

# User Security Governance Overview

Dave Johnson (Principal Engineering Manager)

Bartosz Szpiech (Vice president of Product XPlus)

Saurabh Gupta (Senior Software Engineer)

Timo Gossen (Principal FastTrack Solution Architect Manager)

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# Agenda

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- Current customer challenges / Goals
  - User Security Governance overview
    - Key features
    - Timeline
  - Demo
  - Resources and Q&A

**Current customer  
challenges / Goals**

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# Current customer challenges

- **Complexity in managing security, roles, and licensing within ERP systems** as organizations scale.
- **Need for separate customer ISV agreements for Subscription or Licensing Management**
- **Need for robust governance, efficient user management, and cost-effective licensing strategies.**
- **Preparation for compliance certifications** (e.g., Sarbanes-Oxley (SOX)) with increasingly stringent regulatory standards.
- **Mitigation of risks** associated with fraud, reporting errors, and security breaches.
- **Importance of security** with the adoption of new AI technologies.
- **Safeguarding sensitive data** and ensuring ethical AI deployment through robust governance frameworks.
- **Maintaining rigorous control** over financial processes, role management, and security protocols.
- **Providing visibility and a transparent audit trail** to ease the certification process.
- **Reducing the likelihood of non-compliance**, protecting the organization from financial and reputational risks.

# What is User Security Governance (USG)

Our definition: **USG** is about empowering organizations with creating their **security architecture** closely aligned with their business processes, keeping robust **governance**, efficient **user management**, and cost-effective **licensing strategies** in focus. Also help prepare for **compliance certifications**, including Sarbanes-Oxley (SOX).

# User Security Governance

## Focus:

Provide more detailed **segregation of duty** and **separation of privileges** reports

Promote **process-based security roles**, duty and/or privilege

Easily allowing new **roles/ duties** from the existing objects through **import processes**

Provide **temporary role capabilities**

**Privileged User** Management (aka FireFighter role) to enable dedicate accounts to gain time-bound access

## Goals:

**Eliminate** need for separate customer **ISV** agreements for **Subscription or Licensing Management**

**Simplified** user interface to streamline **security configuration setup and maintenance**, in much faster time

Allows **modular approach** with **security roles setup**, hence **flexible security structure** which is easy to change in quick turnaround

**Multi-level view** of **Licensing cost**, giving a **360' view** to system administrators on **Licensing spend**

Cross-checking all **roles, duties and privileges** at all the time, to provide more detailed **segregation of duty** and **separation of privileges** report

## Benefits:

Converting business **processes into security**

**Minimize** financial risks

**Elevating** Dynamics 365 security to help companies prepare for **compliance certifications**, including Sarbanes-Oxley (SOX)

**Optimizing Dynamics 365 ERP Licensing Cost**

← User Security Governance →

# User Security Governance overview

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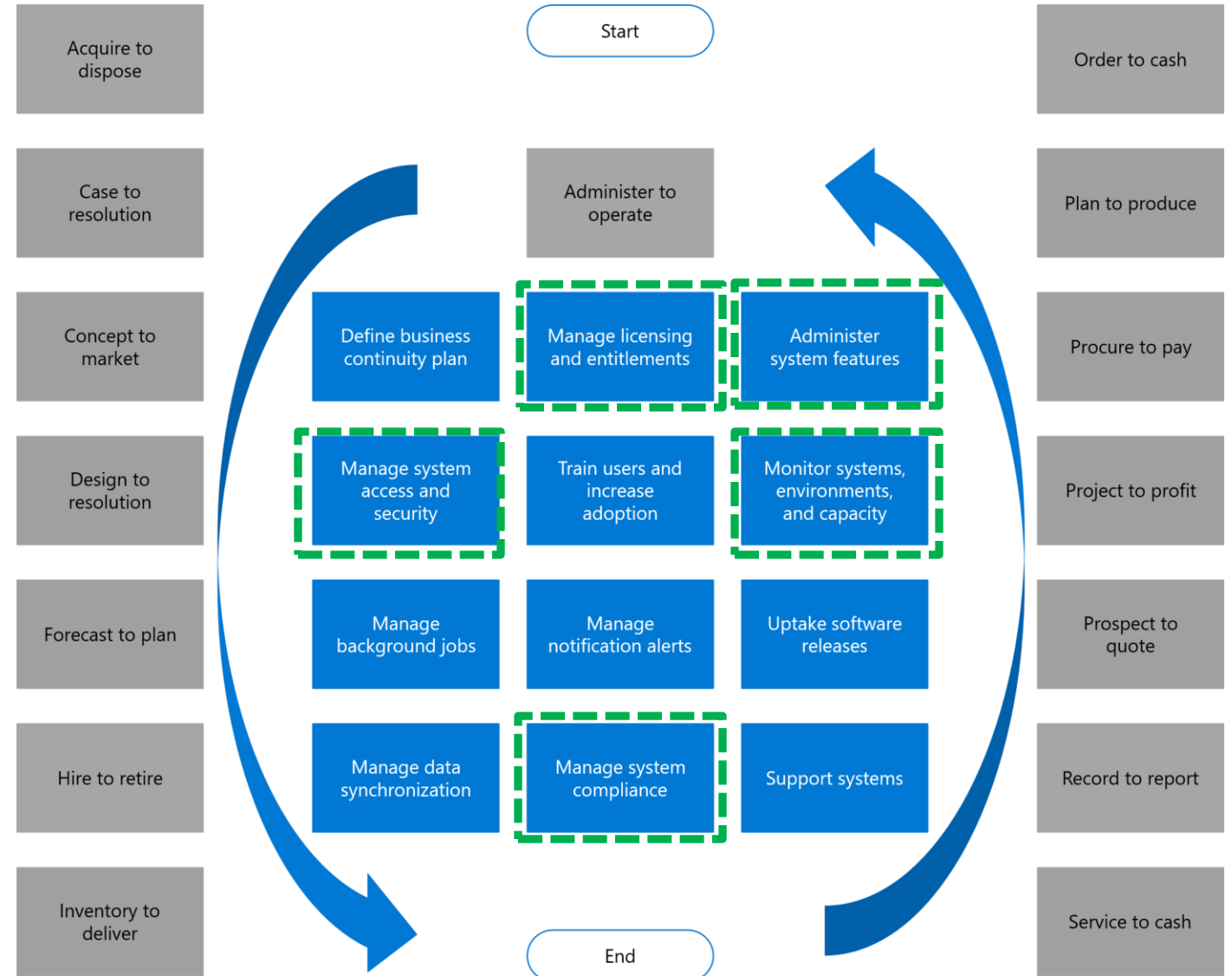
# User Security Governance overview

Enhanced capabilities

## Business Process Catalog Reference

### Administer to operate

- Implement solutions
- Manage licensing and entitlements
- Administer system features
- Manage system access and security
- Manage system compliance



# Features/ improvements

- Better UI to design process-based security roles, duty and/or privilege
  - Position/ responsibility-based user role designer to meet accurate needs
- Added tools for creating new roles/ duties from the existing objects through import processes
  - Merging of duties
- Automate temporary role assignments
- Privileged User Management (aka FireFighter role)
  - Enable dedicate accounts to gain time-bound elevated privilege
- Segregation of duties & Separation of privileges continuous monitoring
  - Define threshold and control the creation of duties/ privileges with overlapping entry points.
- Allow to draft and eventually convert defined roles to AOT project
- Role, duty, and privilege versioning
  - Supplemented with version comparison
  - Feature to restore previous versions
- Duty subtraction function
- Export of security configuration to xml
- Security audit trail to track changes done in our module
- New reports added with License indicators by
  - Role
  - Duty
  - Privilege
  - Entry points
- User Aging report

# Preview Program Planning

**Jan 27, 2025**

Public Preview availability

**July 2025**

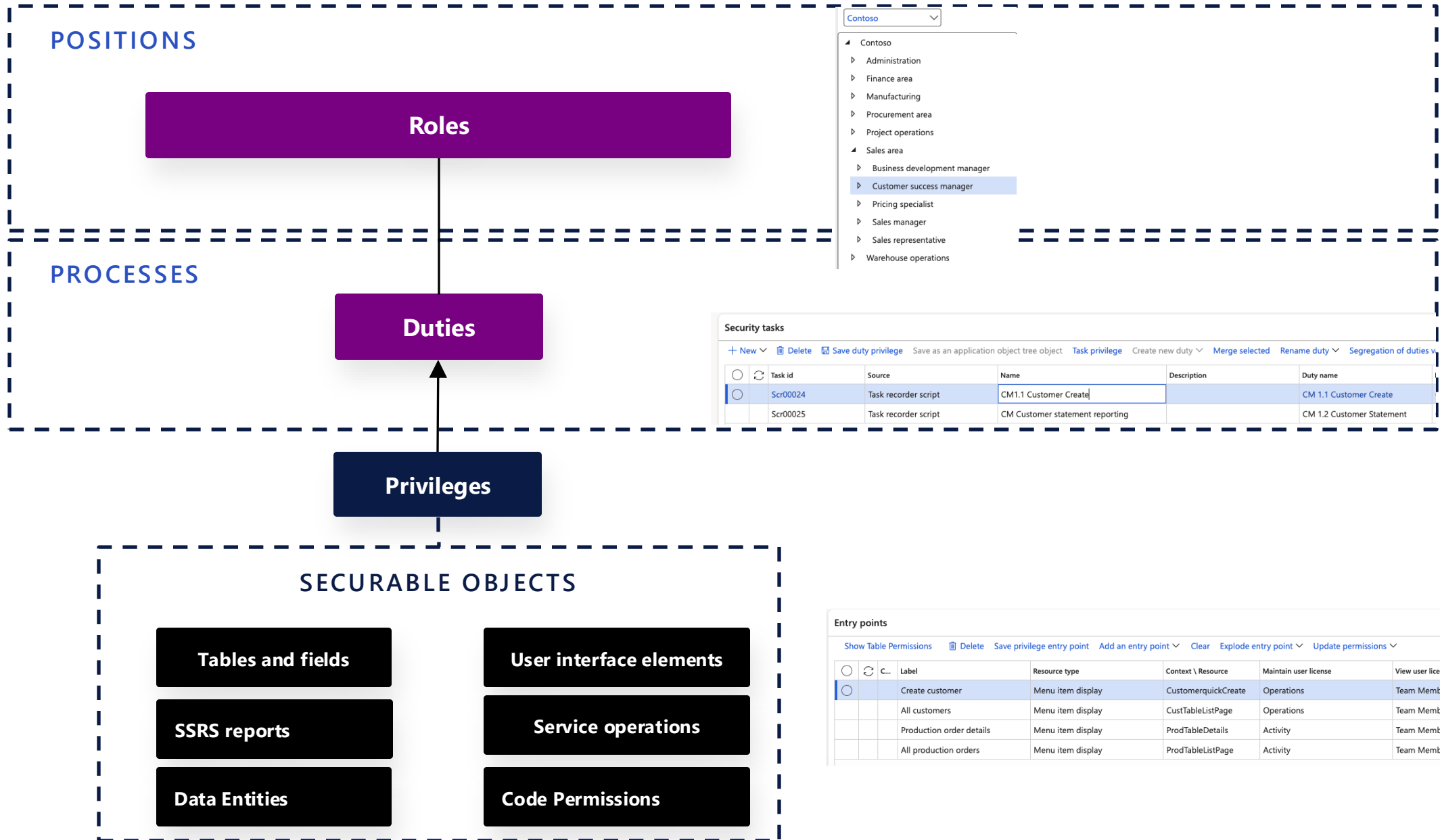
General availability

**March 14, 2025**

End of  
Public Preview



# Position-Based Security: Tailored to Fit Your Business



DEMO



# Contoso Entertainment System USA

Search people ...

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Work items assigned to me

Work items will be displayed here after they are assigned to you.

### APPS

- Business performance analytics (preview)
- Business performance planning
- Copilot for Finance (Preview)
- Demand planning
- Human Resources
- Inventory Visibility
- Invoice capture

### WORKSPACES

Bank management	Channel deployment	Customer credit and collections	Expense management	Leave and absence	People	Recruitment management	System administration
Benefits	Channel merchandising configuration validator	Customer invoicing	Feature management	Ledger budgets and forecasts	Personnel management	Released product maintenance	Task management
Budget planning	Collections coordinator	Customer payments	Financial analysis - all companies	Maintenance request management	Product readiness for discrete manufacturing	Reservation management	Vendor bidding
Business document management	Commerce pricing and discount management	Data management	Financial analysis - current company	Master planning	Product readiness for process manufacturing	Resource lifecycle management	Vendor information
Business processes for human resources	Compensation management	Data validation checklist	Financial period close	My business processes	Product variant model definition	Retail and Commerce IT	Vendor invoice automation
Business processes for payroll	Confirmed purchase orders with changes	Distributed order management	Fixed asset management	Optimization advisor	Production floor management	Sales order processing and inquiry	Vendor invoice entry
Cash overview - all companies	Cost accounting ledger administration	Electronic reporting	General journal processing	Outbound work monitoring	Project management	Sales return processing	Vendor payments
Cash overview - current	Cost administration	Employee development	Globalization studio	Outbound work planning	Purchase order	Store financials	Warehouse

Resources

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# Resources

- [Prioritizing security above all else - The Official Microsoft Blog](#)
- Product News: [Optimizing ERP Security Configuration and Licensing](#)
- MS Learn: [Security governance](#)
- FAQ: [Security governance FAQ](#)
- Viva Engage group: [F&O User Security and Governance advance features](#)
- Dynamics 365 Ideas Portal: [Ideas](#)
- Business Process Guide: [Overview of business processes in Dynamics 365 - Dynamics 365 | Microsoft Learn](#)

Q&A