|  |  |  |
| --- | --- | --- |
|  |  |  |
| Security Design & Review Guidelines **Version 2.0**  Solution & Capability Enablement - **Business Applications** |
|  |
| **Customer/Partner:** TBD  **Key contact(s) e-mail(s) and role(s):** TBD **Solution Name:** TBD **Date:** TBD |

**Your privacy is important to us. Please do not include any personal or sensitive information. To learn more read** [**Microsoft Privacy Statement**](https://privacy.microsoft.com/en-US/privacystatement)

**Table of Contents**

[Security Design & Review Process 1](#_Toc833148717)

[1. Security Design Life Cycle 3](#_Toc2025443940)

[2. Business Applications Security Recap 5](#_Toc1630272962)

[3. Secure by Design 5](#_Toc239945138)

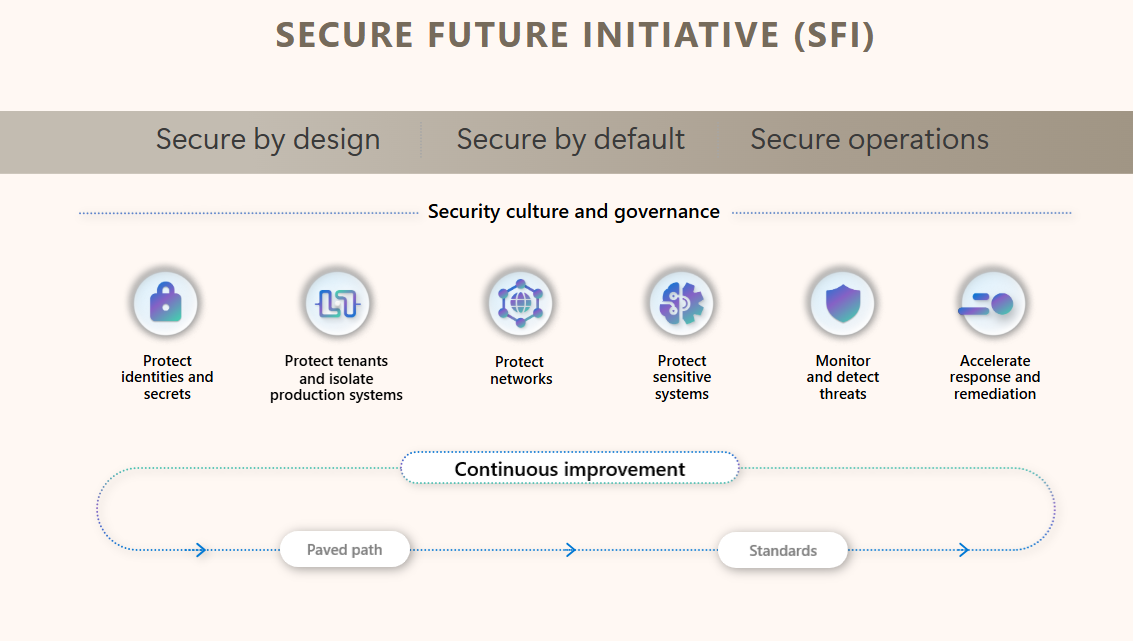
[4. Secure by Default 10](#_Toc2084167426)

[5. Secure Operations 16](#_Toc1834491169)

[Appendix: 21](#_Toc2101862549)

# **Security Design & Review Process**

The purpose of this document is to provide a structural approach on best practices, enablement topics for Dynamics 365 and Power Platform, specifically tailored for the Secure Future Initiative. This document is designed to guide solution architects in implementing robust security measures across various stages of solution development and deployment and product implementation.



The document is structured into three main sections: Secure by Design, Secure by Default, and Secure in Operations. Each section offers topics, and best practices to ensure the security of solutions built on Dynamics 365, Power Platform, and Copilot studio.

Secure by Design: This section focuses on the principles and practices that should be incorporated during the initial design phase of the solution. It includes guidelines on threat modeling, secure design practices, and design reviews to identify and mitigate potential security risks early in the development process.

Secure by Default: This section emphasizes the importance of configuring systems and applications securely out of the box. It covers best practices for default settings, access controls, and configuration management to ensure that the deployed solutions are secure from the outset.

Secure Operations: This section provides best practices for maintaining and monitoring the security of solutions during their operational lifecycle. It includes topics on incident response, continuous monitoring, and regular security assessments to ensure ongoing protection against emerging threats.

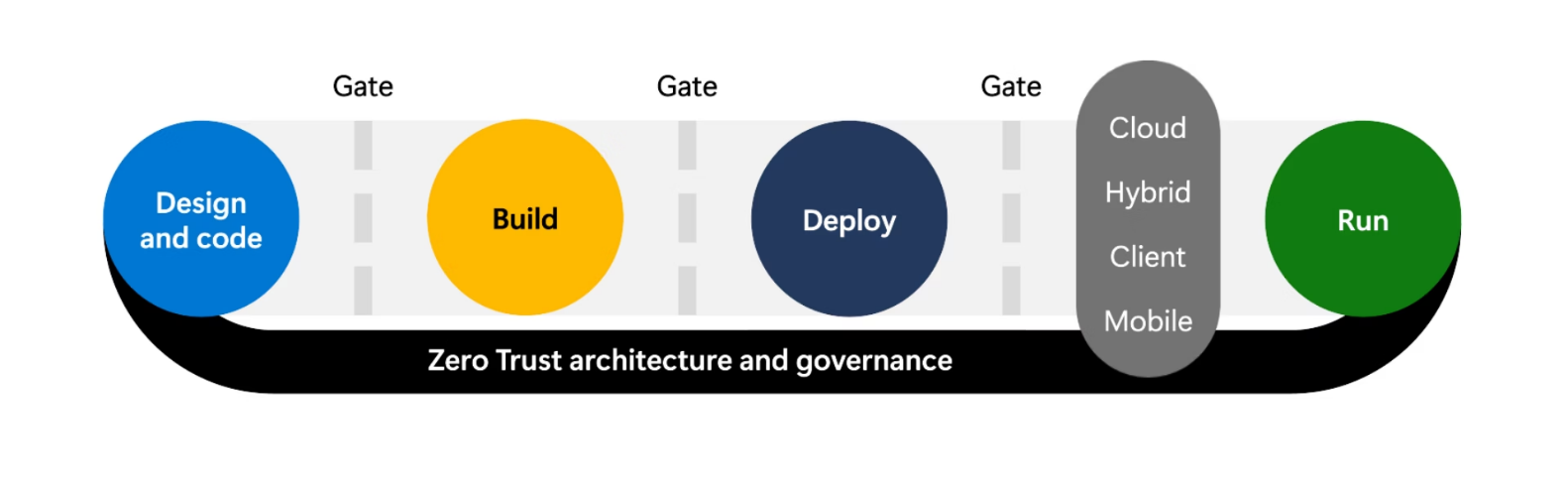
By following the guidelines and best practices outlined in this document, solution architects can mitigate risks, be resilient and comply with industry standards and regulations. This document serves as a valuable resource for architects to build and maintain secure solutions that meet the high standards of the Secure Future Initiative.

Partners / Customers can review more about [[Security above all else – expanding Microsoft’s Secure Future Initiative.](https://www.microsoft.com/en-us/security/blog/2024/05/03/security-above-all-else-expanding-microsofts-secure-future-initiative)](https://www.microsoft.com/en-us/trust-center/security/secure-future-initiative)

***Disclaimer:*** *This document is provided as an example and sample for informational purposes only. It is not intended to be a comprehensive guide. For up-to-date guidance and information, please refer to the official Product documentation and Microsoft Learn resources. Microsoft privacy standards and business application guidelines are subject to change, and it is important to consult the latest official documentation to ensure compliance with current policies and practices.*

1. **Security Design Life Cycle**

The Security Development Lifecycle (SDL) is the approach Microsoft uses to integrate security into DevOps processes (sometimes called a DevSecOps approach). You can use the [SDL guidance and documentation](https://www.microsoft.com/en-us/securityengineering/sdl/) to adapt this approach and practices to your organization.

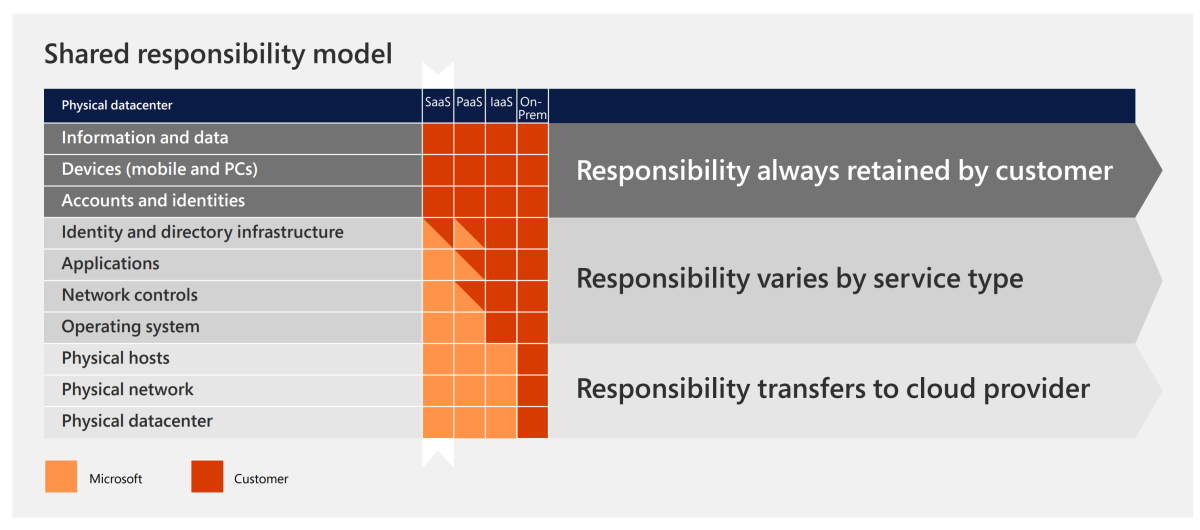


Security risks (and the need to mitigate them) can occur at any point in the development lifecycle:

* **Design** – ensure that the design doesn’t naturally allow attackers to easily gain unauthorized access to the workload, its data, or other business assets in the organization.
* **Code** – ensure that writing (and re-use) of code doesn’t allow attackers to easily take control of the application to perform unauthorized actions that harm customers, employees, systems, data, or other business assets. Developers should also work in a secure environment that doesn’t allow attackers to do this without their knowledge.
* **Build and Deploy** – ensure that the continuous integration and continuous deployment (CI/CD) processes don’t allow unauthorized users to alter the code and allow attackers to compromise it.
* **Run** – ensure that environment running the code (cloud, servers, mobile devices, others) follows security best practices across people, process, and technology to avoid attackers compromising and abusing the workload. This includes the adoption of well-established best practices, security baseline configurations, and more.
* **Zero Trust architecture and governance** – All of these stages should follow Zero Trust principles to assume breach (assume compromise), explicitly verify trust, and grant the least privilege required for each user account, machine/service identity, and application component.

|  |
| --- |
| **SDL Practices** |
| [1. Establish security standards, metrics, and governance](https://aka.ms/sdl/practices/security-program-management) |
| [2. Require use of proven security features, languages, and frameworks](https://aka.ms/sdl/practices/secure-platforms) |
| [3. Perform security design review and threat modeling](https://aka.ms/sdl/practices/secure-by-design) |
| [4. Define and use cryptography standards](https://aka.ms/sdl/practices/cryptography) |
| [5. Secure the software supply chain](https://www.microsoft.com/securityengineering/sdl/practices/sscs) |
| [6. Secure the engineering environment](https://www.microsoft.com/securityengineering/sdl/practices/secure-dev-infra) |
| [7. Perform security testing](https://aka.ms/sdl/practices/security-testing) |
| [8. Ensure operational platform security](https://aka.ms/sdl/practices/operational-security) |
| [9. Implement security monitoring and response](https://aka.ms/sdl/practices/monitoring-and-response) |
| [10. Provide security training](https://aka.ms/sdl/practices/security-training)   1. **Business Applications Security Recap** |

A few topics below to set some ground rules on Security landscape for business applications as follows. If you are new to the topic, it is highly advised to go through recap topics before proceeding to the next sections.



* + [Security Strategy](https://learn.microsoft.com/en-us/dynamics365/guidance/implementation-guide/security)
  + [Security controls](https://learn.microsoft.com/en-us/dynamics365/guidance/implementation-guide/security-strategy-security-controls)
  + [Security in the customer engagement apps](https://learn.microsoft.com/en-us/dynamics365/guidance/implementation-guide/security-strategy-product-ce)
  + [Security in Power Pages](https://learn.microsoft.com/en-us/dynamics365/guidance/implementation-guide/security-strategy-product-portals)
  + [Security in finance and operations apps](https://learn.microsoft.com/en-us/dynamics365/guidance/implementation-guide/security-strategy-product-oa)
  + [Day one priorities](https://learn.microsoft.com/en-us/dynamics365/guidance/implementation-guide/security-strategy-day-one-priority)
  + [Checklist](https://learn.microsoft.com/en-us/dynamics365/guidance/implementation-guide/security-strategy-checklist)

1. **Secure by Design**

**Objective:** To ensure that security is integrated into the design phase of solutions built on Dynamics 365, Power Platform, and Copilot Studio.

**Key Topics:**

* Security architecture principles
* Threat modeling and risk assessment
* Secure design practices

**Best Practices:**

* Incorporate security requirements early in the design process
* Use secure design patterns and frameworks

**Review Components:**

|  |  |  |
| --- | --- | --- |
| Topic | Additional Resources | Evaluation & Recommendations |
| Copilot Scenarios   * Are Copilot/AI features implemented responsibly and securely? For any generative AI scenarios, have you gone through Microsoft’s Responsible AI guidelines and FAQs and configured Data Loss Prevention (DLP) policies to prevent sensitive data leaks? * Are scenarios aligned with [Responsible AI guidelines & FAQs](https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/responsible-ai/responsible-ai-overview). * Are [data loss prevention policies for copilots configured](https://learn.microsoft.com/en-us/microsoft-copilot-studio/admin-data-loss-prevention). * [Has Security FAQs for Copilot Studio reviewed?](https://learn.microsoft.com/en-us/microsoft-copilot-studio/security-faq) | * [Responsible AI FAQs for Copilot Studio](https://learn.microsoft.com/en-us/microsoft-copilot-studio/responsible-ai-overview) * **F&O:** [Chat with finance and operations data on Microsoft 365 Copilot](https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/m365-copilot/chat-with-fno-data-on-m365copilot) * **F&O:** [Architecture of Copilot in finance and operations apps](https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/copilot/copilot-architecture) | Ensure your Copilot scenarios adhere to Responsible AI principles (transparency, fairness, privacy, etc.) as outlined in Microsoft’s guidelines  Also, configure DLP policies for Copilot Studio agents to govern data access and connections  *For example:* Copilot Studio supports real-time DLP enforcement and will warn makers of policy violations before publishing an agent |
| Regulatory & Data Location requirements:   * Does the design address compliance and data residency need? Have you evaluated regulatory requirements (e.g. GDPR, industry standards) and data location constraints, and designed the solution to meet them (for example, choosing appropriate regions for Dataverse or Copilot data)? * What are the regulatory requirements and norms you need to comply with? * Do you have hard requirements as to where the data must be located? * Validate solution and implementation comply with [regulatory requirements](https://www.microsoft.com/en-us/trust-center/product-overview) for data security. * Understand solutions’ [data location](https://www.microsoft.com/en-us/trust-center/privacy/data-location) impact on regulatory requirements. | Microsoft Data Protection resources.   * [Security and geographic data residency in Copilot Studio](https://learn.microsoft.com/en-us/microsoft-copilot-studio/geo-data-residency-security) * **F&O:** [Regulatory Configuration Services (RCS) Globalization features](https://learn.microsoft.com/en-us/dynamics365/finance/localizations/global/rcs-globalization-feature) | Early in design, confirm any regulatory or data residency requirements your solution must abide by.  Microsoft’s cloud provides options to keep data in certain geographies to comply with local laws.  Designing with these in mind avoids costly re-work or non-compliance issues later. |
| Securing Data Model & Integrations   * Is the data model and integration design following security best practices? Have you leveraged platform security features (like Dataverse security roles, field-level security, and secure connectors) for data access, and ensured integrations use secure channels and credentials? * Is data model designed keeping [secured design principals](https://www.microsoft.com/en-us/securityengineering/sdl/) aligned? * Familiarize with [Security concepts in Microsoft Dataverse](https://learn.microsoft.com/en-us/power-platform/admin/wp-security-cds) * [Security Workshop topics](https://learn.microsoft.com/en-us/training/modules/fast-track-security/2-security-workshop-topics) (Implementation / Solutioning) | * [Security concepts for developers](https://learn.microsoft.com/en-us/power-apps/developer/data-platform/security-concepts) * [Review security model for Dynamics 365 solutions](https://learn.microsoft.com/en-us/training/modules/fast-track-security/) * [Security in Microsoft Dataverse](https://learn.microsoft.com/en-us/power-platform/admin/wp-security) * [Create and manage masking rules](https://learn.microsoft.com/en-us/power-platform/admin/create-manage-masking-rules) * **BC:** [Layered security model in Business Central](https://learn.microsoft.com/en-us/dynamics365/business-central/dev-itpro/security/security-application) * **F&O:** [Securing data entities](https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/security-data-entities) * **F&O:** [Integrate your Dynamics 365 apps with other solutions](https://learn.microsoft.com/en-us/dynamics365/guidance/implementation-guide/integrate-other-solutions) | Apply Dataverse’s security model to your data architecture – e.g. define proper security roles and privileges for each table and use record- or column-level security where needed. For any system integrations or APIs, use secure protocols (HTTPS/OAuth) and avoid hard-coding secrets (consider Azure Key Vault or environment variable secrets for credentials). By designing with these built-in features and patterns, you reduce the attack surface from the outset. |
| Copilot Studio   * Are Copilot Studio components reviewed for security? * Do you need to enforce web and Direct Line channel security? * Is the copilot working unauthenticated, authenticated, or both? * Do you plan to use DLP policies to enforce Copilot Studio allowed channels and authentication settings?   [Manage Microsoft Copilot Studio](https://learn.microsoft.com/en-us/training/modules/implement-power-virtual-agents/) | * Review Bot topic permissions * Review Bot entities and flow permissions * Review administrator, export, import permissions * Enable Monitoring * Authentication |  |
| Copilot Authentication   * Have you enabled user authentication for the Copilot agent (avoiding anonymous access) to ensure only authorized users can interact with it? *For internal or sensitive data, require sign-in (SSO via Microsoft Entra ID) rather than allowing unauthenticated use?* | [Configure user authentication (Copilot Studio](https://learn.microsoft.com/en-us/microsoft-copilot-studio/configuration-end-user-authentication) |  |
| App Secrets/ Keys   * Are secrets (API keys, credentials) used by your agent stored securely (for example, in Azure Key Vault via environment variables) instead of hard-coded? This ensures keys are protected and rotated independently of the app code? | [Use environment variables for Azure Key Vault secrets](https://learn.microsoft.com/en-us/power-apps/maker/data-platform/environmentvariables-azure-key-vault-secrets) |  |
| Data Oversharing / Compliance Protections   * Are you following Responsible AI practices (e.g. applying content filters or data classification) to prevent the AI agent from outputting sensitive or harmful information? Employ techniques like prompt filtering (“prompt shields”) and use Microsoft Purview for data governance to ensure AI responses remain compliant and safe? | [Microsoft Purview protections for Copilot](https://techcommunity.microsoft.com/blog/microsoftmechanicsblog/microsoft-purview-protections-for-copilot/4406384) |  |
| Environmental Strategy  Evaluate and choose the right environment strategy.   * [Single vs. Multi-tenant strategy](https://learn.microsoft.com/en-us/power-platform/admin/multiple-online-environments-tenants) * Have you evaluated Managed Environments, Environment groups, rules and routing strategy for solution development & deployment? | * [Control user access to environments: security groups and licenses](https://learn.microsoft.com/en-us/power-platform/admin/control-user-access) * [Managed Environments overview](https://learn.microsoft.com/en-us/power-platform/admin/managed-environment-enable) * **F&O:** [Plan your environment strategy for Dynamics 365](https://learn.microsoft.com/en-us/dynamics365/guidance/implementation-guide/environment-strategy-overview) |  |

1. **Secure by Default**

**Objective:** To ensure that solutions are configured securely out of the box, minimizing the need for extensive post-deployment security configurations.

**Key Topics:**

* Default security settings and configurations
* Access control and identity management
* Data protection and encryption

**Best Practices:**

* Enable multi-factor authentication (MFA) by default
* Apply least privilege access principles
* Use built-in encryption features for data at rest and in transit

|  |  |  |
| --- | --- | --- |
| Topic | Additional Resources | Evaluation & Recommendations |
| Identity Management   * Do you enforce strong requirements for authentication? * How do you control privileged users' access to sensitive data? * Make sure [strong MFA authentication](https://learn.microsoft.com/en-us/entra/identity/authentication/concept-mfa-howitworks) is implemented. * How do you manage secrets? Store and manage secrets, keys, certificates in [Key Vault](https://learn.microsoft.com/en-us/azure/key-vault/general/) * Do you use service principals or managed identities? * Use [Azure Managed Identities](https://learn.microsoft.com/en-us/entra/identity/managed-identities-azure-resources/) for Integrations, Data Exchange and Plugins. | * [Use managed identities for Dataverse plug-ins](https://learn.microsoft.com/en-us/power-platform/release-plan/2024wave1/power-platform-governance-administration/use-managed-identities-dataverse-plug-ins) * [Use managed identities for Azure with your Azure data lake storage](https://learn.microsoft.com/en-us/power-apps/maker/data-platform/azure-synapse-link-msi) * [**BC:** Using App Key Vaults with Business Central Extensions](https://learn.microsoft.com/en-us/dynamics365/business-central/dev-itpro/administration/setup-app-key-vault) * **F&O:** [Setup Azure Key Vault client](https://learn.microsoft.com/en-us/dynamics365/finance/localizations/global/setting-up-azure-key-vault-client) |  |
| Role based Security  All user roles must be on least privilege principle.  [Get started with security roles in Dataverse](https://learn.microsoft.com/en-us/training/modules/get-started-security-roles/?wt.mc_id=cybersecurityawarenessmonth2022_csaalignedpost_blog_wwl) | * [Leverage security role templates](https://learn.microsoft.com/en-us/power-apps/developer/data-platform/security-roles) * **F&O:** [Role based security](https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/role-based-security) * **F&O:** [Active Directory security groups](https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/active-directory-security-group) * **F&O:** [Extensible data security policies](https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/extensible-data-security-policies) * **F&O:** [User security governance overview](https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/sysadmin/security-gov-overview) |  |
| Review privileged accounts security strategy   * Understand privileged roles for Microsoft 365, Dynamics 365 and Power Platform * Consider Just-In-Time access approach to grant limited elevated privileges * Leverage Service principals and Entra Applications for integrations & deployments | * [Configure user security in an environment](https://learn.microsoft.com/en-us/power-platform/admin/database-security) * [Use service admin roles to manage your tenant](https://learn.microsoft.com/en-us/power-platform/admin/use-service-admin-role-manage-tenant) * [Create an administrative user and prevent elevation of security role privilege](https://learn.microsoft.com/en-us/power-platform/admin/prevent-elevation-security-role-privilege) * [Enable just-in-time database access](https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/database/database-just-in-time-jit-access) * [Manage application users in the Power Platform admin center](https://learn.microsoft.com/en-us/power-platform/admin/manage-application-users) * [Register a Microsoft Entra app and create a service principal](https://learn.microsoft.com/en-us/entra/identity-platform/howto-create-service-principal-portal) * [Leverage security role templates](https://learn.microsoft.com/en-us/power-apps/developer/data-platform/security-roles) |  |
| Data Loss Policies Control   * Are you leveraging Power Platform’s default security controls? Have you set up Data Loss Prevention (DLP) policies and other environment-level guardrails so that apps, flows, and agents cannot use disallowed connectors or share data in insecure ways by default? * How do you ensure that internal confidential data doesn’t get available externally? * Do you plan to use DLP policies to enforce allowed or blocked Power Automate connectors or HTTP requests? * [Evaluate and provision DLP controls](https://learn.microsoft.com/en-us/power-platform/admin/wp-data-loss-prevention) | * [Cross-tenant inbound and outbound restrictions](https://learn.microsoft.com/en-us/power-platform/admin/cross-tenant-restrictions) * [Email exfiltration controls for connectors](https://learn.microsoft.com/en-us/power-platform/admin/block-forwarded-email-from-power-automate) | Enforcing DLP policies at the tenant/environment level provides guardrails that prevent makers from unintentionally connecting to unauthorized services or exfiltrating data.  For example, DLP rules can block agents from using anonymous access or certain publishing channels by default.  Consider using Managed Environments for Power Platform, which comes with enhanced default protections (e.g. weekly app risk analysis, secure tenant settings) out-of-the-box. |
| Environment Access   * Are access privileges restricted to the least privileges by default? Have you ensured new apps or bots are only shared with intended users/groups initially (instead of broadly), and are you using features like environment routing to isolate development work? * Keep check on Security Page Score. * Have you evaluated Managed Environments, Environment groups, rules and routing strategy for solution development & deployment? | * [Environment Routing (Personal Environments)](https://learn.microsoft.com/en-us/power-platform/admin/default-environment-routing)  Role-based sharing settings * [Security page overview](https://learn.microsoft.com/en-us/power-platform/admin/security/security-overview) * [Rules for environment groups](https://learn.microsoft.com/en-us/power-platform/admin/environment-groups-rules) | By limiting default access and sharing, you reduce exposure. For example, Power Platform’s *preview* sharing limits can restrict who a Copilot agent is shared with until it’s certified for wider use.  Likewise, enabling environment routing (a Managed Environments feature) gives each maker a personal dev environment so they aren’t building in the default environment where others could access their work.  Ensure new apps aren’t visible or usable by everyone by default – only grant broader access deliberately as needed. |
| Audit & Logging   * Do you audit and review access periodically? * Do you plan to use the Center of Excellence Starter Kit to monitor your copilots in your tenant? * Do you have other technical monitoring requirements and plans? * [Manage Dataverse auditing](https://learn.microsoft.com/en-us/power-platform/admin/enable-use-comprehensive-auditing) * [Evaluate and enable Entra Audit logs](https://learn.microsoft.com/en-us/entra/identity/monitoring-health/concept-audit-logs) * [Monitor Dataverse usage](https://learn.microsoft.com/en-us/power-platform/guidance/adoption/cds-usage) | * [Microsoft Dataverse and model-driven apps activity logging](https://learn.microsoft.com/en-us/power-platform/admin/enable-use-comprehensive-auditing) |  |
| Application Telemetry   * How do you plan to technically monitor your integrations and cloud flows? * Are audit logging and monitoring features enabled by default for the environment? For example, Dataverse’s auditing should be turned on to track critical actions. By default, many Power Platform services can log user activities – ensure this is configured so you have a security trail from day one. * [Azure Application Insights](https://learn.microsoft.com/en-us/power-platform/admin/overview-integration-application-insights) | * [Center of Excellence Starter kit](https://learn.microsoft.com/en-us/power-platform/guidance/coe/starter-kit) * [Power Platform: Auditing and Monitoring Setup](https://learn.microsoft.com/en-us/power-platform/admin/monitoring-troubleshooting) |  |
| Encryption   * [Manage the encryption key for environment](https://learn.microsoft.com/en-us/power-platform/admin/manage-encryption-key) * [Setup Lockbox (if applicable)](https://learn.microsoft.com/en-us/power-platform/admin/about-lockbox) * Is data encryption in effect for your solution by default, both at rest and in transit? All Dataverse data is automatically encrypted at rest (using Transparent Data Encryption) and in transit via TLS – ensure these defaults are intact and not circumvented? | * **BC:** [Encrypting Data in Dynamics 365 Business Central](https://learn.microsoft.com/en-us/dynamics365/business-central/dev-itpro/developer/devenv-encrypting-data) * **F&O:** [Encryption in finance and operations apps](https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/encryption) * **F&O:** [Customer managed keys for encryption at rest](https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/customer-managed-keys) |  |
| Network Controls   * Do you have network security requirements? * [Evaluate Service tags](https://learn.microsoft.com/en-us/azure/virtual-network/service-tags-overview) | * [Use Azure ExpressRoute with Microsoft Power Platform](https://learn.microsoft.com/en-us/power-platform/guidance/expressroute/overview) * [Virtual Network support for Power Platform overview](https://learn.microsoft.com/en-us/power-platform/admin/vnet-support-overview) * [Export APIs from Azure API Management to the Power Platform](https://learn.microsoft.com/en-us/azure/api-management/export-api-power-platform) * **BC:** [Use Azure security service tags to restrict network access from/to Business Central](https://learn.microsoft.com/en-us/dynamics365/business-central/dev-itpro/security/security-service-tags) |  |
| Data management strategy (Reporting / outside sources)   * [Row-level security (RLS) with Power BI](https://learn.microsoft.com/en-us/fabric/security/service-admin-row-level-security) | * [Evaluate & Review DirectQuery / SQL Query with PowerBI (if applicable)](https://learn.microsoft.com/en-us/power-query/connectors/dataverse) |  |
| Additional Security Best Practices | * [Safeguarding Dataverse sessions with IP cookie binding](https://learn.microsoft.com/en-us/power-platform/admin/block-cookie-replay-attack) * [Configure IP firewall in Power Platform environments](https://learn.microsoft.com/en-us/power-platform/admin/ip-firewall) * [Restrict Guest user permissions](https://learn.microsoft.com/en-us/power-platform/admin/control-user-access) * [Enable tracking user access for continuous improvements](https://learn.microsoft.com/en-us/power-platform/guidance/adoption/access-usage)   **F&O:** [RSAT User-based authentication](https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/perf-test/rsat/rsat-user-based-authentication) |  |

1. **Secure Operations**

**Objective:** To maintain and enhance the security of solutions during their operational lifecycle.

**Key Topics:**

* Continuous monitoring and incident response
* Patch management and vulnerability assessments
* Security training and awareness

**Best Practices:**

* Implement continuous security monitoring and logging
* Regularly update and patch systems
* Conduct periodic security training for all stakeholders

|  |  |  |
| --- | --- | --- |
| Topic | Additional Resources | Evaluation & Recommendations |
| Data archival & retention | * **F&O:** [Archive data in Dynamics 365 finance and operations apps with Dataverse](https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/archive-data) * **Purview** * [View Copilot Studio audit logs](https://learn.microsoft.com/en-us/microsoft-copilot-studio/admin-logging-copilot-studio) * [View the Power Platform connector activity logs](https://learn.microsoft.com/en-us/power-platform/admin/connector-events-power-platform) * **BC:** [Auditing in Purview](https://learn.microsoft.com/en-us/dynamics365/business-central/dev-itpro/auditing/audit-events-in-purview) |  |
| Do you have monitoring and alerts set up for your apps and data? Are you capturing audit logs and using tools like Microsoft Sentinel or Purview to detect suspicious activities (e.g. unusual data downloads, privilege changes, etc.) in your Power Platform environment? | * [Microsoft Sentinel Solution (Biz Apps)](https://learn.microsoft.com/en-us/azure/sentinel/business-applications/solution-overview)  [Power Platform Audit Logs (Purview)](https://learn.microsoft.com/en-us/power-platform/admin/admin-activity-logging) | Power Platform provides unified audit logs (user/admin activities) that surface in the Microsoft Purview compliance portal. Ensure these logs are enabled and retained. Moreover, the Microsoft Sentinel solution for Business Applications can be deployed to actively monitor those logs for threats.  Sentinel comes with analytics rules to detect anomalies — *for example:* mass deletion of records, apps executed from unusual locations, or flows run by deprovisioned users.  Configure alerting so that security events in your apps or bots trigger notifications to your administrators or Security Operations Center. |
| Incident Response & Backup Restores   * Do you have a clear incident response and recovery plan? In the event of a security breach or major incident, have you defined the procedures, contacts, and tools to respond quickly and mitigate damage (for example, isolating affected apps, revoking compromised credentials, notifying stakeholders)? * Are you taking regular backups of the Business Application environment and agent configurations? This ensures that if something goes wrong (security incident or otherwise), you can restore the last well-known state. Power Platform provides automatic and manual backup capabilities for Dataverse environments. | * [Incident Response Guidance (Power Platform)](https://learn.microsoft.com/en-us/power-platform/well-architected/security/incident-response) * [Back up and restore environments](https://learn.microsoft.com/en-us/power-platform/admin/backup-restore-environments) | It’s critical to establish and test an incident response plan for your Power Platform solutions. Microsoft’s guidance recommends defining procedures covering everything from minor security issues to full disaster recovery scenarios. Make sure your team knows who what will do if an incident occurs (for instance, who will contact the Security team, who will disable or quarantine affected components). Consider using Azure AD Privileged Identity Management for on-demand elevation of admin rights during incidents, and ensure you have data backup and restore processes for recovery. A systematic incident response approach will reduce the time to identify, contain, and remediate security incidents. |
| Environmental Strategy   * Are you doing periodic security assessments? * Are there procedures for regular updates, reviews, and incident responses for the solution? Plan for maintenance: apply updates/patches to any custom code or connectors, rotate secrets regularly, review audit logs, and have an incident response plan if the agent malfunctions or a security breach occurs. | * [Stay current with Dynamics 365 service updates](https://learn.microsoft.com/en-us/dynamics365/guidance/implementation-guide/service-solution-service-updates) * [Security assessment for your tenant](https://learn.microsoft.com/en-us/power-platform/admin/security/security-posture-overview) * [Protect and rotate application secrets (Power Platform)](https://learn.microsoft.com/en-us/power-platform/well-architected/security/app-secrets) * **F&O:** [Request credentials to access D365 finance and operations product database](https://learn.microsoft.com/en-us/power-platform/developer/unified-experience/finance-operations-product-db-access) |  |
| Monitor Telemetry Analytics   * Do you have monitoring and alerting in place for your agent and environment? Implement a holistic monitoring strategy – for example, integrate Power Platform telemetry and audit logs with a SIEM like Microsoft Sentinel to detect suspicious activities in agent interactions? * Do you have specific governance requirements? * Evaluate Security Information and Event Management (SIEM) implementation * Evaluate Security Orchestration, Automation, and Response (SOAR) implementation * Evaluate Data Governance strategy and solution implementation | * [Monitor and detect threats in Power Platform](https://learn.microsoft.com/en-us/power-platform/well-architected/security/monitor-threats#power-platform-facilitation) * [Dynamics 365 connector for Microsoft Sentinel](https://learn.microsoft.com/en-us/azure/sentinel/data-connectors/dynamics-365) * [Data governance via Azure Purview](https://learn.microsoft.com/en-us/purview/register-scan-dataverse?tabs=MI) * [Power Apps Tenant-wide analytics](https://learn.microsoft.com/en-us/power-platform/admin/tenant-level-analytics) * [Power Automate analytics](https://learn.microsoft.com/en-us/power-platform/admin/analytics-flow) * [Using Data Lake](https://learn.microsoft.com/en-us/power-platform/admin/self-service-analytics) * [Deploy the Microsoft Sentinel solution for Microsoft Power Platform](https://learn.microsoft.com/en-us/azure/sentinel/business-applications/deploy-power-platform-solution) * **F&O:** [Microsoft Sentinel solution for Dynamics 365 Finance and Operations](https://learn.microsoft.com/en-us/azure/sentinel/dynamics-365/dynamics-365-finance-operations-solution-overview) |  |
| Additional Security Best Practices | * Apply [Context based AD policies](https://learn.microsoft.com/en-us/power-platform/guidance/adoption/conditional-access) * [Block access by location with Microsoft Entra Conditional Access](https://learn.microsoft.com/en-us/power-platform/admin/restrict-access-online-trusted-ip-rules) * [Continuous access evaluation](https://learn.microsoft.com/en-us/entra/identity/conditional-access/concept-continuous-access-evaluation) * [Services Trust Portal Guidance](https://servicetrust.microsoft.com/ViewPage/TrustDocumentsV3) * [Penetration Testing Rules of Engagement](https://www.microsoft.com/en-us/msrc/pentest-rules-of-engagement?rtc=1) |  |

Further guidelines listed in this artifact are not exhausted, implementers are always advised to look at product updates for updated guidance.

**Appendix:**

* [Microsoft Power Platform security and governance documentation](https://learn.microsoft.com/en-us/power-platform/admin/security)
* [Microsoft Learn Security Hub](https://learn.microsoft.com/en-us/security/)
* [Protect your data with Dynamics 365 security controls](https://learn.microsoft.com/en-us/dynamics365/guidance/implementation-guide/security-strategy-security-controls)
* [Well-Architected Security quick links](https://learn.microsoft.com/en-us/power-platform/well-architected/security/)
* [Dynamics 365 FastTrack Architecture Insights](https://learn.microsoft.com/en-us/shows/dynamics-365-fasttrack-architecture-insights/best-practices-power-platform-and-dataverse-security)
* [Microsoft Power Platform and Dataverse: Skill up on security by design](https://techcommunity.microsoft.com/t5/microsoft-learn-blog/microsoft-power-platform-and-dataverse-skill-up-on-security-by/ba-p/3250818)
* [Cybersecurity Awareness - Power Platform](https://learn.microsoft.com/en-us/collections/g1kbpkdg628q7?wt.mc_id=cybersecurityawarenessmonth2022_csaalignedpost_blog_wwl)
* [Protecting Data with Dataverse Part 2: Security from Internal Threats (Users)](https://www.microsoft.com/en-us/power-platform/blog/power-apps/protecting-data-with-dataverse-part-2-security-from-internal-threats-users/?msockid=1de4bf3d1c9d60712ccbabaa1dde61a6)
* [Embrace proactive security with Zero Trust](https://www.microsoft.com/en-us/security/business/zero-trust)
* [Power Platform and Dynamics 365 Apps – Guide to security and Compliance](https://aka.ms/D365SecurityAndComplianceGuide)
* [Dynamics 365 implementation guidance](https://learn.microsoft.com/en-us/dynamics365/guidance/implementation-guide/overview#p=192)
* [Solution architect series: Model security for Power Platform solutions](https://learn.microsoft.com/en-us/training/modules/model-security/?wt.mc_id=cybersecurityawarenessmonth2022_csaalignedpost_blog_wwl)
* [Implementation recommendations for Microsoft Power Platform environments](https://learn.microsoft.com/en-us/training/modules/implementation-recommendations/)
* [Power Platform security FAQs](https://learn.microsoft.com/en-us/power-platform/admin/security/faqs)
* [Secure your Dynamics 365 data and apps](https://learn.microsoft.com/en-us/dynamics365/guidance/implementation-guide/security)
* [Microsoft Power Platform security and governance documentation](https://learn.microsoft.com/en-us/power-platform/admin/security)
* [IT Governance Controls for Your Copilot agents](https://www.microsoft.com/en-us/power-platform/blog/power-apps/it-governance-controls-for-your-copilot-agents/)