TO INCREASE

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Security and Compliance Studio 10.0.39.43

Release Notes

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Document Information

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1. Introduction

1.1 Purpose

This document highlights new features and enhancements that ship in the new **Security and Compliance Studio 10.0.39.43** release from To-Increase. This release is compatible with the version of Microsoft Dynamics 365 for Finance and Operations, **10.0.36 or later**.

1.2 Audience

This document is intended for new or current Security and Compliance Studio partners and customers. Some knowledge of D365 for Finance and Operations and prior versions of Security and Compliance Studio, previously Dynamic Security Management (DSM), for Microsoft Dynamics AX 2012 is assumed.

1.3 Product release information

Security and Compliance Studio 10.0.39.43 *for Dynamics 365 Finance and Dynamics 365 Supply Chain Management (10.0) is built upon D365 version [Minimum GA version required]. Since Microsoft maintains a no breaking changes policy, the fact that this release is built on this version means that it can be applied to an environment running on D365 version [Minimum GA version required] or any later version and the application should compile without any issues. However, as we have only functionally validated this version against D365 version [latest GA version], we recommend applying our TI product release on that MS version as well. If you deviate from this (and thus apply the release to a different version), we recommend performing a more thorough round of testing before applying the release to a production environment.*

This is summarized in the following table.

Release date [TI-Product]	[TI-Version number]	Minimum required D365 version	Validated against D365 version	Compatible with D365 version
05/04/2023	10.0.39.43	10.0.36	10.0.39	10.0.36 and above

In case of an Error, To-Increase may provide a Hotfix on a reasonable efforts basis in a way it considers appropriate in its discretion. To-Increase cannot be obliged to provide Hotfixes if Client has not deployed the latest Release or the Release second to the latest Release and/or is not using a supported version of Microsoft Dynamics.

To ensure our customers can fully leverage the latest enhancements, features, and quality improvements, we are committed to providing increased support by keeping them updated with the most recent releases. Our data indicates that customers on the latest version experience fewer issues and requests, demonstrate greater resilience, and effectively enhance their organizational efficiency.

More information about our latest available product versions, the latest validate GA-versions from Microsoft as well as the Minimum MS version required, please visit this page : Knowledge Base - Support - To-Increase

1.4 Deliverables

Security and Compliance Studio is released on the following Microsoft Dynamics 365 for Operations Build.

Deliverable	Description
Solution package	Security and Compliance Studio is delivered as a Microsoft Dynamics Lifecycle Services (LCS) solution package.
Software deployable package	Security and Compliance Studio 10.0.39.43 and SCS-fix deployment issue
Release notes	This document is provided with the Security and Compliance Studio product deliverables.
Implementation methodology	The solution package contains a *Security and Compliance Studio implementation methodology* that provides detailed step-by-step instructions on how to install, learn, and implement Security and Compliance Studio.
Getting started BPM library	The solution package includes a *Getting started with the Security and Compliance Studio* BPM library. This library contains a number of task guides that showcase some of the key capabilities of Security and Compliance Studio.
Documentation BPM library	The solution package includes a *Security and Compliance Studio documentation* BPM library. This library contains a comprehensive set of task guides that document how to use *Security and Compliance Studio* for your BPM activities. This documentation is provided in U.S. English only.
Authentication assets	A To-Increase security certificate is provided to allow trusted installation of the provided model files and ISV license files.
Process data package	The solution package provides a simple Security and Compliance Studio *demo* process data package that can help you get started from LCS.

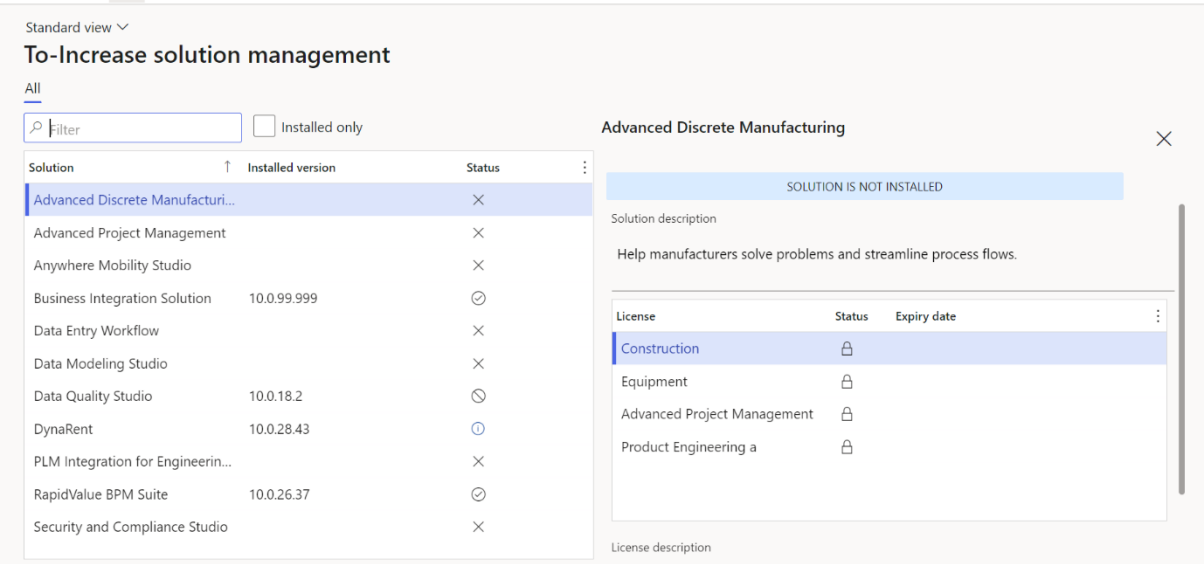
1.5 Common features

To-Increase is offering various different add-on solutions. Some features and technical solutions are common or could be common for all of our solutions on the Dynamics 365 Finance and Operations platform. As of November 2022, we will start leveraging a new common library model.

The common library model will be a centralized location where the new common features will be added automatically and customers don't have to make an additional effort to update the build pipelines after the first enablement of this model.

ISV licensing is technically supported with a code signing certificate. The certificate we have to use is expiring every three years, next up for renewal in 2023. In the near future, our solutions will refer to this common model for the code signing certificate, instead of maintaining it separately in all our solutions.

Next to technical content, the common library comes with features which are beneficial to our customers. E.g. a Solutions Management dashboard gives a clear view of currently installed versions, status of license, option to renew licenses without any downtime, easy access to release notes and documentation, and the ability to leave feedback through the in-app feedback system.



On all To-Increase forms, there is on the left-top of the forms a smiley icon in the menu where you can provide us feedback, suggestions and ideas so we can learn how improve our solutions.

1.6 Certificate renewal

The security certificate, that expires every 3 years, ensures that our customers have valid To-Increase software installed and not an unlicensed copy. This digital check is executed during installations and upon installing the license files, ensures that they have legitimate software installed. The previous security certificates for To-Increase solutions would expire on June 9, 2023.

This release (and releases beyond) contains the new certificate and a new feature within the Solution Management Workspace. After installing the update, the security certificate renewal can be completed in 3 simple steps.

Step 1: Install the update and navigate to the Solution Management Workspace

Step 2: Click the 'Retrieve available licenses' in the action pane

Step 3: Validate the licenses for correctness and completeness and click import

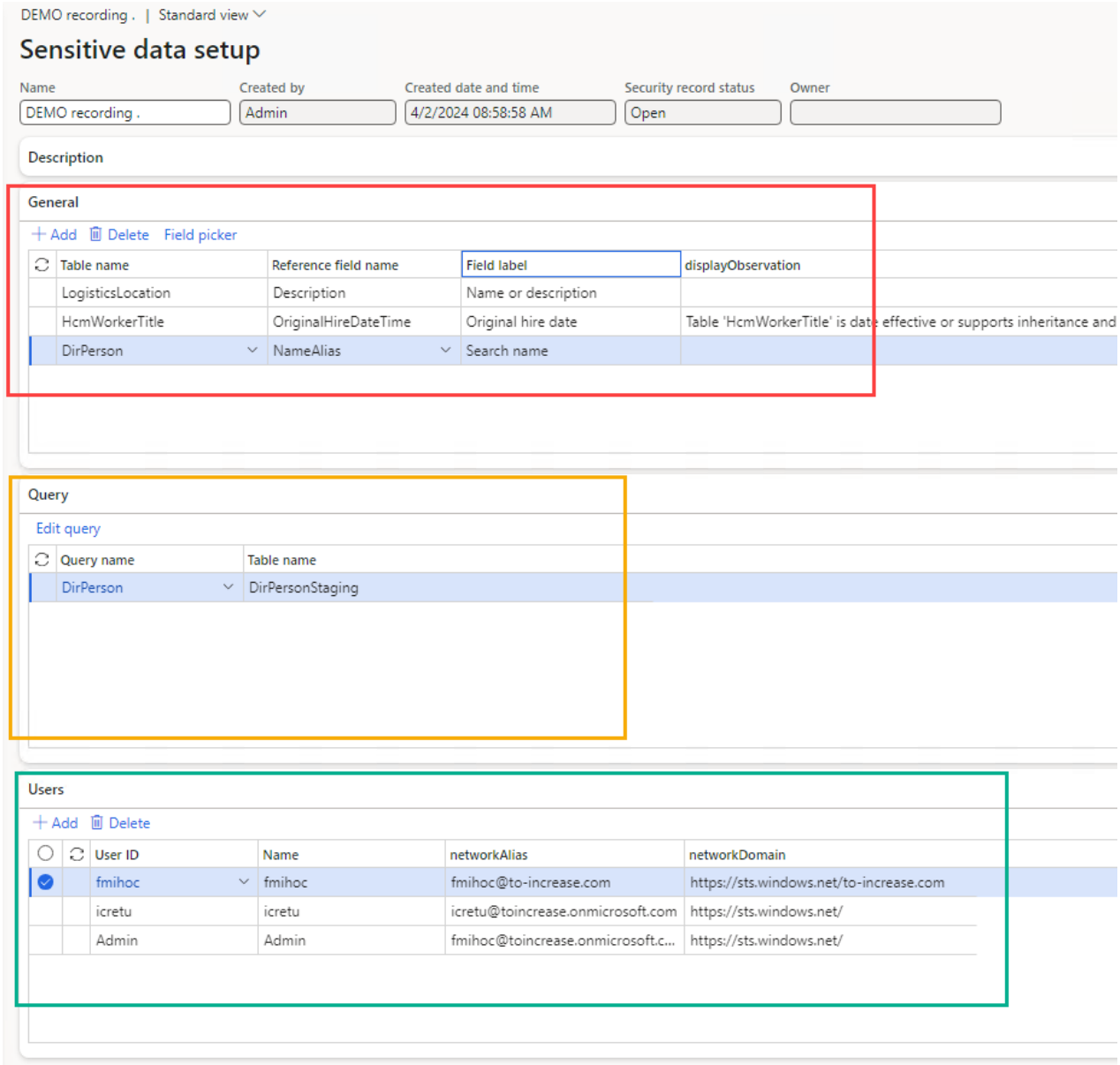
Click here for more information on the Solution Management Workspace.

2. What's New in Security and Compliance Studio 10.0.39.43

2.1 User audit log for sensitive data

A new feature will allow the system admin to trace potential security violations regarding business sensitive information.
Using the field picker tool or manually adding, the user can now record the fields that are providing access to sensitive data, creating a 'Sensitive data setup' that will be used to track any changes to those fields.

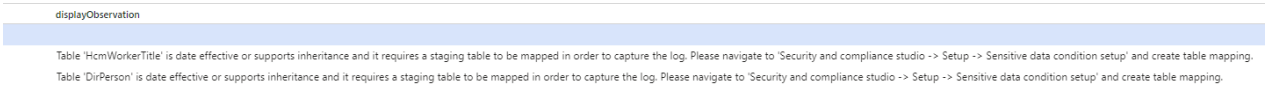
This new form can be found under *Security and Compliance Studio -> Inquires -> Sensitive data setup*.
Please refer to the screenshot below:



This page has three sections:

- General section: In this section, user can use the 'Field Picker' option to navigate to desire forms and pick the fields that need are providing access to sensitive data, or you can use the 'Add' option to manually add the table and the field using the lookups.
- Query section: For each table recorded you can also add query conditions using the 'Edit query' option. For example, you can add fields from the Address table and then add query condition where the address is marked as Private. That means the address information is sensitive data only if it's marked as 'Private'.
- User: The user section denotes the users that can see the log generated for this current sensitive setup.

When recording /adding fields you might see the following observations:

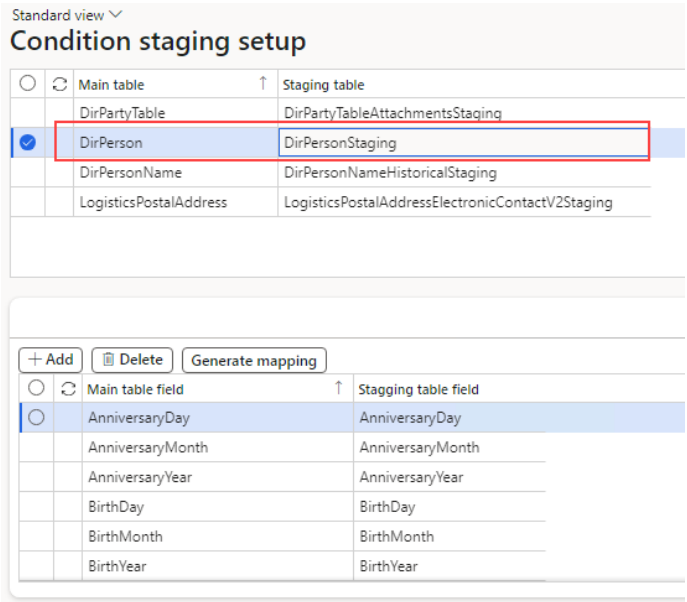


Observation example: Table '(table name)' is date effective or supports inheritance and it requires a staging table to be mapped to capture the log. Please navigate to 'Security and Compliance studio -> Setup -> Sensitive data condition setup' and create table mapping."

This means that the selected table is part of an exception and cannot be used to validate the data against it, so we need to create a table mapping that will be replacing the original table in the validation process.

The mapping table should be a staging table or a child table that has the field(s) in question (the fields we are trying to mark as sensitive).

Navigating to *Security and Compliance studio -> Setup -> Sensitive data condition setup' and create table mapping* will open the form. Here we can create the mapping.



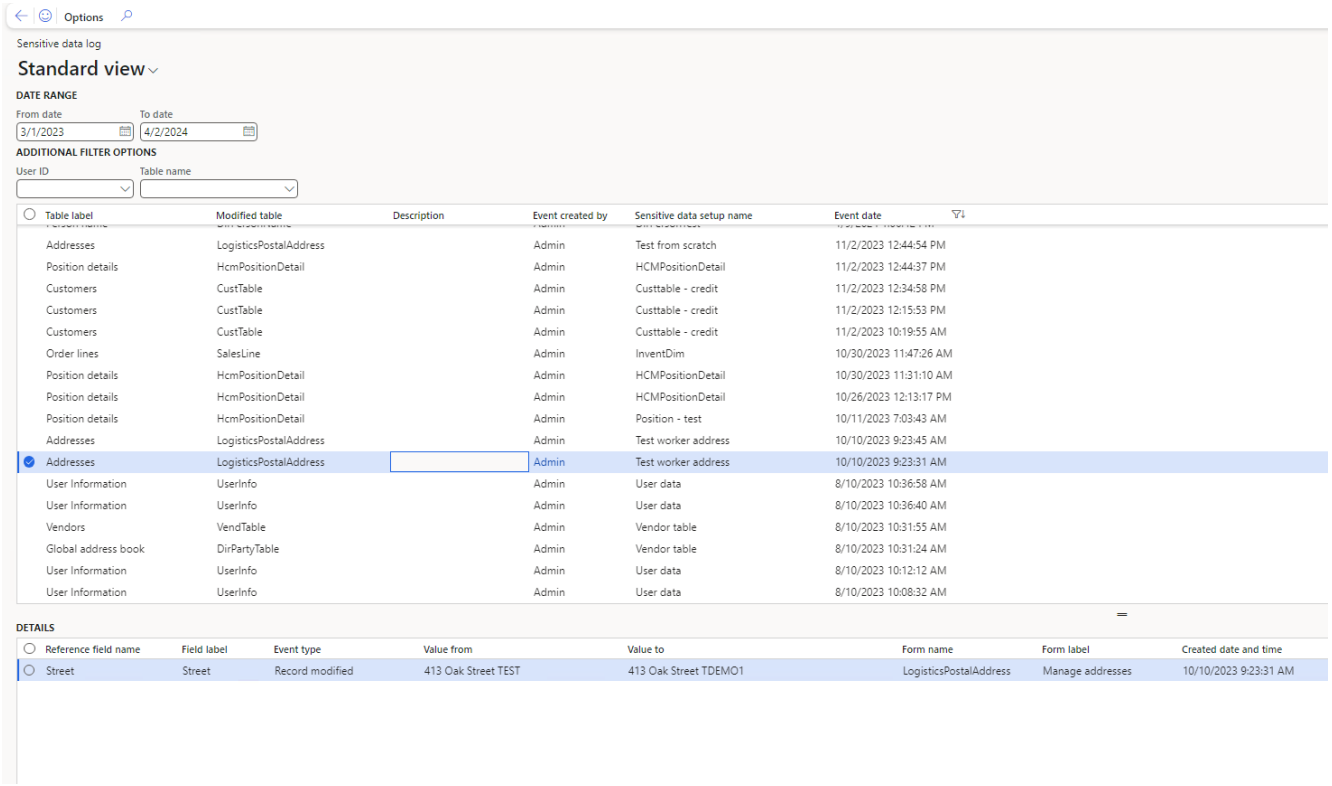
The mapping can be manually created using the 'Add' button to add the field mapping. Or we can use the 'Generate mapping' option to automatically determine the field mapping. In this case the fields that have the same name on both tables will be added.

NOTE: There are exceptions where the field name from 'Main table' is different from the field on the 'Staging table'. E.g.: 'BirthDay' and 'Day of birth'. Manual mapping is required in this case.

After the mapping is completed the message from the Observation will be removed.

Now, when editing the fields from the Sensitive data setup will be capture under a log.

The new log can be seen opening the "*Security and Compliance studio -> Inquiries -> Sensitive data log".*



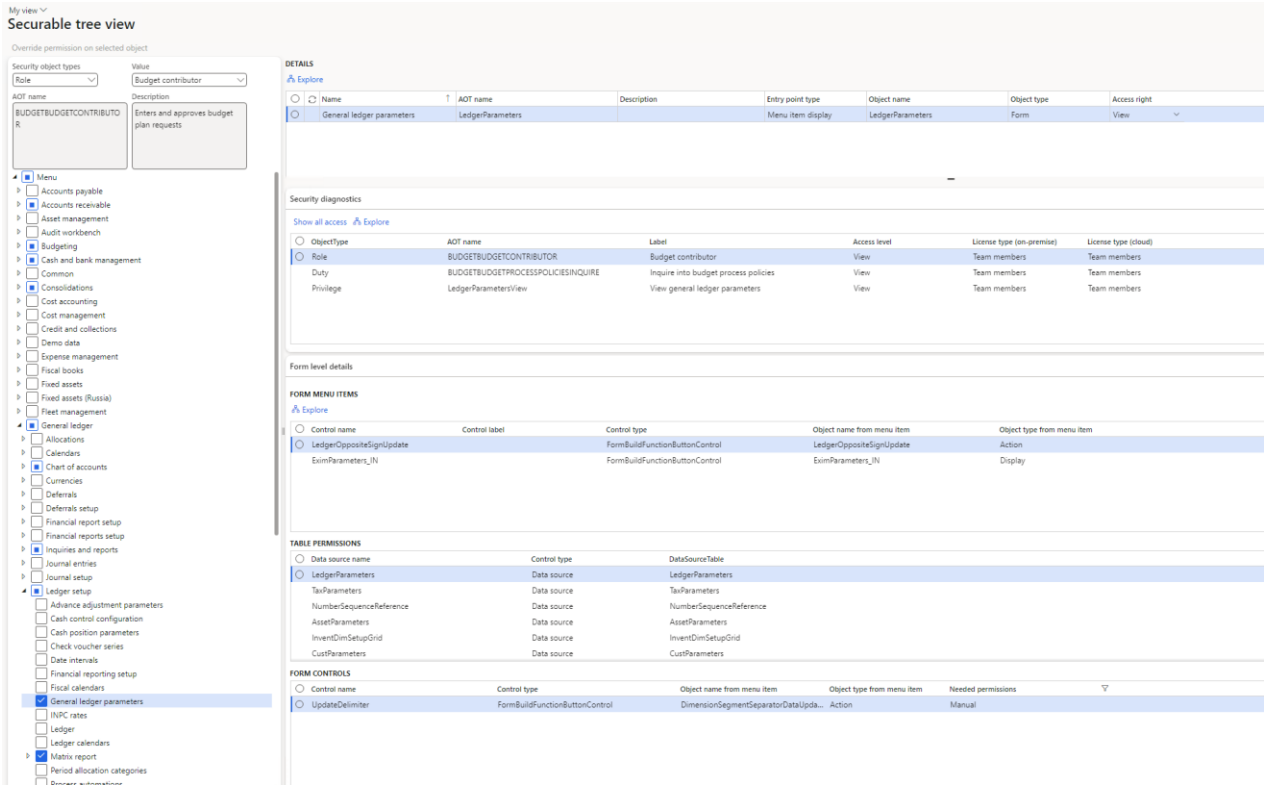
The Sensitive data log can be filtered based on date, user ID and table name.

NOTE: A part of the log can be seen only by the users that are assigned on the Sensitive data setup.

2.2 Securable tree view

This feature will allow an overview of the securable objects for a better and easier visibility and control on which objects are being used in what menu items to provide optimum security access.

By selecting a securable object (role, duty or privilege) you can immediately see in the menu lookalike tree node where the object has access to and drill down for more details.

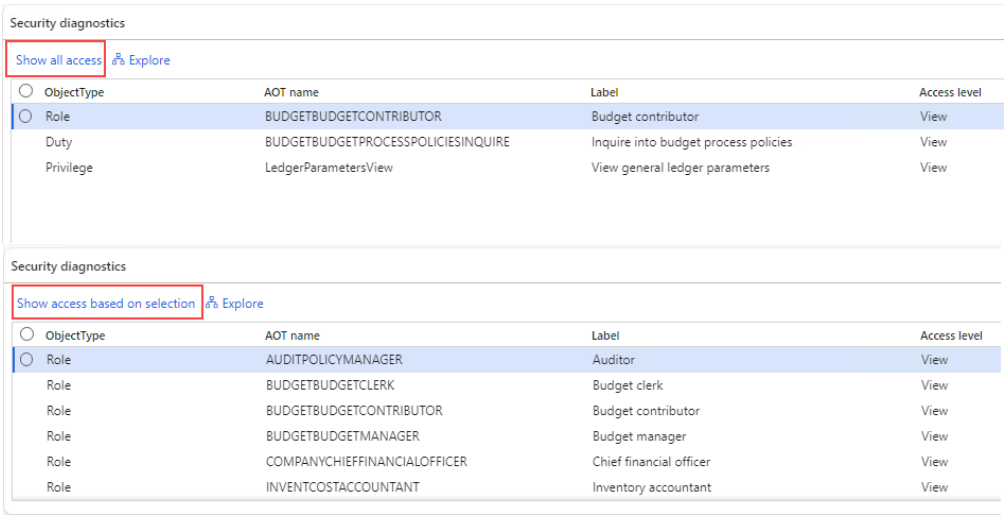


After selecting a securable object, the tree node will update with blue markers based where access is provided. In this example the 'Budget contributor' role was selected and we can see all the modules where it has access.

We can expand the tree node to navigate to the entry points level for more details.

This page contains the following section:

- **Details**: The details section shows the selected menu items or the menu items from the selected group.
- **Security diagnostics**: This section shows the securable objects where the selected menu item has access to. Here there are two options Show all access button/ Show access based on selection (same button, label will toggle based on clicking it) :
    a) Show all access button – that will show all the security objects (roles, duties and privileges) from the system where the selected menu items have access to
    b) Show access based on selection button (default option) – will show all the security objects from the main selected object (in this example 'Budget contributor' role)



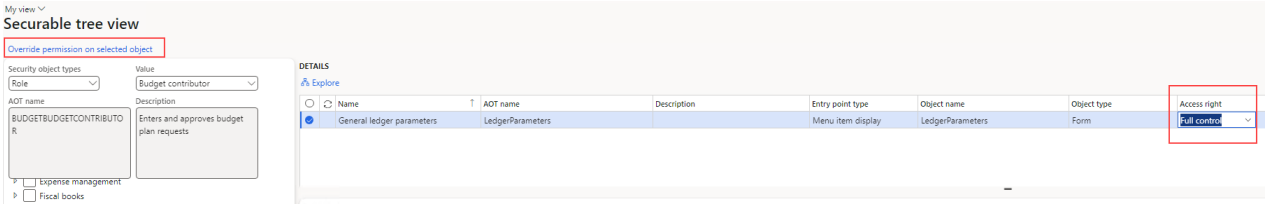
NOTE: Security diagnostics section is similar with the 'Security diagnostics' option from standard D365FO that can be found on every form.

- **Form level details:** This section it's divided into three grids as follows:
  a) Form menu items: if the selected entry point (from Details grid) is form type it will display all the other menu items that are found on the form's level.

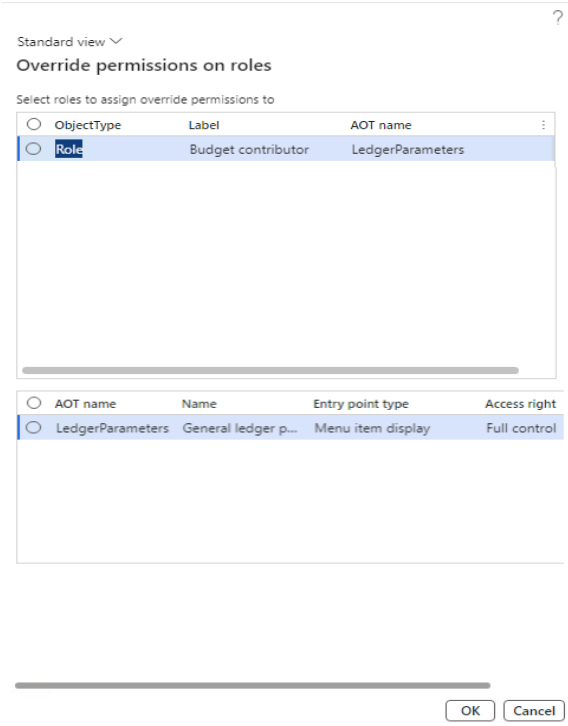
     On form level there are multiple options/buttons that are opening other forms. Here these forms are displayed so you will know that if you want to provide full access to a form you need to provide access to the forms that are opening from the buttons available on that form.

  b) Table permissions: it will display all the tables behind the datasources of the selected entry point on the Details grid.
  c) Form Controls: some form control require 'manual persmission' that is set on the form's properties by the developer/Microsoft. These controls require the specific access in order to access them.

In the Details grid you can modify the 'Access level' of the entry points. This will enable the 'Override permission on selected object' button that will allow you to modify the access level of the item.



When using the option, a dialog form will be opened with the summary of the changes. Clicking 'Ok' it will apply the new changes, modifying the access level of the security object and refresh the tree node.

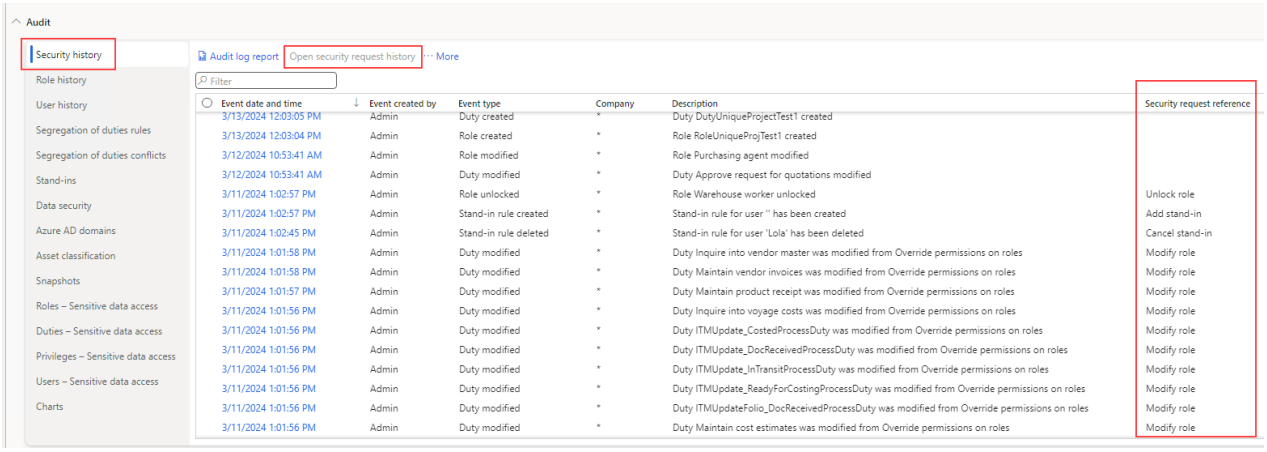


2.3 Security request history track

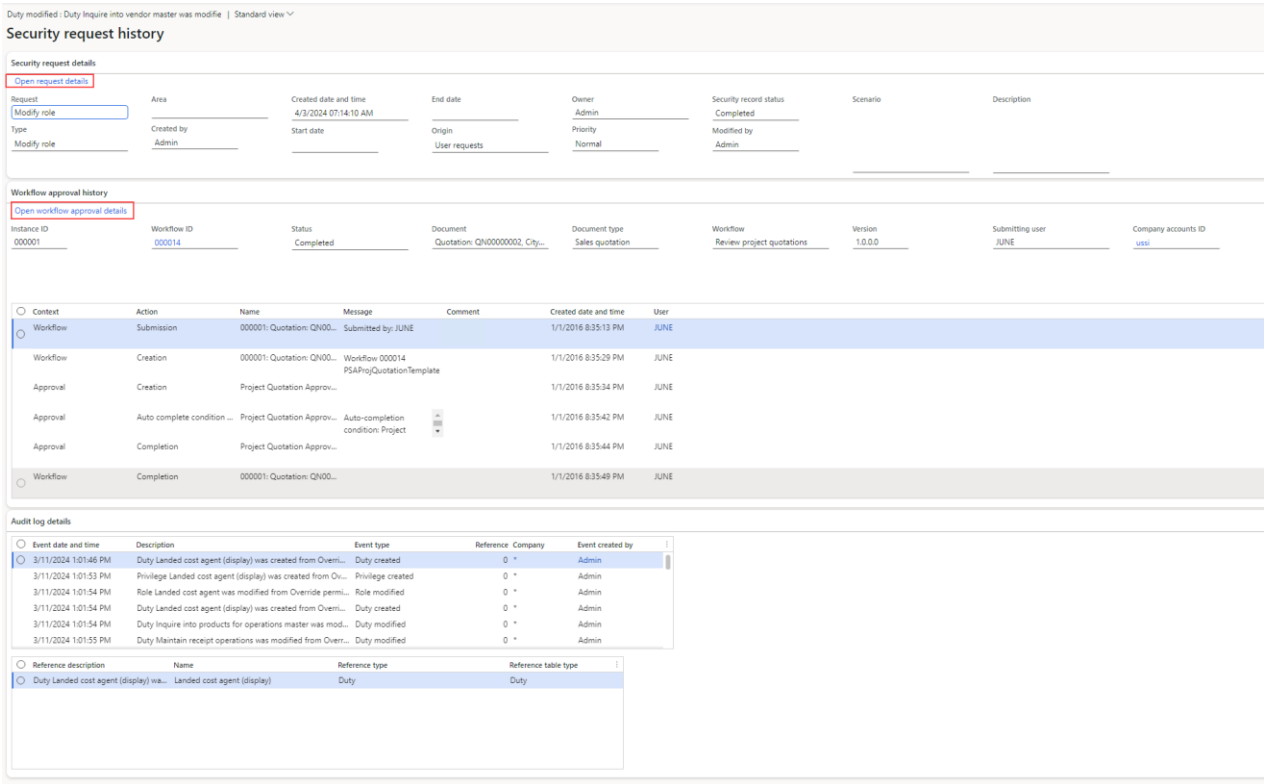
We had a request to have a **Workflow-enabled user changes requests history,** to link the Audit Log entries to the Security Request, for example, when a new user requested has been approved and the user has been created a new Audit Log record will be recorded, but we are not able to track it if it was generated by now we know that the Audit Log record has been created from a Security Request and we know who approved it and when that did happen.

For this we have added a new column into the 'Security history' that can be access from *Security and Compliance -> Workspaces -> Security audit.*

The new column will display the name of the 'Security Request' if the audit trails was generated by one.
A new button was added, and it will be enabled when a record with 'Security request' has been selected.



Using the 'Open security request history' button it will navigate you to a new form that will have a summary of the security request history where information related to the Security Request and the workflow history can be seen.



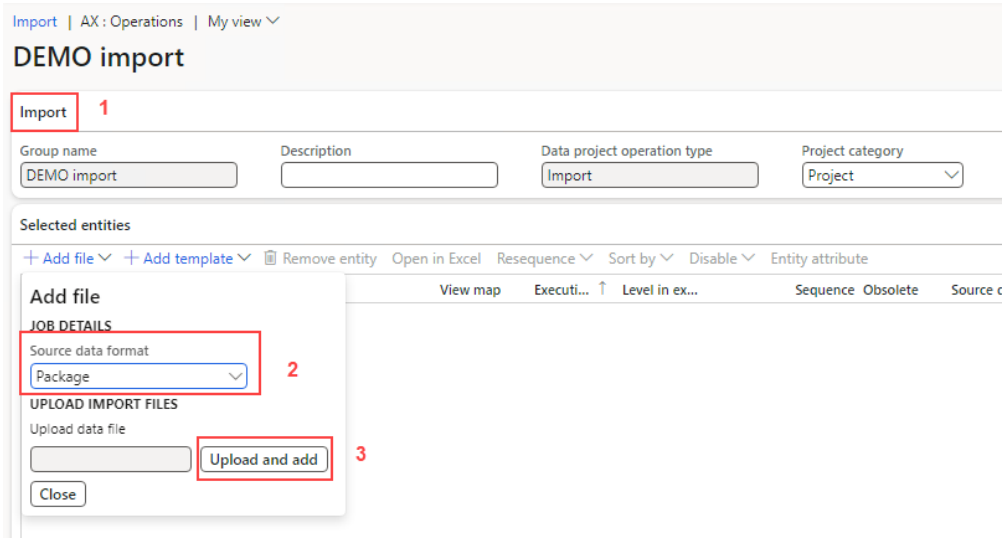
Of course, for in deep analysis options like ‘Open request details’ and ‘Open workflow approval details’ are available.

2.4 Enhanced SoD predefined list

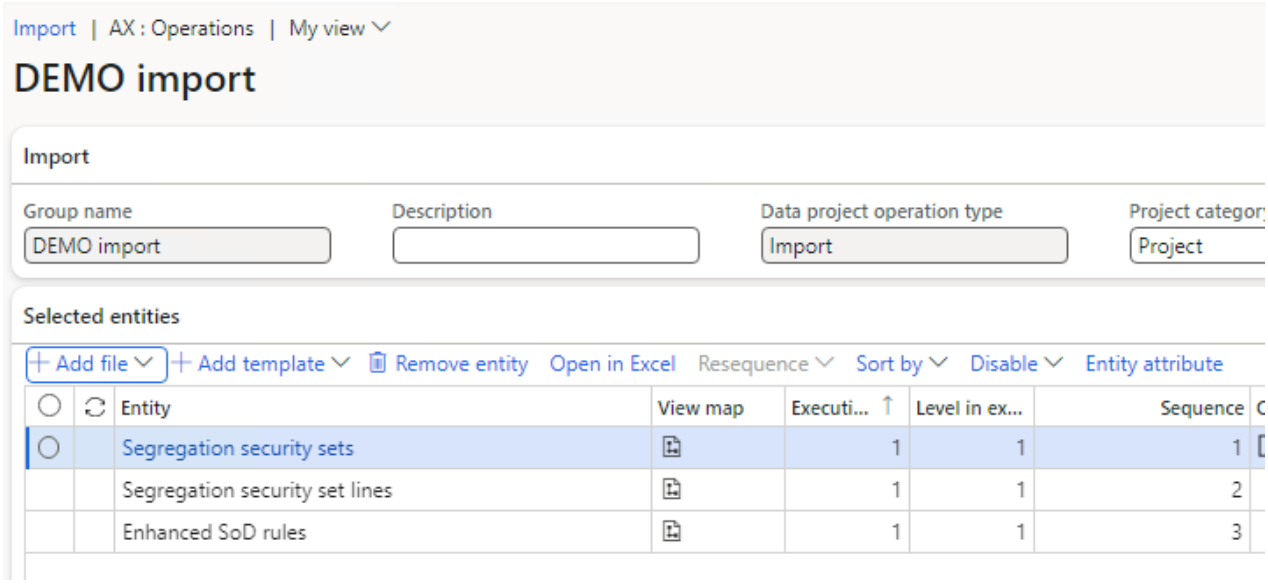
A list of predefined enhanced SoDs rules has been created. The rules are based on privilege and entry points (segregation security sets).

The file will be available from our support teams. Do not hesitate to request it.

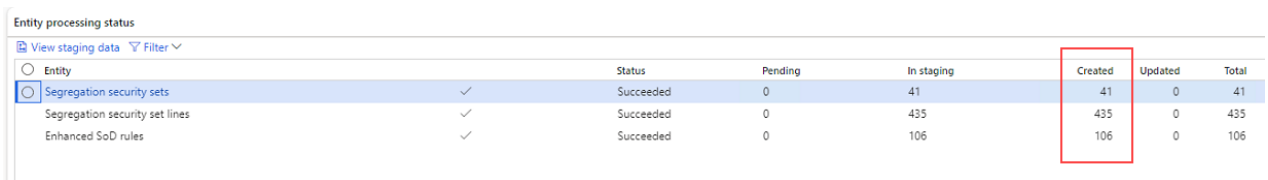
The file can be imported using the standard Data Management Framework (DMF) where a new import project needs to be created and a package file type needs to be added.



After the file upload three data entities will be added to the import project.



Import the file and the result should look like this:



This will import the segregation security sets and afterwards the enhanced SoD rules.

The rules should be 106.

NOTE: 106 rules will be imported, but children records will be automatically created on the import. Overall a number of 2421 rules will be generated.

3. Features introduced in last few releases of Security and Compliance Studio

Some important features from the last few releases includes a number of important new capabilities and enhancements requested by customers and partners, such as:

- Security requests enhancements and workflow. Security requests functionality has been introduced to new exciting features that will help your organization to better handle user requests. The form has been enhanced and for a better control we also introduced the workflow component that will allow you to review/approve/deny/reject the security requests.
  One of the greatest enhancements brought to you is the automated process that will create security requests once it is approved.
- Export security explorer objects to excel in a de-normalized format. You can now export securable objects in a "De-normalized form" from security explorer. All Securable objects related to a particular role/user/duty/privilege/entry points can be exported into an Excel sheet for further analysis.
- Merge security scenarios and match role. You can now merge more than one scenario into one new scenario if required by business and change in organization setup. This feature is very useful in combining more than one scenario then create a role which can perform all the business process recorded in the scenarios.
- Mark any Security Role as Active/Inactive. Mark any security role as "Inactive". Once the role is inactive, it cannot be assigned to any user in SCS. This feature is very useful in limiting the number of security roles that can be assigned to users. Also if you want to preserve a set of roles that should not be updated like standard Microsoft security roles for reference. With SCS, it is useful in helping prevent update standard MS roles by mistake.
- Recording steps to scenario. You can now record Business process steps along with entry points while creating a security scenario for more information.
- Override permission based on scenarios. You can now override permission on existing roles based on your recording or a security scenario. This helps security administrators to deny access to some entry points on a particular role. Customized permission can also be set for other access types. Very useful if you want to merge roles and just exclude limited entry points
- Option to mark, track and audit security objects providing access to sensitive data. You can now use SCS in defining and managing the security objects access to sensitive data. Specific definition of sensitive data might be different for different industries or countries. An organization can define specific definition for sensitive data as per their industry, country and policies. For some organizations, sensitive data might be any data that is related to finance, human resource or personal. It is up to an organization to define sensitive data. In D365FO we assign security roles to users. Security roles grant access to perform business operations, it might provide access to sensitive data as well. In SCS we can specify which role, duty, privilege or entry point provides access to sensitive data.
- Option to create a duty from Matched Privileges grid in Match roles form. You can now create a duty from selecting one or more privileges in the Match roles form to design a security role matching the user work scenario at the least license cost.
- Option to import and export data using Data Entities in Security and Compliance Studio. In this release we have added some data entities currently supported for Security and Compliance Studio.

The approach has been to enable data entities for all tables where relevant in Security and Compliance Studio in order to provide import and export capabilities.

- Option to compare Security Snapshots stored in the security setup. Building upon what we already have implemented in the fall release (security snapshots) we have gone furthered and added the possibility of comparing the existing security snapshots. Snapshot comparison feature allows security officers and administrators to do a detailed comparative analysis between any two security snapshots for all security objects in D365 FOE setup i.e. Users, roles, duties, privileges. Both single record compare and full compare options for the selected snapshots are supported along with multiple views. The comparison option will allow the user to see what modifications had occurred in the security setup since the last changes. The users can keep track of the changes, comprehend and analyze them in order to strengthen the security further.
- Enhanced Audit log capability to capture all the changes from development space (AOT) as well into Audit Log
  This release enhances the audit log feature within Security and Compliance studio in order to capture and register the changes made directly on the security objects from the development space (visual studio). Now, when a new snapshot is created; automatically the new snapshot will be compared with the last one. In this way all the changes made in security configuration will be captured in the Audit log.
  This comes as a solution of capturing all the changes no matter if they took place in the *UI (user interface)* or directly into *development space (in Visual Studio).*
- Option to create one or more privileges and also one or more duties while merging roles. "Merge role" feature now comes with an option to create only one merged privilege for all entry point types in addition to the existing options to create multiple privileges and one or more duties. Previously you can split up entry points in separate privileges and duties by entry point type. Now you can create also only one privilege for the merged roles.
- Ability to create scenarios from D365 module menus. You can now model security scenarios for D365 modules. "Add module access" feature helps you to create a new scenario based on the complete list of a module menu items with a desired level of access types. This is of great help when you desire to have a security role providing you access to all or most of one module features.
- Snapshots based performance and scalability enhancements. The entire functionality for Rebuild Data, Security Explorer and Match Roles revolves around the security objects (roles, duties, privileges and entry points) and the associations between them (duties assigned to role; privileges assigned to each duty, etc.). All of these are kept in standard code that was preserved, externally, into a DLL. Using this DLL for multiple scopes in Security and Compliance Studio end up with a performance issues on the above mentioned business logics/functionalities. We now have created a structure of tables to keep the data related to each security object and the association between them and easily access it directly from tables and also much faster. This has led to drastic improvement in the "Match roles" and "Rebuild data" programs performance.
- Improved "Create role wizard" based on a grid framework. "Create role wizard" is now based on a new grid framework making it a great user experience. This wizard helps you to create a new security role based on duties and privileges with letting you know the license type before role creation.
- Accessing Security Explorer from all D365 FOE forms. This release comes with Security and compliance studio security explorer embedded in all D365 FOE forms. This provides a very useful way to analyze users and associated security objects (roles, duties, privileges, entry points) that have access to that D365 FOE form.
- Option to create duties and SOD compliance check as well while merging roles. "Merge role" feature now comes with an option to create duties along with the privileges. Previously you can split up entry points in separate privileges by entry point type. Now you can create and associate duties as well for the different entry point type (action, display, output etc.).
- Importing New Users while Synchronizing the group users with the Active Directory group members. We added a new small feature to our Azure AD group synchronization job. On the dialog

of the Synchronize the group users with the Active Directory group members, we introduced a new parameter to import users.

- Licensing changes – To help our customers we have implemented new licensing changes within SCS. Microsoft has taken a commercial decision last year to split the license to Finance, SCM, and project, for more details you can have a look at Microsoft's new licensing guide. These changes left customers confusing about how they can be compliant with new license changes. That's why we have decided to build this feature, now customers can see a new license type field in SCS forms such as security explorer, match roles, license optimization workspace, etc.
- Uptake RapidValue Scenarios directly as SCS Security Scenarios – Customers can now directly upload the RapidValue Scenario task guides per security roles (Procedure activities which include flows across multiple roles) as a Security scenario in Security and Compliance Studio. This will be very useful where both RapidValue BPM Suite and Security and Complicate Studio are implemented. You might be aware that now in RapidValue, you can have Business process hierarchy with its linked task guides exported from RapidValue to a user defined local Windows folder. Export logic takes care of both the modeling techniques where customer is using Flow-Activity way of modeling and also the Scenario" Procedure Activity" way of capturing flow variations.

- Enhanced Segregation Of Duties – In standard D365FSC, we can only define SoD rules at duty level which is rarely useful. In SCS, with this release user can now define SoD rulesets at any level (Duty, Privilege or Entry Point) in the security hierarchy in D365FSC. This makes this feature more practical and extremely useful for customers seeking better regulatory compliance like ISO 27001 section 6.1.2, SOX Control 404 and in general much improved security design better equipped to prevent frauds.

- Organization Risk Register– All Organizational risks can be now mapped in SCS "*Integrated risk Management workspace*". They may be financial risks related to SoD violations or can be related to any other organizational strategy or operational aspect. This feature will evolve in coming quarters in a full-fledged "Risk Management" capabilities within SCS enabling Organizations to register, assess, monitor, mitigate and close it.

- AAD related SoD Validations across SCS – SCS now ensures that SoD violation checks also consider Security roles acquired by a user from being associated within an AAD. This is applicable all across SCS features. This helps in better handling of internal controls.

- Security Explorer displaying Tables, Service operations and Data Entities entry point's type - Security expirer has been enhanced to now include also the following entry point's type: Tables, Service Operations and Data Entities.
- Performance Optimization – Significant performance improvement in the following programs: Create snapshot; Security Explorer pinning, Match roles and Marking a record as sensitive.
- A new "Share" Workspace - A new workspace "Security and compliance file share" is added to manage task recording and images being used at various places in security & compliance studio.
- AAD groups' information in D365FO- In standard D365FO, we cannot check what all the users added to AAD groups and we have to login to azure portal. Now in SCS, we can check what all the users added to AAD groups in D365FO itself along with all related audit tracking for AAD groups in SCS itself.
- Verify SoD rules in Stand in - You can now use "Validate Sod rules " functionality while defining new stand-ins in SCS to know in advance, if there will be any SoD violation when security roles of user will be assigned to stand in user.

- Chart to give an overview of number of users and their last logging details- SCS now comes with a chart to categorize all users with their login details and time series analytics .This helps a lot in both compliance needs and optimizing license costs to deactivate or remove users based on an organization's security policy.
- Asset classification User Interface - SCS provides user interface, which shows all the fields with their asset classification. Chart to get the overview of different asset classification and how many field has the same asset classification. Asset classification is a table field property, classifying type of data it contains. Tagging a column helps easily marking data in scope for GDPR/GxP and many other such compliance regulations.
- A List page with delegation details – This one is a UI improvements to make it easier for SCS administrators to manage and track "*Workflow Delegations".* Every user has to login by himself to delegate work flow to other user, in D365FO. Now using SCS, administrator can delegate workflow to any user for a particular time period.
- User groups – combined two tabs in one - This one is a UI improvements to make it easier for SCS administrators to manage a simplified standard user group's form. Users who are outside the organization hierarchy for budget planning must work with budget plans, you can assign budget plans to user groups. You can also set up restrictions for journal posting that are based on user groups. Users can be added to different groups using same tab. Also in SCS now a list of added users to different groups can be exported to excel using list tab.
- Dynamic snapshot - We got a lot of feedback and learnings related to the security snapshot. A lot of features depend on having actual data in the snapshot. New changes in the snapshot framework have been introduced where the snapshot no longer requires to updated via a batch job after security changes have been made.

  NOTE: 'Creating snapshot' functionality is still available, and it will remain to be used as a safe net. We advise you to create a new snapshot from time to time to make sure that security inconsistency will not appear. Using the snapshots, you can create static versions of the security at a certain point in time.

  This is a change that has an impact on the product. Please provide feedback so we can further improve the dynamic snapshot feature.
- New export/import role functionality
  1. Problem: For a couple of years, we have discovered and reported to Microsoft a standard bug that for AOT Privileges the node 'FormControlOverrides' is not readable from code and that is affecting, for example, the current SCS Export / Import functionality.
  2. Issue that is generated by the bug explained: When exporting a role using SCS Export function the XML file generated does not contain the entries under the 'FormControlOverrides' from AOT Privileges.

     After the SCS Import function runs, the content from the XML file is applied to the target environment. Since the 'FormControlOverrides' node is empty in the XML file, the algorithm interprets it as a change (entries removed from node by user) therefor it will override the privilege in target environment and the entries will be removed.
  3. Solution: Since the only framework that was exporting the 'FormControlOverrides' is the standard 'Export' from Security Configuration form (which exports only the customizations and all of them) we decided to use that and make it more practical for the end user, where now, with the new functionality you can export the customizations for a selection of roles.

     The 'Export role configuration' / 'Import role configuration' can be found on *Security and Compliance -> Security management workspace -> Roles tab*

     A new column has been introduced to show all the roles that due have customizations and can be exported. The 'Export role configuration' button will be enabled when a record marked as 'Has configuration' is selected.

NOTE: This is working the same as standard security configuration export, except the fact that you can export them per roles.

- License count changes - New options have been added in the *Security and Compliance Studio -> Setup -> Parameters* form, under License count tab.

  For all cloud licenses (Finance, Commerce, HR, Project operations, SCM) a new input option has been added called '- attached license' (E.g. Finance – attach license) where the user can add the number of attached licenses that have been bought, not only the base number.

  These changes will reflect in the 'License optimization' workspace on the 'Usage' tab.

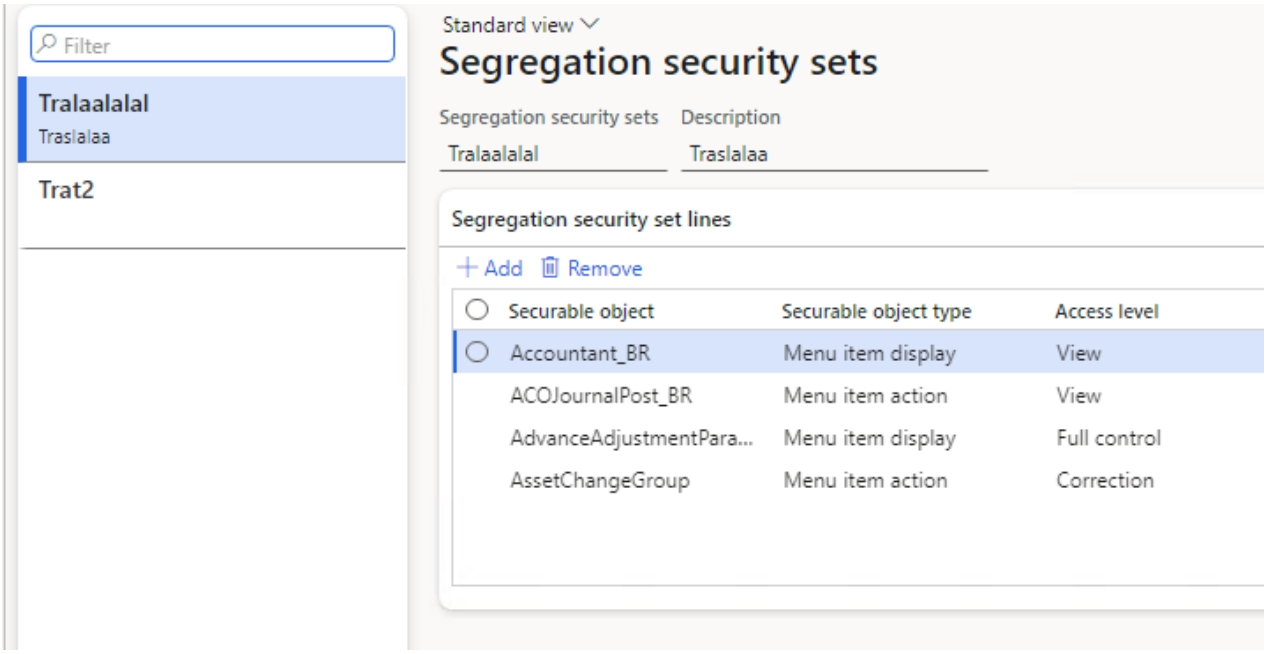
  The new license calculation formula will now: (Base license + Attached license) – Actual user count.

  In order to separate the 'cloud license' from 'On premise' licenses we added the "View on premise" / "View cloud license" button that can toggle this view.

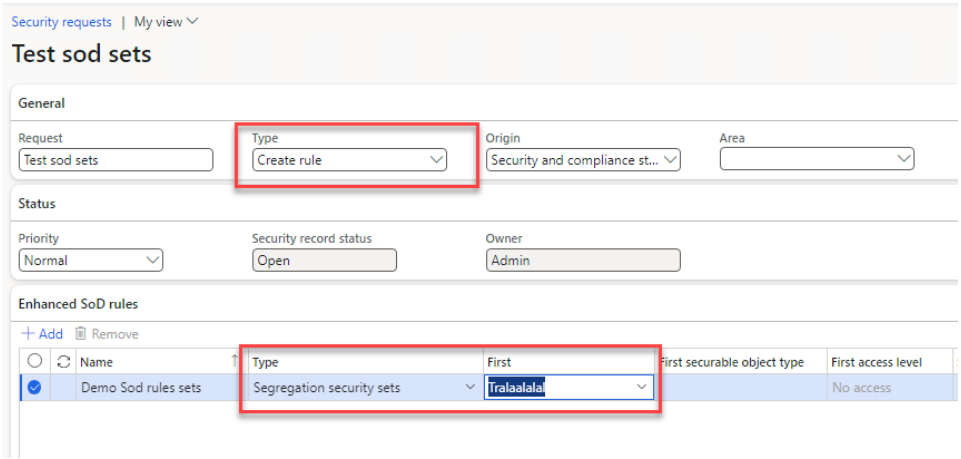
3.1 Segregation of duties sets

A new way of creating Enhanced SoD rules for entry points type, has been introduced. This new method will consists in creating a set of entry points (a list) that you desire to be part of the rules and then, using Security requests, the rules will be created automatically.

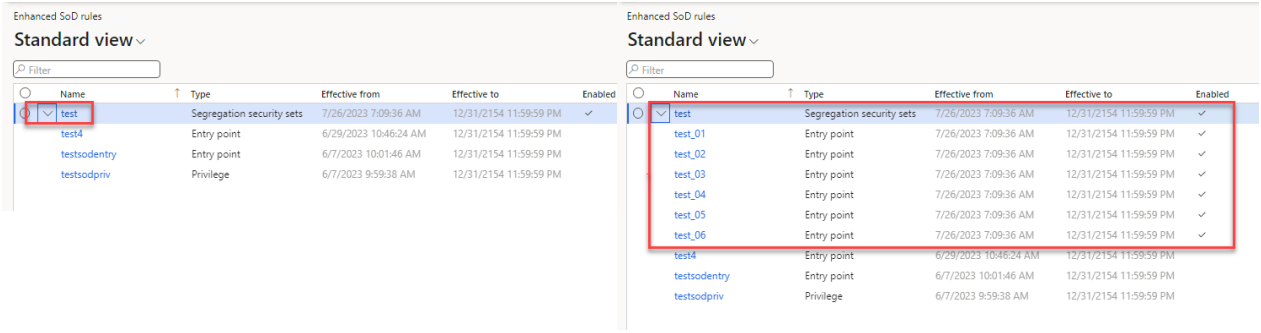
1. Navigate to 'Security and Compliance Studio -> Setup -> and open Segregation security sets' form to define a list of entry points.



2. Navigate to 'Security and Compliance Studio -> Security -> and open Security requests' form in order to create a new request for SoD rules.
    a. Create new Security request of type 'Create rule'
    b. In the 'Enhanced SoD rules' tab add new record of type 'Segregation security sets' and select the set from the lookup in 'First' column.
    c. Submit and approve the request.



3. Navigate to 'Security and Compliance Studio -> Setup -> and open Enhanced SoD rules' form. Here you will find the new set of rules created as a parent-child hierarchy that can be expanded.



A predefine list of SoD examples will be available as excel sheet to be imported in system if desired. This will help you in starting the security setup for your environment 😊

3.2 Security requests enhancements and workflow

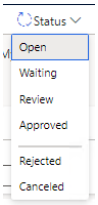
Security requests functionality has been introduced to new exciting features that will help your organization to better handle user requests. The form has been enhanced and for a better control we also introduced the workflow component that will allow you to review/approve/deny/reject the security requests.

One of the greatest enhancements brought to you is the automated process that will create security requests once it is approved.

I. Security requests enhancements:

1) **Security types** has been added. This will allow you to select what kind of request to do want to create. For each of the types there will be a new tab where the user will add the required data.
2) **Security workflow**. Navigate to **Security and Compliance Studio -> Setup ->** and open **Security Requests workflow configuration** form. Click new and this will open the workflow editor. Here you can create your own approval workflow and then activate it. The 'workflow' button will be available on the form. After the user creates a security requests he can submit it to approval.

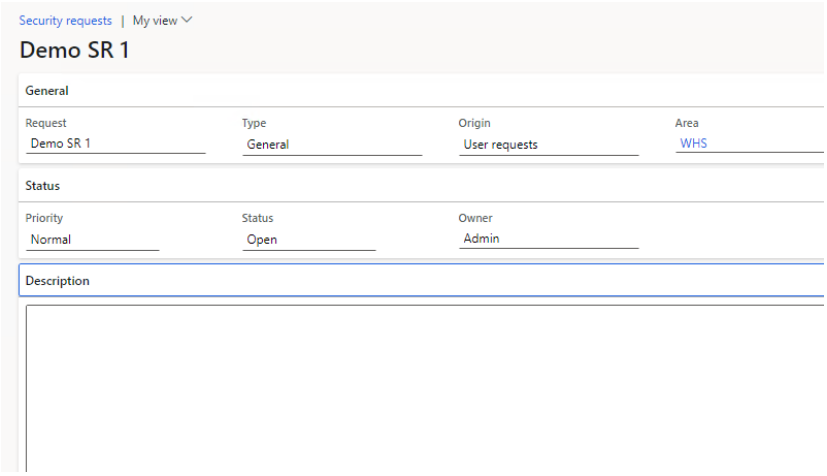
Note: when the workflow is not activated you can review/approve/reject/etc the security request by using the ***Status*** button.



Security types

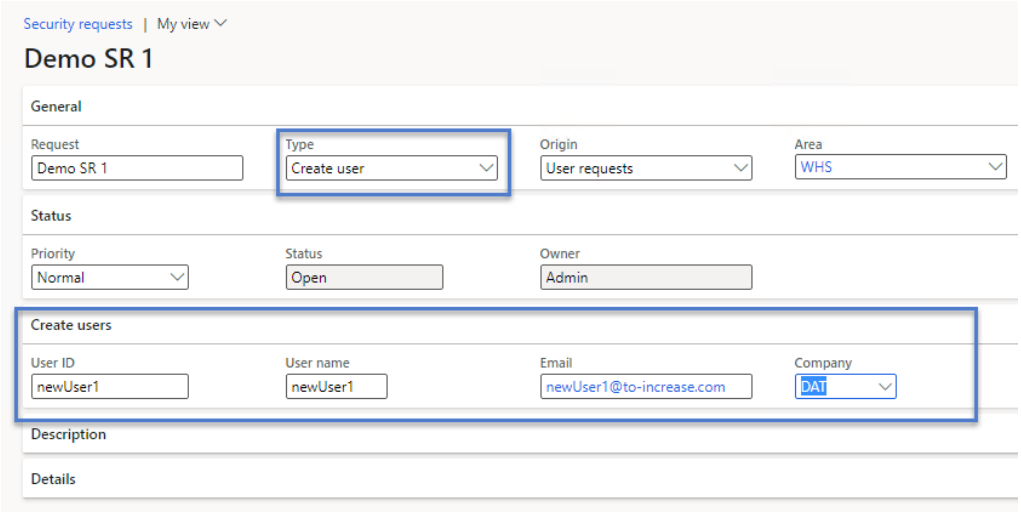
a) General

The 'general' security type is used for requests that cannot be handled by the defined types below and cannot be an automated process, but rather an action that some supervisor user needs to do 'manually'. The request will be created and the details field will be used to describe the request.



b) Create user

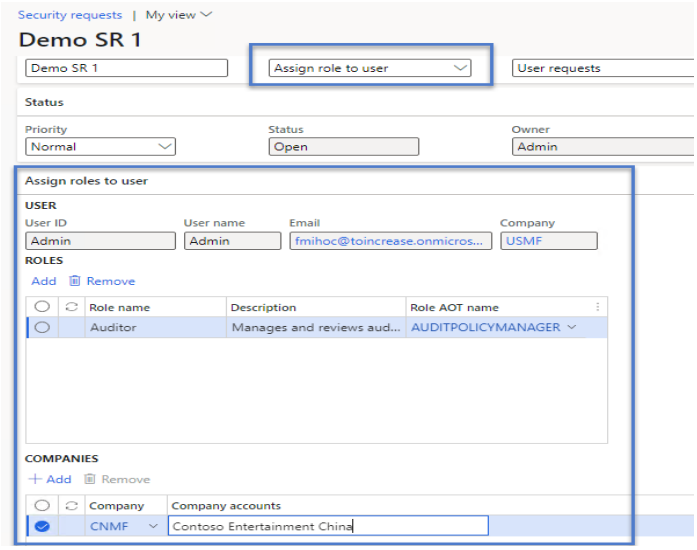
A new tab will be made visible. Here the required information for creating a new role will be available to fill in. When the request will be approved the user will be automatically created and it will be available in the System administration -> Users form.



c) Assign role to user

A new tab will be made visible. In this tab there will be an option to select roles that are desired to be assigned to the user. You can select an existing user from the UserId lookup and all other user information will be automatically filled in.

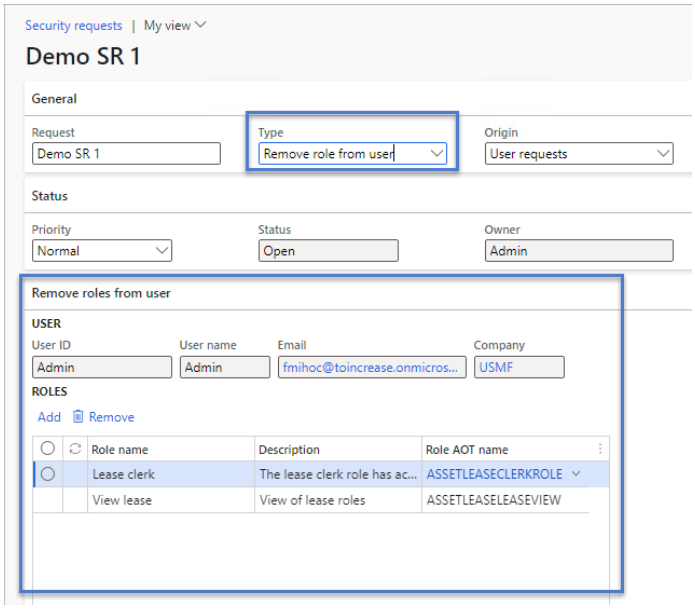
For each selected role there is also the possibility of selecting a specific company. If not company is selected, the role will be added for all companies.



d) Remove role from user

A new tab will be made visible and in this tab that will be addressed to the user who created the security request. You can select an existing user from the UserId lookup and all other user information will be automatically filled in. A list of all the roles currently assign to the user will be available to choose from.

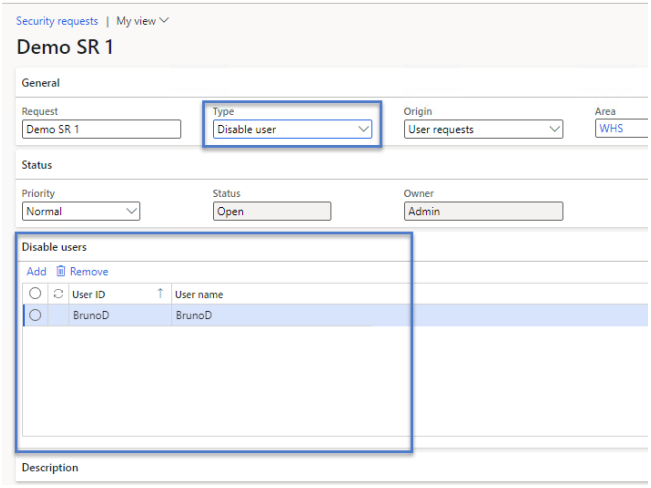
When the request is approved all the selected roles will be removed from the user.



e) Disable user

A new tab will be made visible and in this tab a list of all enabled users in the system will be available to choose from using the 'Add' button.

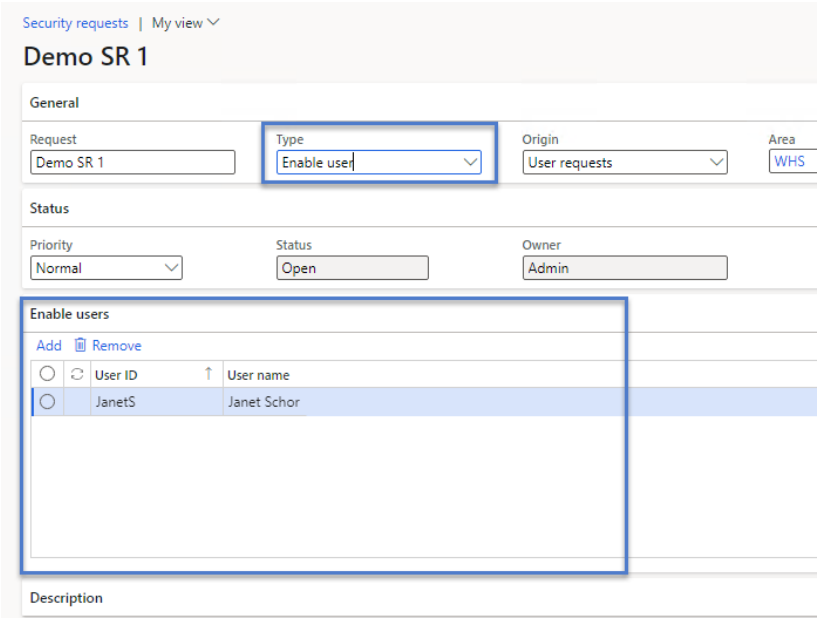
When the request is approved all the selected users will be disabled.



f) Enable user

A new tab will be made visible and in this tab a list of all disabled users in the system will be available to choose from using the 'Add' button.

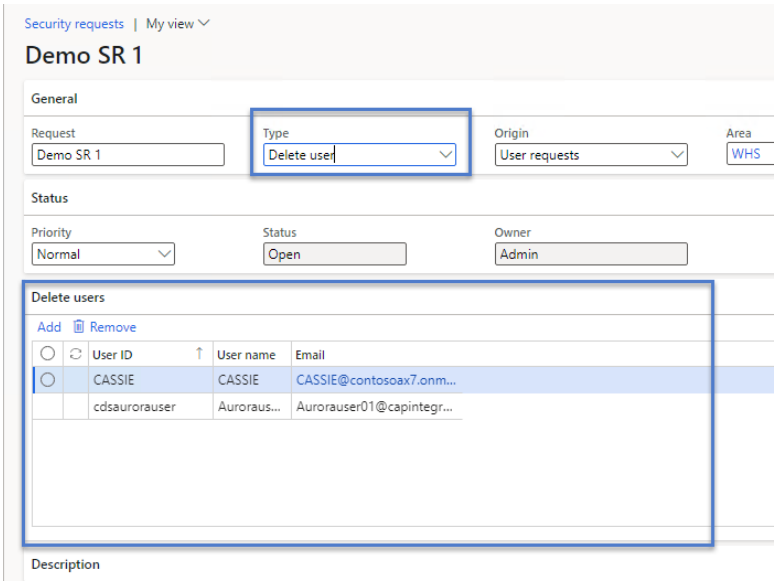
When the request is approved all the selected users will be enabled.



g) Delete user

A new tab will be made visible and in this tab the option of deleted an existing user will be available. Using the 'Add' button a selection can be made from a list with all the users in the system.

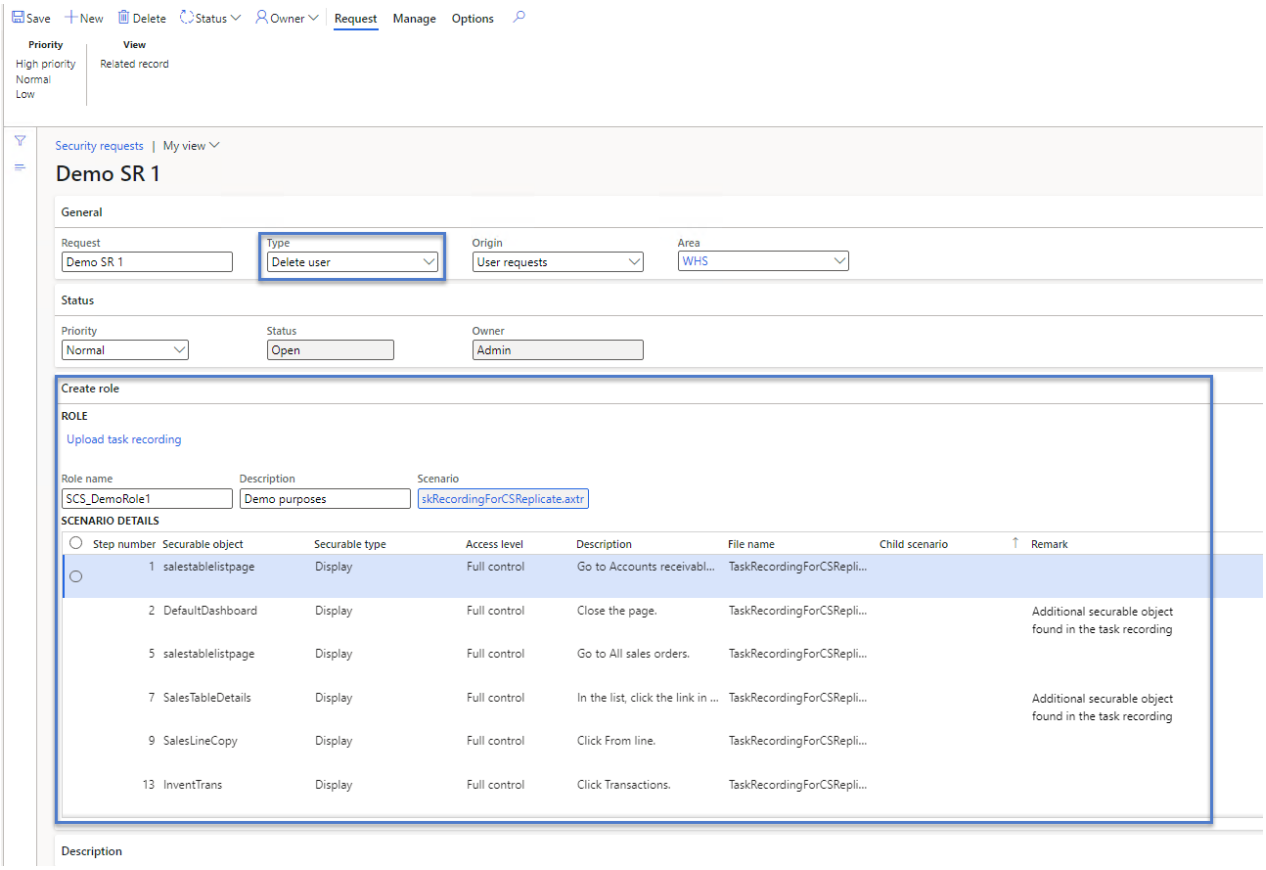
When the security request is approved the selected users will be deleted from the system.



h) Create role

A new tab will be made visible. On this tab there will be an option to create a role based on a task recording. The task recording will be uploaded in the system, a scenario will be automatically created and it will be added on the form along with all the menu items detected.

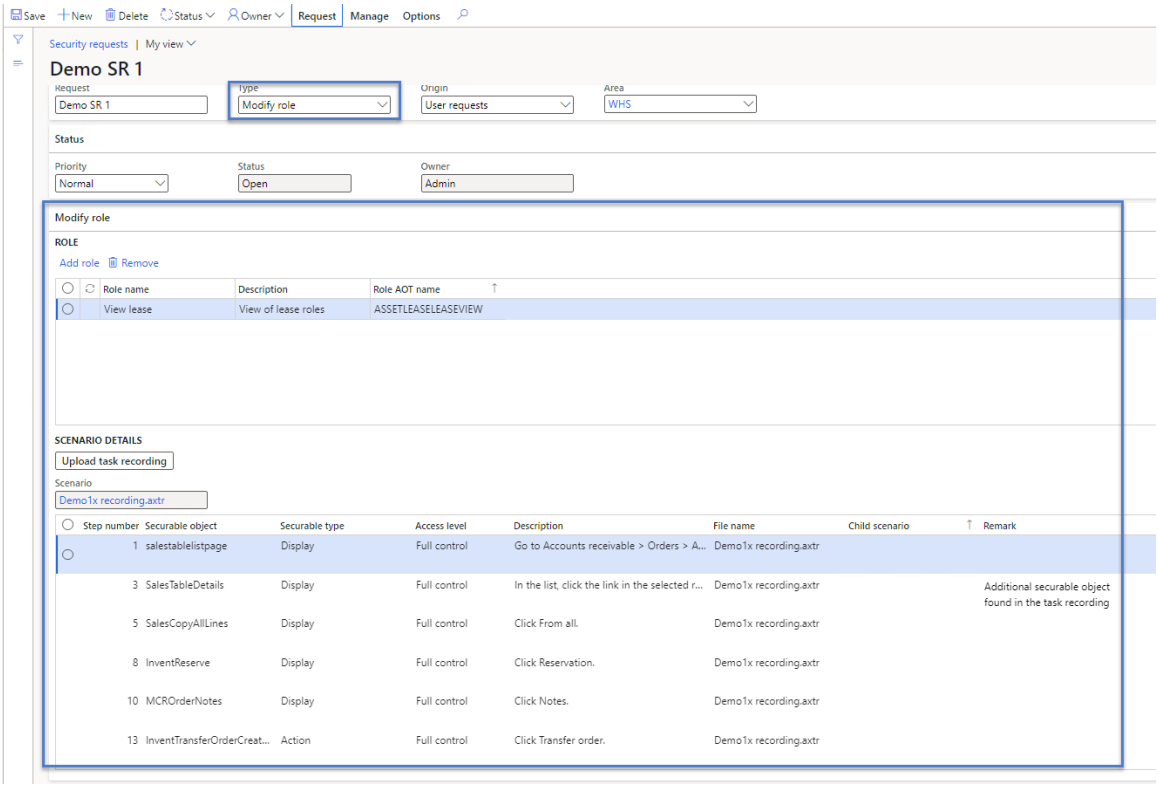
When the security request is approved the role will be created based on the scenario's securable objects and the selected access level.



i) Modify role

A new tab will be made visible. On this tab there will be an option to modify one or more existing roles based on a task recording. The task recording will be uploaded in the system, a scenario will be automatically created and it will be added on the form along with all the menu items detected.

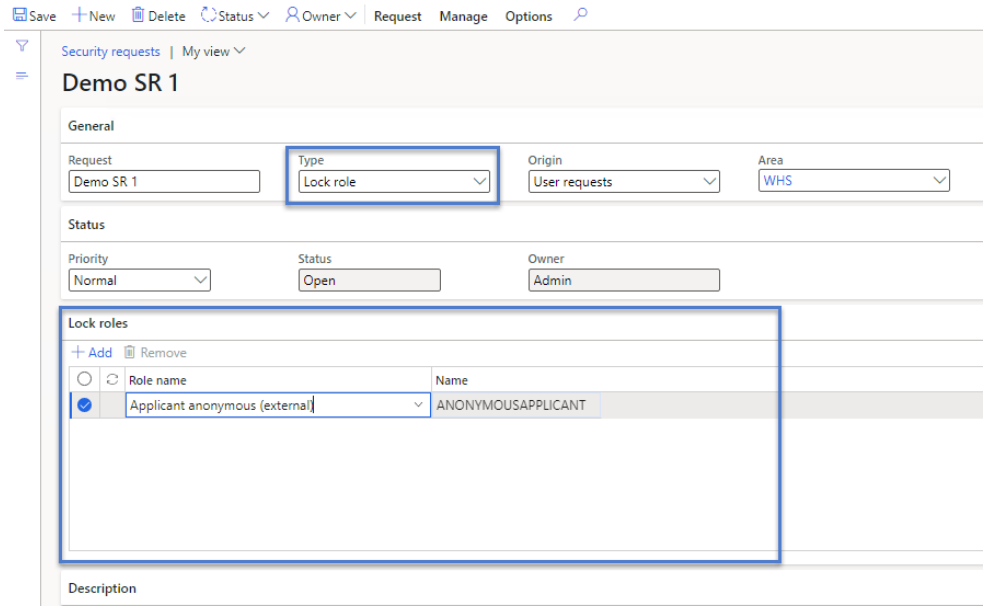
When the security request is approved the role will be modified based on the scenario's securable objects and the selected access level. If the securable objects exist on the role they will be updated with the selected access level, or they will be added if do not exists.



j) Lock role

A new tab will be visible and an option to lock roles will be presented. Roles can be chosen from a list of all unlocked roles available in the system.

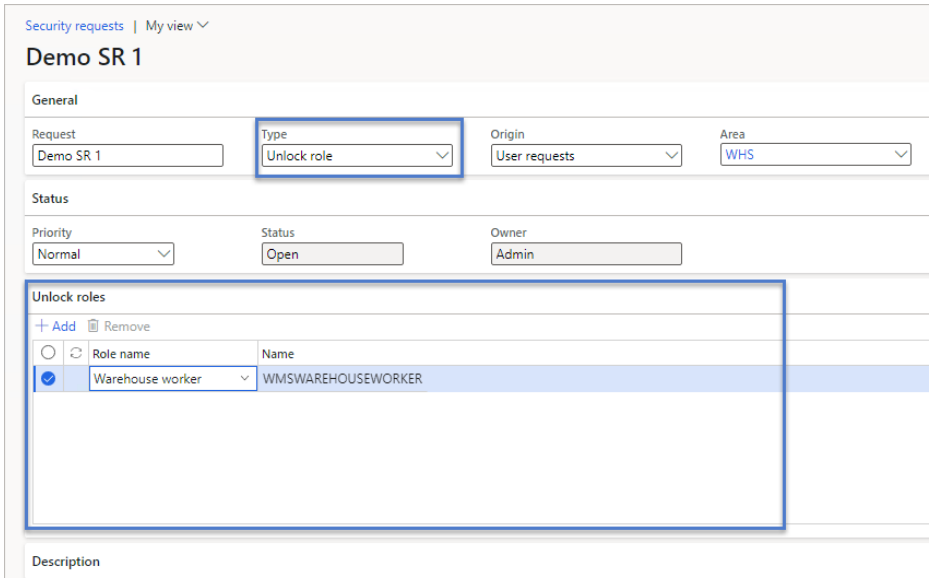
When the security request is approved the role(s) will be locked and can be found in the ***Security and Compliance Studio -> Inactive security roles.***



k) Unlock role

A new tab will be visible and an option to unlock roles will be presented. Roles can be chosen from a list of all unlocked roles available in the system.

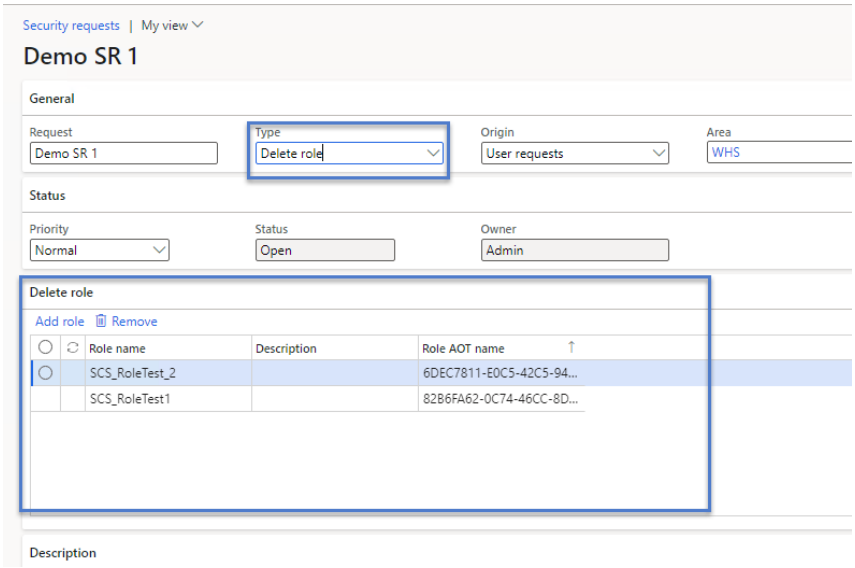
When the security request is approved the role(s) will be unlocked and removed from the ***Security and Compliance Studio -> Inactive security roles.***



l) Delete role

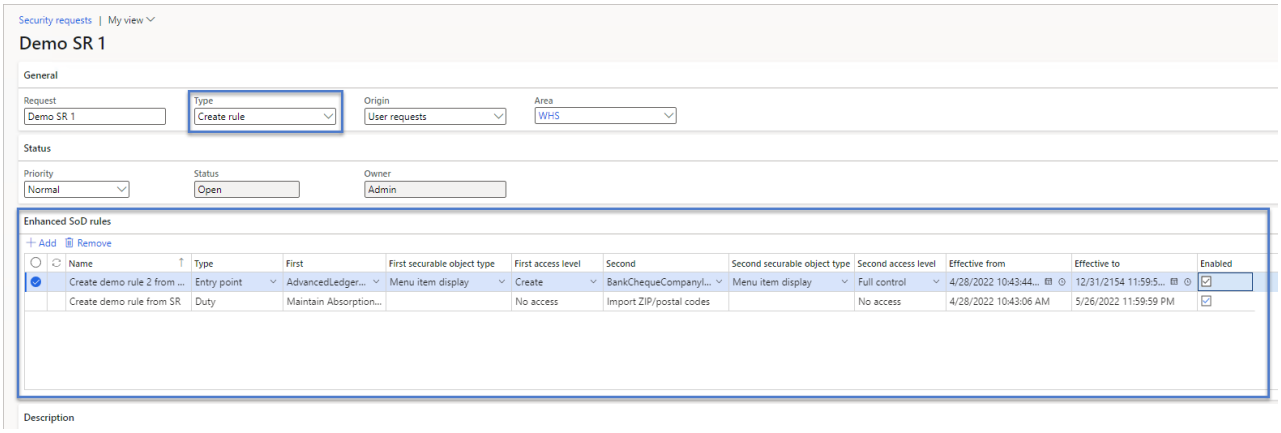
A new tab will be visible and an option to delete roles from the system will be available. Roles can be chosen from a list of all existing in the system.

When the security request is approved the role(s) will be permanently deleted from the system.



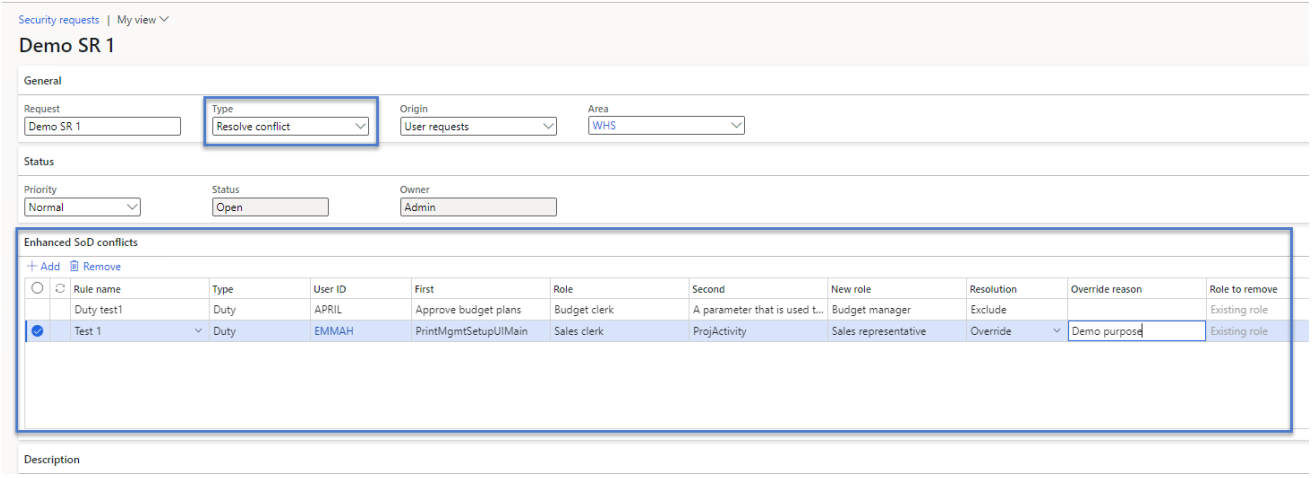
m) Create rule

A new tab will be visible. In here enhanced sods can be defined. Once the security request is approved all the rules will be automatically created. They can be found under ***Security and Compliance Studio -> Security -> Enhanced SoD -> Enhanced SoD rules*** form.



n) Resolve conflict

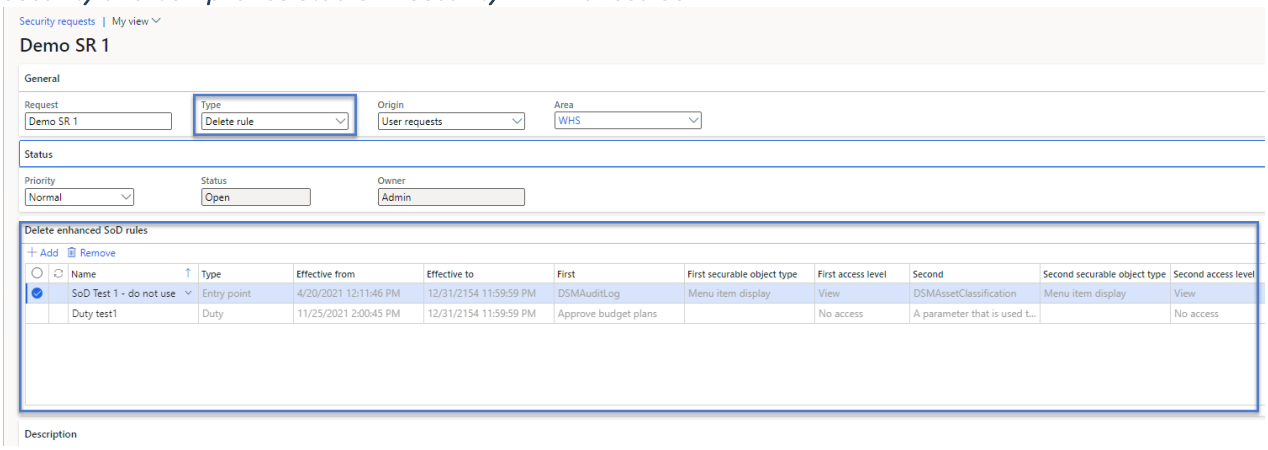
A new tab will be visible. In here there will be the possibility of selecting which conflict(s) are wished to be resolved and how. The resolution type can be set and the override reason can be filled in. Once the security request is approved all the conflicts will be resolved. They can be found under ***Security and Compliance Studio -> Security -> Enhanced SoD -> Enhanced SoD conflicts*** form.



o) Delete rule

A new tab will be visible. Here the user can select what rules to be deleted from the system.

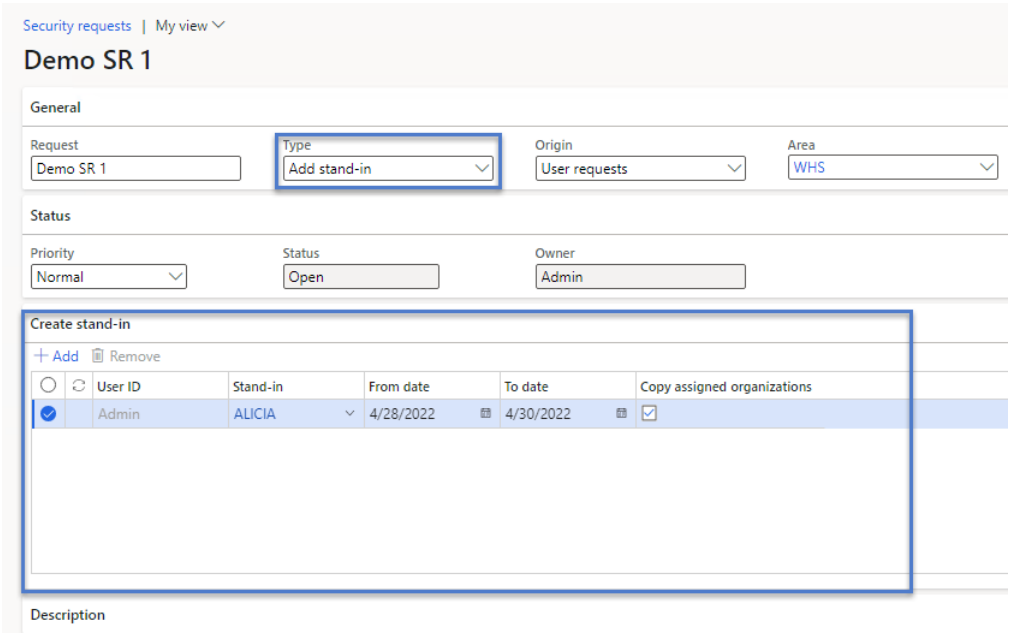
Once the security request is approved all the rules will be deleted. They will be removed from the *Security and Compliance Studio -> Security -> Enhanced SoD* form.



p) Add stand-in

A new tab will be visible and in here the user who created the request can set up a stand-in for a specific period of time.

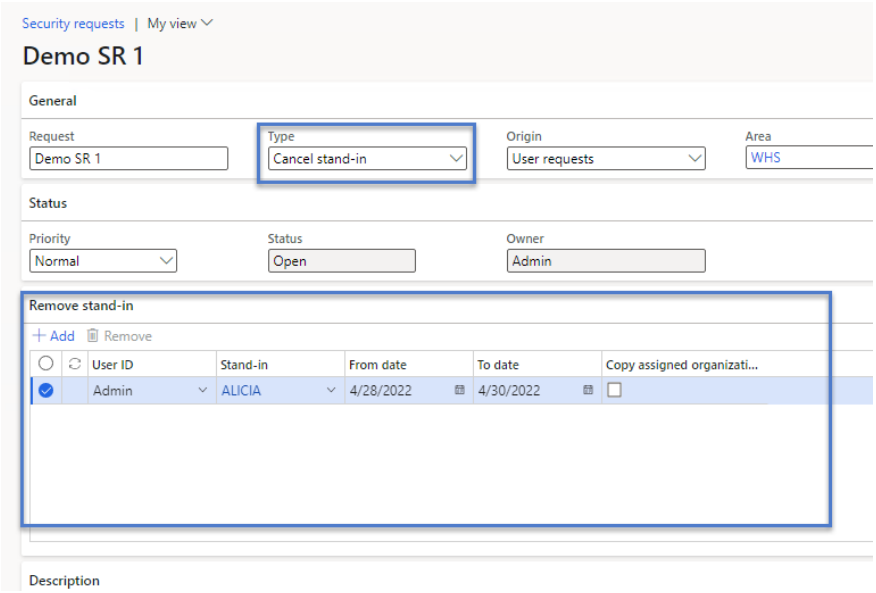
Once the security request is approved the stand-in will be created and it can be found under *Security and Compliance Studio -> Security -> Stand-in* form.



q) Cancel stand-in

A new tab will be visible and in here the user who created the request can cancel one or more stand-ins available.

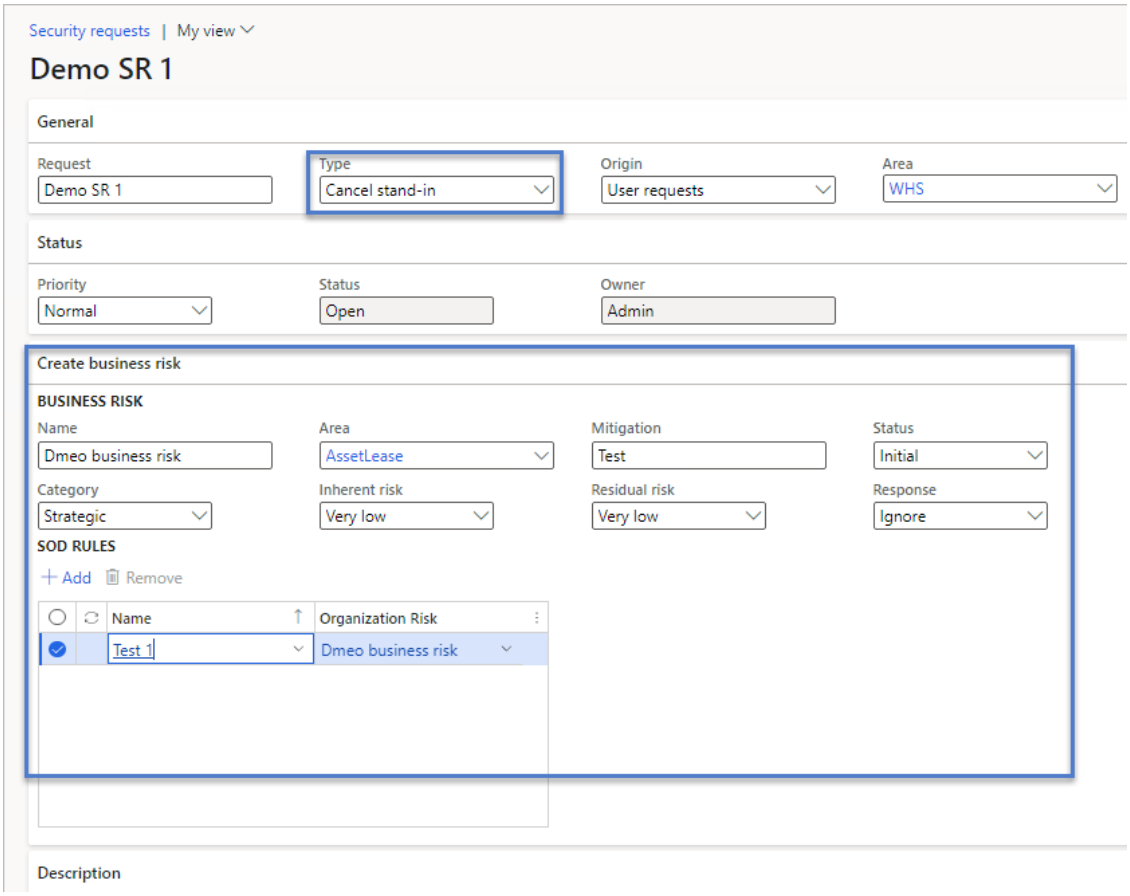
Once the security request is approved the selected stand-in(s) will be cancelled.



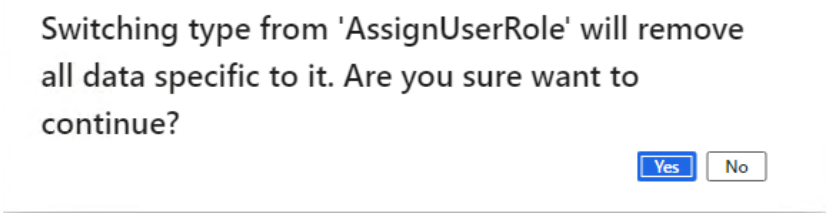
r) Create business risk

A new tab will be visible and all the information required to create a business risk will be presented to the user. Additionally, enhanced sods can be assigned to the created business risk.

As soon as the security request is approved the business risk will be created and the selected sod rules will be linked to it. The created business risk can be found under ***Security and Compliance Studio -> Workspaces -> Integrated risk management*** workspace.



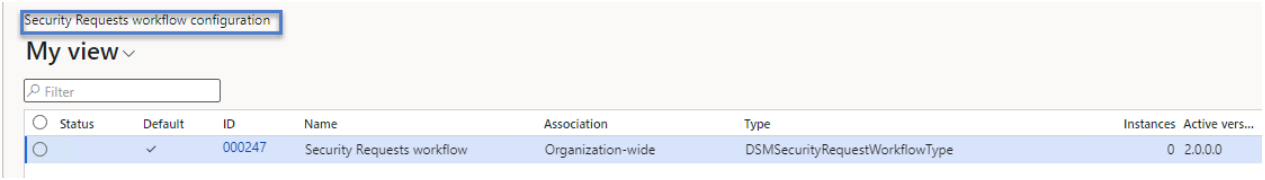
Note: if the type of the request is changed all the information from the current tab will be deleted. A pop-up message will be available to inform the user that all data related to the current type will be removed.



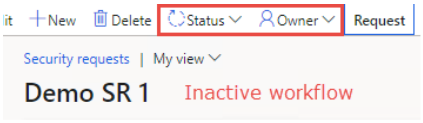
II. Security requests workflow

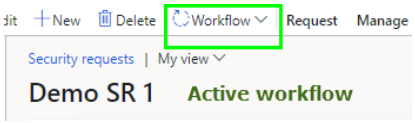
Activating the security request workflow requires to navigation to ***Security and Compliance Studio -> Security -> Security request workflow configuration*** form.

A new workflow will need to be created by using the "New" button. This will open the standard workflow editor where the workflow approval design will be created. Once it is done it will appear in the form and it will be activated.

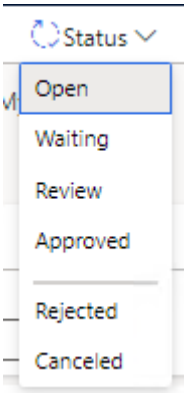


Activating the security request form will replace the "Status" and "Owner" buttons with the "workflow" option from where the request can be submitted to approval. From here the standard workflow framework will kick in and do the rest, based on the workflow design.





If the workflow is not activated the approval can be done manually by the owner of the request using the "status" button.



Once the "created by" user finishes the filling in all the necessary information on the Security Request it will select the **owner** (the person designated to review and take suitable action) and it will change the status to **Waiting.** In this moment only the owner of the request can take action.

When the owner will start looking into the request(s) it will set the status to **Review.**

As soon as the owner decided what action to take he can do the following:

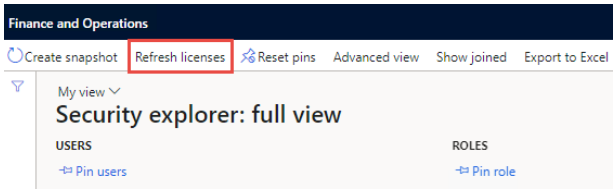
- Approve – set the status to **Approved** and the request will be automatically created.
- Reject – set the status to **Reject** and decline the request.
- Require more information from the user and set the status to **Rejected** or back to **Open**.

Licensing framework update

Microsoft has taken some decisions during the last releases and introduced multiple licenses like Finance, SCM, EAM, Operations, Retail, HR, Activity and Team members. For more details, you can have a look at Microsoft's new licensing guide. These changes left customers confusing about how they can be compliant with new license changes. That's why we have managed during the past releases to keep up with them and redesign the SCS licensing framework to be compliant with the new changes.

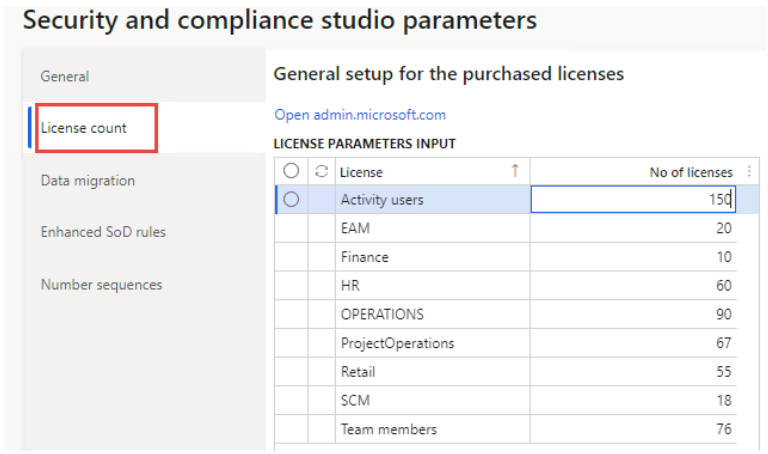
Steps required after update to SCS 10.0.24.20:

a) Navigate to **Security and Compliance Studio module -> Inquires** -> and open **Security explorer** form and here run the "Refresh licenses" batch job option and wait to finish.

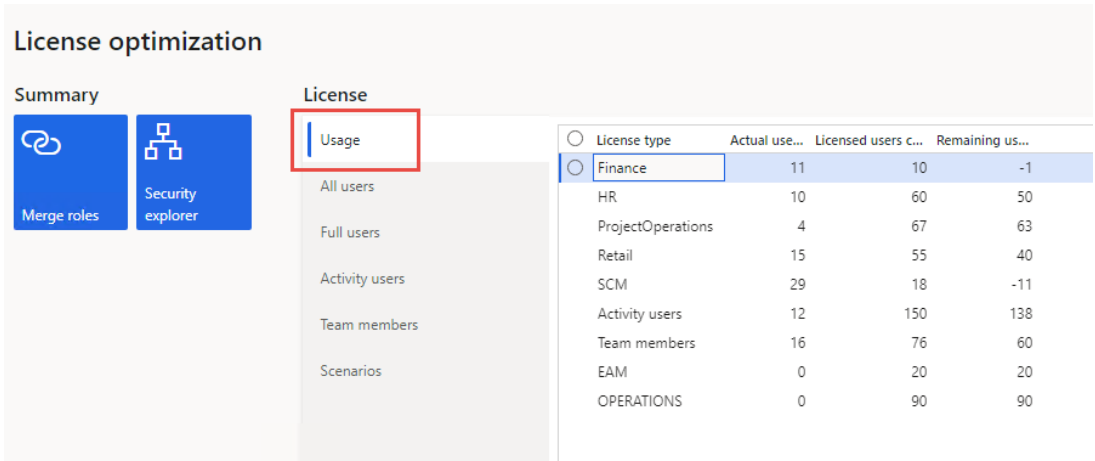


b) After the "Refresh licenses" job finished navigate to **Security and Compliance Studio module -> Setup ->** and open the **Parameters** form.

On the **License count** tab there will be a new grid that will display all the licenses detected on the system. This grid has been design to store and save the data related to acquired licenses, details that you can get from your Microsoft admin page: https://admin.microsoft.com/



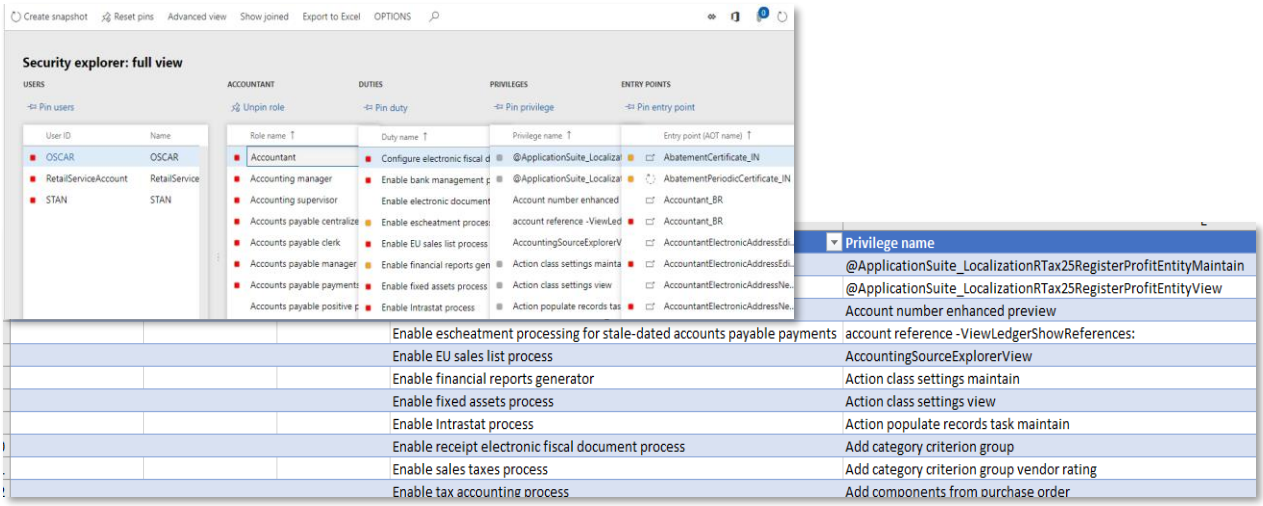
c) Navigate to **License optimization** workspace and here you can find the updated information related to number of used licenses in your system.



NOTE: In this release, we made updates to comply with Microsoft changes around the new License SKUs for Dynamics 365 subscriptions. Although we tested all standard security and some custom security objects, we would not know if all scenarios for customizations on security will be reflected correctly. In case the license SKUs are not displayed correctly, we would need your feedback to improve the complex logic.

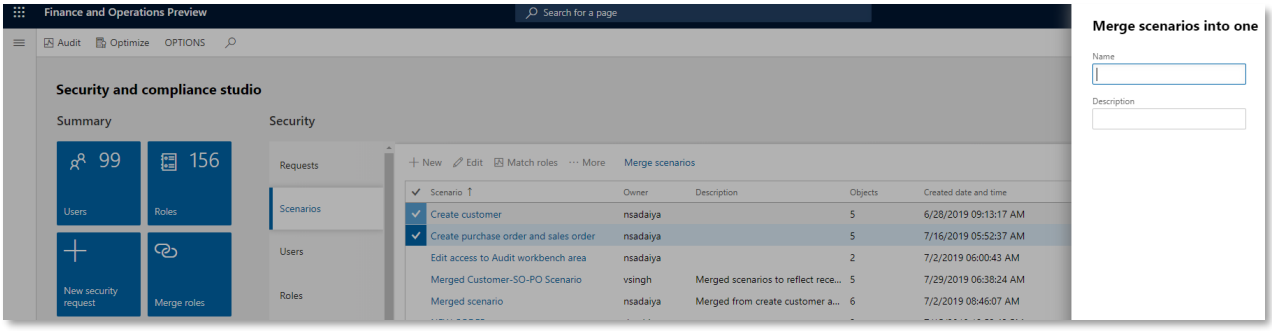
3.3 Export security explorer objects to excel in a de-normalized format

You can now export securable objects in a "De-normalized form" from security explorer. All Securable objects related to a particular role/user/duty/privilege/entry points can be exported into an Excel sheet for further analysis.



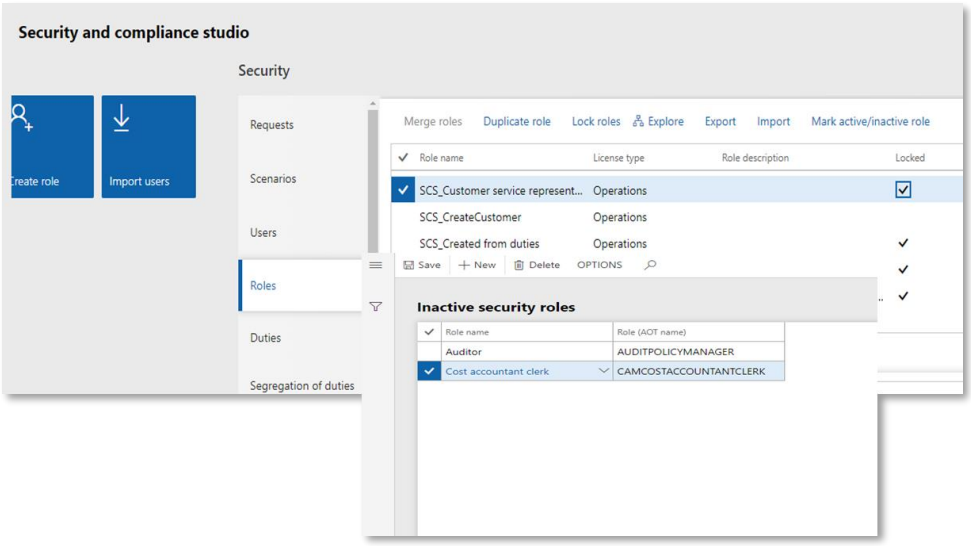
3.4 Merge security scenarios and match role

You can now merge more than one scenario into one new scenario if required by business and change in organization setup. This feature is very useful in combining more than one scenario then create a role which can perform all the business process recorded in the scenarios.



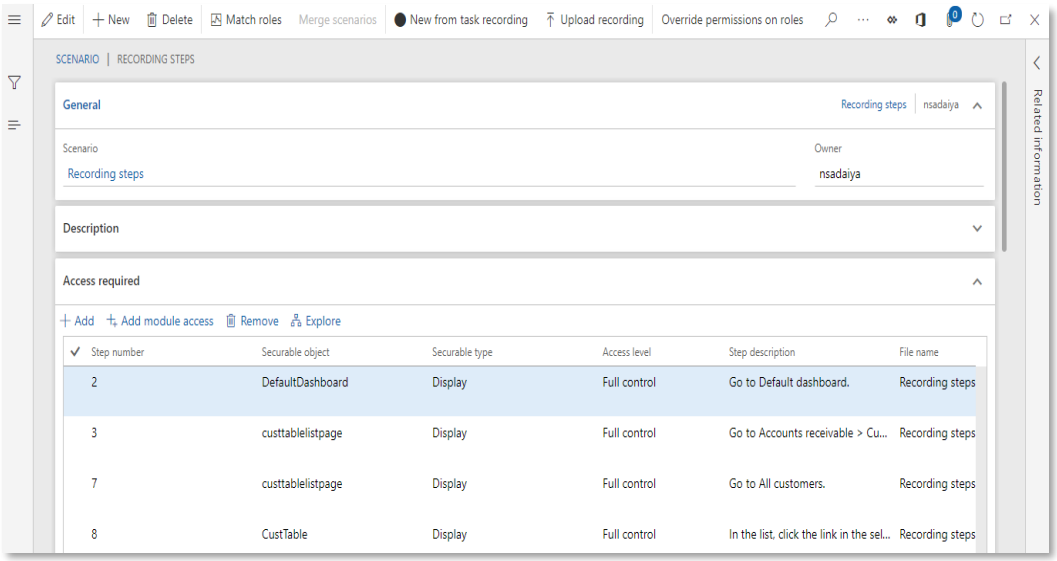
3.5 Mark any Security Role as Active/Inactive

Mark any security role as "Inactive". Once the role is inactive, it cannot be assigned to any user in SCS. This feature is very useful in limiting the number of security roles that can be assigned to users. Also if you want to preserve a set of roles that should not be updated like standard Microsoft security roles for reference. With SCS, it is useful in helping prevent update standard MS roles by mistake.



3.6 Recording steps to scenario.

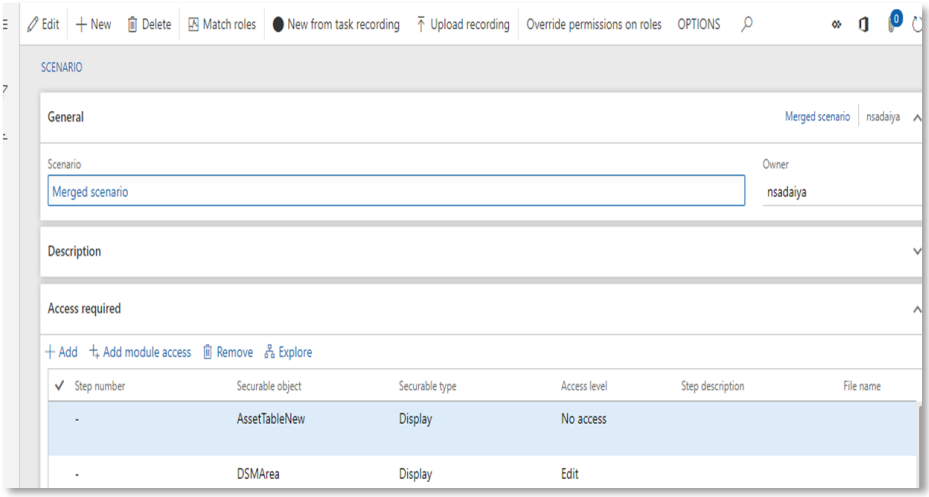
You can now record Business process steps along with entry points while creating a security scenario for more information.

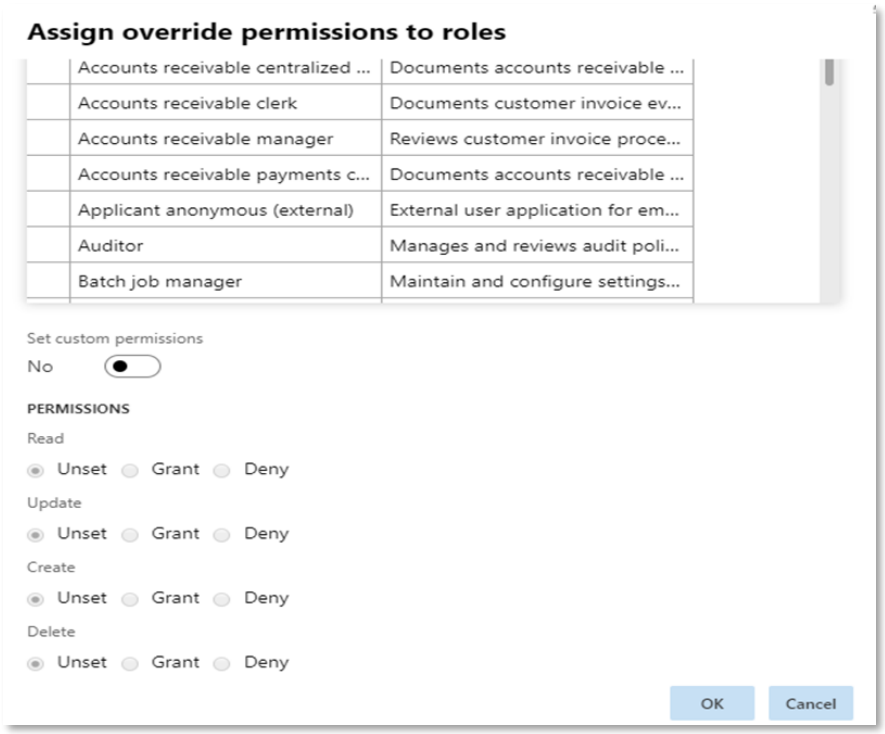


Useful in optimizing the license cost while creating a new security role. If an entry point is increasing the license cost, recorded steps will help to decide whether access is required or not.

3.7 Override permission based on scenarios

You can now override permission on existing roles based on your recording or a security scenario. This helps security administrators to deny access to some entry points on a particular role. Customized permission can also be set for other access types. Very useful if you want to merge roles and just exclude limited entry points.



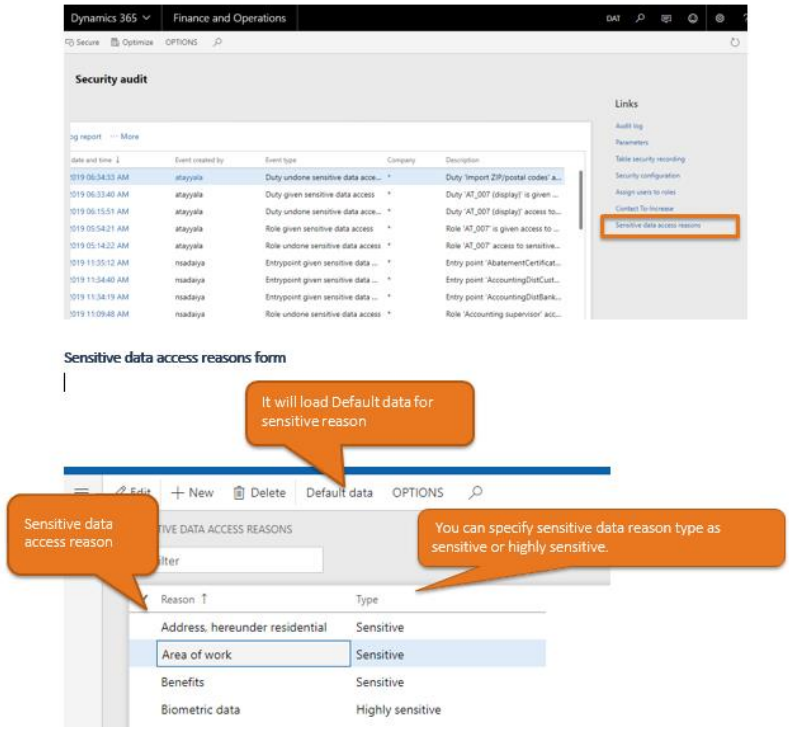


3.8 Option to mark, track and audit security objects providing access to sensitive data

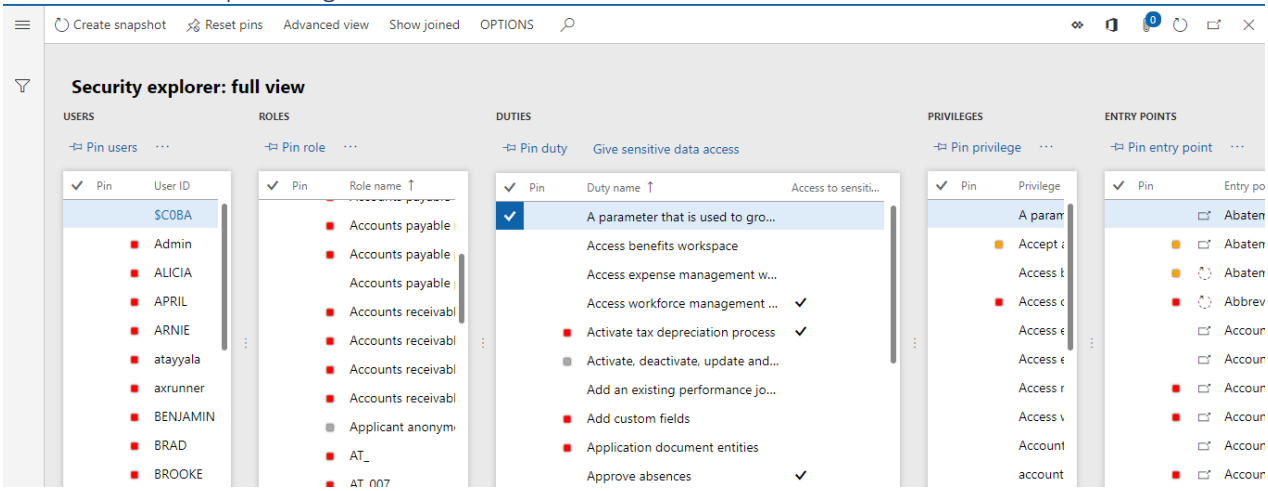
Specific definition of sensitive data might be different for different industries or countries. An organization can define specific definition for sensitive data as per their industry, country and policies. For some organizations, sensitive data might be any data that is related to finance, human resource or personal. It is up to an organization to define sensitive data. SCS helps in defining and managing the security objects access to sensitive data. In D365FO we assign security roles to users. Security roles grant access to perform business operations, it might provide access to sensitive data as well. In SCS we can specify which role, duty, privilege or entry point provides access to sensitive data.

Following specific features have been developed in SCS in this release:

- Set up sensitive data access reasons

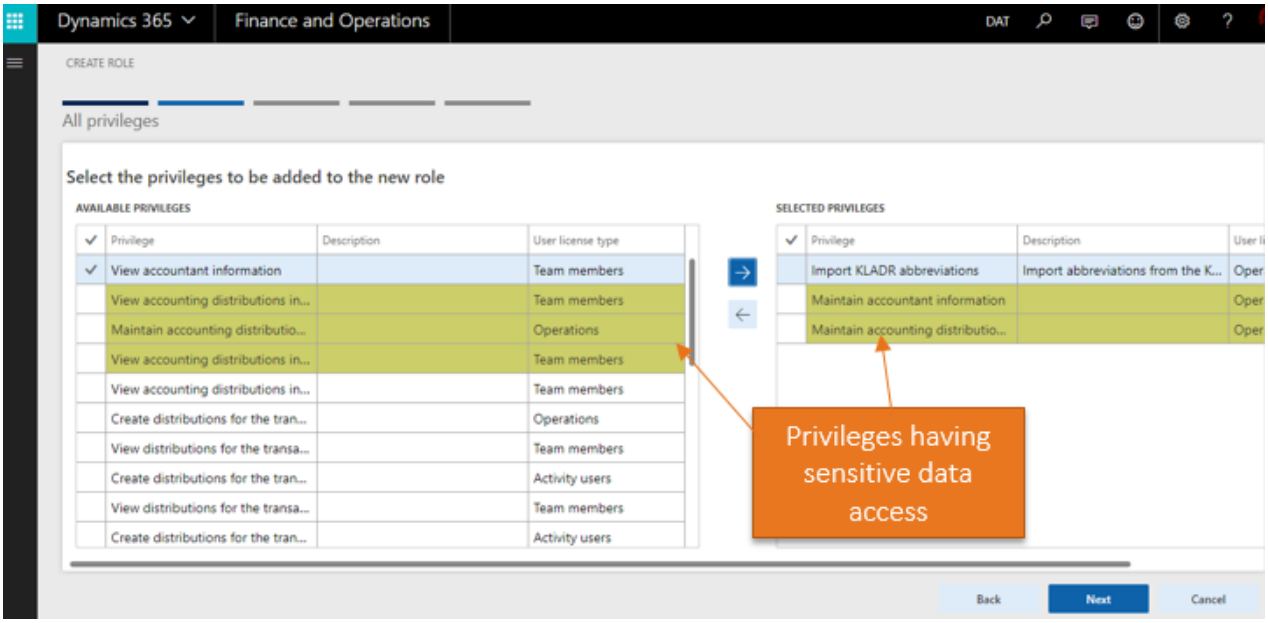


- Give access to sensitive data- You can mark sensitive data access to a securable object that you feel provides access to sensitive information. If you grant sensitive data access to a securable object, then automatically all securable objects which are related to it are marked as providing access to sensitive data.

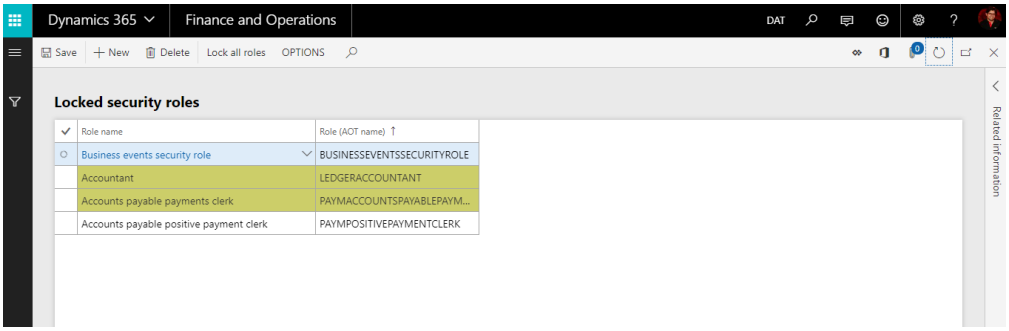


For example, if you grant sensitive data access to a privilege, then related users, roles, privileges, and entry points also are marked as providing access to sensitive data.

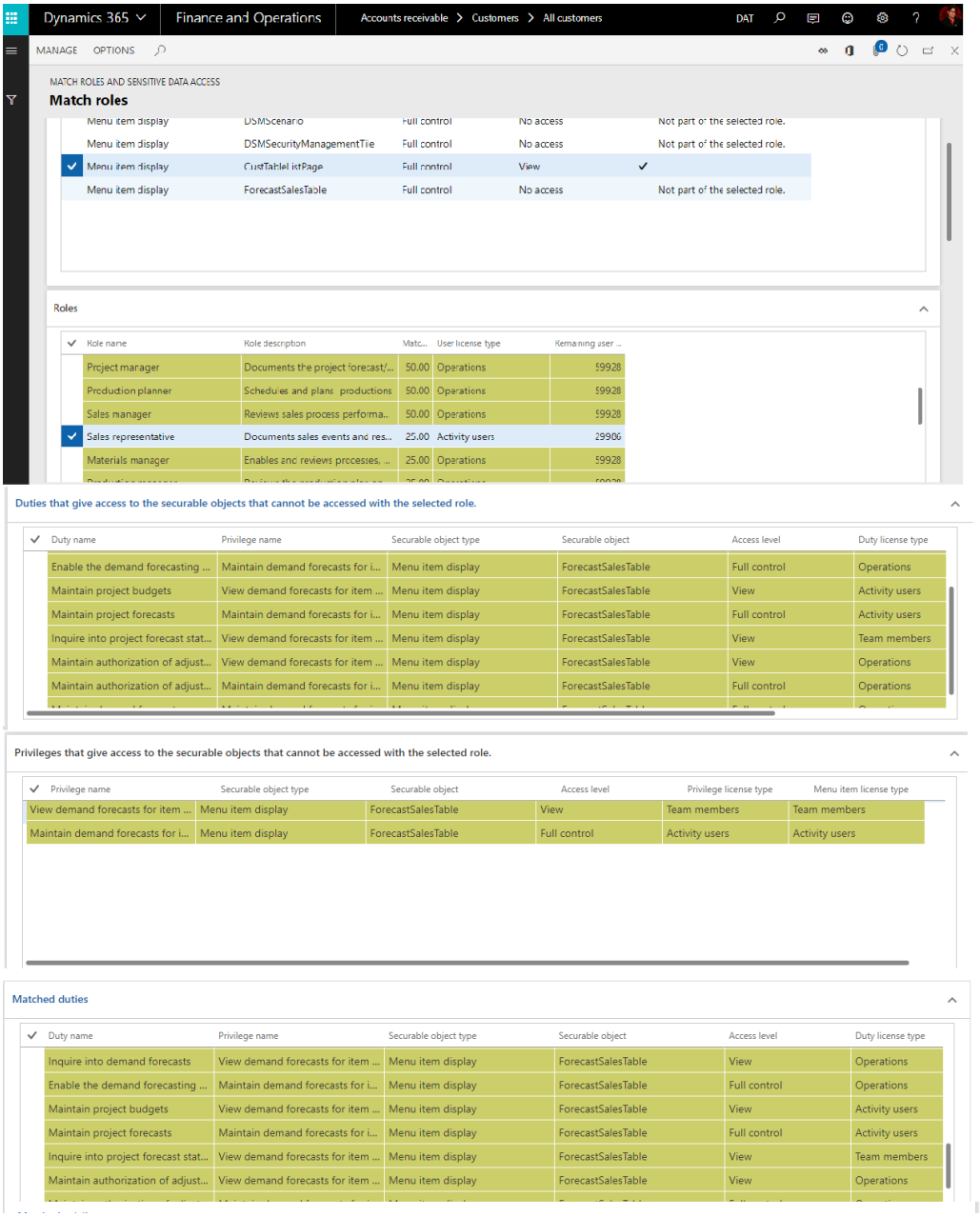
- Undo access to sensitive data - You can unset sensitive data access to a securable object. If you unset sensitive data access to a securable object, then automatically all securable objects which are related to it lose access to sensitive data.
- Sensitive data access inheritance- Please refer to the Product Documentation for more details on this topic.
- Use of sensitive data access - Once an organization define sensitive data access to securable objects, we can use this information while creating, locking and matching roles.
    - Create Role Wizard - When you are creating a new role using create role wizard. It is important to know that whether newly created role will have access to sensitive data.



- Locked Roles - Security roles having access to sensitive data is highlighted in locked roles form



- Match Roles - In the “Match Roles” form, security objects having access to sensitive data will be highlighted in all the grids.



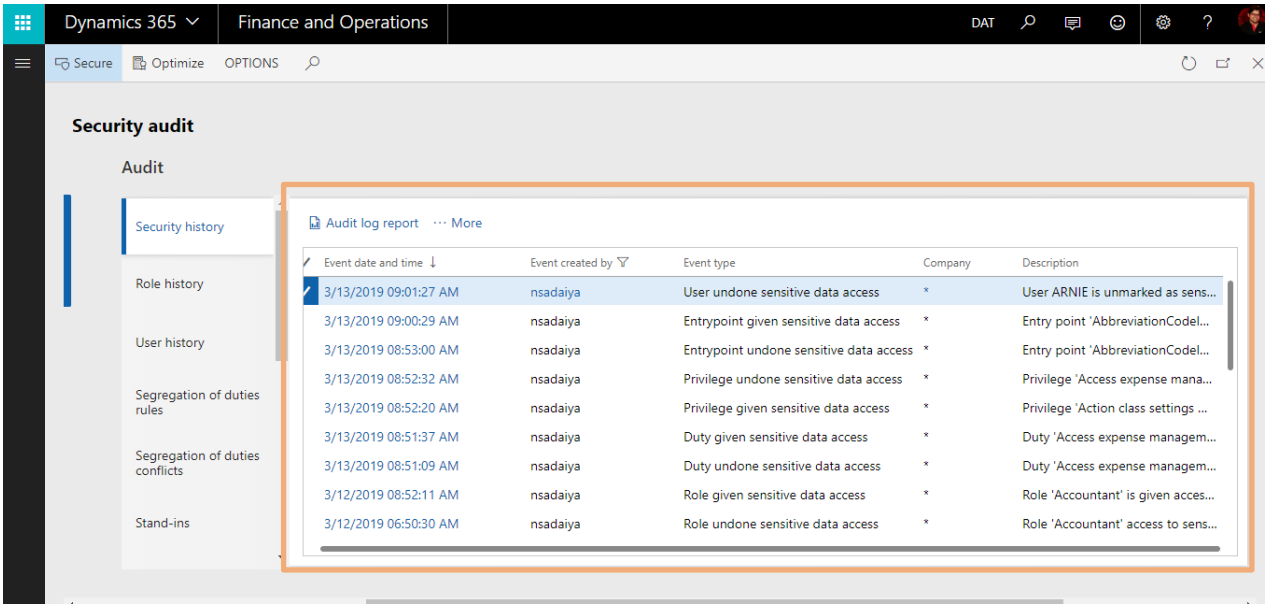
- Audit log enhancements to capture all changes to security objects providing sensitive data access

If we give/undo sensitive data access to a securable object such as role, privilege, duty or entry point, then this event is captured in audit log. The audit log contains the event details like event type and event description.

Event types are as mentioned below:

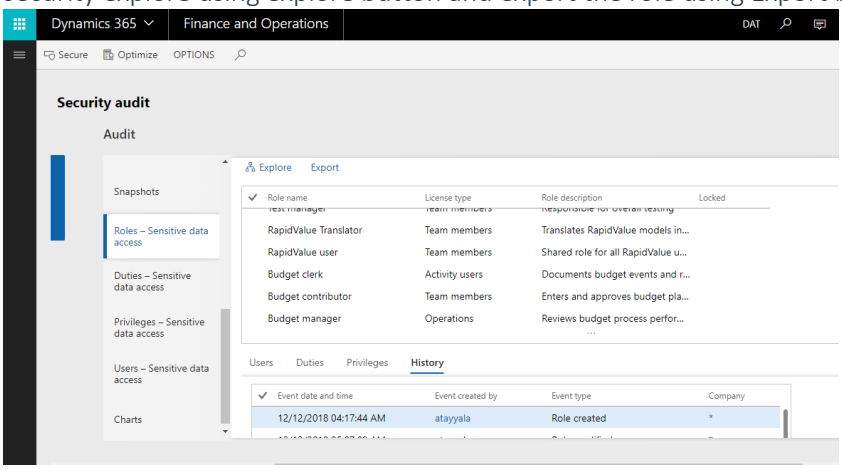
- Role given sensitive data access/ Role undo sensitive data access.
- Duty given sensitive data access/ Duty undo sensitive data access.
- Privilege given sensitive data access/ Privilege undo sensitive data access.
- Entry point undo sensitive data access/ Entry point undo sensitive data access.

- Below is the image of audit log.



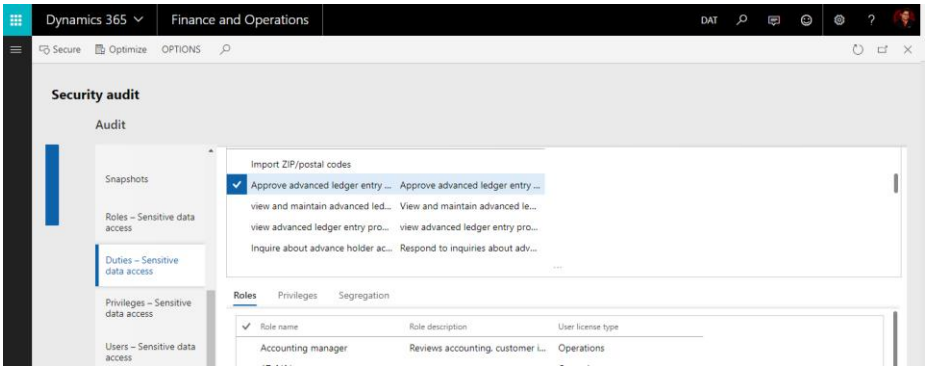
- Sensitive data access forms
    - Roles - Sensitive data access

It shows all the roles which have access to sensitive data. It also shows all the user, duties and privileges related to role. You can also see role history which contained changed events of the role. You can go to security explore using explore button and export the role using Export button.



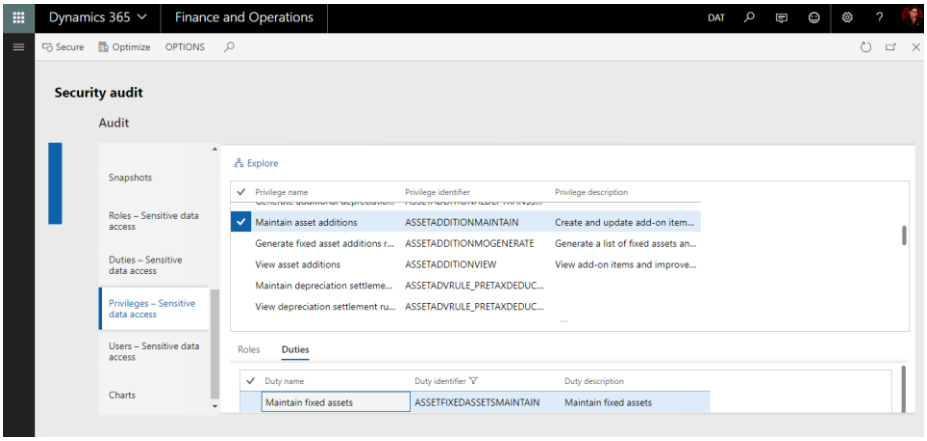
- Duties - Sensitive data access

It shows all the duties which have access to sensitive data. It also shows all the roles, privileges and SoD related to duty. You can go to security explore using “explore” button and you can create SoD rule using “Create segregation of duties rule” button.



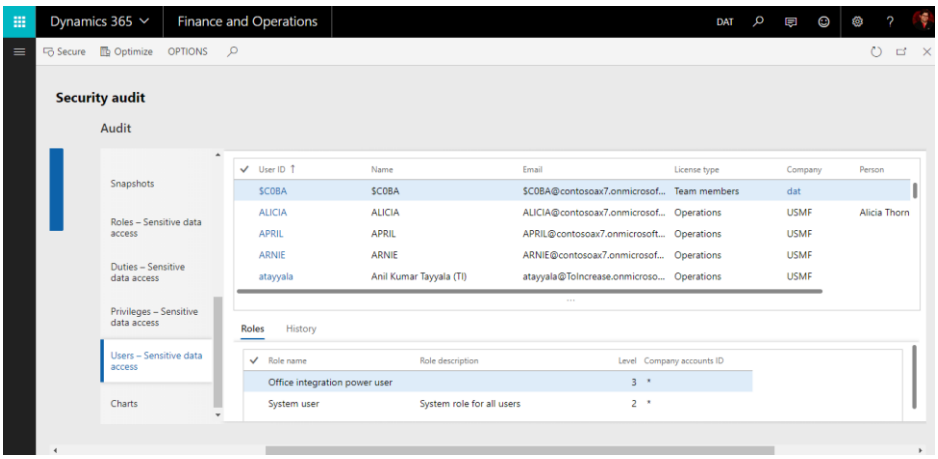
- Privileges - Sensitive data access

It shows all the privileges which have access to sensitive data. It also shows all the roles, duties related to privilege. You can go to security explore using “explore” button.



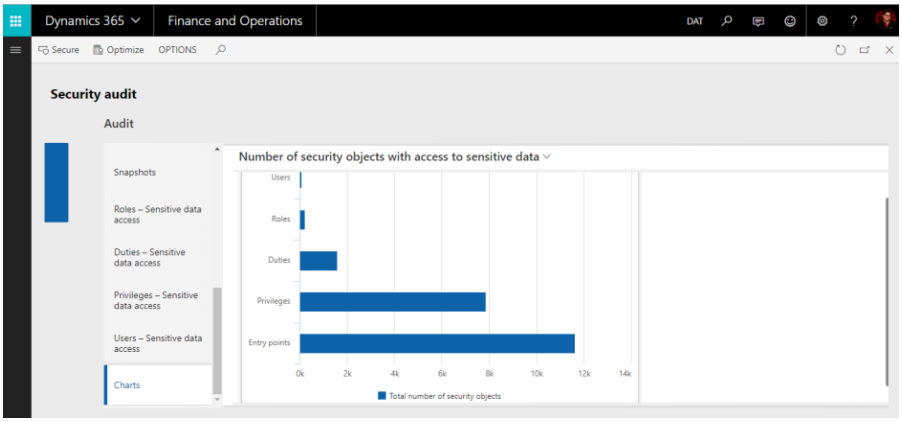
- Users - Sensitive data access

It shows all the users which have access to sensitive data. It also shows all the role related to user. You can also user history which contained changed events of the user.

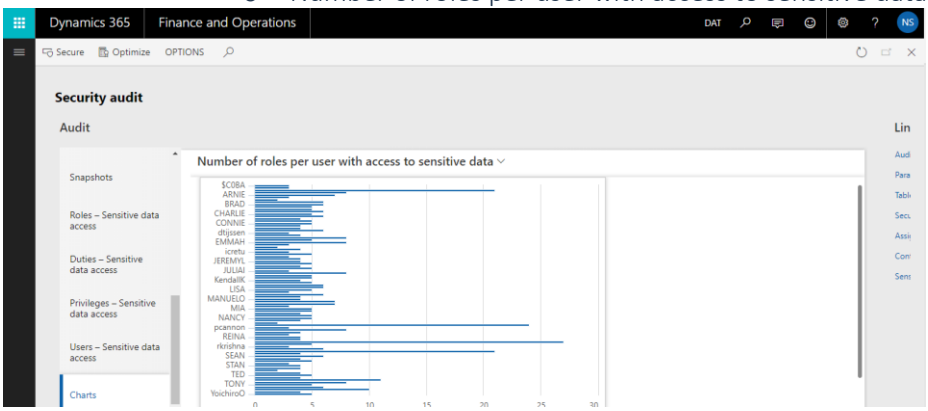


- Charts
  - Number of security objects with access to sensitive data

  - Number of users with access to sensitive data per organization



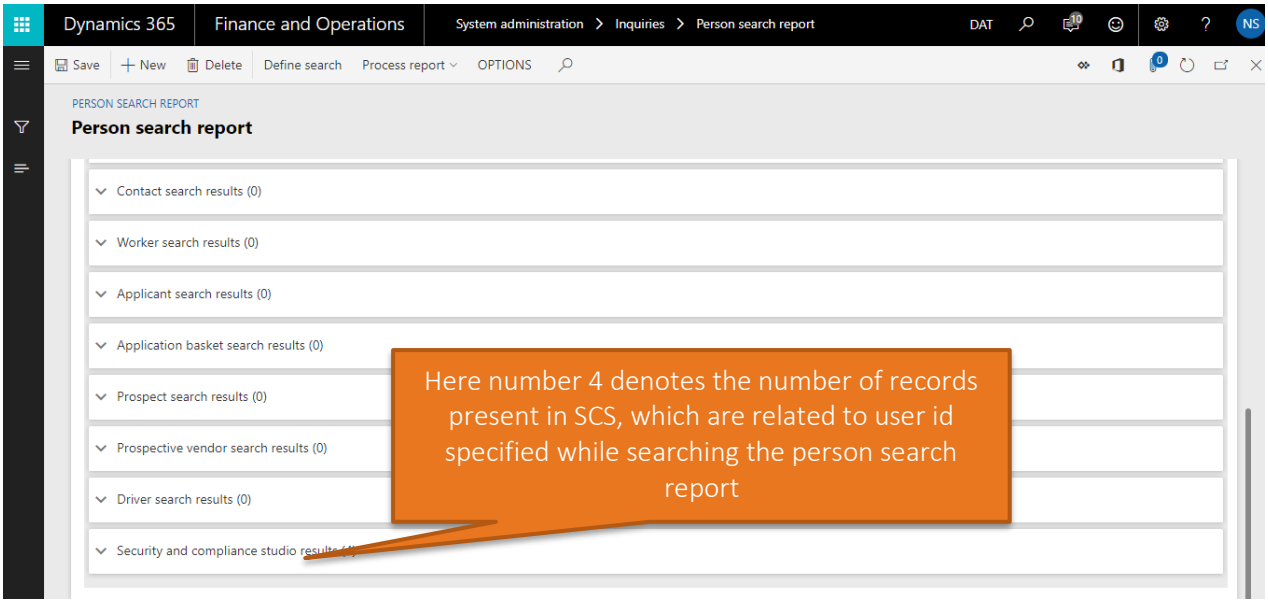
- Number of roles per user with access to sensitive data



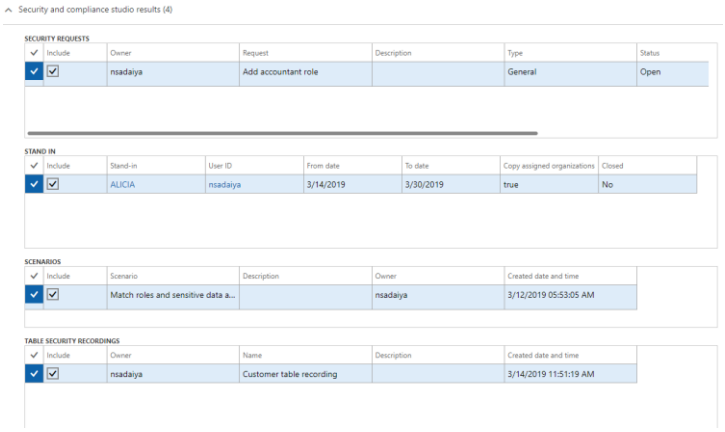
- Reasons to give roles access to sensitive data

- Person search report extension

On the standard Person search report form a new SCS tab is added. For more details on person search report please refer https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/gdpr/gdpr-person-search-report. You can find person search report at System administration > Inquires > person search report. Below image is a screen shot of the person search report.



When you expand SCS results tab, you can see all the records present in SCS, which are related to user id specified while searching the report. In below image we have used user id as nsadaiya.



Please refer to the product documentation ***User and Training Guide - Security and Compliance Studio*** – available on request and ***Documentation BPM libraries*** available with the deployable package of the latest SCS release.

3.9 Option to create a duty from Matched Privileges grid in Match roles form

You can now create a duty from selecting one or more privileges in the Match roles form to design a security role matching the user work scenario at the least license cost.

The SCS *Create duty from privileges* functionality helps you to select multiple privileges from the *Matched Privileges* grid on the Match Roles form and create a duty. This is very useful feature to help you evaluate the privileges that provide complete access to a recorded security scenario at the least license cost and create a new duty and eventually a role if required..

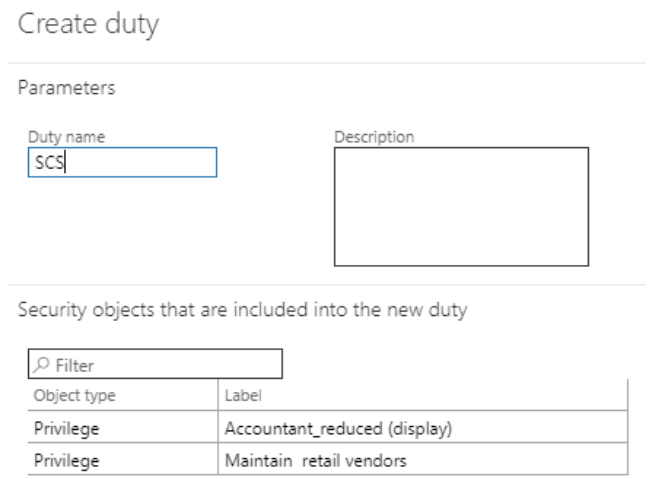
Select one or more privileges on the *Matched Privileges* grid.

Matched privileges

Privilege name	Securable object type	Securable object	Access level	Privilege license type	Menu item license type
MergeRoleTest	Menu item display	VendTable	Full control	Activity users	Team members
Maintain vendors	Menu item display	VendTable	Full control	Activity users	Team members
Maintain retail vendors	Menu item display	VendTable	Full control	Team members	Team members
Accountant_reduced (display)	Menu item display	VendInvoiceJournal_Action	View	Team members	Team members

Click on the Create Duty button as shown below.

Enter the new duty name and the description.



The new duty is now in place and you can assign it to a security role and user to end users in D365.

3.10 Option to import and export data using Data Entities in Security and Compliance Studio

Data entity provides conceptual abstraction and encapsulation (de-normalized view) of underlying table schemas to represent key data concepts and functionalities. A data entity encapsulates a business concept into a format that makes development and integration easier. Below table holds the data entities currently supported for Security and Compliance Studio. The approach has been to enable data entities for all tables in SCS in order to provide import and export capabilities where relevant.

Notes:

- See comments column for additional info when relevant.

Entity Name	Category	Create	Modify/Update	Import	Export	Comments
Scenario	Master	Yes	Yes	Yes	Yes	
File store	Reference	Yes	Yes	Yes	Yes	Reference data for “Scenarios”
Stand-in	Master	Yes	Yes	Yes	Yes	Can be or not reference to “Security requests”
Locked Roles	Master	Yes	Yes	Yes	Yes	Can be or not reference to “Security requests”
SOD	Master	Yes	Yes	Yes	Yes	This is standard entity and can be reference to “Security requests”
Table security recording	Master	Yes	Yes	Yes	Yes	Can be or not reference to “Security requests”
Security Requests	Master	Yes	Yes	Yes	Yes	
SCS Parameters	Parameter	Yes	Yes	Yes	Yes	

3.11 Option to compare Security Snapshots stored in the security setup

Snapshot comparison feature allows security officers and administrators to do a detailed comparative analysis between any two security snapshots for all security objects in D365 FOE setup i.e. Users, roles, duties, privileges. Both single record compare and full compare options for the selected snapshots are supported along with multiple views. The comparison option will allow the user to see what modifications had occurred in the security setup since the last changes. The users can keep track of the changes, comprehend and analyze them in order to improve and strengthen the security.

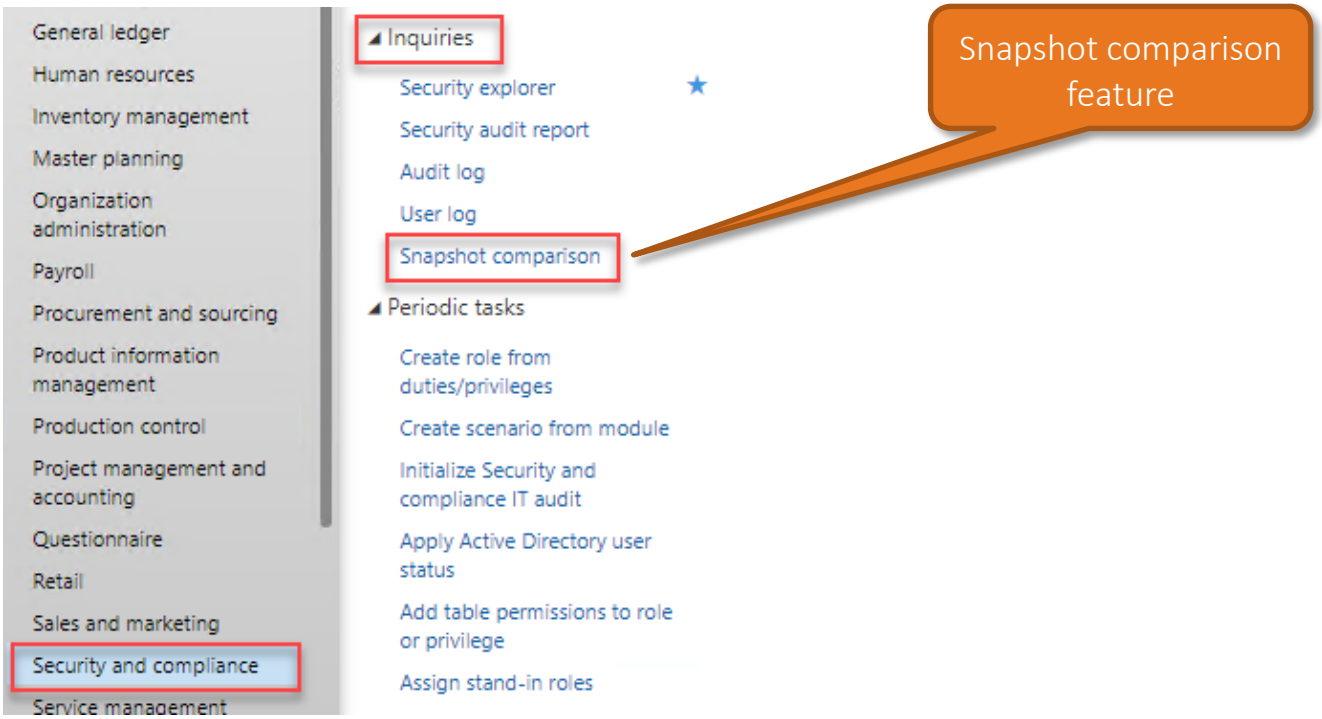


Fig 1. Snapshot comparison path

The form that will open will show like this (see Fig. 2) and below a short description of it.

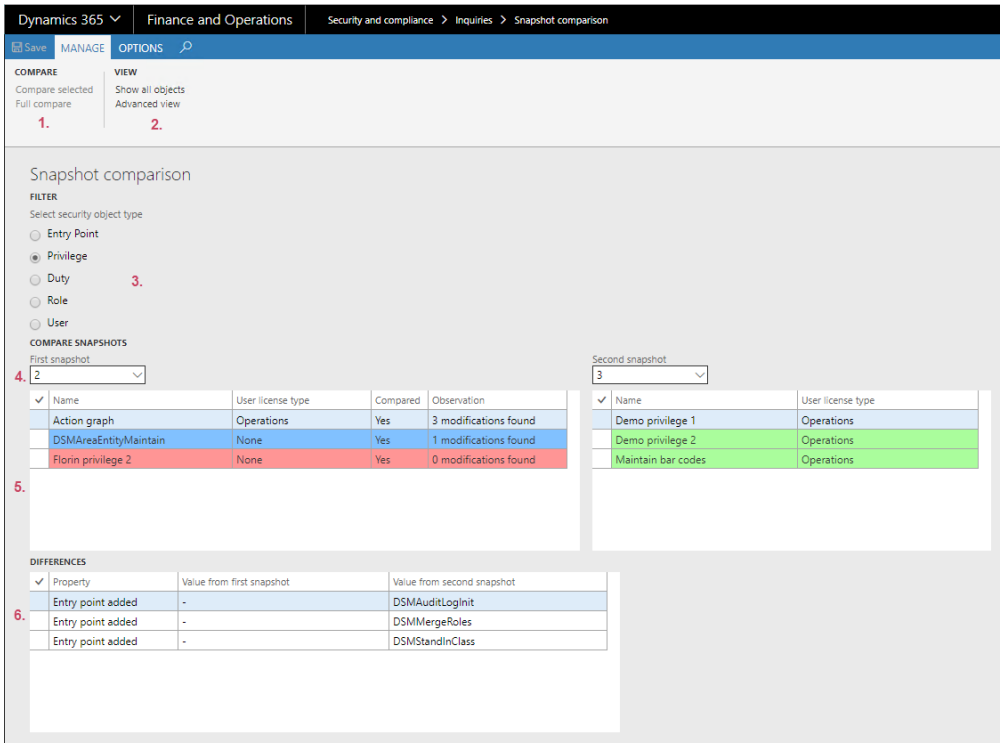


Fig 2. Snapshot comparison form

Legend:

1. COMPARE button group – contains two buttons:

a) Compare selected: will run a comparison only for the selected records from the first grid.

b) Full compare: will run a full comparison between the two selected snapshots

2. VIEW button group – contains three buttons:

a) Show changes only:

i. when clicked will display only the objects that have been changed (deleted, modified or newly created);

ii. label will be changed to “Show all objects” (see Fig. 3)

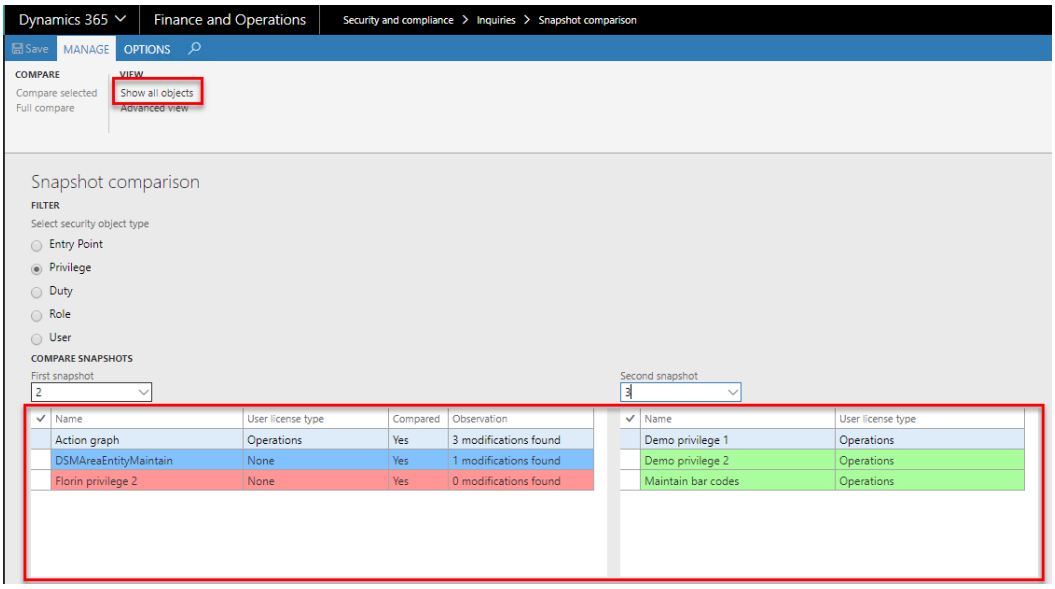


Fig. 3 See a list of the modified objects

b) Show all objects:

i. when clicked will display all the objects from both of the selected snapshots

ii. label will be changed to "Show changes only" (see Fig. 4)

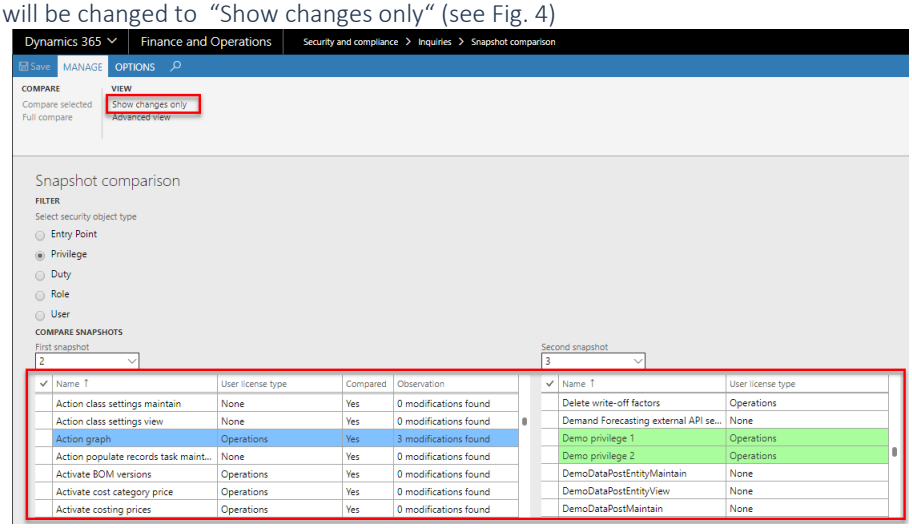


Fig 4. See a list of all objects from selected snapshots

c) Simple view: - When clicked some fields will be hidden (this is the default view when the form is opened) and the label will be changed to "Advanced view". (See Fig. 4 as by default the form is in Simple view)

d) Advanced view: - when clicked, the "identifier" and "User license type" fields will be visible and the label will be changed to "Simple view" (see Fig 5)

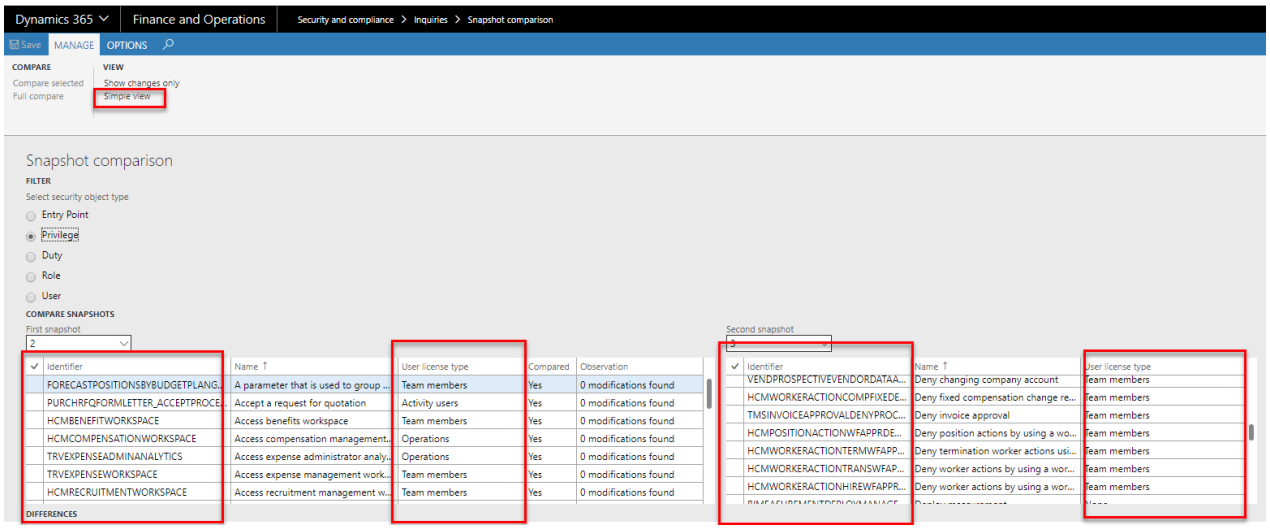


Fig 5. Advanced view

3. **Filter group** – contains one radio button control:
   a) Select security object type: select the security object type to be displayed in the grids below.
4. **Compare snapshots group** – contains two drop downs to select the snapshots to compare
   a) First snapshot : select the snapshot that will be compared
   b) Second snapshots: select the snapshots that first snapshot will be compared with

Observation:

   i. Second snapshot will be disabled until first snapshot will be selected
   ii. Second snapshot cannot be lower or equal with first snapshot (see fig. 6)

Fig. 6 snapshot selection restriction

5. **Grid group** – contains two grids. One for each snapshot selection:
   a) Left grid: shows the records associated with the value from First snapshot dropdown.
   Observations:
      i. In column **Compared** you will see if the record was already compared or not.
      ii. in column **Observation** you will see how many changes were detected

Colour legend:

Colour	Definition
Red	The records exist in first snapshot, but not the second one -> the security object was deleted.
Blue	The records exist in both snapshot but changes were detected -> the security object was modified.

   b) **Right grid:** shows the records associated with the value from **Second snapshot** dropdown.

Colour legend:

Colour	Definition
Green	The record exists only in the second snapshot -> the security object was newly created.

6. **Details group** – contains one grid where the differences will be displayed.
   a) Difference grid: shows the differences for the selected record (from first grid) in comparison with the second one. Here you can see what was modified. The old value, the new value and the property that was changed.

E.g.: 1) the license type for a role has changed from "Team members" to "Operations" it will display the following:

Property	Value from first snapshot	Value from second snapshot
UserLicType	Team members	Operations

2) A new duty was added to the selected role:

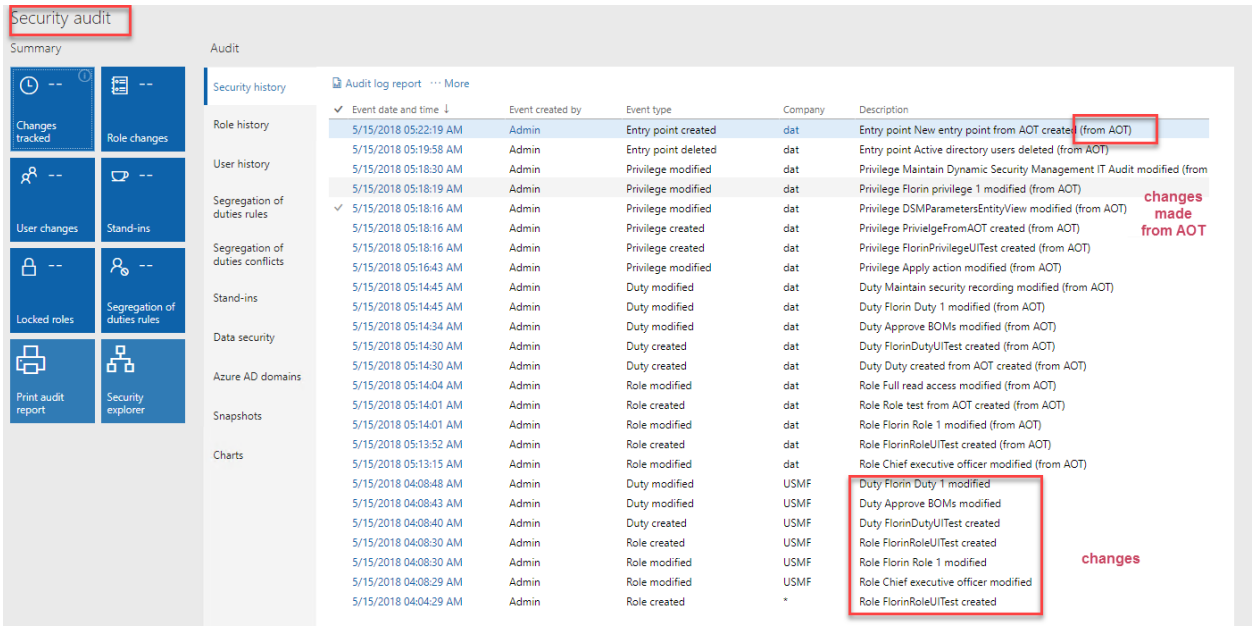
Property	Value from first snapshot	Value from second snapshot
Duty added	-	View sales

3) A new duty was removed to the selected role:

Property	Value from first snapshot	Value from second snapshot
Duty removed	Maintain sales	-

3.12 Enhanced Audit log capability to capture all the changes from development space (AOT) as well into Audit Log.

The Audit log will have a larger spectrum and will capture all of the changes from security configuration. Beside the Audit log we will also include a visualization of the changes, of the comparison so the user can analyze.



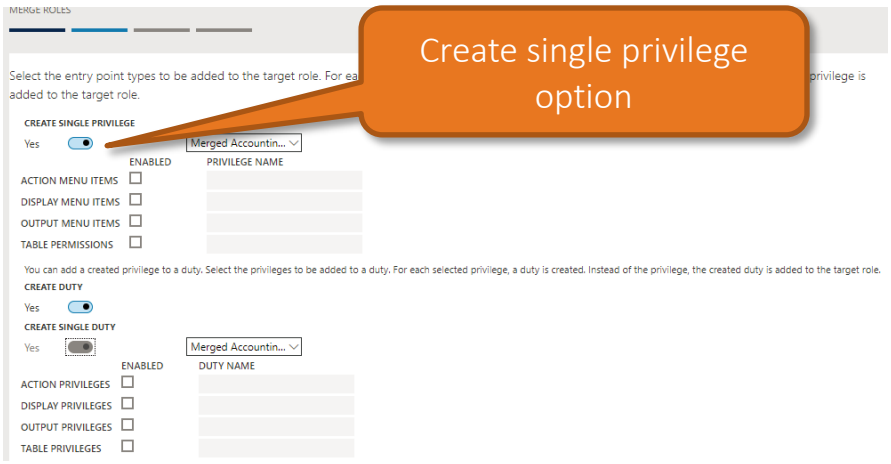
New Events types that will be used to track changes done directly to permissions from Development environment:

Event name	Status
Entry point deleted	New
Entry point modified	New
Entry point created	New

This comes as a solution of capturing all the changes no matter if they took place in the UI (user interface) or directly into development space (in Visual Studio).

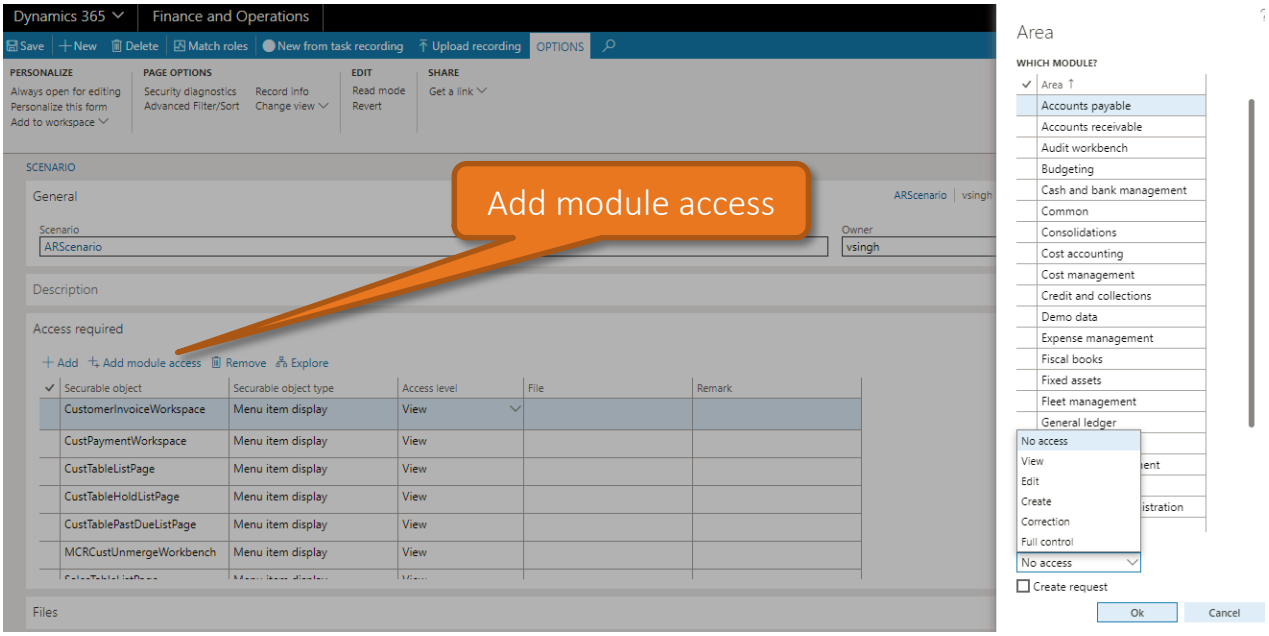
3.13 Option to create one or more privileges and also one or more duties while merging roles.

You now have an option to create duties along with the privileges while using the “Merge roles” feature. Previously you can split up entry points in separate privileges by entry point type. Now you can create and associate duties as well for the different entry point type (action, display, output etc.). In addition you are also warned of possible SOD violations while you select the roles to be merged.

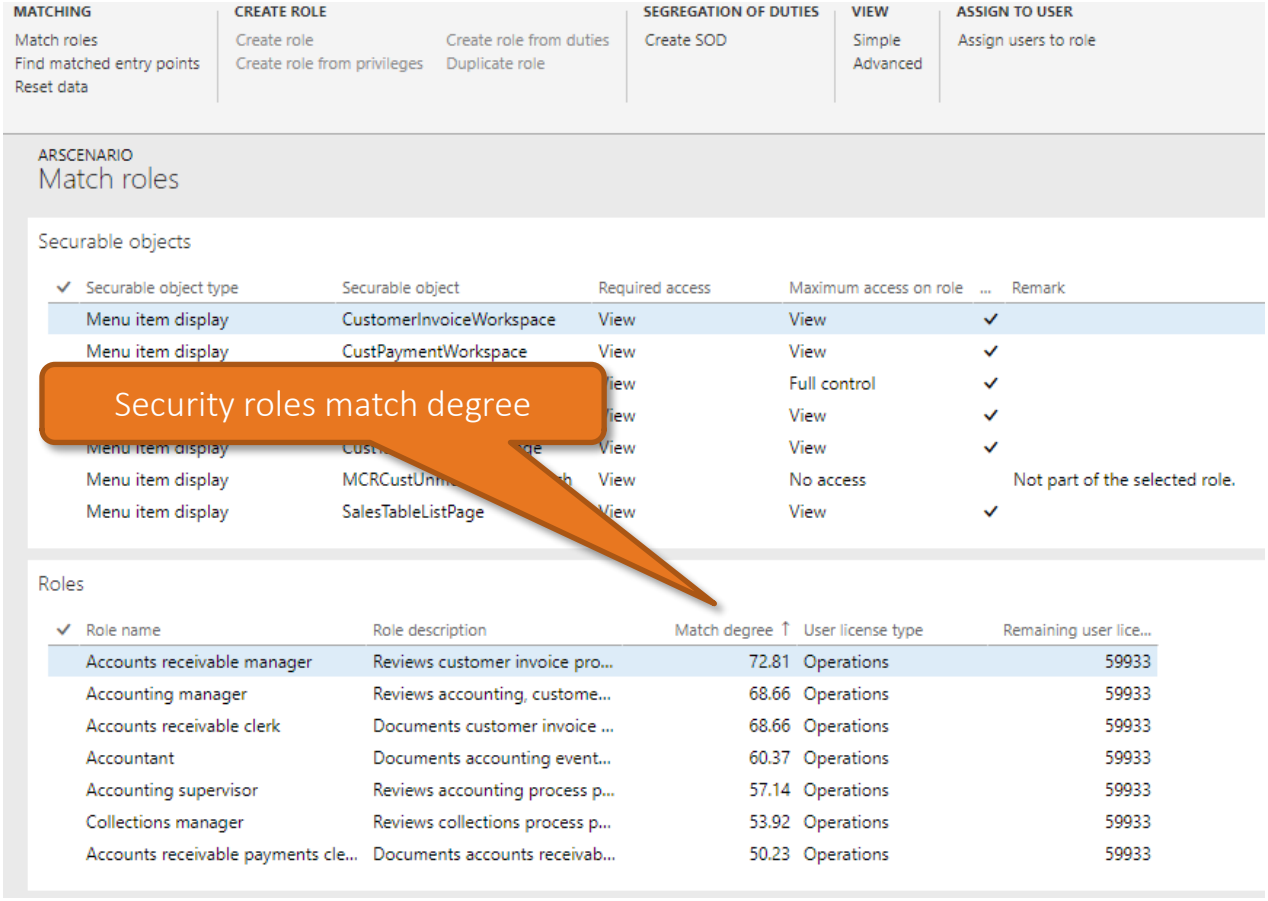


3.14 Ability to create scenarios from D365 module menus

"Add module access" feature helps you to create a new scenario based on the complete list of a module menu items with a desired level of access types. This is of great help when you desire to have a security role providing you access to all or most of one module features. You can also select the access type for the module security objects- No access, View, Edit, Create, Correction and Full control.

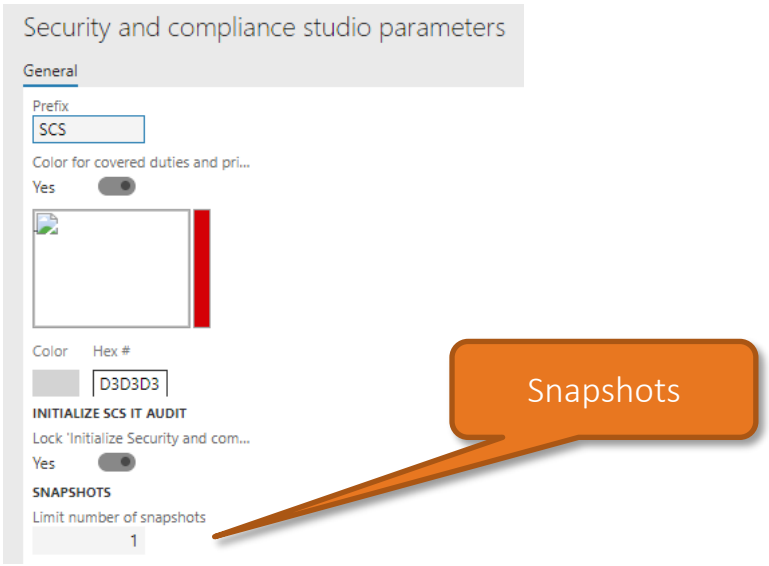


You can also create an associated security request in the same step to ensure proper tracking. You can then run match roles from the same form to find out the best matching role at the least license cost.

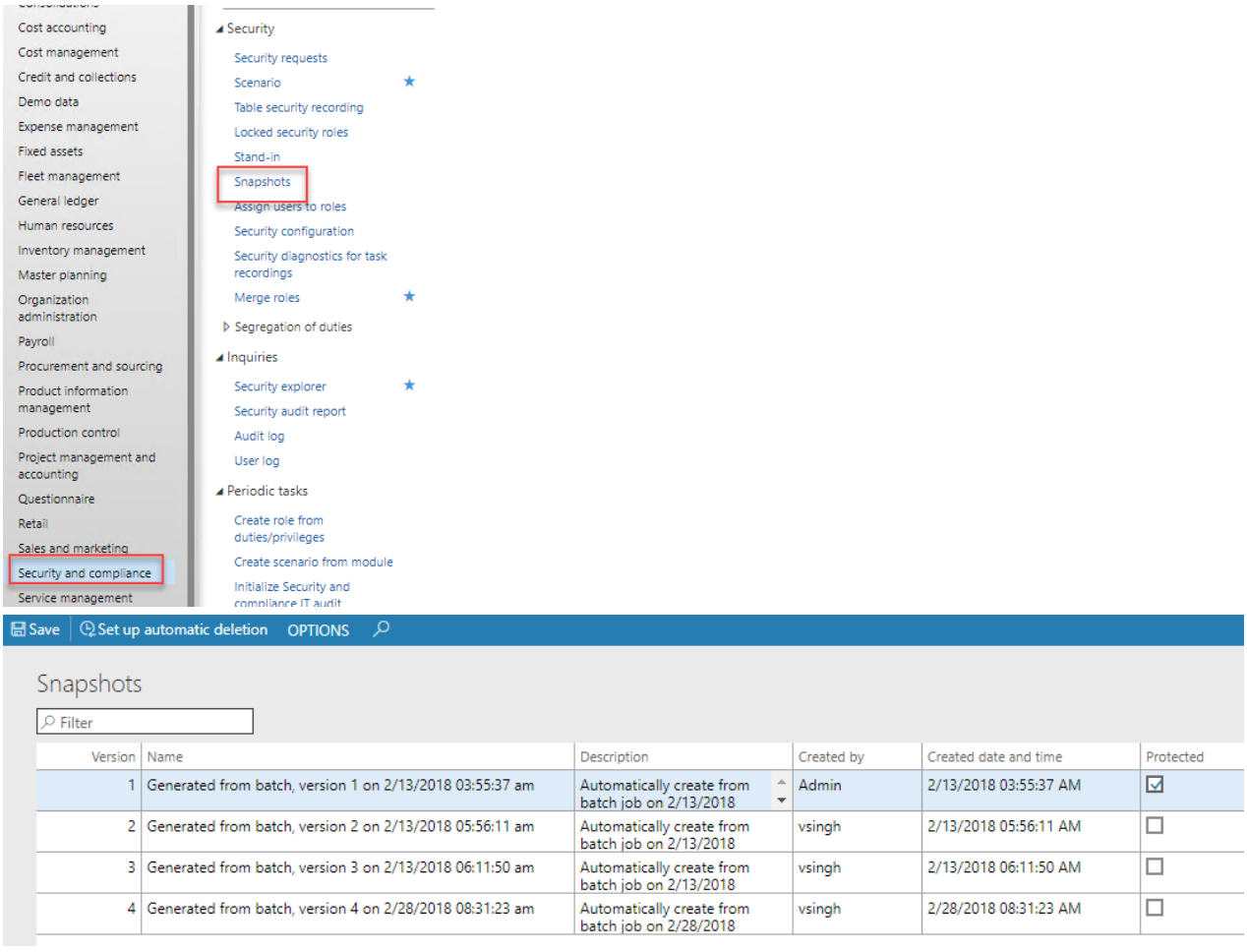


3.15 Snapshots based performance and scalability enhancements

A Snapshot means a version of the current security configuration setup. The entire functionality for Rebuild Data, Security Explorer and Match Roles revolves around the security objects (roles, duties, privileges and entry points) and the associations between them (duties assigned to role; privileges assigned to each duty, etc.). All of these are kept in standard code that was preserved, externally, into a DLL. Using this DLL for multiple scopes in Security and Compliance Studio end up with a performance on the above mentioned business logics/functionalities. As a response, our solution was to create a structure of tables to keep the data related to each security object and the association between them and easily access it directly from tables and also much faster. This was important to support security analysis of scenarios with very high number of security objects. This has led to drastic improvement in the “Match roles” and “Rebuild data” programs performance. For example analyzing scenarios with 200 objects takes a minute.



Security administrator can decide on the number of snapshots to be stored as per company policy. You can also lock a snapshot if you don't want it to be deleted by checking on the ***Protected*** check box.



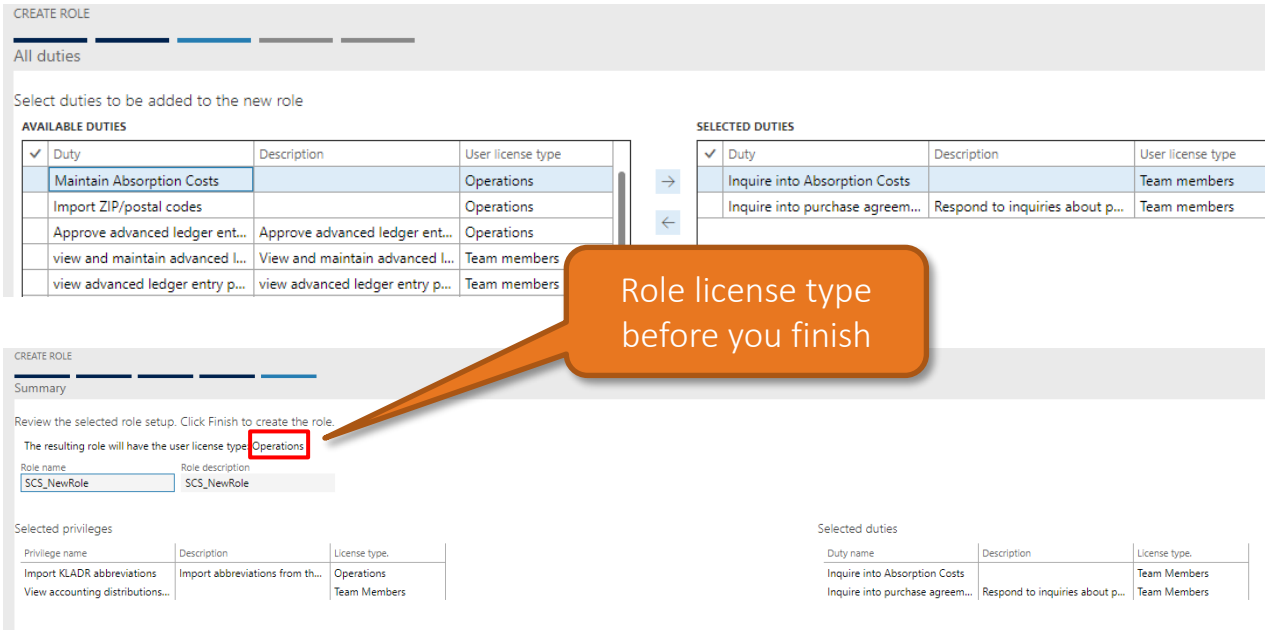
A batch program need to be set up for automatic deletion of the snapshots based on the parameter settings. "Set up automatic deletion"

This feature also lays the foundation for further enhancements in Audit Workspace to capture, compare and visualize Snapshots of the complete D365 FOE data log.

"Limit number of snapshots" parameter functionality has been change as following
a) "-1" (negative one) value will used to store unlimited number of snapshots. This will also pop-up two warnings to inform the user.
b) "0" (zero) value will not keep any snapshot versions except the ones marked as 'protected'.

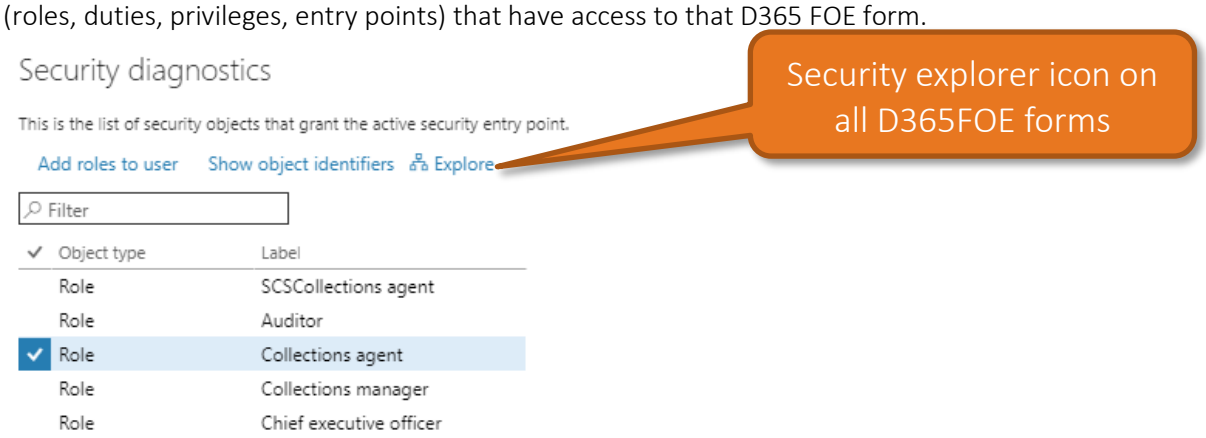
3.16 Improved “Create role wizard” based on a grid framework

Create role wizard” is now based on a new grid framework making it a great user experience. This wizard helps you to create a new security role based on duties and privileges with letting you know the license type before role creation.

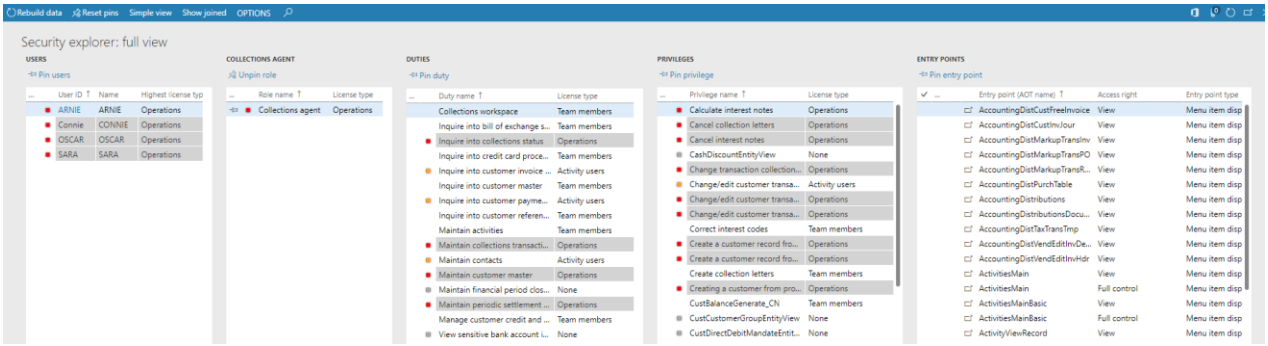


3.17 Accessing Security Explorer from all D365 FOE forms

You can now access the Security and compliance studio security explorer embedded in all D365 FOE forms from security diagnostics. This provides a very useful way to analyze users and associated security objects (roles, duties, privileges, entry points) that have access to that D365 FOE form.

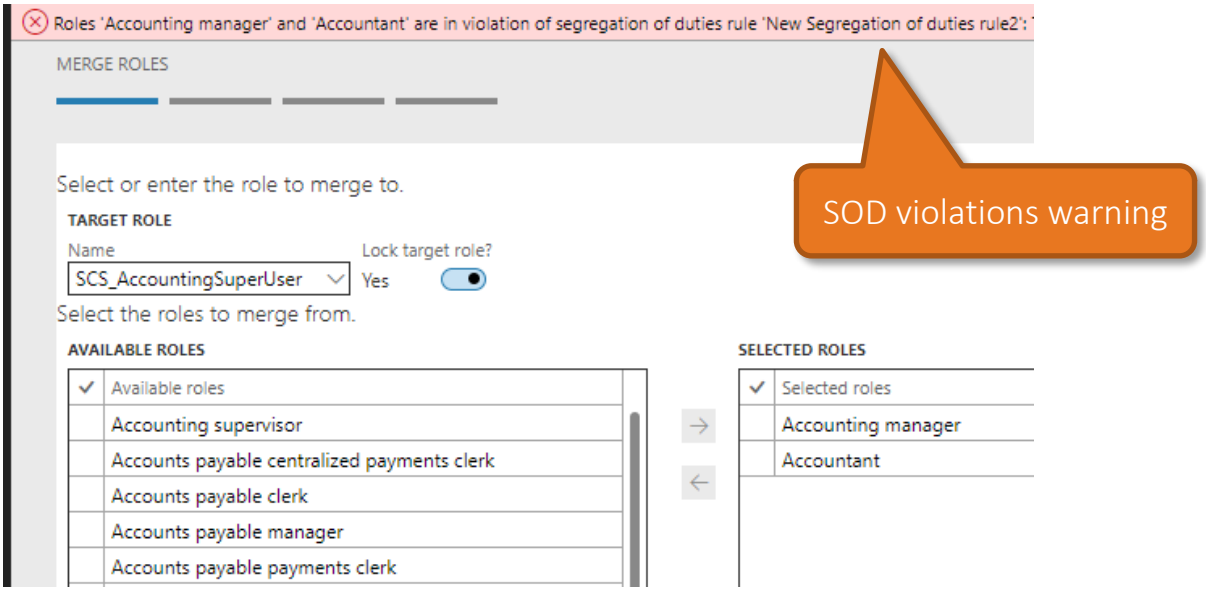


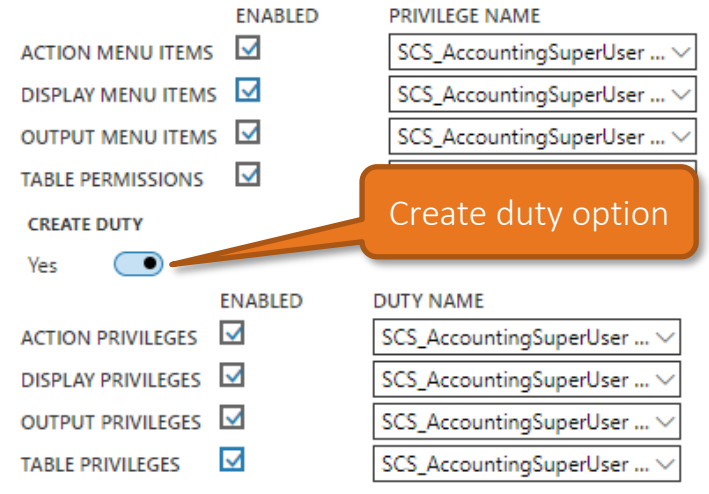
Clicking on the icon will provide you a 360 degree view of that object type.



3.18 Option to create duties and SOD compliance check as well while merging roles.

You now have an option to create duties along with the privileges while using the “Merge roles” feature. Previously you can split up entry points in separate privileges by entry point type. Now you can create and associate duties as well for the different entry point type (action, display, output etc.). In addition you are also warned of possible SOD violations while you select the roles to be merged.

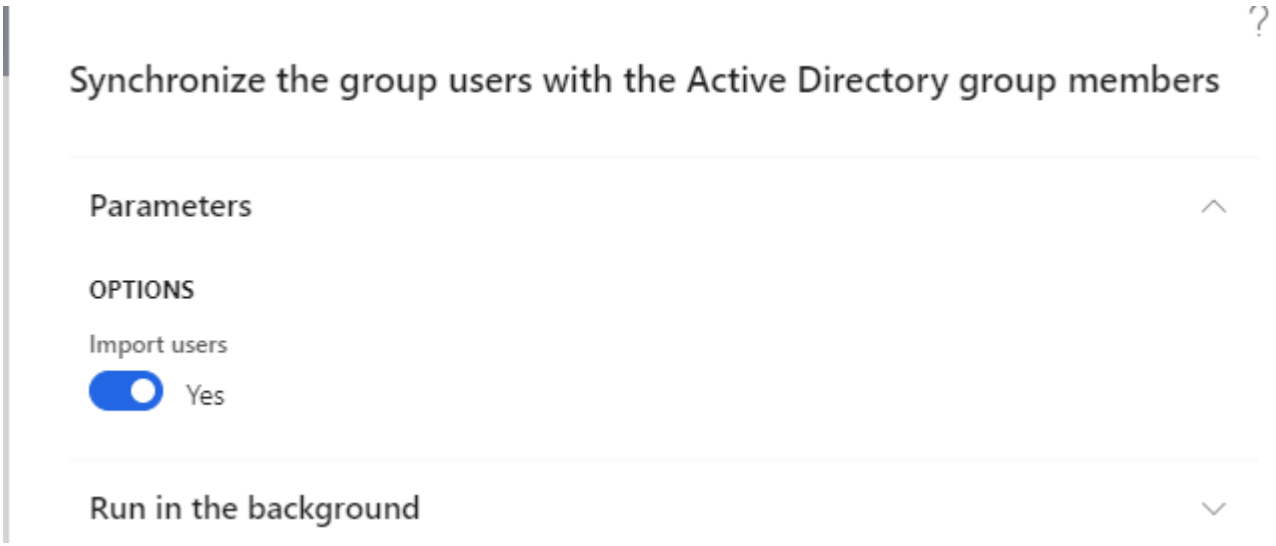




3.19 Importing New Users while Synchronizing the group users with the Active Directory group members

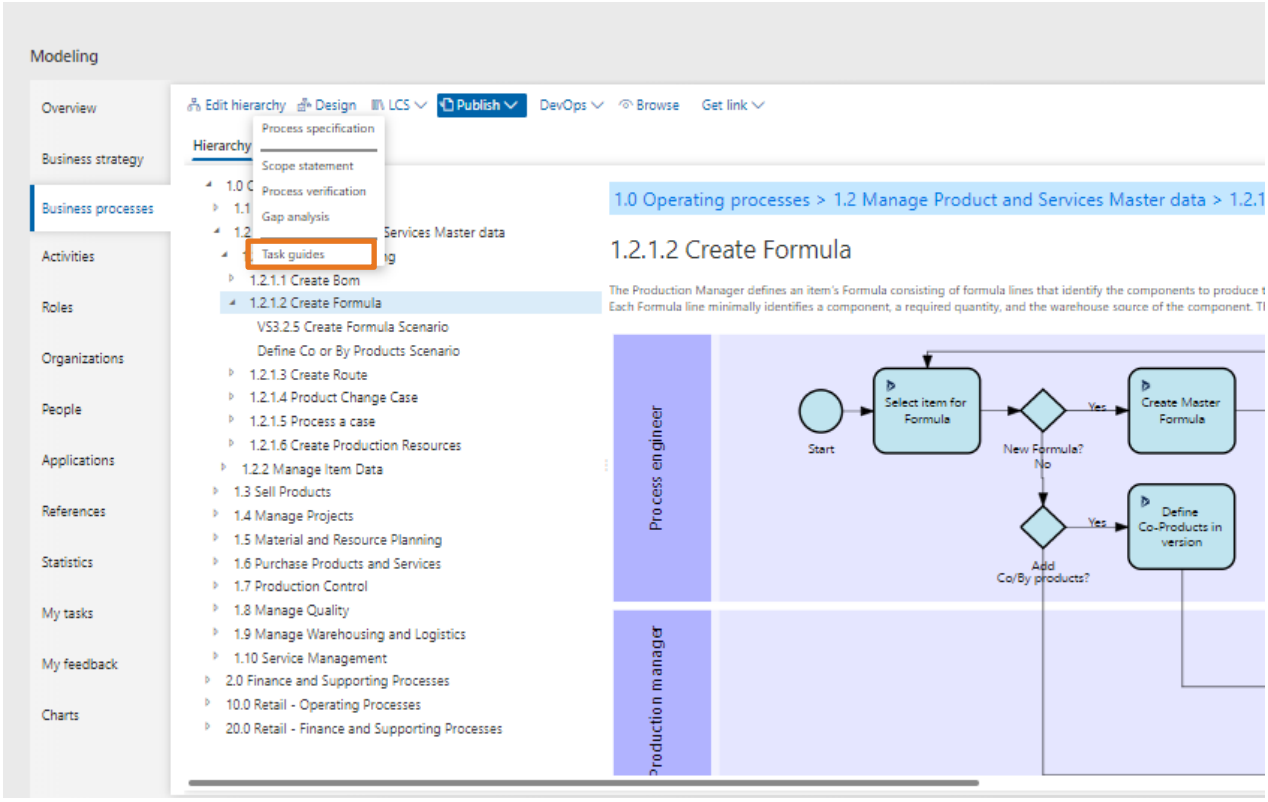
This is very useful for offline analysis and drill down of the required security setup in a company or department. We added a new small feature to our Azure AD group synchronization job. On the dialog of the Synchronize the group users with the Active Directory group members, we introduced a new parameter to import users. When enabled, it will not only synchronize the Azure AD group member information but will also look for users which are not a user in Dynamics 365. The user will be added to the application together with the group information. The default login company and language will be copied from the Group settings.

By introducing this feature, the creation of users, assigning roles and check for possible Segregation of Duties with our enhanced SoD features can be fully automated with information from Azure Active Directory.



3.20 Uptake RapidValue BPM Suite Scenarios directly as SCS Security Scenarios

Customers can now directly upload the RapidValue Scenario task guides per security roles (Procedure activities which include flows across multiple roles) as a Security scenario in Security and Compliance Studio. This will be very useful where both RapidValue BPM Suite and Security and Complicate Studio are implemented. You might be aware that now in RapidValue, you can have Business process hierarchy with its linked task guides exported from RapidValue to Share Workspace. Export logic takes care of both the modeling techniques where customer is using Flow-Activity way of modeling and also the Scenario" Procedure Activity" way of capturing flow variations.



If the customer is predominantly using Scenarios (Procedure Activity) based modeling; following logic applies.

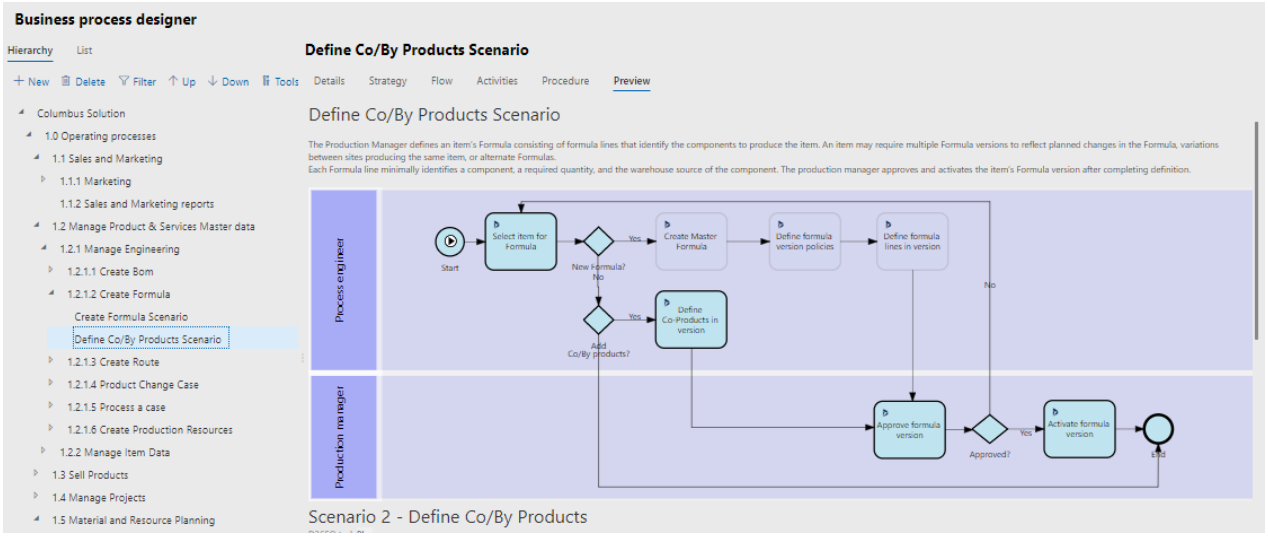


Figure: Scenario-Procedure activity based modeling

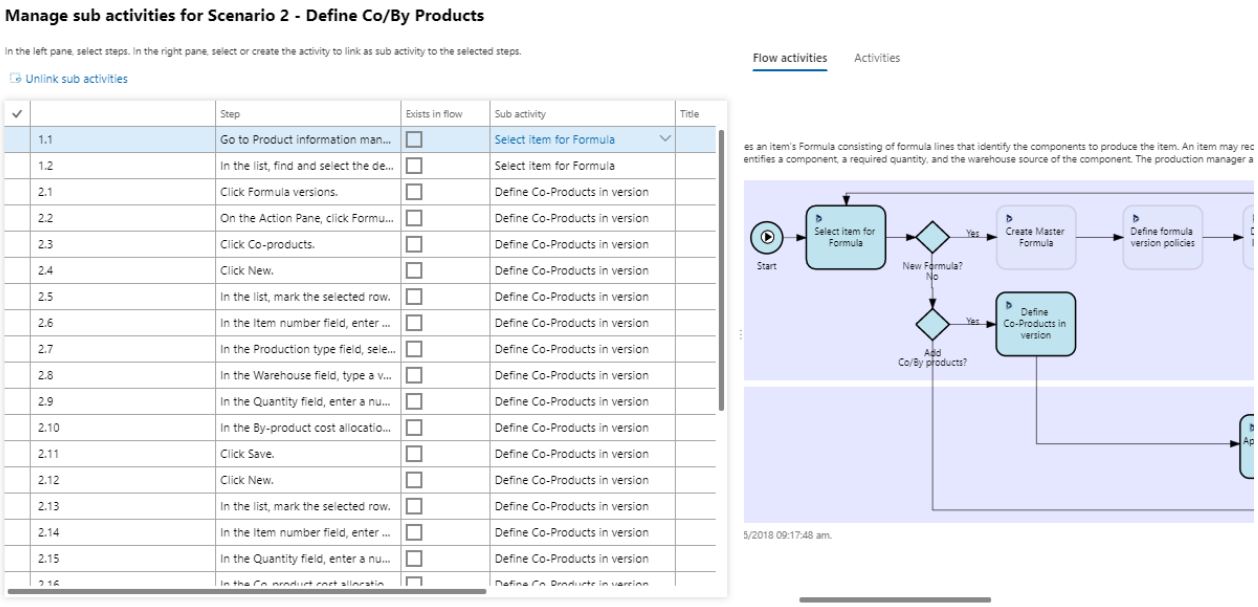
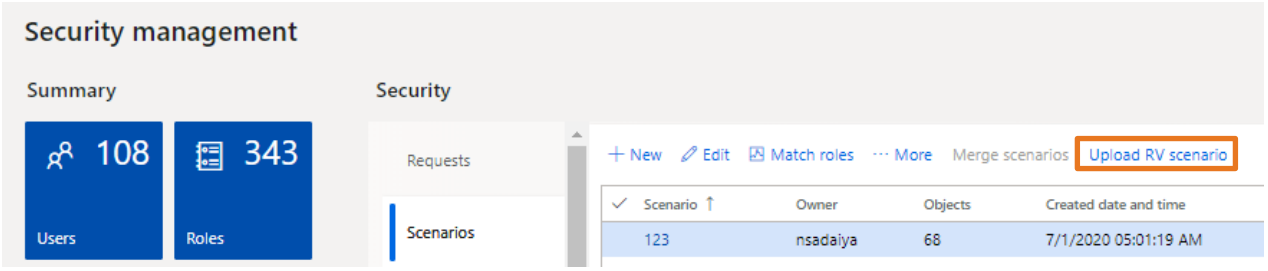


Figure: Scenario-Procedure activity based modeling with recorded steps linked to flow activities

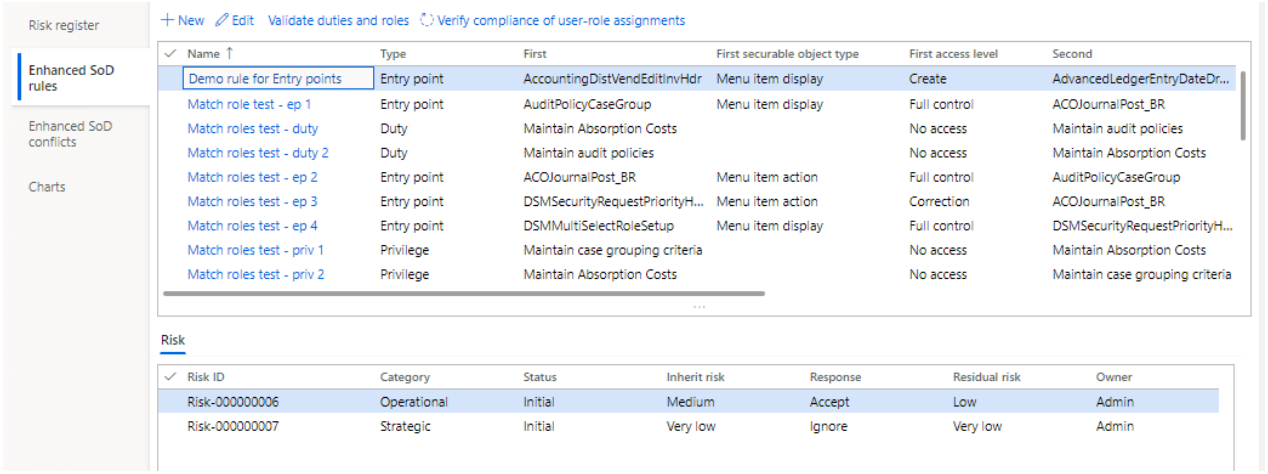
In the example shown above, for the scenario attached to the business process node, Define Co/By Products Scenario, exporting the task guides will create at the lowest level, two folders one each for *Production Manager* and *Process Engineer* with the respective task guides.
These can be uploaded in SCS using the SCS **(Upload RV Scenario)** Button in Scenarios tabbed list in the Security Management Workspace



This makes it easier to create right “Security Role” using Match roles feature in SCS based on role definitions in RapidValue.

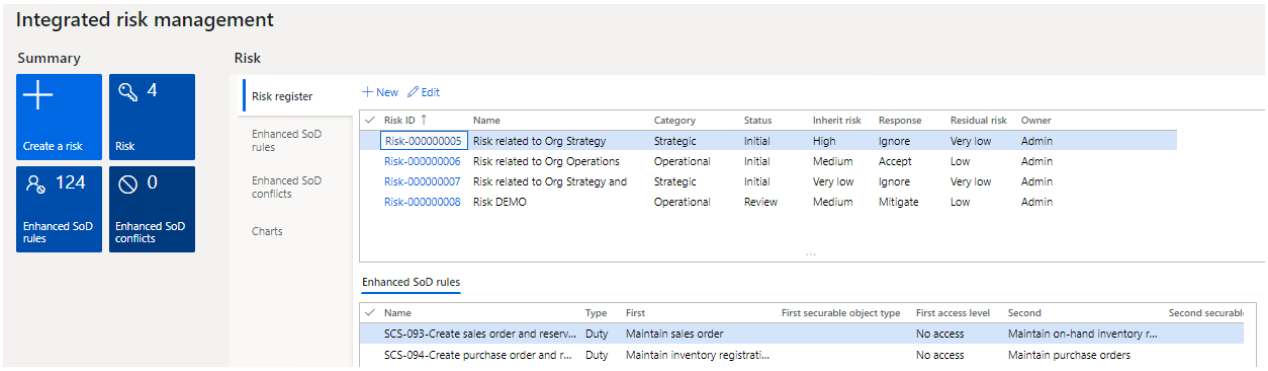
3.21 Enhanced Segregation of Duties

In standard D365FSC, we can only define SoD rules at duty level which is rarely useful. In SCS, with this release user can now define SoD rulesets at any level (Duty, Privilege or Entry Point) in the security hierarchy in D365FSC. This makes this feature more practical and extremely useful for customers seeking better regulatory compliance like ISO 27001 section 6.1.2, SOX Control 404 and in general much improved security design better equipped to prevent frauds.



3.22 Organization risk Register

All Organizational risks can be now mapped in SCS "*Integrated risk Management workspace*". They may be financial risks related to SoD violations or can be related to any other organizational strategy or operational aspect. This feature will evolve in coming quarters in a full-fledged "Risk Management" capabilities within SCS enabling Organizations to register, assess, monitor, mitigate and close it.



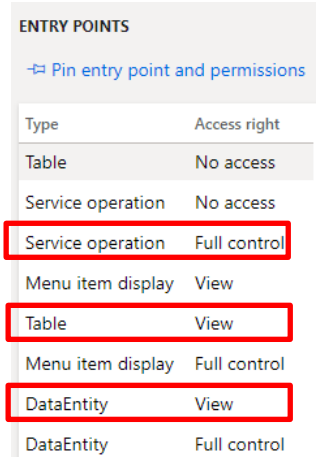
3.23 AAD related SoD Validations across SCS

SCS now ensures that SoD violation checks also consider Security roles acquired by a user from being associated within an AAD. This is applicable all across SCS features. This helps in better handling of internal controls.

3.24 Security Explorer displaying Tables, Service operations and Data Entities entry point's type

Security explorer has been enhanced to now include also the following entry point's type: Tables, Service Operations and Data Entities. The complete list of entry point types are listed below:

- Menu item display
- Menu item action'
- Menu item output
- Table
- Data entity
- Service operation



3.25 Performance Optimization

Performance improvement across the application have been implemented in this release to improve user experience. Following programs have been positively impacted by the changes:

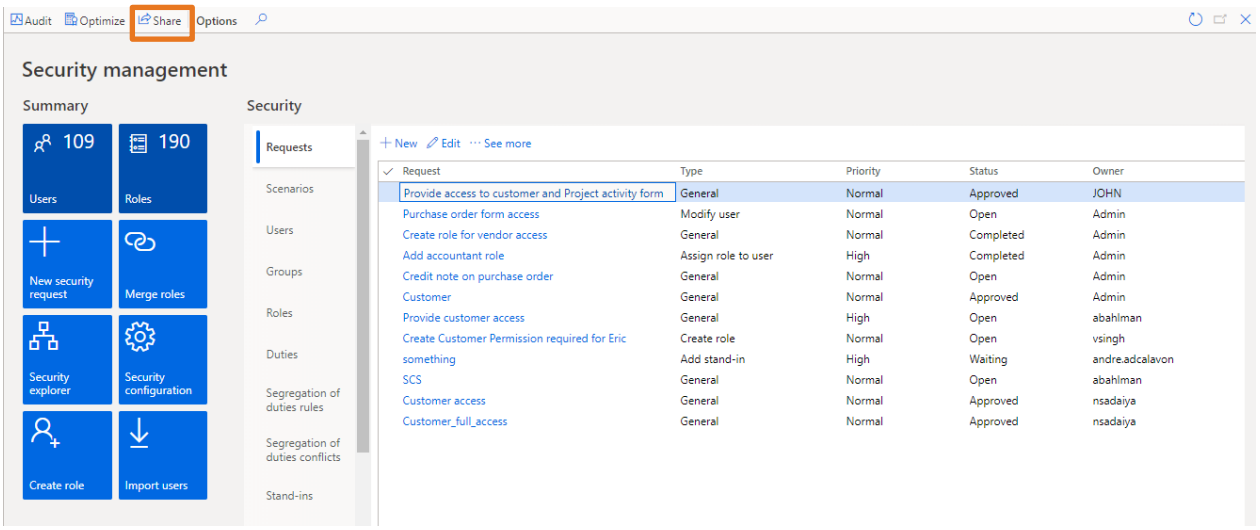
- Create snapshot,
- Security Explorer pinning,
- Match roles and
- Marking a record as sensitive.

Changes have been made in both indexes and the logic to improve the customer experience when working on these forms.

3.26 A new "Share" workspace

A new workspace "Security and compliance file share" is added to manage task recording and images. You can upload new task recordings and add them to scenarios (refer Add files to scenario). All the task recordings added to different scenarios will be listed in this workspace, you can also delete the task recordings which are no longer used in any scenario. Images can also be uploaded and added to the security request.

For viewing "Security and compliance file share ", go to Security management workspace and click on Share

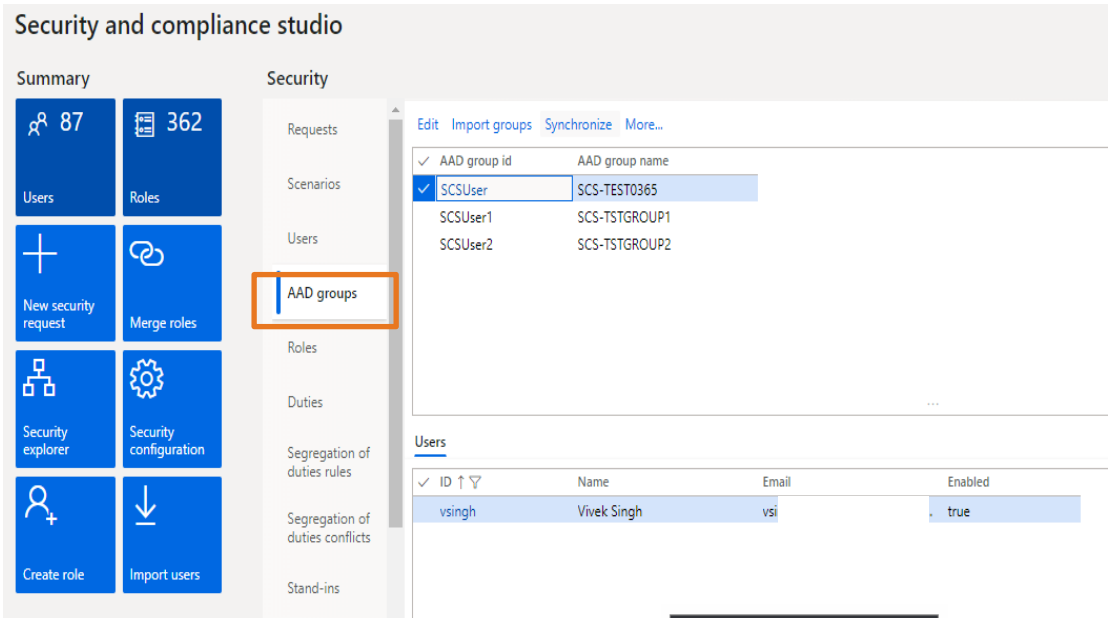


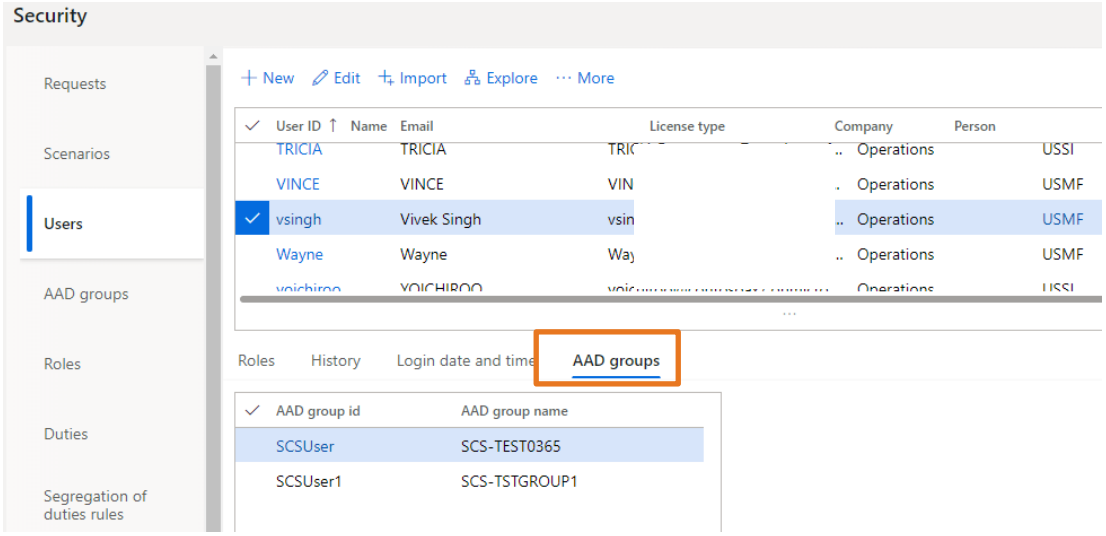
More details are mentioned in the “User and training manual”.

3.27 AAD groups’ information in D365FO

In standard D365FO, we cannot check what all the users added to AAD groups and we have to login to azure portal. Now in SCS, we can check what all the users added to AAD groups in D365FO itself along with all related audit tracking for AAD groups in SCS itself.

If a role is assigned to a group then all the users added in the group also get access to that role, SCS captures this important information in various SCS forms and in audit log.

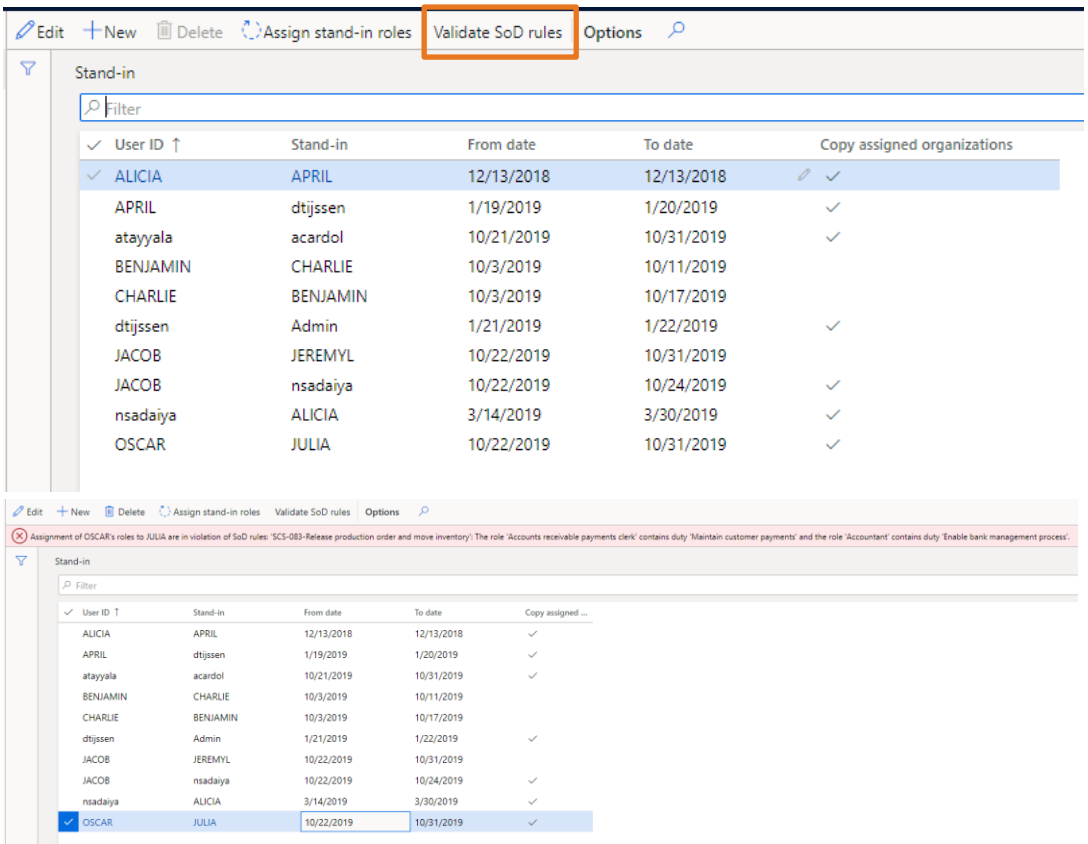




3.28 Verify SoD rules in Stand in

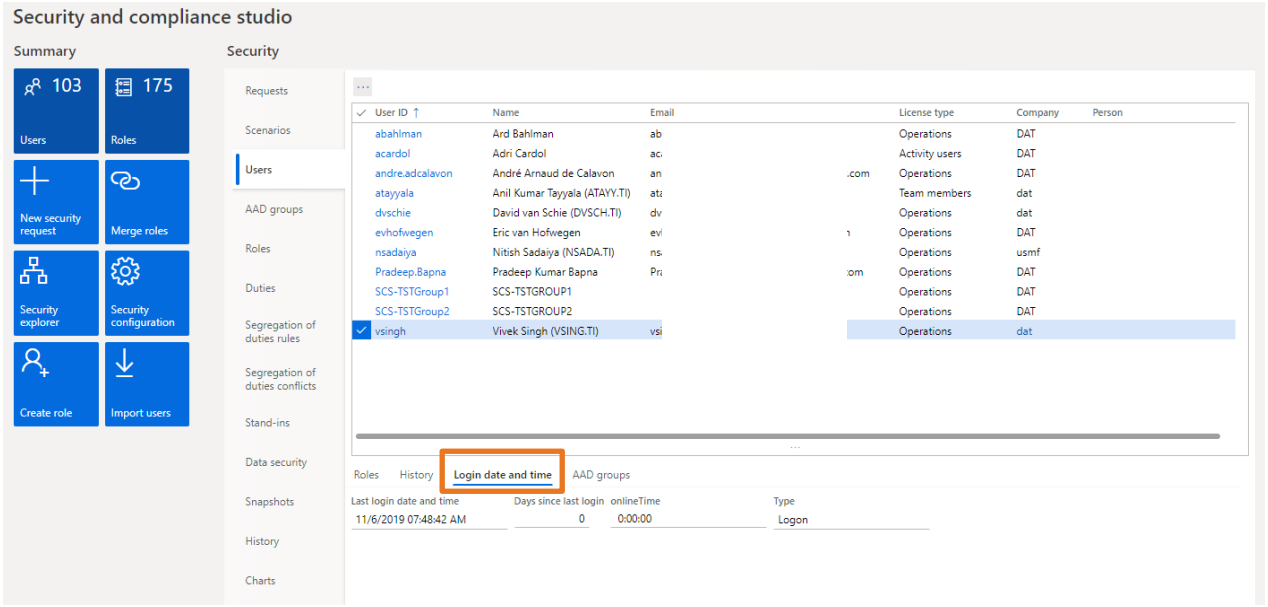
You can now use “Validate Sod rules “ functionality while defining new stand-ins in SCS to know in advance, if there will be any SoD violation when security roles of user will be assigned to stand in user.

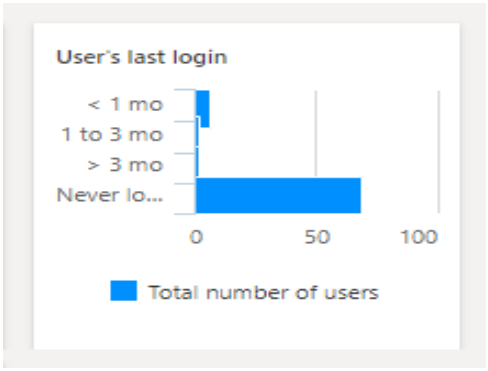
This is important from compliance perspective to be aware of any SoD violation proactively.



3.29 Chart to give an overview of number of users and their last logging details

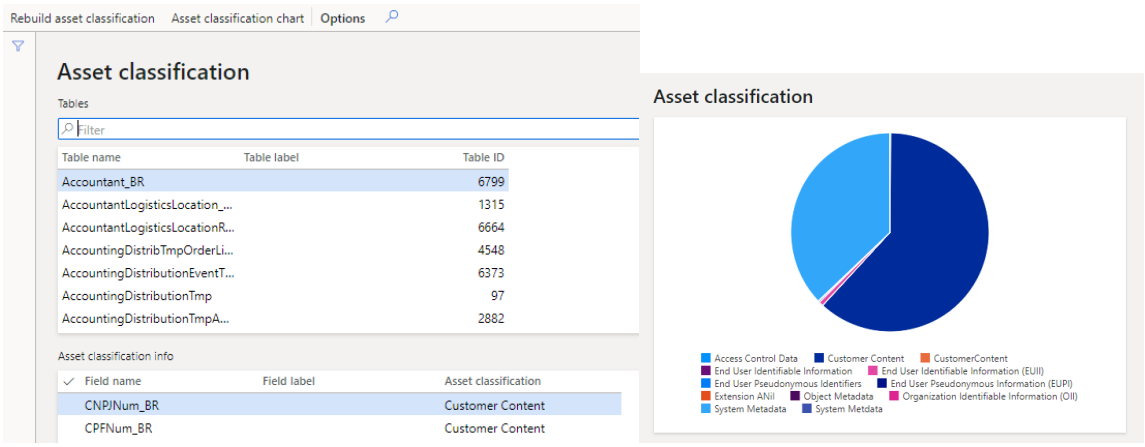
SCS now comes with a chart to categorize all users with their login details and time series analytics .This helps a lot in both compliance needs and optimizing license costs to deactivate or remove users based on an organization’s security policy.





3.30 Asset classification User Interface

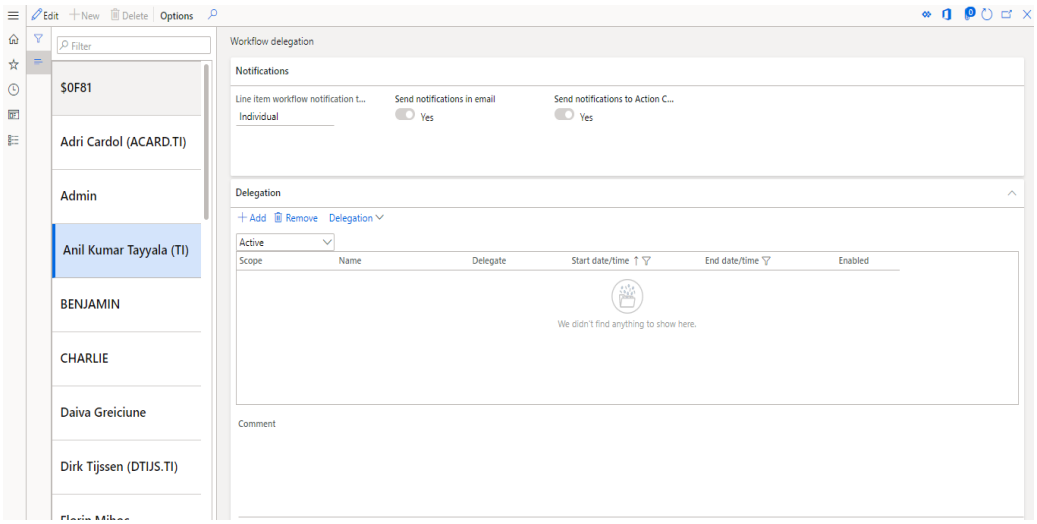
In standard D365FO there is no user interface in D365FO to know asset classification property set on different table fields. SCS now provides user interface, which shows all the fields with their asset classification. You have a chart to get the overview of different asset classification and how many field has the same asset classification. Asset classification is a table field property, classifying type of data it contains. Tagging a column helps easily marking data in scope for GDPR/GxP and many other such compliance regulations.



3.31 A List page with Workflow delegation details

This one is a UI improvements to make it easier for SCS administrators to manage and track "*Workflow Delegations"*. Every user has to login by himself to delegate work flow to other user, in D365FO. Now using SCS, administrator can delegate workflow to any user for a particular time period.

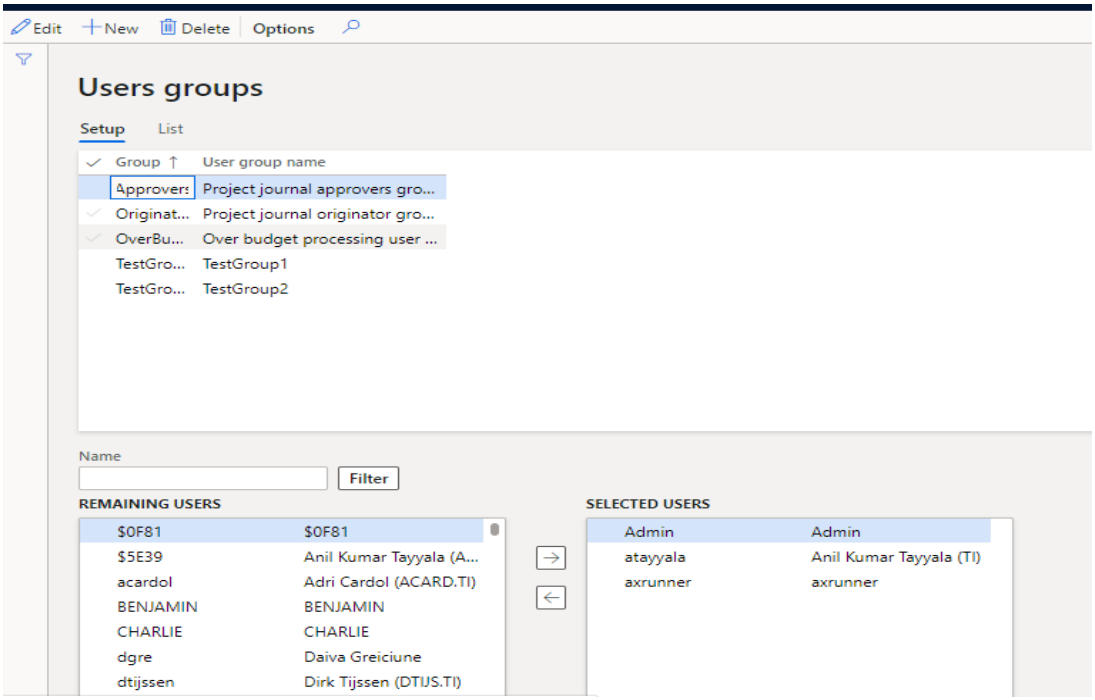
Workflow delegation history list page is also there for tracking. You can reach here from the Security and Compliance Module > Inquiries > Workflow delegation and >Workflow delegation history



3.32 User groups – combined two tabs in one

This one is a UI improvements to make it easier for SCS administrators to manage a simplified standard user group's form. Users who are outside the organization hierarchy for budget planning must work with budget plans, you can assign budget plans to user groups. You can also set up restrictions for journal posting that are based on user groups. Users can be added to different groups using same tab. Also in SCS now a list of added users to different groups can be exported to excel using list tab.

Users can be added to different groups using same tab.



You can reach here from the Security and Compliance Module > Inquiries > User groups

3.33 New export/import role functionality

a) Problem:

For a couple of years, we have discovered and reported to Microsoft a standard bug that for AOT Privileges the node 'FormControlOverrides' is not readable from code and that is affecting, for example, the current SCS Export / Import functionality.

b) Issue that is generated by the bug explained:

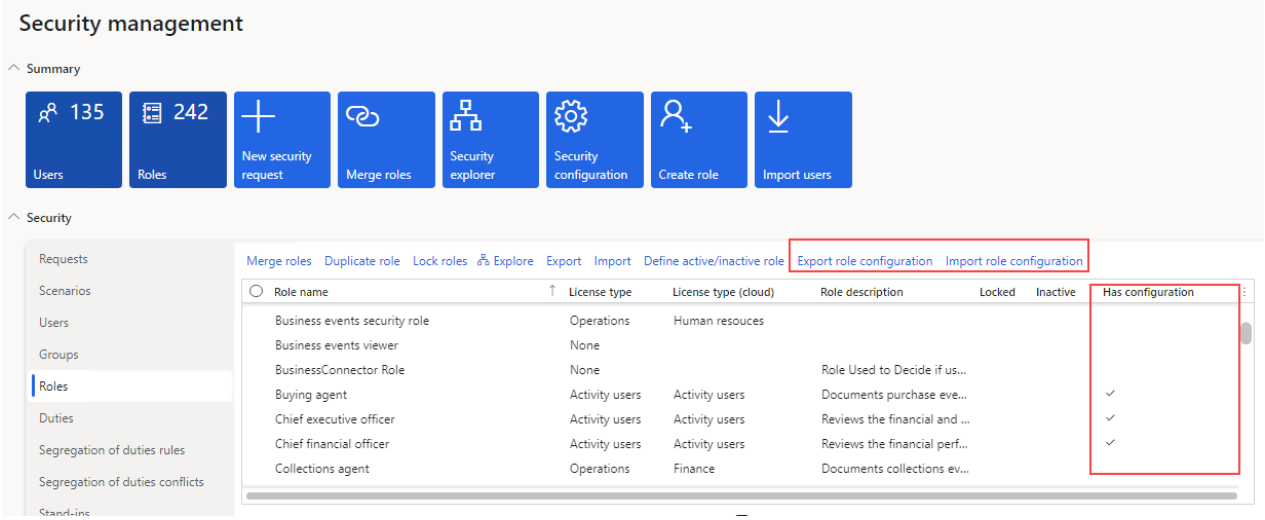
When exporting a role using SCS Export function the XML file generated does not contain the entries under the 'FormControlOverrides' from AOT Privileges.

After the SCS Import function runs, the content from the XML file is applied to the target environment. Since the 'FormControlOverrides' node is empty in the XML file, the algorithm interprets it as a change (entries removed from node by user) therefor it will override the privilege in target environment and the entries will be removed.

c) Solution:

Since the only framework that was exporting the 'FormControlOverrides' is the standard 'Export' from Security Configuration form (which exports only the customizations and all of them) we decided to use that and make it more practical for the end user, where now, with the new functionality you can export the customizations for a selection of roles.

The 'Export role configuration' / 'Import role configuration' can be found on *Security and Compliance -> Security management workspace -> Roles tab*



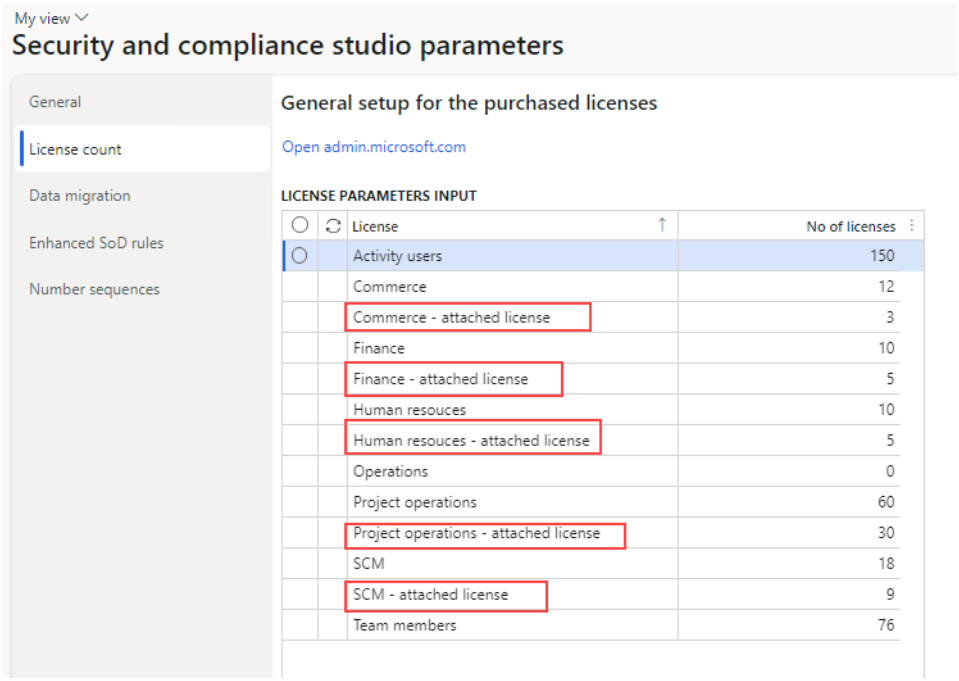
A new column has been introduced to show all the roles that due have customizations and can be exported. The 'Export role configuration' button will be enabled when a record marked as 'Has configuration' is selected.

NOTE: This is working the same as standard security configuration export, except the fact that you can export them per roles.

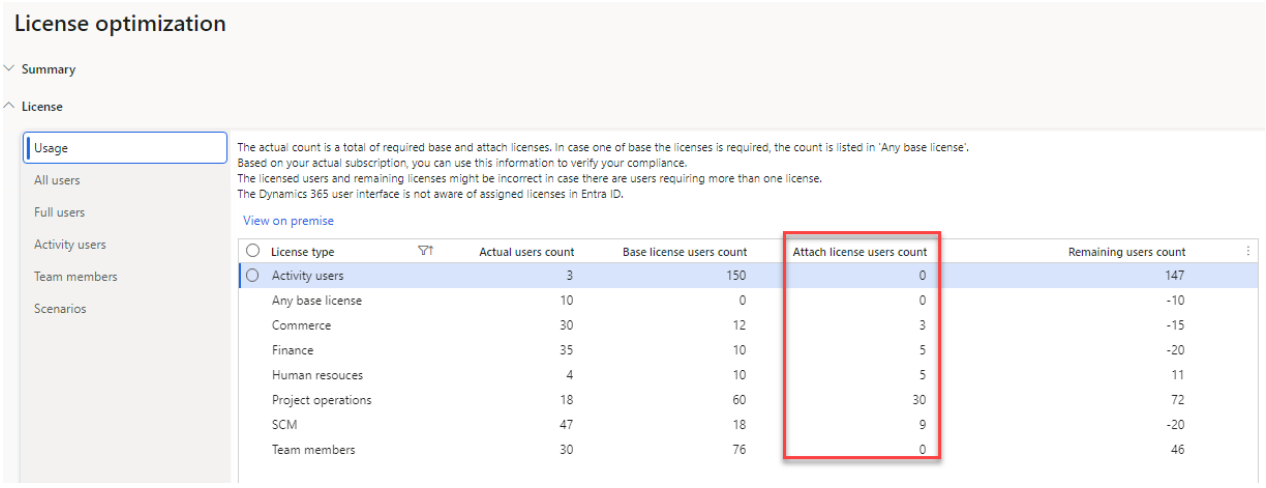
3.34 License count changes

New options have been added in the *Security and Compliance Studio -> Setup -> Parameters* form, under License count tab.

For all cloud licenses (Finance, Commerce, HR, Project operations, SCM) a new input option has been added called '- attached license' (E.g. Finance – attach license) where the user can add the number of attached licenses that have been bought, not only the base number.

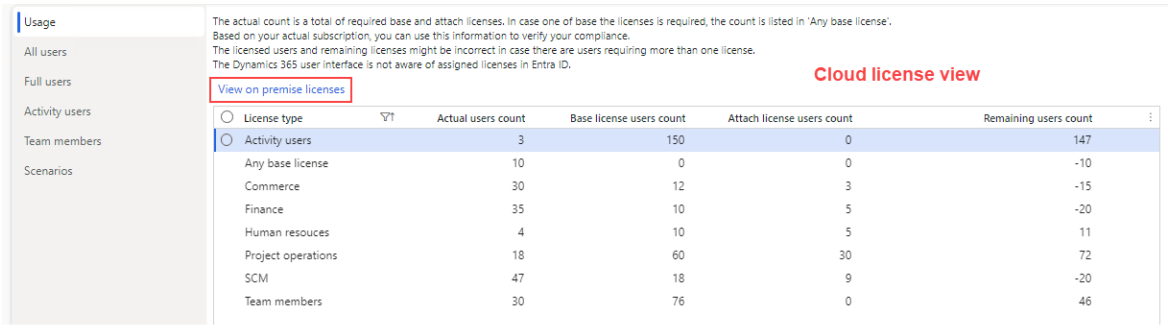


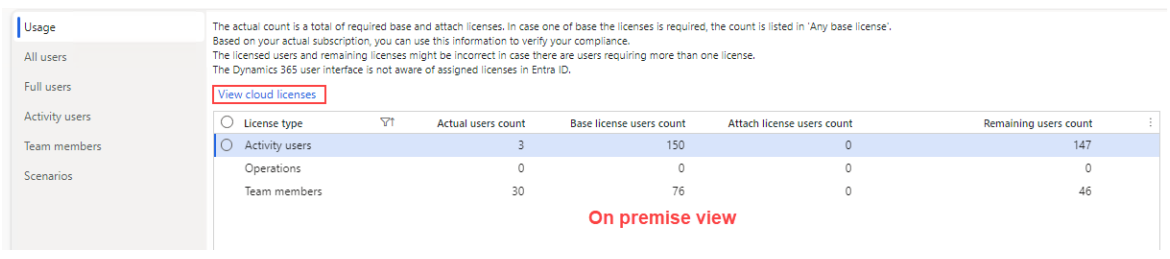
These changes will reflect in the 'License optimization' workspace on the 'Usage' tab.



The new license calculation formula will now: (Base license + Attached license) – Actual user count.

In order to separate the 'cloud license' from 'On premise' licenses we added the "View on premise" / "View cloud license" button that can toggle this view.





4. Bug fixes

4.1 Security and compliance studio 10.0.39.43

ID	Description	Observation
183994	CS00232323 | German labels in modul SCS are missing or incorrectly translated	German label was not correctly translated. Fixed now.
179439	CS00227272 | Publishing unpublished objects can take hours.	Performance improved.
185793	Duty pinning is fetching incorrect roles	Pinning down a duty was also bringing roles that were added directly to the privileges of the selected duty. Fixed: pinning down a duty will show only roles where the duty is assigned.
185794	License suggestion not showing on all levels	Incorrect license suggestion on role level when Project Operation license was present. Fixed.
183138	Menu item actions not available on entry point table - Security explorer	Menu items action not showing any more on Security Explorer. Fixed.

4.2 Security and compliance studio 10.0.37.42

ID	Description	Observation
175967 & 176711	CS00227225 | Export/Import function in Security and Compliance Studio modifies std. objects. & CS00227144 | Deviation in standard role after import of custom role.	AOT privileges with 'FormControlOverrides' node populated are having an issue on SCS Export/Import functionality due to a MS standard bug. All entries from this node cannot get pass into the XML file, therefore at the import step the node will get overridden and all entries are removed (as the object from the XML file). As a fix we introduced a new functionality called : "Export role customizations / Import role customizations". For more details please see WHAT'S NEW SECTION.
180975	CS00227886 | Manage access on roles to multiple organisations is not working in 'NL'	Using a different language than EN-US was making 'System administrator' role available for organization assignation, which is not correct since it is an all-organizations role.
180707 & 180696	CS00227833 | 'Any base license' roles are counted in both 'Finance' and 'SCM' licenses &	Incorrect license count. New options have been added to the SCS parameters license count system. For more details please see WHAT'S NEW SECTION.

	CS00227738 | wrong count of used licenses for role	
176445	**Internal** | Description of the Security request should not be editable after it had been submitted to the workflow	Some form sections from 'Security requests' were still editable after it was submitted. Fixed now.
179815	**Internal** | Align licensing details with MSFT changes (Read overrides to Team members)	Align with new change from MS where if a securable object (role, duty or privilege) it's view only than the license should be 'Team members', always.

4.3 Security and compliance studio 10.0.36.41

ID	Description	Observation
180210	CS00227639 | Cannot import roles. Error: "Cannot create a record in Roles (DSMRolesTable)."	This is most likely an issue where the role was initially deleted and imported again. A Dynamic Snapshot feature is generating the error, probably due to incorrect data. To fix the issue at short notice, we added a parameter in the Security and Compliance Studio where the Dynamic snapshot feature can be switched on and off. In case the feature is disabled, the snapshot versions should be created regularly to have all information in Security and Compliance Studio up to date. E.g. the Security Explorer is dependent on actual snapshot information.

4.4 Security and compliance studio 10.0.36.40

ID	Description	Observation
169675	Internal | Security request should not be editable after it had been submitted to the workflow	After submission the security request remains available for editing. Fixed.
171641	Internal | Error publishing selection - security configuration	Publishing objects in security configuration was throwing an error. Roles created via 'Merge role wizard' can encounter a problem if there are entities involved. In some special cases entities were added under the 'tables' node, which is not correct and the roles become corrupted.
172461	CS00226211 | Task recorder saving to security failing - DSM 10.0.32.38	Recording and saving a scenario using D365FO in different language than English was generating an error. Now it's fixed.
173892	CS00226365 | Dead lock error while publishing role changes	Dead lock error while publishing huge amount on objects in security configuration.

4.5 Security and compliance studio 10.0.34.39

ID	Description	Observation

169679	CS00225097 | Unwanted records created in log	Running a full comparison of two snapshots was generating some false audit log for standard privileges. This has been identified and fixed.
169725	CS00225236 | Match role functionality is not showing any role, duty, or privilege	Creating a scenario based on a task recording file that was recorded in a different user language than English was causing the matching to fail.
170823	CS00225405 | privilege not shown when matching roles via a scenario	Duties or privileges that were not linked to any role were not shown up in Match Roles functionality. Now these objects will be visible.
171005	Internal | Data entity support for user and user role details for security requests.	New data entities added for 'Security requests'.

4.6 Security and compliance studio 10.0.32.38

ID	Description	Observation
160423	CS00223035 | Meaning of any unique license	In specific scenarios the license suggestion from Security Explorer was not correct. Calculating licenses has been improved.[1]
163925	CS00223817 | AD user status sync	Microsoft users like 'PowerPlatformApp' which are used specifically by the system to operate different frameworks were disabled. Issue has been fixed.
144592	Internal | Error when downloading file	Some files were throwing a 'Record for ID – {xxx.xxx.xx.xxx.xx} not found'. Error was due to connection to temp blob. Issue has been fixed.
161013	Internal | License calculation not working correctly - 'Activity' license shouldn't be included	Some activity users were displaying incorrect license. Issue fixed.[1]
162939	Internal | Implement new form pattern for vertically scrolling workspaces	Applying new form patterns to the workspaces. They are now displayed vertical
164224	Internal | Review licenses on the menu items	Security and Compliance Studio's menu items have been reviewed and the user licenses have been updated accordingly
165288	Internal | Merge role wizard -> entity permissions set wrong on merged role	Permissions at entity level were not set correctly when roles were created/modified using 'Merge role' wizard. Issue has been fixed.

[1] Based on support feedback from our customers, we improved the licensing suggestions. Both to get more accurate information, but also we improved the suggestion text. To get the new code working, a new security snapshot should be created first, before running the License updates. Due to ongoing updates and possible bugs from Microsoft, there might be some suggestions wrongly interpreted. In case you find any inconsistent suggestions, please contact To-Increase support, so we can review, improve and contact Microsoft to get better suggestions in future releases.

4.7 Security and compliance studio 10.0.31.37

ID	Description	Observation
158243	Internal | Snapshot deletion not working properly	In specific scenarios the snapshot deletion was not respecting the setting for number of snapshots to keep. Snapshot details were deleted; only headers remained. This issue has been fixed.
160517	Internal | A user without system administrator rights can create users and grant the system admin role	There were two places where a security administrator or other custom roles could assign the security role to a user; including himself. When importing users and during the copy security setup, we restricted now the option to copy the system administrator role in case a user is not assigned to the system administrator role.
159501	CS00222903 | Can't create a snapshot	When the snapshot creation got interrupted by e.g. an environment restart or shutdown, some orphaned records could cause an error: “Cannot create a record in Privilege – duty link (DSMSecurityPrivDutyAssociationHistory). The record already exists.” When starting the snapshot creation, the records will be cleaned up to prevent the duplicate record error.

4.8 Security and compliance studio 10.0.29.36

ID	Description	Observation
153855	Internal | Synchronize the group users with AD group members batch runs into error when Import roles parameter is activated.	Enchanced error handle to provide more information when an user fails to be imported from azure groups.
151835	Internal | Data source fields not recognised during direct role import	Changes over the data source fields are not detected during direct role import.

4.9 Security and compliance studio 10.0.28.34

ID	Description	Observation
145372	CS00221370 | Incorrect user security log in SCS	Now shows the correct log items
146730	CS00221689 | Issue with Licensing framework	If snapshot is in queue and due to start in the upcoming 30 mins, the refresh license job cannot be set to start.
147973	CS00221859 | The "Copy security setup" functionality on users also copies disabled roles	Disabled users are not copied anymore.
144053	CS00212605 | New license type	Changes made to license display and calculation. The security explorer now shows recommendations for the base and attach licenses.

4.10 Security and compliance studio 10.0.27.33

ID	Description
146434	CS00221640 | SCS user log does not record user role changes when using "Copy security setup". This has been fixed now.

4.11 Security and compliance studio 10.0.26.32

ID	Description
143052	CS00214823 | Security and Compliance Studio 10.0.22.27 (isv)
144943	CS00220293 | Add multiple selections to the enhanced SOD
145090	CS00220439 | Changing operations license type on read only objects for SCS tool

4.12 Security and compliance studio 10.0.26.31

ID	Description
144620	CS00218247 | No security change logging when importing security roles while running in background

4.13 Security and compliance studio 10.0.25.30

ID	Description
124413	CS00164201 | SCS - Role Export / Import Generating New AOT Name

4.14 Security and compliance studio 10.0.24.29

ID	Description
140218	CS00208843 | Rename of Group in Azure is not complete in D365
140147	CS00208677 | Table securable objects shown as a menu item display in the securable objects grid when the matching role functionality is used.

4.15 Security and compliance studio 10.0.22.27

ID	Description
124414	CS00162740 | SCS - Unable To Add Alert (Workflow Delegation History)

4.16 Security and compliance studio 10.0.18.1

ID	Description
	No external bug has been reported in the last release ! We dont list down the internal bugs fixed in the release notes.

4.17 Security and compliance studio 10.0.12.5

ID	Description
124417	CS00162914 | Security request on the user does not open the specific security request.

4.18 Security and compliance studio 10.0.12.4

ID	Description
124416	CS00164486 - User security log does not work when a data management import has been used

4.19 Security and compliance studio 10.0.12.3

ID	Description
	No external bug has been reported in the last release ! We dont list down the internal bugs fixed in the release notes.

4.20 Security and compliance studio 10.0.12.2

ID	Description
121625	CS00155216 - Amended Master Roles Not Removing Privileges During Export / Import Into New Sys

4.21 Security and compliance studio 10.0.12.1

ID	Description
119466	CS00150048-New User Import - Assign Organisations Based on Existing User Not Working
119596	CS00150823-Apply Active Directory Status - Using AAD Email Address Not UPN/Alias

4.22 Security and compliance studio 10.0.10.1

ID	Description
115373	CS00144263-Enhanced SoD not showing display menu items when setting up, only action/output

4.23 Security and compliance studio 10.0.6.11

ID	Description
109266	CS00130218-Alert rule on SCS audit log table email contains no further information
113069	CS00140037-SCS Parameter - Warning Dialogue Spelling Mistake

4.24 Security and compliance studio 10.0.6.10

ID	Description
108559	CS00128698-DSM Tables growing rapidly (V10.0.6.6)
108471	CS00128399-Export and import of security scenarios fails
108836	CS00129465-TI SCS Parameters Data Entity Missing Fields

4.25 Security and compliance studio 10.0.6.9

ID	Description
103912	CS00121877-Blank securable objects on certain task recordings
104104	CS00121887-When importing security scenarios, in some cases file relations is lost

4.26 Security and compliance studio 10.0.6.8

ID	Description
99355	CS00107517-SCS Role Export - Not Including "Form Controls"

4.27 Security and compliance studio 10.0.6.7

ID	Description
87380	CS00080500: Sensitive Access Users Not Showing on Form
100873	CS00111593-Security Snapshot Will Not Run In Batch Mode
100974	CS00111816-"Corrupted Data Batch Fix" Doesn't Remove SCS Parameters
100323	CS00111058-Create the batch job for role import and export
101229	CS00112112-SCS Periodic AAD Sync Disabled Admin Account
101712	CS00114631- cannot create snapshots. It throws an error "Cannot create a record in License roles for user (DSMSecurityRoleUserAssociationHistory). The record already exists.
101897	CS00114717-SCS Role Export Not Including Sub Roles
101957	CS00115222-"Migrate scenario data" batch job throws error
100837	CS00109162-Asset Classification - Re-Running "Rebuild asset classification" periodic job
100836	CS00111408-Sensitive Data Access Configuration Lost During Application Update

4.28 Security and compliance studio 10.0.6.6

ID	Description
100323	CS00111058-Unable To Import Security Roles

4.29 Security and compliance studio 10.0.6.5

ID	Description
84033	CS00106681-SCS parameters page should be independent of the company
98372	CS00104154-Entity "task recording step" is marked as obsolete
99360	CS00107418-Import Roles - Name is already in use
99496	CS00106272-Security administrator are able to add System administrator to own user

4.30 Security and compliance studio 10.0.6.4

ID	Description
97753	CS00102923: DSMAOTMenuItemsTable.AOTName Limited to 60 characters
98176	CS00103892-New indexes introduced in SCS 10.6.3 is causing environments to not update
97110	CS00101145: FW: Issue in SCS for customer DFDS Group on renaming scenarios

4.31 Security and compliance studio 10.0.6.3

ID	Description
95300	CS00097146: Entities are being added as table permissions rather than entities on Merge role
95306	CS00097144: Form controls being created with the incorrect table name

95373	CS00090408: Sensitive Data Access Hex Colour Using Incorrect Parameter

4.32 Security and compliance studio 10.0.6.2

ID	Description
91326	CS00089115: Remove excess entry points only gives grant to Delete and not Read Update Create
48279	CS00089476: SCS - Data Management Template

4.33 Security and compliance studio 10.0.6.1

ID	Description
81072	**Purchased license count setup:** License information is now stored at admin.Microsoft.com. SCS now provides an option to administrator to setup the purchased license value in SCS. Purchased license value is used in license optimization workspace.
86619	CS00080538 – Security Explorer- No colored icon for “Tem Member” license type.
86627	CS00079152 – Apply Active Directory User Status – Authentication Method

4.34 Security and compliance studio 10.0.3.3

ID	Description
83602	– Standard Import user menu item is not visible if SCS license expired.

4.35 Security and compliance studio 10.0.3.2

ID	Description
77956	CS00069693 – License Count Data Source.

4.36 Security and compliance studio 10.0.3.1

ID	Description
77954	CS00070995 – Pin privilege is not working properly.
77957	CS00069700 – SCS-Table recording issue.

4.37 Security and compliance studio 10.0.1.3

ID	Description
	No external bug has been reported in the last release ! We dont list down the internal bugs fixed in the release notes.

4.38 Security and compliance studio 10.0.1.2

ID	Description
	No external bug has been reported in the last release ! We dont list down the internal bugs fixed in the release notes.

4.39 Security and compliance studio 10.0.1.1

ID	Description
	No external bug has been reported in the last release ! We dont list down the internal bugs fixed in the release notes.

4.40 Security and compliance studio 81.3.2.1

ID	Description
68669	TI-12573-X5J6 - Merger role functionality is assigning the higher level of access if read.
70101	TI-12768-F2K5 - Cannot import security object having name more than 30 characters.
71286	TI-12922-K0V1 - Security setup to GOLD at EQIN.

4.41 Security and compliance studio 81.3.1.1

ID	Description
68926	TI-12597-S1R0 Merger role functionality is assigning the higher level of access if read.

4.42 Security and compliance studio 81.2.1.1

ID	Description
67975	TI-12427-X2X7 Issue with security role export
68381	TI-12526-Q4F4 'Not part of current AOT configuration'

4.43 Security and compliance studio 81.1.2.1

ID	Description
67640	TI-12373-Q2R9 Add securable objects outside privileges to a new privilege
66654	TI-12213-S8Q4 Add table permissions to role or privilege

4.44 Security and compliance studio 81.1.1.1

ID	Description
67640	TI-12373-Q2R9 Add securable objects outside privileges to a new privilege
66654	TI-12213-S8Q4 Add table permissions to role or privilege

4.45 Security and compliance studio 81.20.3.1

ID	Description
67267	TI-12287-S1G1 Matched control is not part of privilege

4.46 Security and compliance studio 81.20.2.2 *(This build was created as the earlier deployable package had some issues)

ID	Description
66652	TI-12204-S3M9 Audit log duplicate records as coming from AOT
66653	TI-12205-P0Y5 User audit log not working properly
66654	TI-12213-S8Q4 Add table permissions to role or privilege
66533	TI-12179-C0V4 Error on security role import.
	Note: For Bug 66533 and BUG 66652 requires immediately after installation running of the “Clean Demo Data” batch program and thereafter creating a snapshot.

4.47 Security and compliance studio 81.20.2.1

ID	Description
66652	TI-12204-S3M9 Audit log duplicate records as coming from AOT

66653	TI-12205-P0Y5 User audit log not working properly
66654	TI-12213-S8Q4 Add table permissions to role or privilege
66533	TI-12179-C0V4 Error on security role import.
	Note: For Bug 66533 and BUG 66652 requires immediately after installation running of the "Clean Demo Data" batch program and thereafter creating a snapshot.

4.48 Security and compliance studio 81.20.1.1

ID	Description
	No external bug has been reported in the last release ! We dont list down the internal bugs fixed in the release notes.

4.49 Security and compliance studio 1804.15.2.1

ID	Description
61572	TI-11605-D4L0 Creating new role with exact access level not working
62494	TI-11720-N4Y4 SCS Installation issue
	Note: Bug 62494 requires the one time running of a job to update the data model changes. Instructions for the same are given in the known issues section.

4.50 Security and compliance studio 1804.15.1.1

ID	Description
	No external bug has been reported in the last release ! We dont list down the internal bugs fixed in the release notes.

4.51 Security and compliance studio 1712.12.1.1

ID	Description
	No external bug has been reported in the last release ! We dont list down the internal bugs fixed in the release notes.

5. Changed or deprecated features

5.1 Deprecated features 10.0.31.37

Feature	Notes
Create role from duties/privileges	The functionality was broken and is now replaced with the new Security role wizard which has more enhanced features; also for updating roles instead of only creating new security roles. See also the what's new section in this document.

5.2 Deprecated features older versions

Feature	Notes
License model	A single license enables the full functionality of Security and Compliance Studio, as opposed to separate security and audit licenses used in Dynamic Security Management on AX 2012.
Security Tree	The security and license type explorer tree has been replaced with a list based Security explorer form which provides list based insight into user, role, duty, privilege and entry point relationships.
Active Directory Users overview	The AD group related features has been deprecated in D365 for Finance and Operations because those are no longer relevant.
AD group membership information	The AD group related features has been deprecated in D365 for Finance and Operations because those are no longer relevant.

6. Known issues

1. In case you are using Microsoft demo data; first "***Clean DEMO data base***" as the current DEMO database from Microsoft is coming with some corrupt security data. Few privileges and duties have been deleted from AOT, but still exist in the table. So now the table has the record and the privilege/duty does not exist in AOT and this causes errors. This job will clean up this corrupt data so that you don't get any error while working on Security and compliance studio. **Path: Security and Compliance -> Periodic Tasks -> Clean DEMO database.**
2. Bug 62494 requires the one time running of a batch program to update the data model changes. Instructions are as below:

   For the users that are trying to update Security and Compliance Studio to the update 15 and encountered the following error, below are the steps needed in order to not lose any data from production environments:

   "ALTER TABLE ALTER COLUMN ENTRYPOINTNAME failed because one or more objects access this column.
   ALTER TABLE DSMSECURITYENTRYPOINTPRIVASSOCIATION ALTER COLUMN ENTRYPOINTNAME NVARCHAR(255) NOT NULL;
   UPDATE SQLDICTIONARY SET STRSIZE = 255, RIGHTJUSTIFY = 0, FIELDTYPE = 0 WHERE NAME = 'EntryPointName' AND TABLEID = 19484"

   ## Steps:

   1. Navigate to **Security and Compliance Studio** -> **Security** -> and open **Parameters** form.

   On this form a new tab called "Migration" will be available (see figure 1)

   *NOTE: this option will be available only if you have data into the "DSMSecurityEntryPointPrivAssociation" table (the table from the error above).

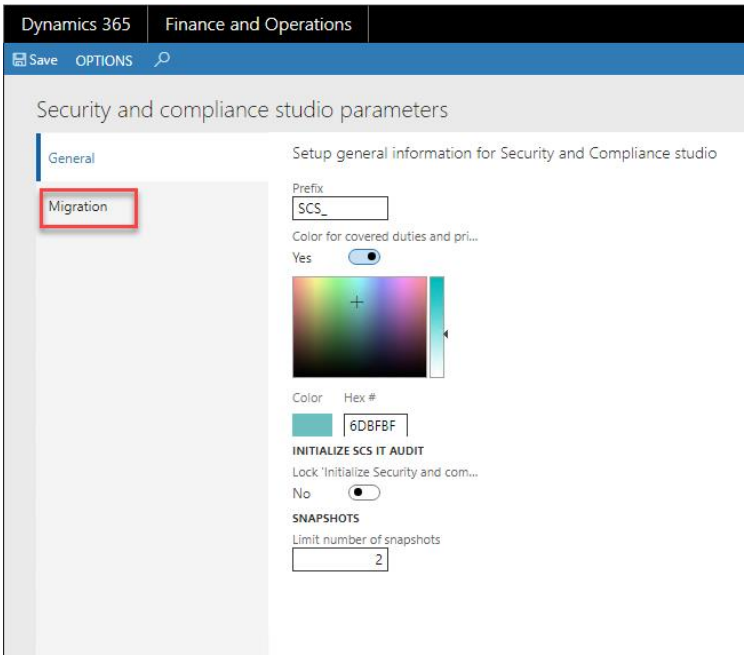


Fig. 1 New tab in SCS Parameters form

2. On this tab a new button is available and it's called "Migrate data". Click this button in order to move data (see figure 2)

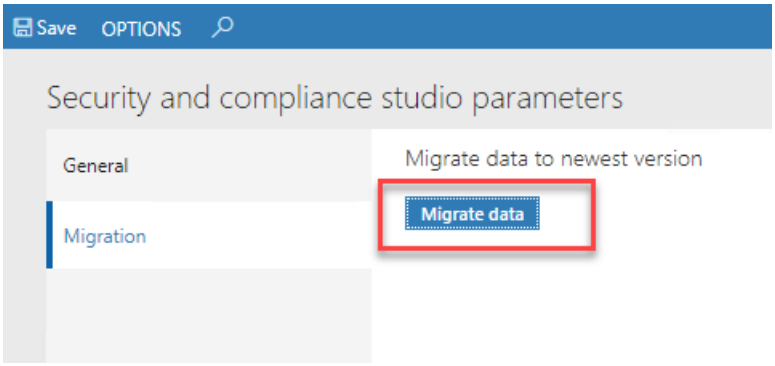


Fig. 2 “Migrate data” button on SCS Parameters form

3. The process of moving data will start and it will take few seconds / minutes, depending of the amount of data that you have.

After the process is finished a message to restart the D365 user interface will be displayed and the “Migration” tab will not be available anymore (see figure 3)

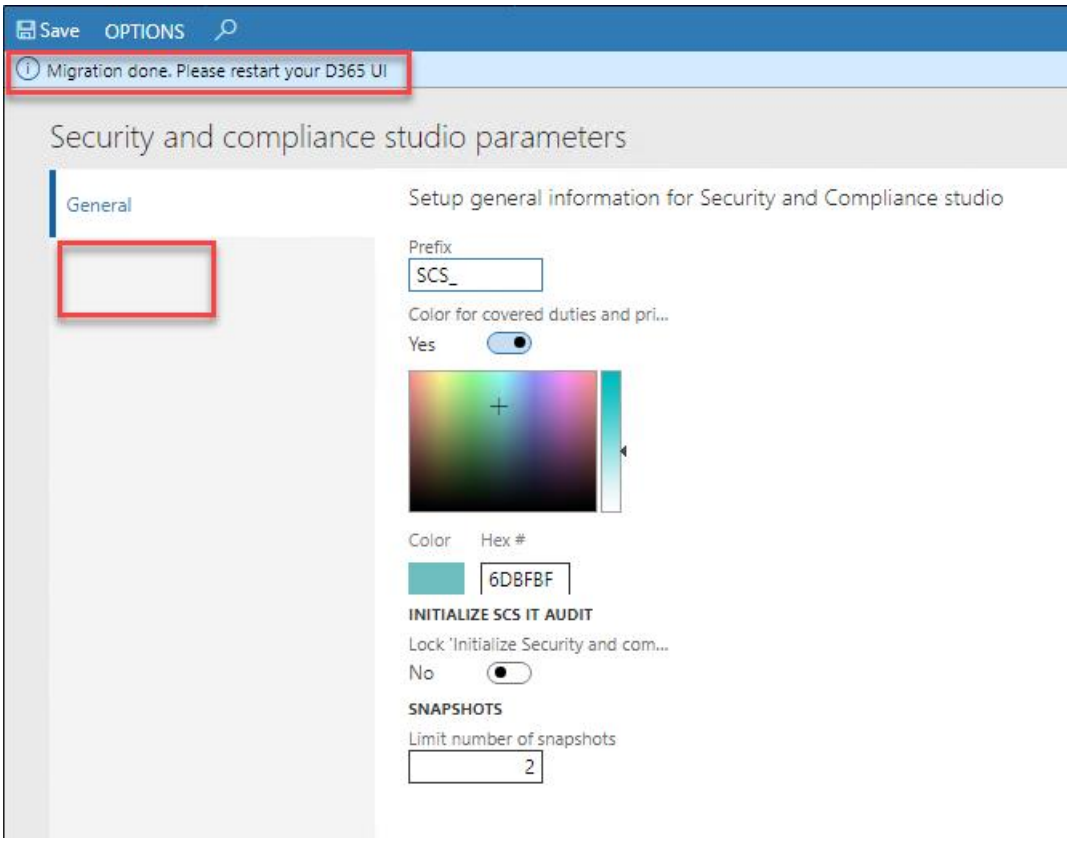


Fig. 3 “Migration” tab not available anymore after moving data