House	Blocked	
Balance (LCY)	2,617.50	Total Sales - Fiscal Year	**0.00**
Balance (LCY) As Vendor	0.00	Costs (LCY)	0.00

Details | Attachments (0)

Sell-to Customer Sales History

Error: Sorry, the current permissions prevented the action. (TableData 36 Sales Header Read: Base Application).


Sorry, the current permissions prevented the action. (TableData 36 Sales Header Read: Base Application)
Page New - Sales Order has to close.
Share details
Was this information helpful?
Yes
No
OK


Licence Configuration
Saved
Dynamics 365 Business Central Premium
Customising permissions below will affect only newly created users who are assigned Dynamics 365 Business Central...
Users
Business Central admin center
Microsoft 365 admin center
More options
Licence
Dynamics 365 Business Central Premium
Customise permissions
Custom Permission Sets
New Line
Delete Line
Permission Set
Description
Company
Extension Name
Permission Scope
AUTOMATE - EXEC
Automate - Exec
CRONUS UK Ltd.
System Application
System
D365 BUS PREMIUM
Dyn. 365 Prem. ...
CRONUS UK Ltd.
Base Application
System
EXCEL EXPO
D365 Excel Expo...
CRONUS UK Ltd.
System Application
System
LOCAL
Country/region-...
CRONUS UK Ltd.
Base Application
System
LOGIN
Login access
CRONUS UK Ltd.
System Application
System
New Line
Delete Line
Select More
Delete the selected row

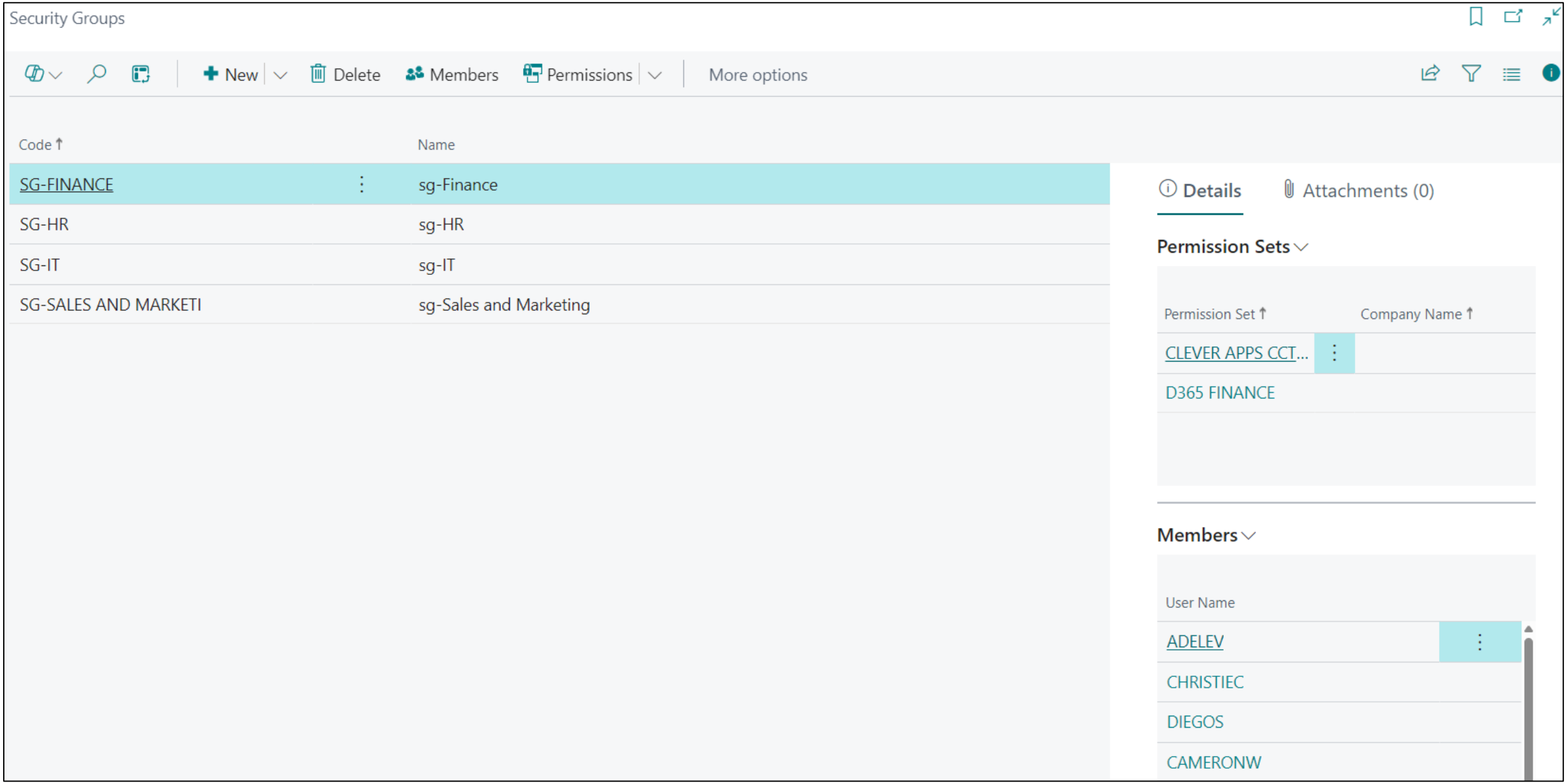
Can this be taken even further?

Security Groups:

- Automatic Addition of Permission Set(s) to a user
- For best effect, requires the ability to have access to your Entra/Microsoft 365 Admin areas
- Only way to remove permissions given to a user this way would be to remove the user from the group, or remove the permission from the group itself

Profiles/Roles:

- Set up the screens for users
- Add in reports/fields/Personalisation for a more standardised experience
- Can now Lock fields on a profile to give a discourage changes at a field level
  - This gets even stronger if you remove users' permissions to change profile/role


Security Groups
New
Delete
Members
Permissions
More options
Code
Name
SG-FINANCE
sg-Finance
SG-HR
sg-HR
SG-IT
sg-IT
SG-SALES AND MARKETI
sg-Sales and Marketing
Details
Attachments (0)
Permission Sets
Permission Set
Company Name
CLEVER APPS CCT...
D365 FINANCE
Members
User Name
ADELEV
CHRISTIEC
DIEGOS
CAMERONW

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Resources

	A	B	C	D	E	F	G	H	I	J	K	L
1												
2			**Description:**	An example of the Include/Excludes that can be used to modify the default licence permisisons to give a quick and effective lockdown of general users								
3			**Rationale:**	Kept broad to allow holiday/absence cover deliberately, so suits the scenario where we don't care if they can see other parts of the system, just limit access to finance/banks and setup								
4			**Instructions:**	Copy the required lines in to the main/middle section of your new permissios set, then review								
5												
6	Type	Object Type	Object ID	Object Name	Object Caption	Read Permission	Insert Permission	Modify Permission	Delete Permission	Execute P	Security Filter	Notes (don't inlcude when copying!)
7	Include	Table Data	15	G/L Account	G/L Account	Yes	Indirect	Indirect	Indirect		G/L Account: No. 2=<>LIMITED	INCLUDE: Will limit access to just the nomials that do not have "
8	Exclude	Table Data	18	Customer	Customer		Exclude		Exclude			EXCLUDE (if required): Removes the ability to create/insert a cu
9	Exclude	Table Data	23	Vendor	Vendor		Exclude		Exclude			EXCLUDE (if required): Removes the ability to create/insert a cu
10	Exclude	Table Data	91	User Setup	User Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
11	Exclude	Table Data	92	Customer Posting Group	Customer Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
12	Exclude	Table Data	93	Vendor Posting Group	Vendor Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
13	Exclude	Table Data	94	Inventory Posting Group	Inventory Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
14	Exclude	Table Data	98	General Ledger Setup	General Ledger Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
15	Exclude	Table Data	189	VAT Setup	VAT Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
16	Exclude	Table Data	230	Source Code	Source Code		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
17	Exclude	Table Data	242	Source Code Setup	Source Code Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
18	Exclude	Table Data	250	Gen. Business Posting Group	Gen. Business Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
19	Exclude	Table Data	251	Gen. Product Posting Group	Gen. Product Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
20	Exclude	Table Data	252	General Posting Setup	General Posting Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
21	Exclude	Table Data	270	Bank Account	Bank Account		Exclude	Exclude	Exclude			Read permission must remain, required by Sales Order function
22	Exclude	Table Data	271	Bank Account Ledger Entry	Bank Account Ledger Entry	Reduce to indirect	Reduce to indirect	Reduce to indirect	Exclude			This prevents the user seeing bank balances, as the Balance Flo
23	Exclude	Table Data	273	Bank Acc. Reconciliation	Bank Acc. Reconciliation	Exclude	Exclude	Exclude	Exclude			EXCLUDE: Hides bank info from non finance users
24	Exclude	Table Data	274	Bank Acc. Reconciliation Line	Bank Acc. Reconciliation Line	Exclude	Exclude	Exclude	Exclude			EXCLUDE: Hides bank info from non finance users
25	Exclude	Table Data	275	Bank Account Statement	Bank Account Statement	Exclude	Exclude	Exclude	Exclude			EXCLUDE: Hides bank info from non finance users
26	Exclude	Table Data	276	Bank Account Statement Line	Bank Account Statement Line	Exclude	Exclude	Exclude	Exclude			EXCLUDE: Hides bank info from non finance users
27	Exclude	Table Data	277	Bank Account Posting Group	Bank Account Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Hides bank info from non finance users
28	Exclude	Table Data	311	Sales & Receivables Setup	Sales & Receivables Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
29	Exclude	Table Data	312	Purchases & Payables Setup	Purchases & Payables Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
30	Exclude	Table Data	313	Inventory Setup	Inventory Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
31	Exclude	Table Data	314	Resources Setup	Resources Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
32	Exclude	Table Data	315	Jobs Setup	Jobs Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
33	Exclude	Table Data	323	VAT Business Posting Group	VAT Business Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
34	Exclude	Table Data	324	VAT Product Posting Group	VAT Product Posting Group		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)
35	Exclude	Table Data	325	VAT Posting Setup	VAT Posting Setup		Exclude	Exclude	Exclude			EXCLUDE: Setup pages are required for READ (so remains blank)

Permissions excIds (Genrl User) | Licence Permisison sets | Tecman Mods | ISV-Clever | ISV-Jet | ISV-Continia | ISV-Cosmos | ISV-SANA | ISV-Shopify

Strategy guide…Controlling user Permissions

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Please Note: There is an Excel file to accompany this booklet, this can be used to import some of the required lines, the file is "**Permissions – Exclude and Include for a general user.xlxs**"

Moving forward with permissions

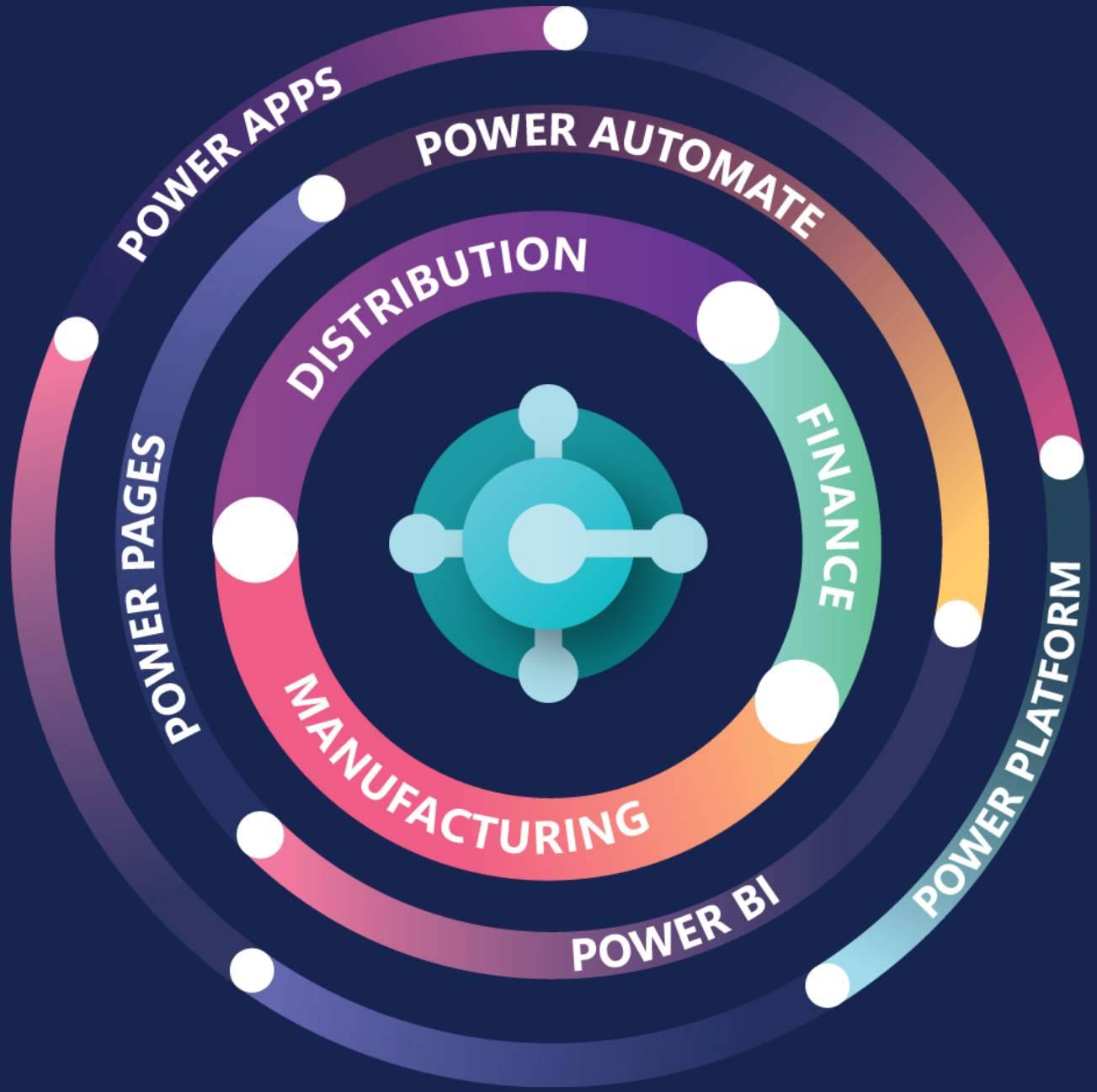
Business Central has introduced several changes and new features to the Permissions security process in recent versions and is in the process of removing User Groups. This document introduces these in the context of outlining a potential process for effectively managing your users' permissions in the most practical way.

With recent versions of Business Central, many of the features previously found within User Groups have been combined into how Permission Sets now work, as well as new features that both make them easier to manage and give them greater potential than before. New BC environments now are created without User Groups.

In review

What we covered:

1. What you get out of the box & the issues
2. Strategies for managing Permissions
3. Making sure Apps are accounted for
4. Lock down further with Security Filters
5. License Configuration to prevent initial issues
6. Next steps?
7. Resources!

Thank you.

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