



Dynamics 365 and Power Platform Community Conference

MAY 22 – 24, 2023
Portorož, Slovenia, Europe

Setting up security roles in Dynamics 365 F&O: A blessing or a curse?

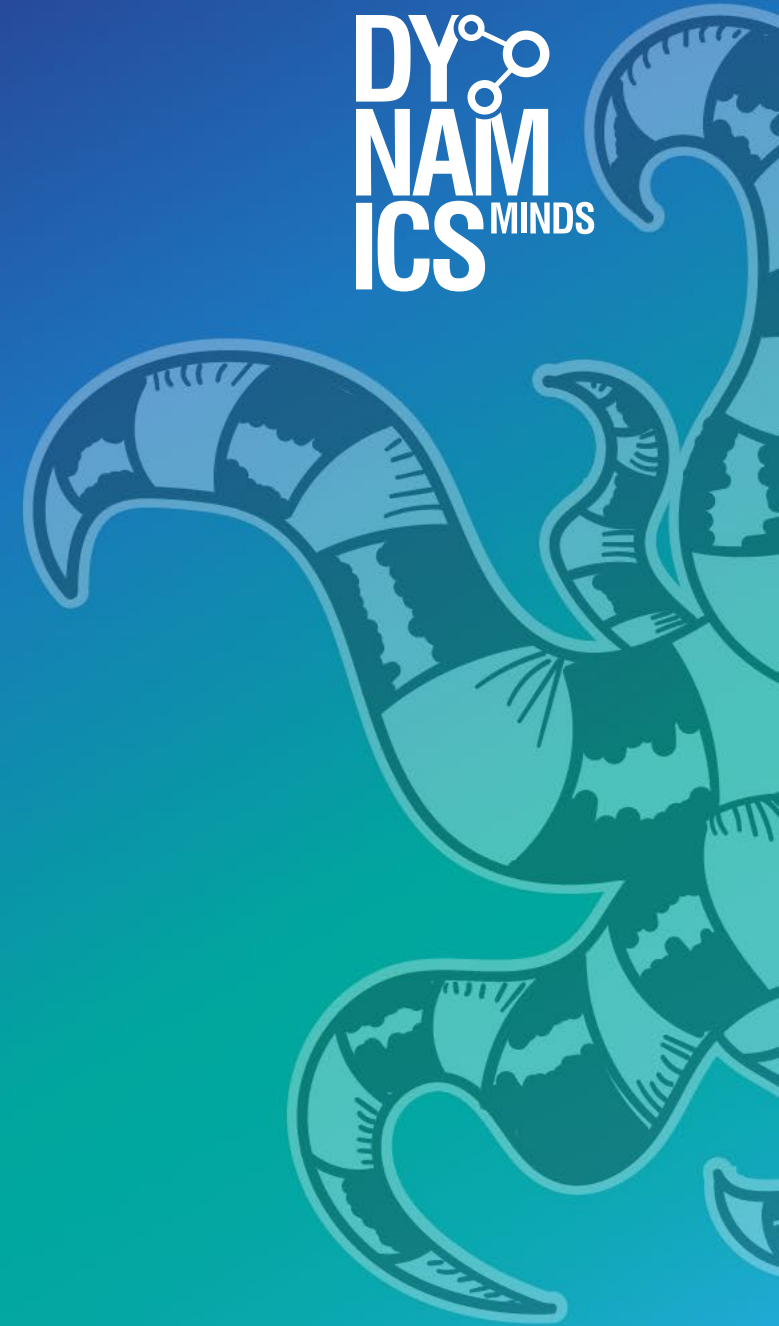
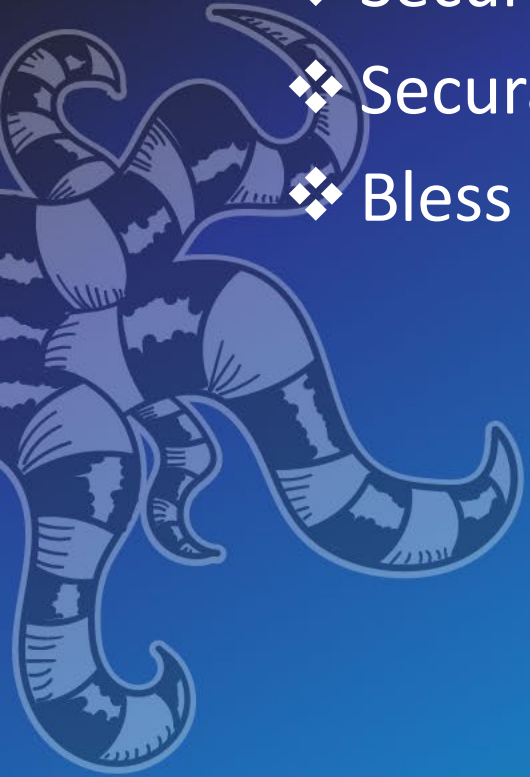


André Arnaud de Calavon

Solution Architect/Product Owner
To-Increase

Agenda

- ❖ The curse
- ❖ Security architecture
- ❖ Securable elements
- ❖ Bless you!

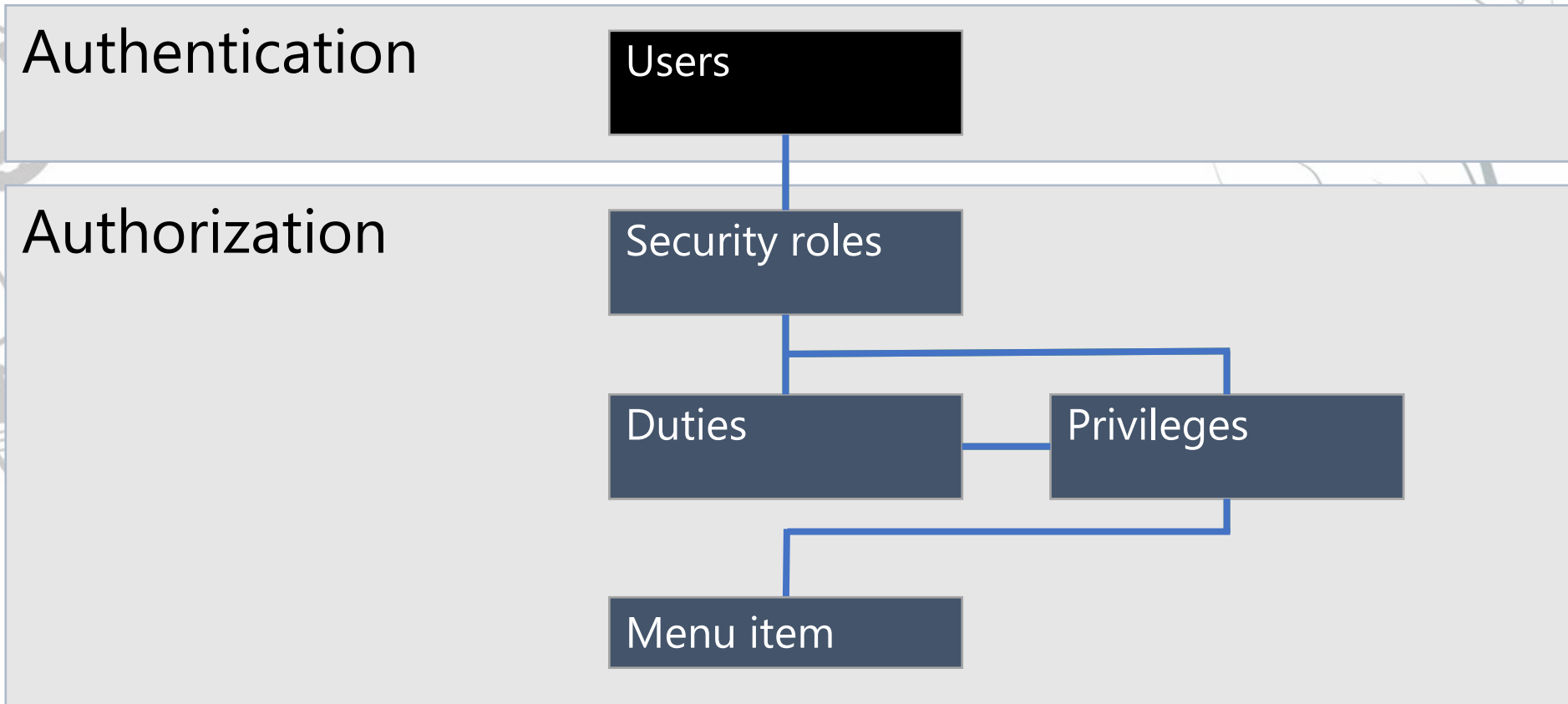


Why a curse?

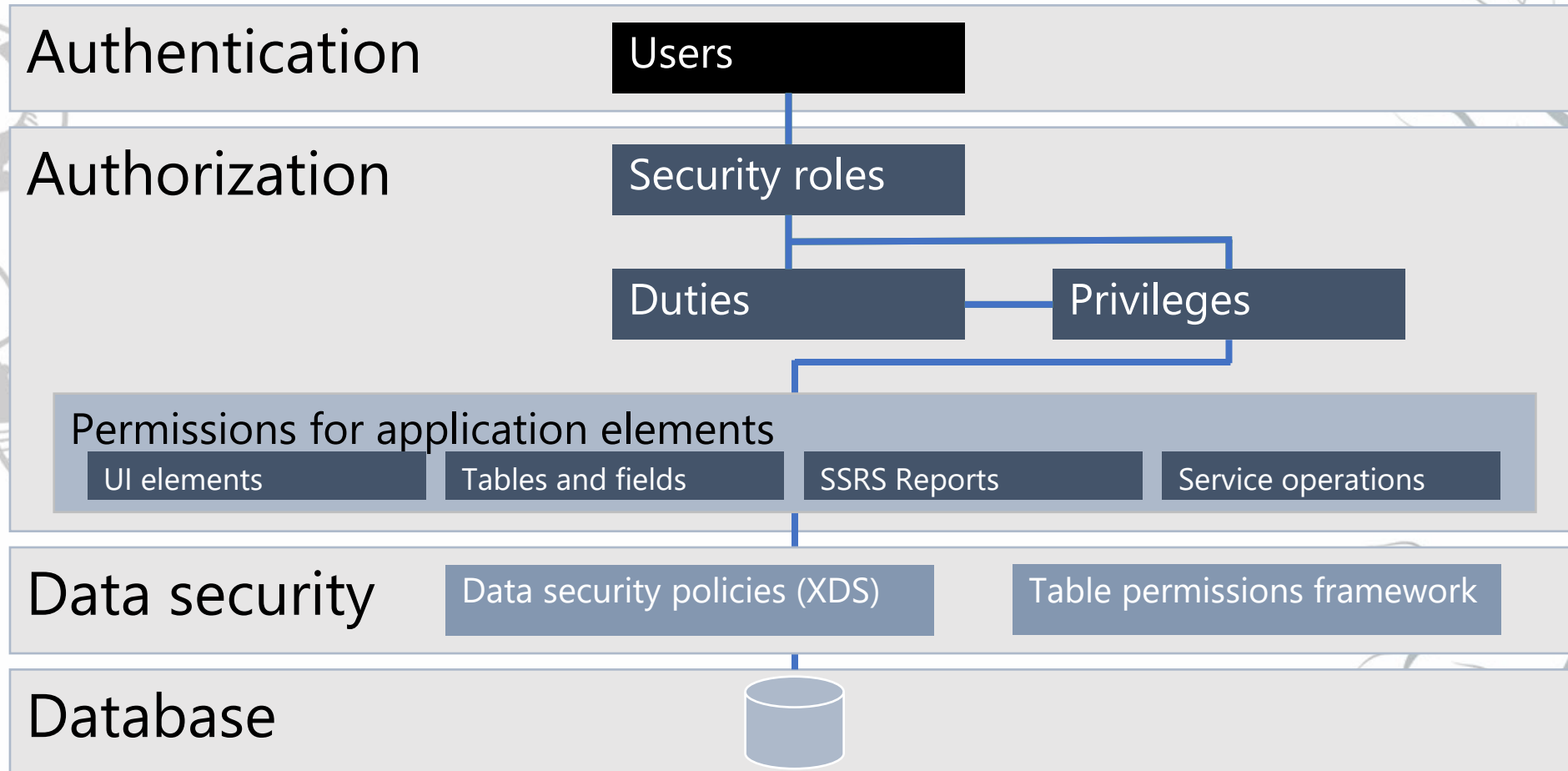
- ❖ Project plan?
- ❖ Customizations?
- ❖ Architecture overview/knowledge/experience?
- ❖ Many roles/complexity?
- ❖ Least privilege versus least effort
- ❖ GDPR / SOX compliance requirement?
- ❖ Too many system administrators!
- ❖ Acceptance test with correct security roles?
- ❖ Licensing



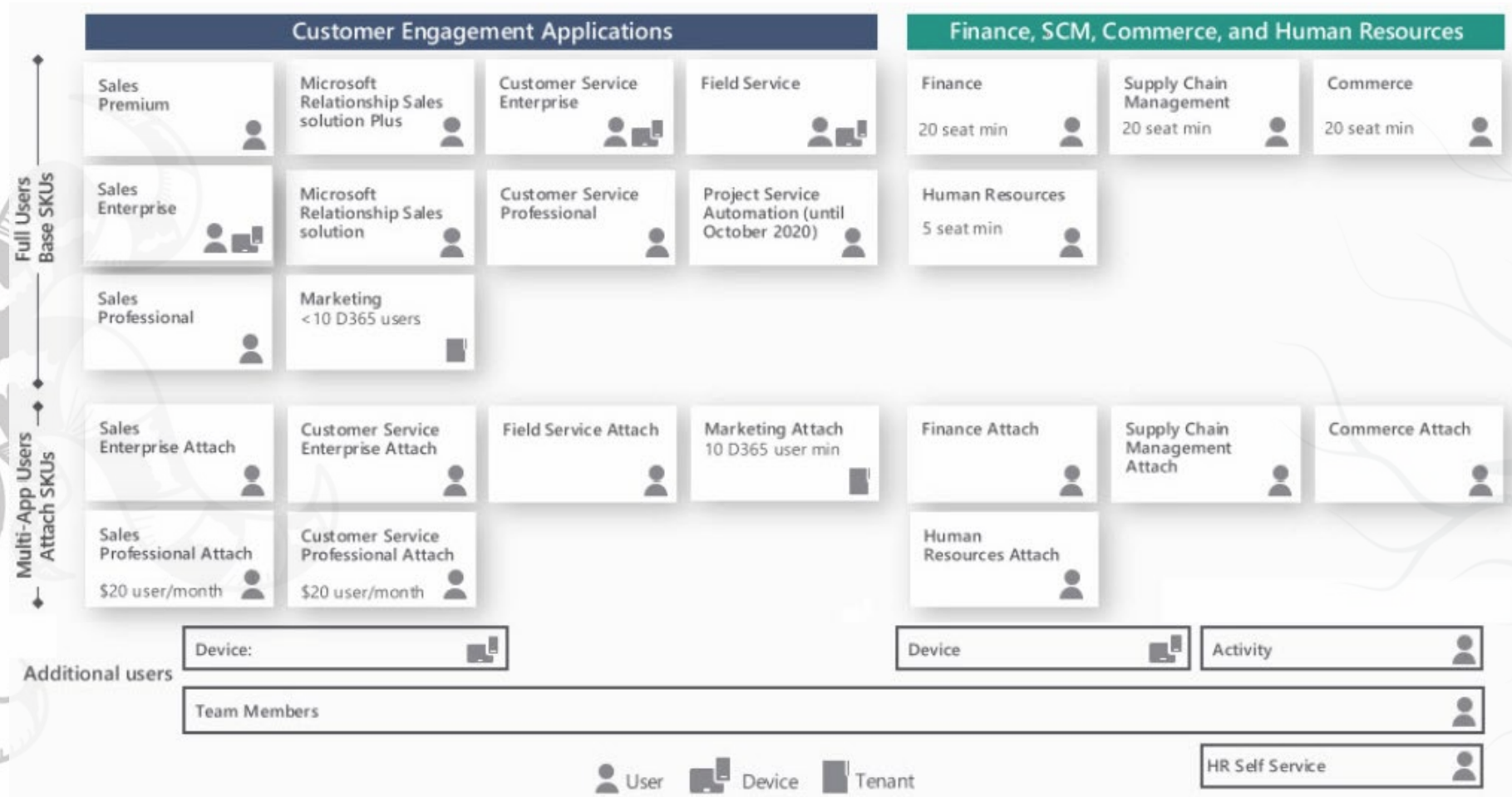
Architecture – Is it this simple?



Architecture - Complete picture



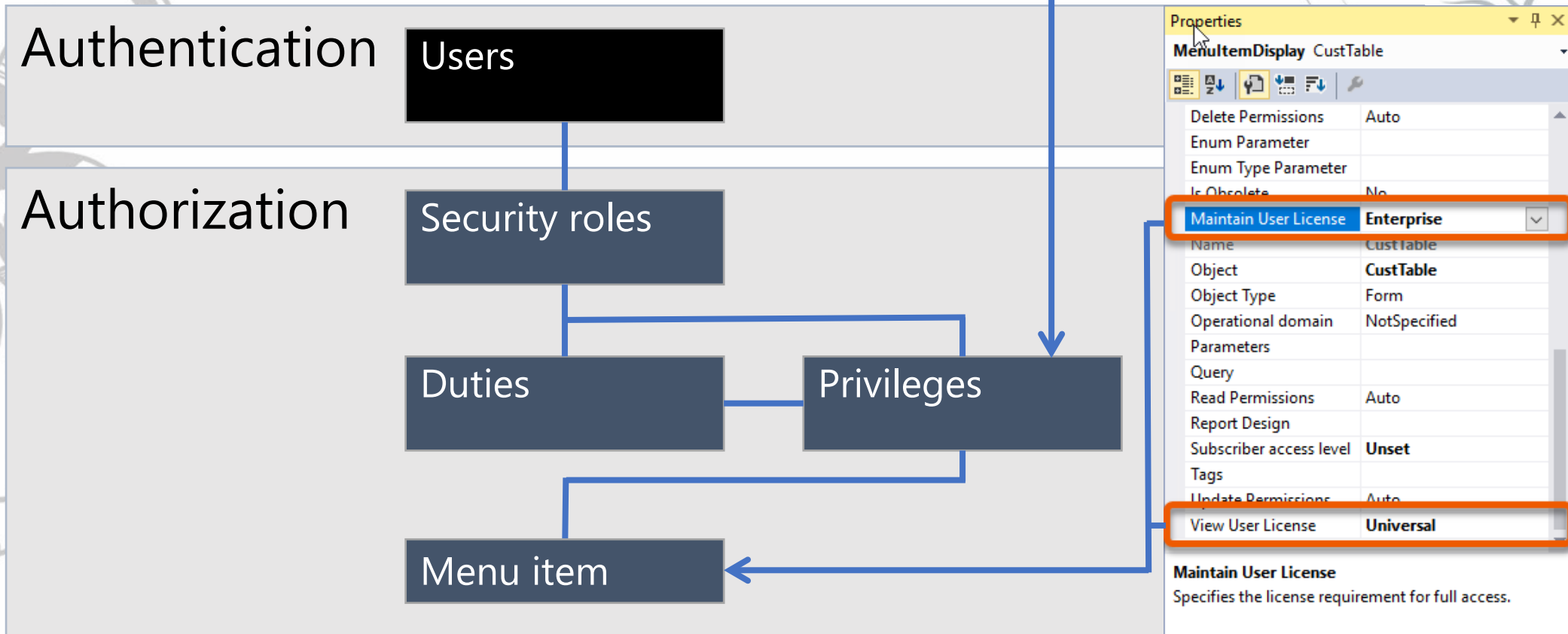
A curse called Licensing



* SKUs, Minimum seats and prices might be changed already. The screenshot is for license impact awareness only.

License impact

SKUNAME	PRIVILEGEIDENTIFIER	PRIVILEGERECID	ISUNIQUE
Finance	ABBREVIATIONCODEIMPORT_IMPORT_RU	1	0
Finance	ACCOUNTANTENTITYMAINTAIN	10473	0
Finance	ACCOUNTANTENTITYVIEW	10472	0
Finance	ACCOUNTANTINFORMATIONMAINTAIN_BR	2	1
Finance	ACCOUNTANTINFORMATIONVIEW_BR	3	1
Finance	ACCOUNTINGDISBANKSTATEMENTMAINTAIN	4	1
Finance	ACCOUNTINGDISCUSTFREEINVOICEMAINTAIN	6	1



Related session

D365FO Security and User Licensing Overview

Alex Meyer

May 23 – 17:30

EMERALD I - Virtual



Security information support

Application

- ❖ Security configuration
- ❖ Security diagnostics
- ❖ Task recordings

Visual Studio

- ❖ View related roles



Missing security information support

- ❖ Reports
- ❖ Periodic jobs
- ❖ Workflow
- ❖ Data entities
- ❖ Service operations
- ❖ Table/field information
- ❖ Calling menu items in X++

- ❖ Workaround: Form information
- ❖ Workaround: Reverse engineer in Visual Studio

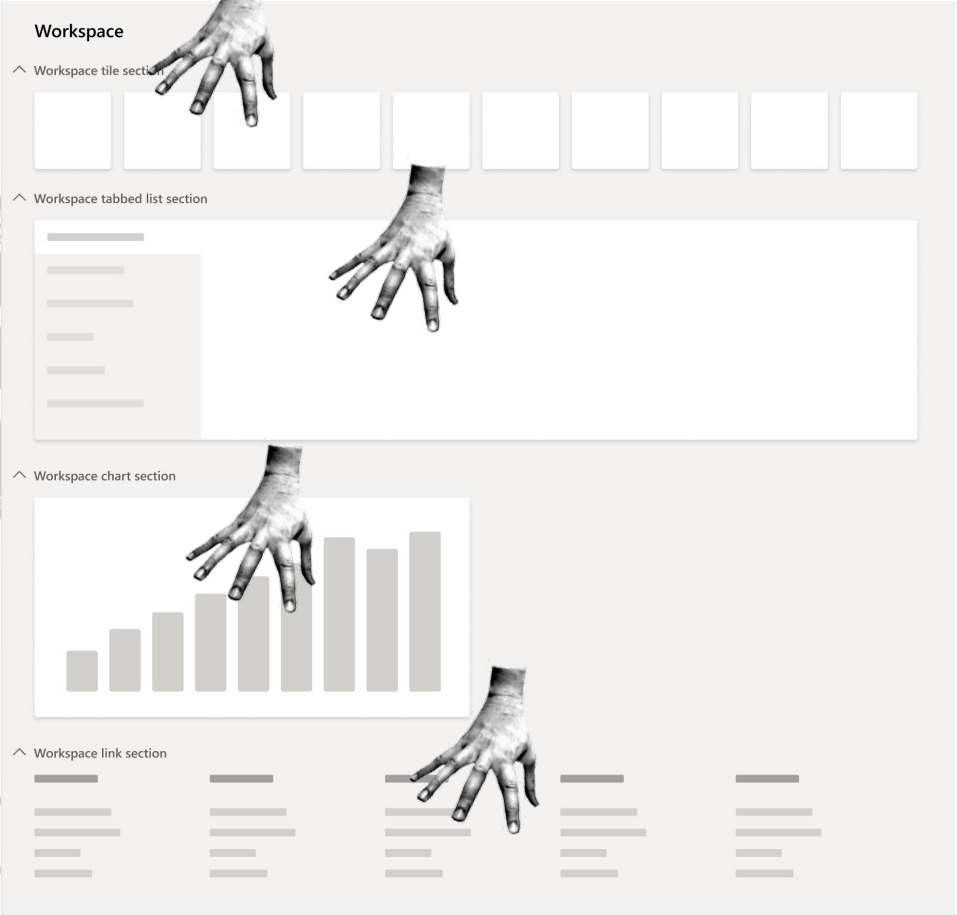


Securable objects – form elements

The screenshot displays a Dynamics CRM interface for managing workers. The main content area shows the profile for Aaren Ekel (ID: 000095). The profile is organized into several sections:

- Worker summary:** Includes fields for Personnel number (000095), Personal title, First name (Aaren), Middle name, Last name (Ekel), Personal suffix, Search name (Aaren Ekel), Display as (FirstMiddleLast), Seniority date (8/4/2008 07:00:00 AM), Title (Sales Associate - USA Central), Office location (Building B - 5153), Office address (989 Brodaway, San Francisco, CA 94115 USA), Address books, and Language (en-US).
- EMPLOYMENTS:** A table showing employment records. The visible record is for USRT on 8/4/2008.
- Navigation pane:** Lists other workers such as Aaron Painter, Adam Carter, Adam Thomas, and Ahmed Barnett.
- Buttons:** Includes 'Show more fields' and 'Previous/Next' navigation buttons.

Securable objects – form elements



Workspace

^ Workspace tile section

^ Workspace tabbed list section

^ Workspace chart section

^ Workspace link section



DY
NAM
ICS MINDS



Workflow security

❖ Workflow type

- Document menu item
- Submit to workflow menu item
- Cancel menu item

❖ Workflow approval

- Delegate menu item
- Document menu item
- Resubmit menu item
- Workflow outcome action menu item
Approve, Deny, Reject, Request change



Standard privileges available

Rely on naming convention

Data entities

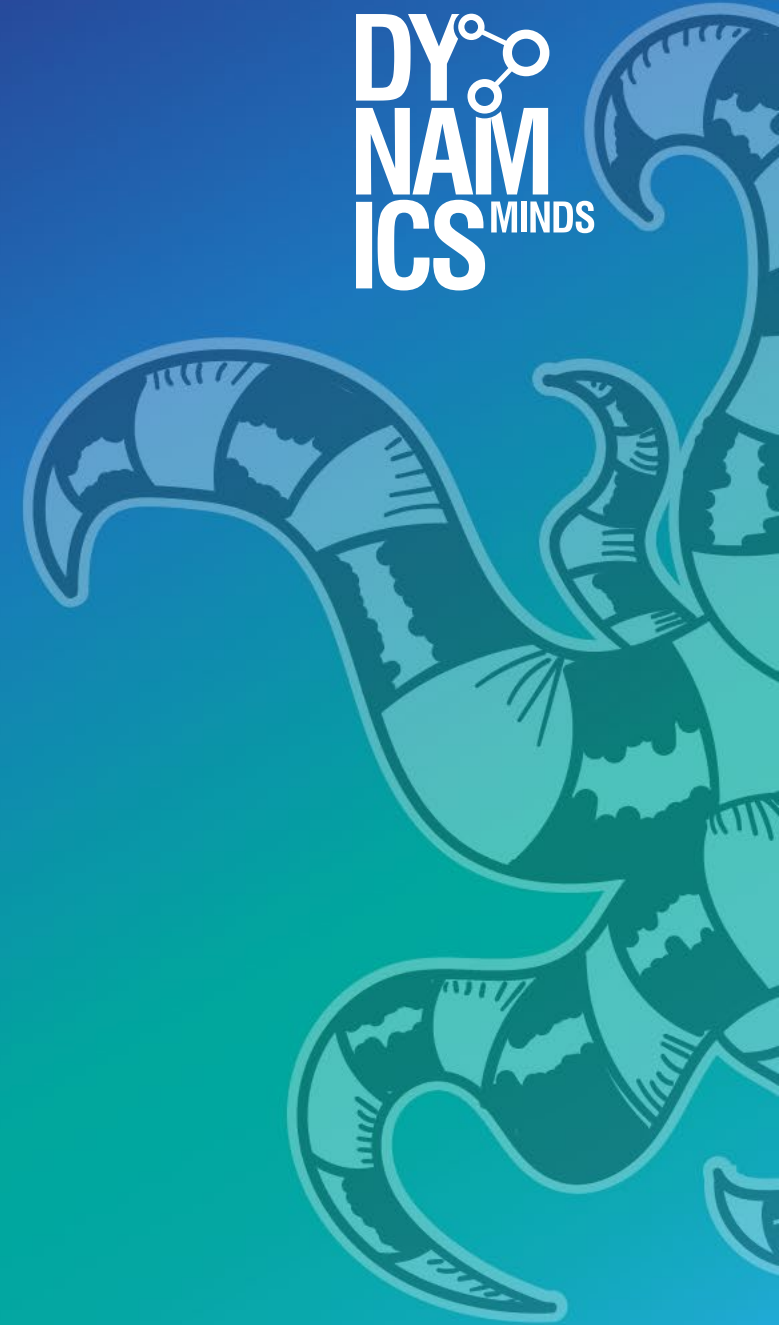
❖ Privileges

- Maintain permissions
- View permissions



View security roles
In Visual Studio

Questions



Thank you for your attention!

André Arnaud de Calavon
Solution Architect/Product Owner
andre@dynamicpedia.com
<https://dynamicpedia.com>