

365

Saturday



Gus Gonzalez

Setting up Security like an MVP



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Nigel Frank
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Saturday

January, 26th 2019

Boston, MA

Gus Gonzalez

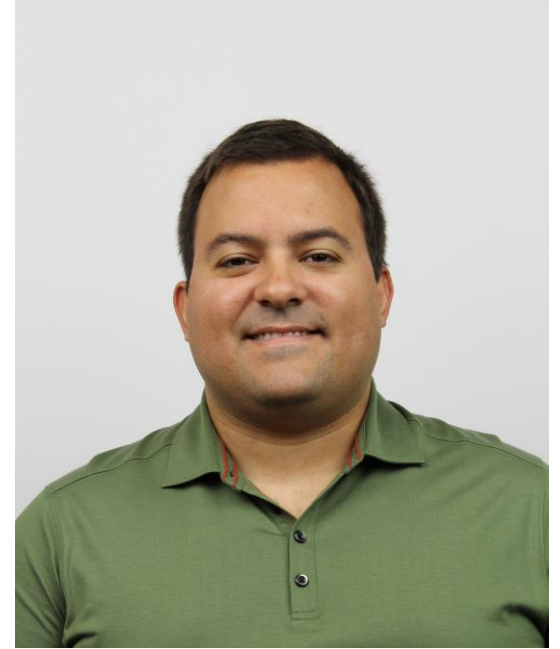
- CEO, Elev8 Solutions
- 7x Microsoft MVP, CRMUG All-Star
- 200+ Deployments
- Host @CRMMVPPodcast

 @GusGonzalez2 | @Elev8Solutions

 <http://www.crmmvppodcast.com>

 gus@elev8solutions.com

 <http://www.elev8solutions.com>



What most Solution Architects do...



Or...



Don't be paranoid...



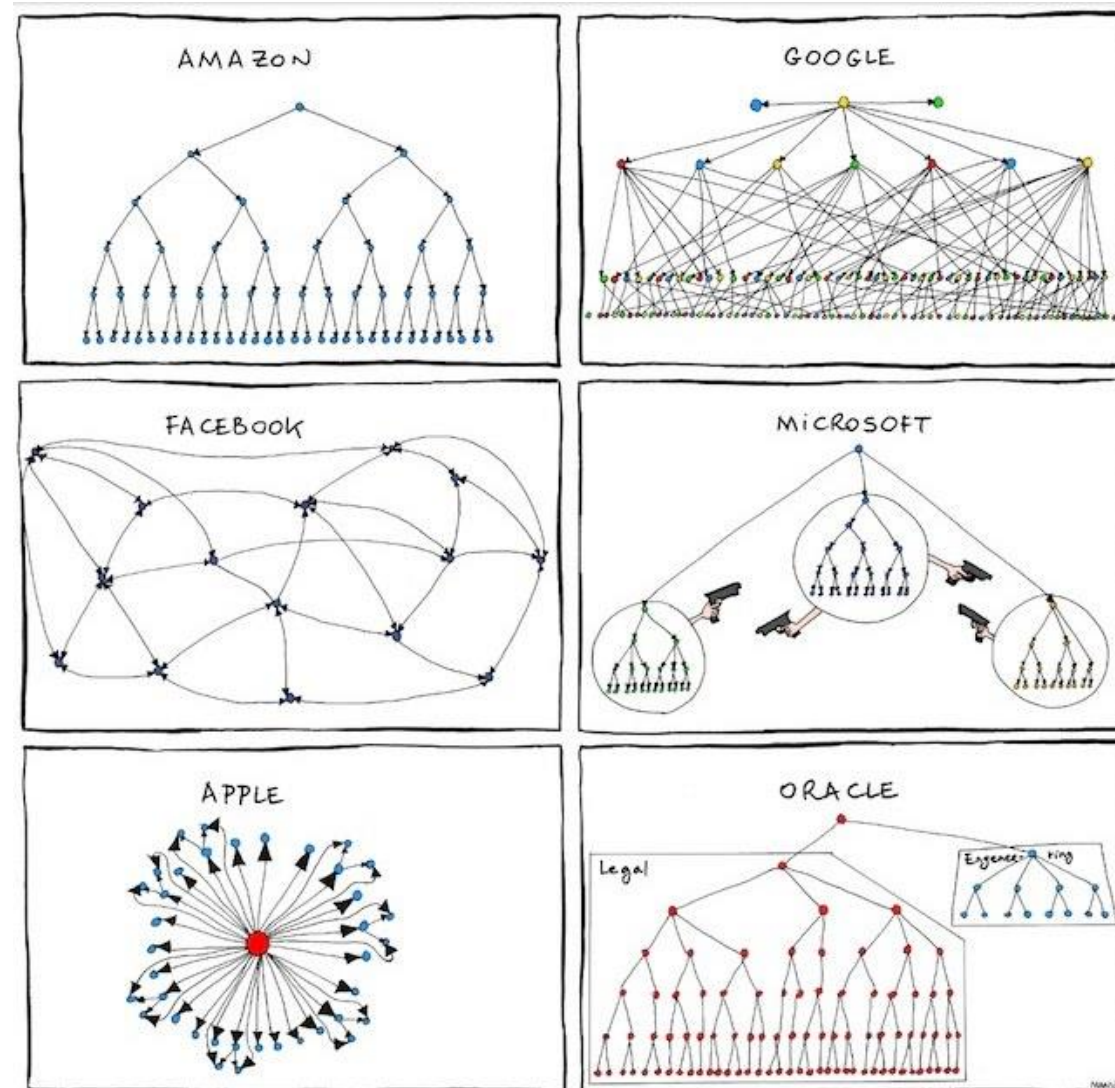
You can trust users...



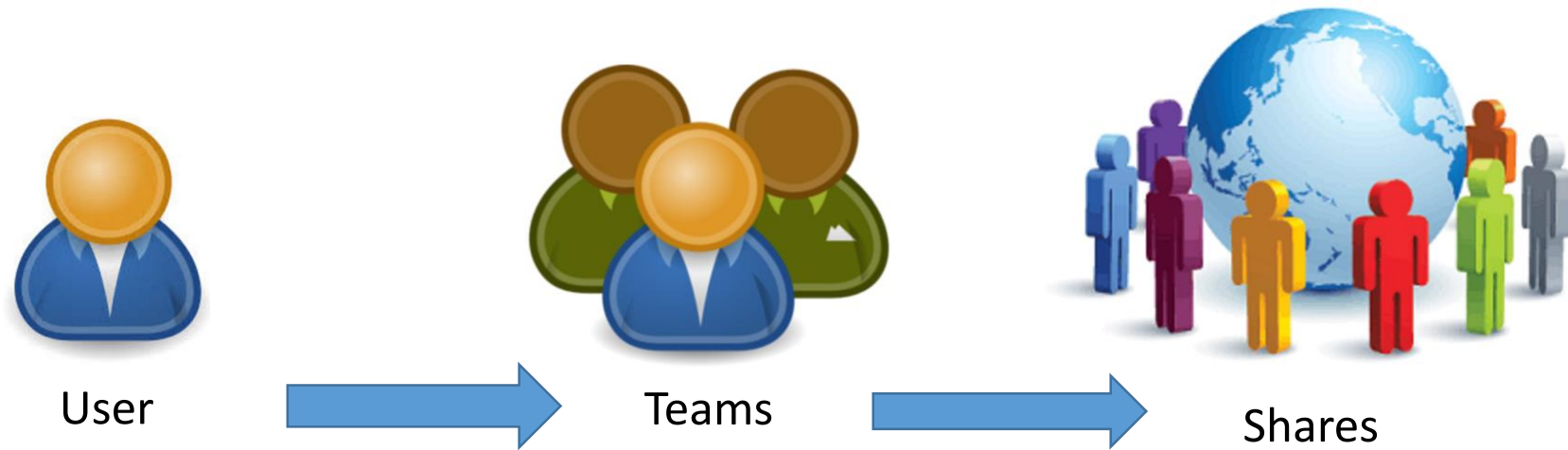
Rules to Maximize Performance

- ✓ Keep it simple
- ✓ Create your own roles
- ✓ Use a Layered Approach
- ✓ Allow them to Deactivate
- ✓ Show them what matters
- ✓ Use only one Business Unit
- ✓ User ownership instead of team ownership
- ✓ Be open
- ✓ Rename unused roles
- ✓ Protect your data

1. Keep it Simple

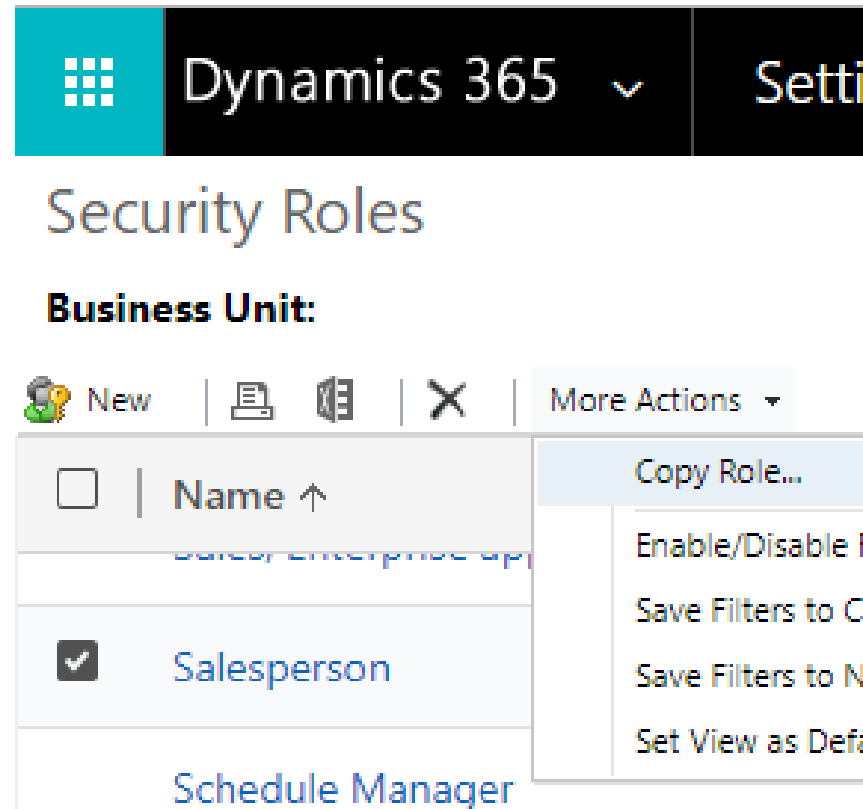


How is security evaluated in Dynamics 365 CE?



2. Create your own roles

Don't edit the out of the box roles

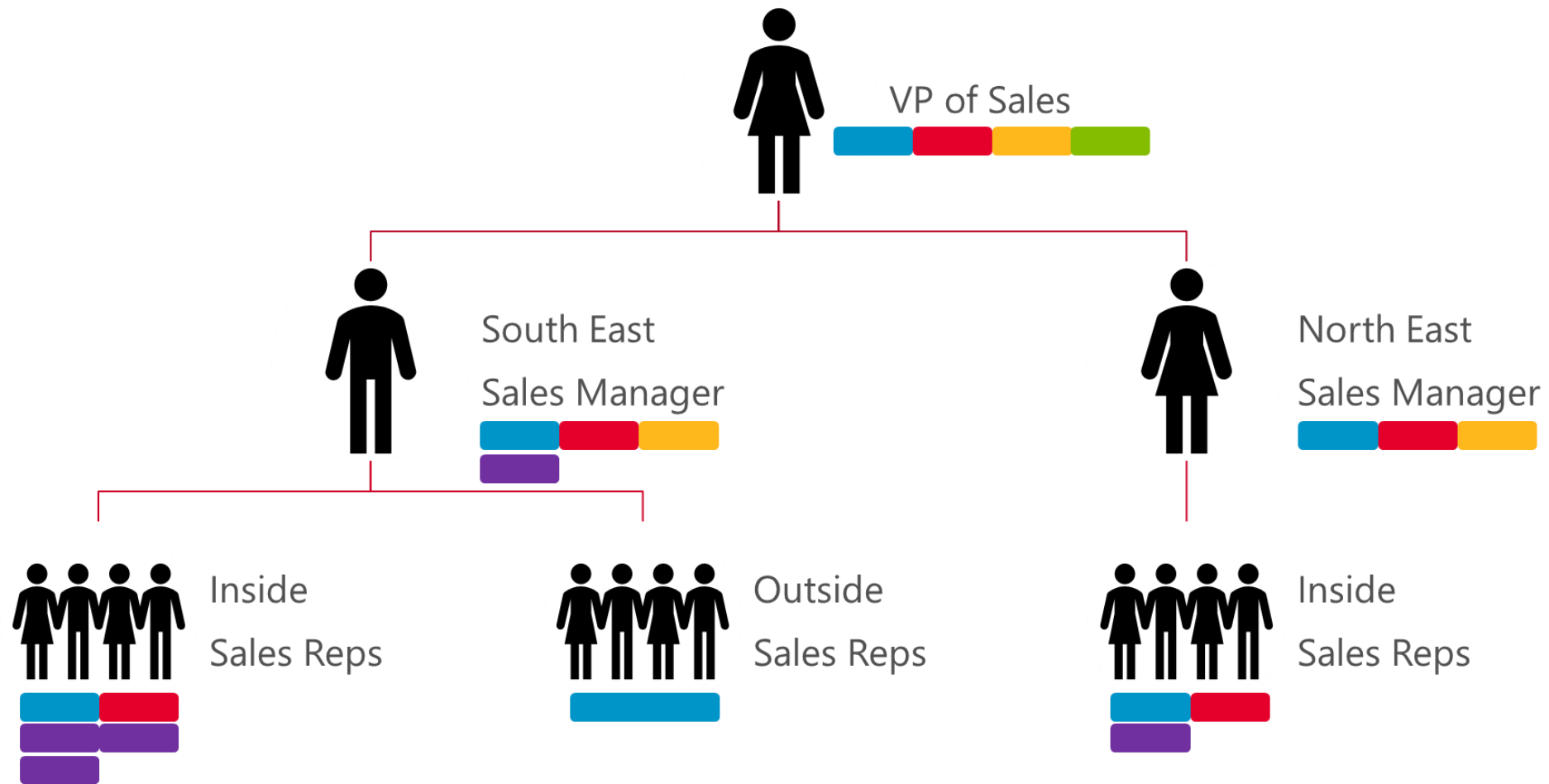


3. Use a Layered Approach

Minimize the number of roles needed



Layered Approach: How it looks




4. Allow them to Deactivate




















































































Remove Delete Permissions

File

Save and Close

Actions

 **Security Role: BASELINE**

Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Missing Entities
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share
Account								
ACIViewMapper								
Action Card								
Action Card User Settings								
Activity								
Advanced Similarity Rule								
Announcement								
Application File								
Azure Service Connection								
Category								
Connection								
Connection Role								
Contact								

5. Show them what matters

User Experience over Security

Security Role: BASELINE

Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Missing Entities	Bu
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share	
Campaign	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Marketing List	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	
Miscellaneous Privileges									
Configure Internet Marketing module	<input type="radio"/>				Create Quick Campaign		<input type="radio"/>		
Use internet marketing module	<input type="radio"/>								

The screenshot shows the Dynamics 365 user interface. At the top, there's a navigation bar with 'Dynamics 365', 'Settings', and 'My Apps'. Below this, there's a search bar and a 'Create new App' button. The main section is titled 'Published Apps (9)' and displays a grid of app cards. Each card has an icon, a title, a description, and a 'WEB' button. The apps shown are: Dynamics 365 — custom, Customer Service, Customer Service Hub, Field Resource Hub, Field Service, and Project Resource Hub.

6. User Only ONE Business Unit

But not the "Root" BU

Dynamics 365 Settings Security

Business Units

View: Active Business Units

New | | | | Run Workflow... | Start Dialog | More Actions

<input type="checkbox"/>	Name ↑	Main Phone
	Elev8 Solutions	
	Elev8 Solutions (ROOT)	

Dynamics 365 Settings Security

+ NEW | PROMOTE TO ADMIN | EMAIL A LINK | FLOWS | RUN REPORT | EXCEL TEMPL

Enabled Users

- Run on Selected Records
- Activities
- User Summary

1 of 1 | 100%

User Summary

Filter Summary

Business Unit: Elev8 Solutions			
User	Title	Email	Main Phone
Gus Gonzalez		admin@gus1017.onmicrosoft.com	4048253086

7. User ownership over Team ownership

It's less confusing for the users and slows performance



8. Lead with an “Open” Mind

Instead of relying on Sharing

File Save and Close Actions									
Security Role: BASELINE									
Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Missing Entities	
Entity	Create	Read	Write	Delete	Append	Append To	Assign	Share	
Account	🟡	🟢	🟢	🔴	🟢	🟢	🟡	🟢	
ACIViewMapper	🔴	🔴	🔴	🔴					
Action Card	🟡	🟡	🟡	🔴	🟡	🟢	🔴		
Action Card User Settings	🟡	🟡	🟡	🟡				🟡	
Activity	🟡	🟢	🟡	🔴	🟡	🟡	🟡	🟢	
Advanced Similarity Rule	🔴	🔴	🔴	🔴	🔴	🔴			
Announcement	🔴	🟢	🔴	🔴		🔴			
Application File	🔴	🟢	🔴	🔴					
Azure Service Connection	🔴	🟢	🔴	🔴	🔴	🔴			
Category	🔴	🟢	🔴	🔴	🟢	🟢	🔴	🔴	
Connection	🟡	🟢	🟢	🟡	🟢	🟢	🟡	🟢	
Connection Role	🔴	🟢	🔴	🔴	🔴	🔴			
Contact	🟡	🟢	🟢	🔴	🟢	🟢	🟡	🟢	

9. Don't forget the “collateral” solutions

Third party security can affect Dynamics 365 performance

- Anti-Virus
- Network/Bandwidth
- Firewalls
- Encryption requirements
- Authentication policies
- Integrations

10. Protect your data

Hiding fields, exporting to Excel permissions, custom views, etc.



Edit Columns ×

Edit columns for the saved view. These columns represent the data that will be displayed in the view.

Account Name ▲ Primary Contact Main Phone

View results are displayed here.

Common Tasks

- ← →
- Custom Controls
- Configure Sorting
- Add Columns**
- Change Properties
- Remove

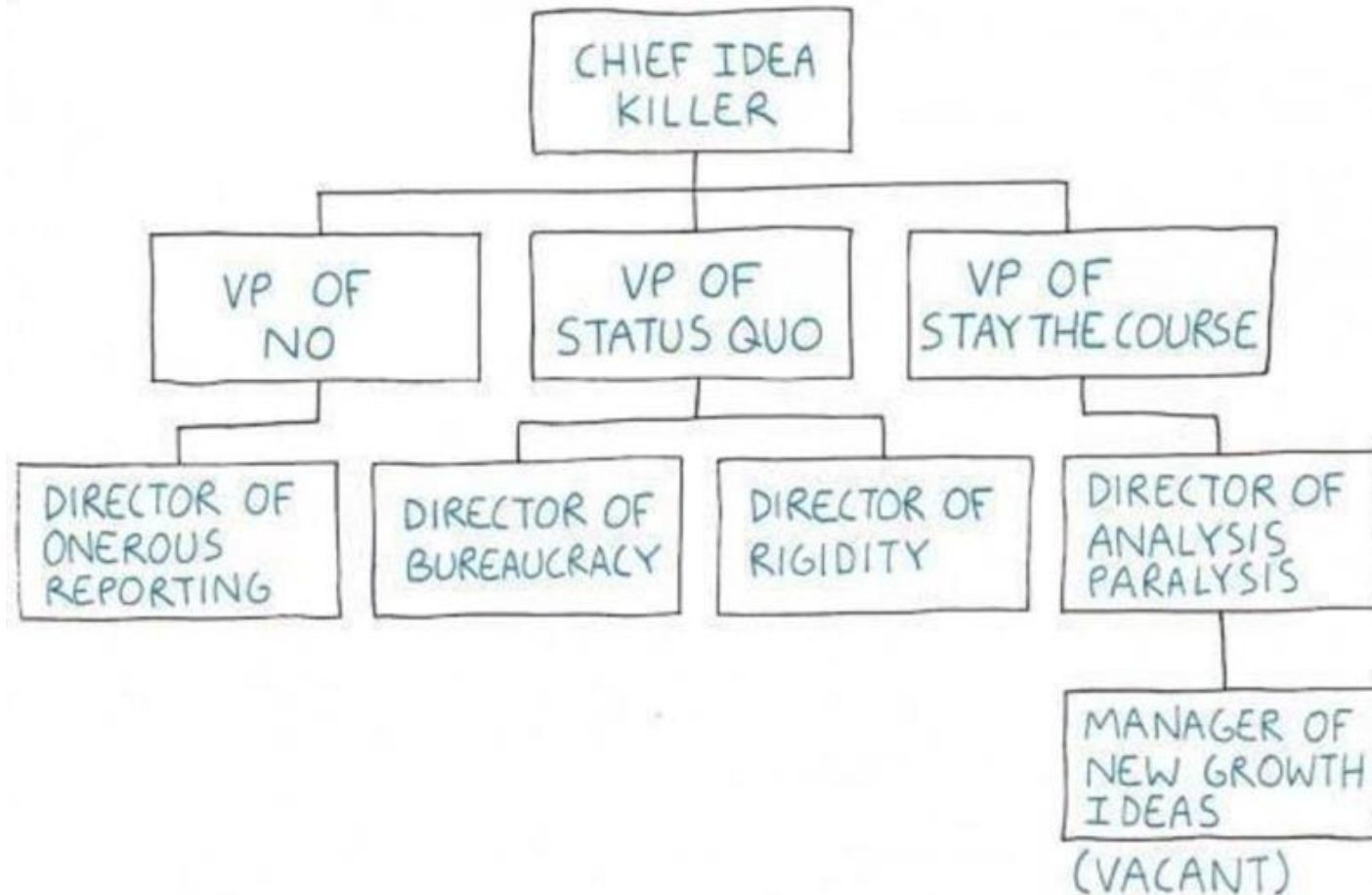


Forms [Help](#) [Report iss](#)

Logical names	God Mode	Record Properties	Changed fields
Record URL	Record Id	Refresh all subgrids	Minimum values

In summary...

You need to make a change





QUESTIONS



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