



ACTIONABLE AUDIT

A tool to track create, update and delete actions on the Entities with complete access of audit data

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Introduction

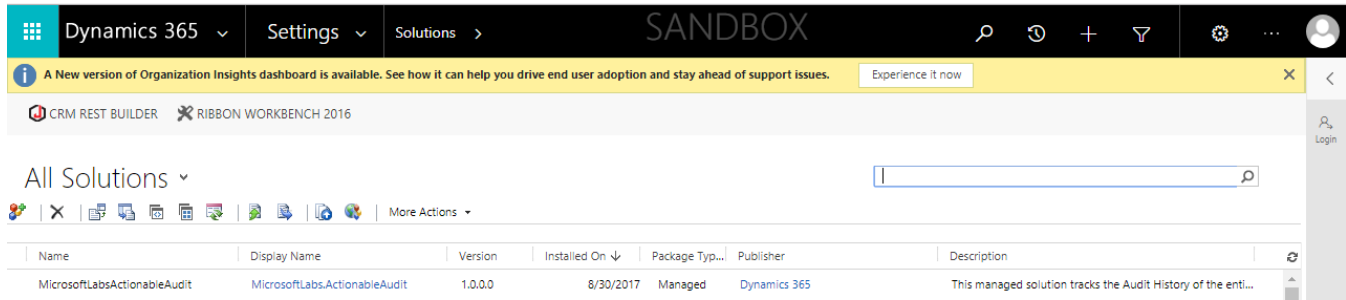
Microsoft Dynamics 365 provides several tools for managing data. One in particular is the auditing feature that tracks changes to data within Dynamics 365, in addition to tracking each time users log in. If auditing is enabled, CRM automatically logs tracked changes, however it disallows access the System Auditing Entity.

To fill this void, Microsoft Labs provides the Actionable Audit solution that gives the user a way to track the audit history of configured entities, in addition to generating reports on the Audited data. Lastly, provides user friendly web resources for the Case entity with Search and Export to CSV options.

Verify Solution Installation

Please follow the below steps, to confirm that Actionable Audit history is successfully installed in CRM.

Go to **Settings|Solutions** and check if **MicrosoftLabsActionableAudit** is available.

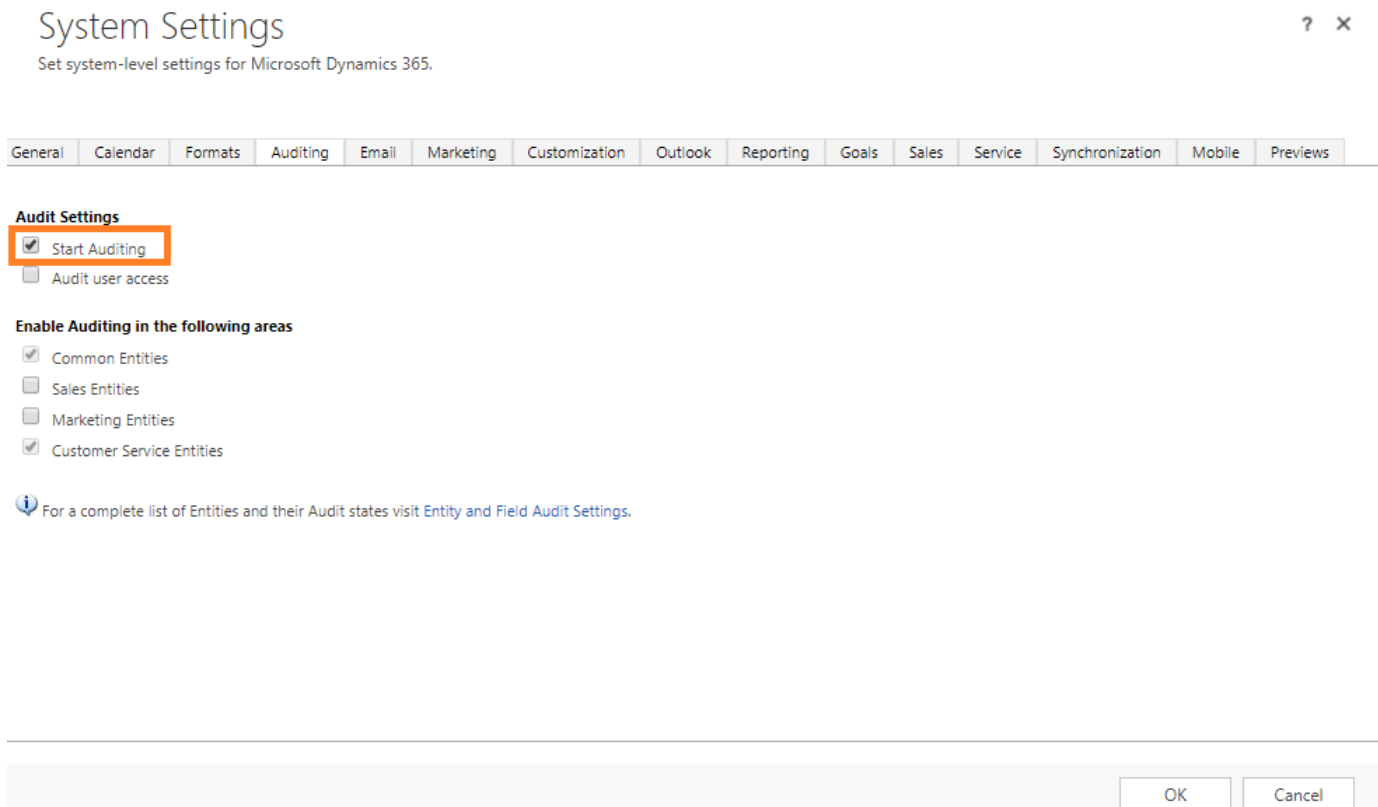


The screenshot shows the Dynamics 365 interface with the 'Solutions' page open. The top navigation bar includes 'Dynamics 365', 'Settings', and 'Solutions'. A yellow notification banner at the top states: 'A New version of Organization Insights dashboard is available. See how it can help you drive end user adoption and stay ahead of support issues. Experience it now'. Below the banner, the 'All Solutions' section is visible, featuring a search bar and a table of installed solutions. The table has columns for Name, Display Name, Version, Installed On, Package Type, Publisher, and Description. One solution is listed: 'MicrosoftLabsActionableAudit' with a display name of 'MicrosoftLabs.ActionableAudit', version '1.0.0.0', installed on '8/30/2017', and a description: 'This managed solution tracks the Audit History of the enti...'. The interface also shows 'CRM REST BUILDER' and 'RIBBON WORKBENCH 2016' in the top left.

Audit History Migration CRM Configuration

Enable audit for the CRM organization

Go to **Settings|Auditing|Global Audit settings**.



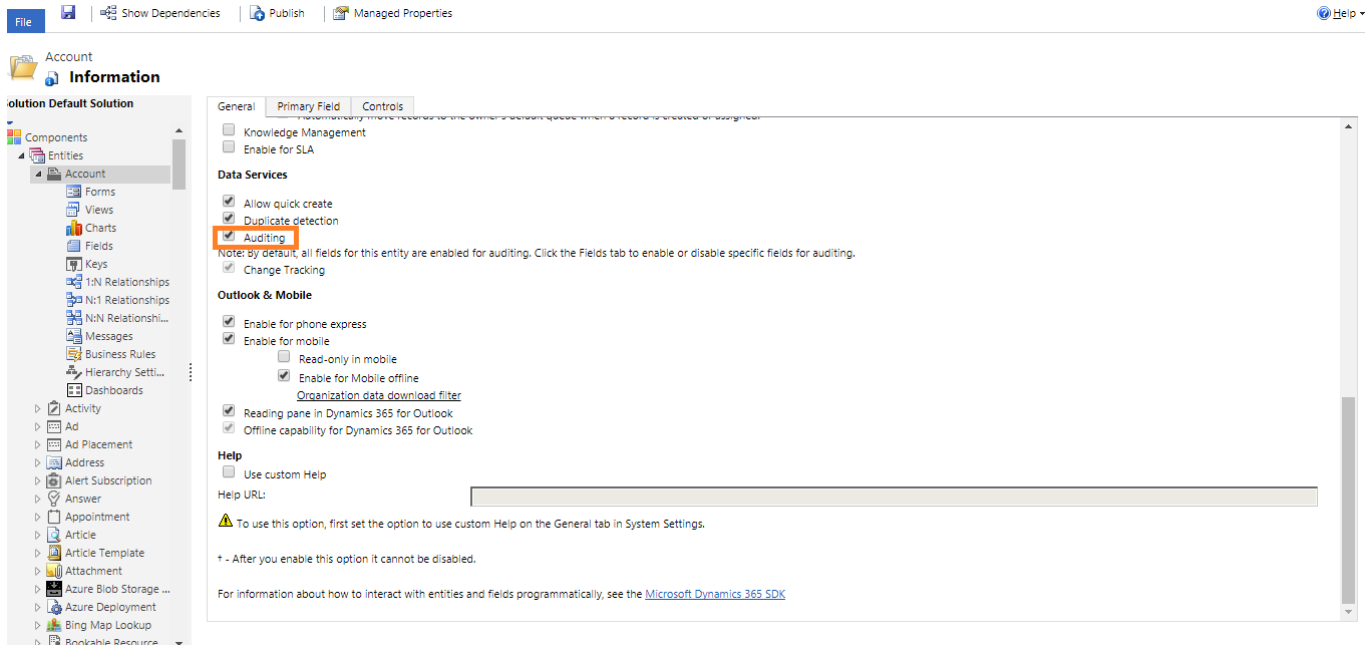
The screenshot shows the 'System Settings' page for Microsoft Dynamics 365, specifically the 'Auditing' tab. The page title is 'System Settings' with a subtitle 'Set system-level settings for Microsoft Dynamics 365.' The navigation tabs include General, Calendar, Formats, Auditing, Email, Marketing, Customization, Outlook, Reporting, Goals, Sales, Service, Synchronization, Mobile, and Previews. Under the 'Audit Settings' section, the 'Start Auditing' checkbox is checked and highlighted with an orange box. Below it, the 'Audit user access' checkbox is unchecked. The 'Enable Auditing in the following areas' section has four checkboxes: 'Common Entities' (checked), 'Sales Entities' (unchecked), 'Marketing Entities' (unchecked), and 'Customer Service Entities' (checked). An information icon at the bottom left indicates: 'For a complete list of Entities and their Audit states visit Entity and Field Audit Settings.' At the bottom right, there are 'OK' and 'Cancel' buttons.

Enable Entity Auditing

Go to **Settings|Customizations|Customize the system|Entities*** and Enable auditing.

**Note: Any entity can be tracked, for example Account, Contact, Case, Opportunity, or Custom Entity.*

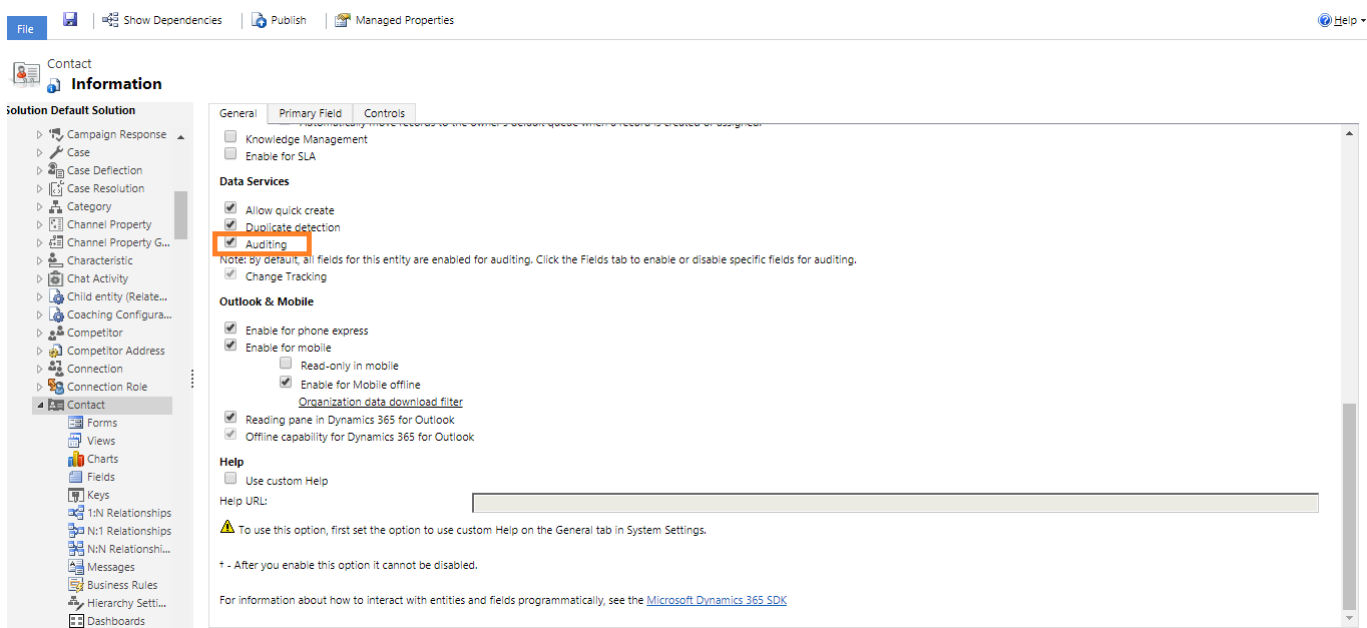
Account:



The screenshot shows the configuration page for the 'Account' entity. The 'Primary Field' tab is active. Under the 'Data Services' section, the 'Auditing' checkbox is checked and highlighted with a red box. Other options like 'Allow quick create', 'Duplicate detection', and 'Change Tracking' are also checked. The 'Outlook & Mobile' section has several options checked, including 'Enable for phone express', 'Enable for mobile', and 'Enable for Mobile offline'. The 'Help' section includes a warning icon and text: 'To use this option, first set the option to use custom Help on the General tab in System Settings.' and '+ - After you enable this option it cannot be disabled.'

After enabling Audit for a particular entity, confirm auditing set in the Entity's Primary Field.

Contact:



The screenshot shows the configuration page for the 'Contact' entity. The 'Primary Field' tab is active. Under the 'Data Services' section, the 'Auditing' checkbox is checked and highlighted with a red box. Other options like 'Allow quick create', 'Duplicate detection', and 'Change Tracking' are also checked. The 'Outlook & Mobile' section has several options checked, including 'Enable for phone express', 'Enable for mobile', and 'Enable for Mobile offline'. The 'Help' section includes a warning icon and text: 'To use this option, first set the option to use custom Help on the General tab in System Settings.' and '+ - After you enable this option it cannot be disabled.'

Case:

File | Show Dependencies | Publish | Managed Properties

Case

Information

Solution Default Solution

- Bookable Resource ...
- Bookable Resource ...
- Bookable Resource ...
- Bookable Resource ...
- Bookable Resource ...
- Booking Status
- Business Unit
- Campaign
- Campaign Activity
- Campaign Response
- Case
 - Forms
 - Views
 - Charts
 - Fields
 - Keys
 - 1:N Relationships
 - N:1 Relationships
 - N:N Relationships...
 - Messages
 - Business Rules
 - Hierarchy Setti...
 - Dashboards

General | Primary Field | Controls

- Knowledge Management
- Enable for SLA

Data Services

- Allow quick create
- Duplicate detection
- Auditing

Note: By default, all fields for this entity are enabled for auditing. Click the Fields tab to enable or disable specific fields for auditing.

- Change Tracking

Outlook & Mobile

- Enable for phone express
- Enable for mobile
 - Read-only in mobile
 - Enable for Mobile offline
 - [Organization data download filter](#)
- Reading pane in Dynamics 365 for Outlook
- Offline capability for Dynamics 365 for Outlook

Help

- Use custom Help

Help URL:

⚠ To use this option, first set the option to use custom Help on the General tab in System Settings.

Opportunity:

File | Show Dependencies | Publish | Managed Properties

Opportunity

Information

Solution Default Solution

- Linked Answer
- Linked Question
- Live Assist Setting
- Mail Merge Template
- Mailbox
- Marketing List
- Mobile Offline Profile
- Mobile Offline Profi...
- Mobile Offline Profi...
- New Process
- Note
 - Opportunity
 - Forms
 - Views
 - Charts
 - Fields
 - Keys
 - 1:N Relationships
 - N:1 Relationships
 - N:N Relationships...
 - Messages
 - Business Rules
 - Hierarchy Setti...

General | Primary Field | Controls

- Automatically move records to the owner's default queue when a record is created or assigned.
- Knowledge Management
- Enable for SLA

Data Services

- Allow quick create
- Duplicate detection
- Auditing

Note: By default, all fields for this entity are enabled for auditing. Click the Fields tab to enable or disable specific fields for auditing.

- Change Tracking

Outlook & Mobile

- Enable for phone express
- Enable for mobile
 - Read-only in mobile
 - Enable for Mobile offline
 - [Organization data download filter](#)
- Reading pane in Dynamics 365 for Outlook
- Offline capability for Dynamics 365 for Outlook

Help

- Use custom Help

Help URL:

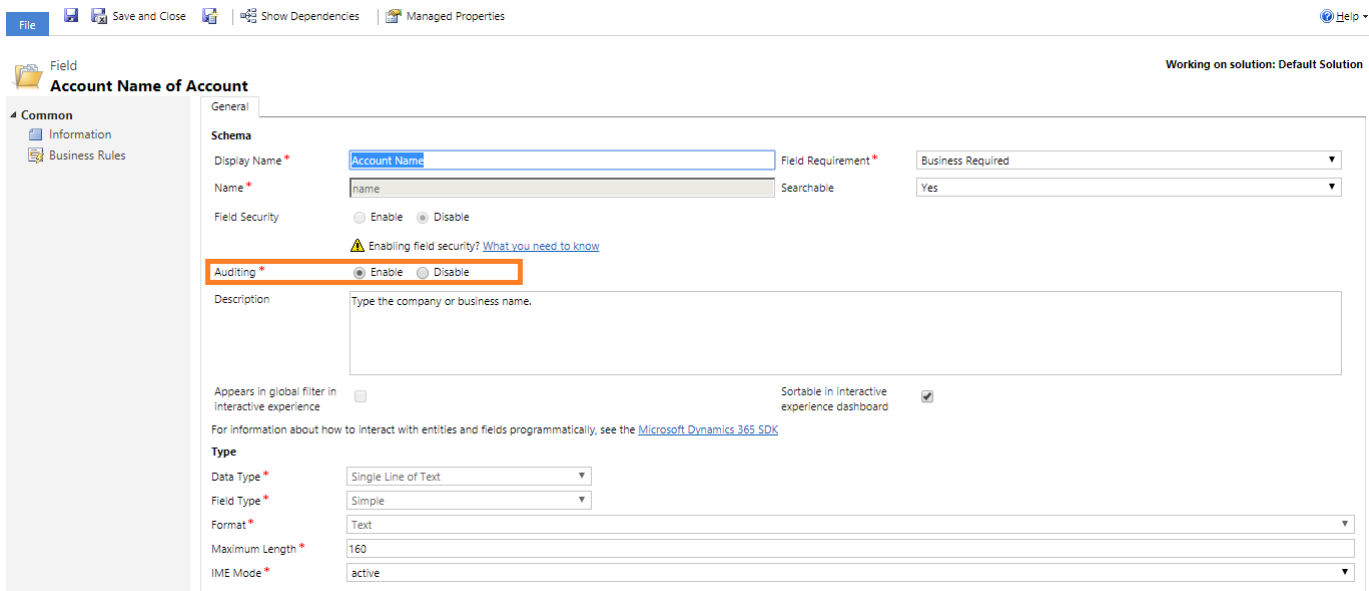
⚠ To use this option, first set the option to use custom Help on the General tab in System Settings.

Enable Field Auditing

Enable auditing of fields of user interest for capture and recording.

Go to **Settings|Customizations|Customize the system|Entities*|Fields*** and Enable auditing.

**Note: Any entity can be tracked, for example Account, Contact, Case, Opportunity, or Custom Entity. In addition, any Field can be tracked, such as Account Name and Account Number.*

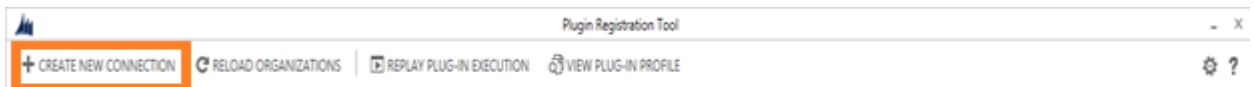


Audit History Migration Plugin Configuration

Download CRM SDK from the given URL

<https://www.microsoft.com/en-in/download/details.aspx?id=50032>

1. Open plugin registration tool (...\\SDK\\Tools\\PluginRegistration\\PluginRegistration.exe).
 - a. Click "CREATE NEW CONNECTION" button in the upper blade of the plugin registration tool.



- b. Set the Deployment Type and Online Region, provide a valid User Name and Password, and then click "Login".

Deployment Type: On-premises Office 365

Display list of available organizations

Show Advanced

Advanced

Online Region:

User Name:

Password:

2. After logging in, select the **MicrosoftLabs.AuditMigration** assembly, then access to basic entities like Case, Account, Contact, and Opportunity will be available.

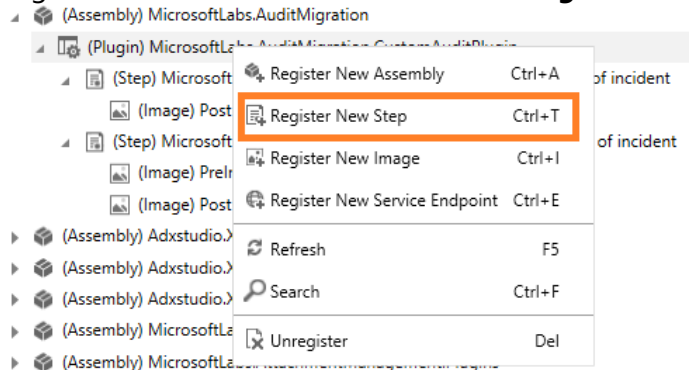
Enable Audit History

There are a few of terms to understand before proceeding with the configurations. First, there are three events that affect the data: Creating, Updating, and Deleting. Auditing checks the state, the *image* of the date before and after to track the changes. Therefore...

- PreImage is how the data existed before any change, and
- PostImage is how the data exists after any change.

Create Audit History

1. Right-click on the **MicrosoftLabs.AuditMigration** assembly and select **Register New Step**.



2. Enter the following details and click on **Register New Step** button.

- **Message:** Create
- **Primary Entity:** Lead/Custom Entity/System Entity
- **Event pipeline stage:** PostOperation
- **Execution mode:** Asynchronous or Synchronous based on business requirement

Register New Step

General Configuration Information			Unsecure Configuration
Message	<input type="text" value="Create"/>		
Primary Entity	<input type="text" value="lead"/>		
Secondary Entity	<input type="text" value="none"/>		
Filtering Attributes	<input type="text" value="Message does not support Filtered Attributes"/>		
Event Handler	<input type="text" value="(Plugin) MicrosoftLabs.AuditMigration.CustomAuditPlugin"/>		
Step Name	<input type="text" value="MicrosoftLabs.AuditMigration.CustomAuditPlugin: Create of lead"/>		
Run in User's Context	<input type="text" value="Calling User"/>		
Execution Order	<input type="text" value="1"/>		
Description	<input type="text" value="MicrosoftLabs.AuditMigration.CustomAuditPlugin: Create of lead"/>		
Event Pipeline Stage of Execution	Execution Mode	Deployment	
<input type="radio"/> Pre-validation	<input type="radio"/> Asynchronous	<input checked="" type="checkbox"/> Server	
<input type="radio"/> Pre-operation	<input checked="" type="radio"/> Synchronous	<input type="checkbox"/> Offline	
<input checked="" type="radio"/> Post-operation			
<input type="checkbox"/> Delete AsyncOperation if StatusCode = Successful			
			<input type="button" value="Register New Step"/> <input type="button" value="Close"/>

3. Right-click on the **MicrosoftLabs.AuditMigration** assembly and select on **“Register New Image”**. Provide the exact same details as shown below and click on **“Register Image”** button.

- Name: PostImage

- EntityAlias: PostImage

Image Type

Pre Image Post Image

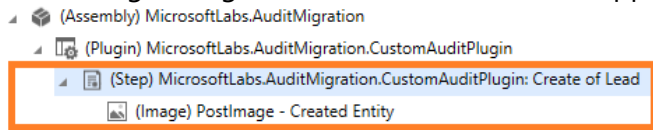
Name: PostImage

Entity Alias: PostImage

Parameters: All Attributes

Register Image Cancel

4. Once image is registered the final version will appear as below.



Update Audit History

Updating the existing settings is very similar to setting up a new Audit History.

- Right-click on the **MicrosoftLabs.AuditMigration** assembly and select **Register New Step**.
- Enter the following details and click on **Register New Step** button.
 - Message : Update
 - Primary Entity : Lead/Custom Entity/System Entity
 - Event pipeline stage : PostOperation
 - Execution mode : Asynchronous/Synchronous based on business requirement

Register New Step

General Configuration Information		Unsecure Configuration
Message	Update	
Primary Entity	lead	
Secondary Entity	none	
Filtering Attributes	All Attributes	
Event Handler	(Plugin) MicrosoftLabs.AuditMigration.CustomAuditPlugin	
Step Name	MicrosoftLabs.AuditMigration.CustomAuditPlugin: Update of lead	
Run in User's Context	Calling User	
Execution Order	1	
Description	MicrosoftLabs.AuditMigration.CustomAuditPlugin: Update of lead	
Event Pipeline Stage of Execution	Execution Mode	
<input type="radio"/> Pre-validation	<input type="radio"/> Asynchronous	<input checked="" type="checkbox"/> Server
<input type="radio"/> Pre-operation	<input checked="" type="radio"/> Synchronous	<input type="checkbox"/> Offline
<input checked="" type="radio"/> Post-operation		
<input type="checkbox"/> Delete AsyncOperation if StatusCode = Successful		
		Secure Configuration

Register New Step Close

- Right-click on the **MicrosoftLabs.AuditMigration** assembly and select on **Register New Image**. Provide the exact same details as shown below and click on **Register Image** button.

Note: Do this step twice: Once for PostImage, and again for PreImage as shown below.

 - PostImage
 - Name : PostImage

- EntityAlias : PostImage

Image Type

Pre Image Post Image

Name: PostImage

Entity Alias: PostImage

Parameters: All Attributes

Register Image Cancel

b. PreImage

- Name: PreImage
- EntityAlias : PreImage

Image Type

Pre Image Post Image

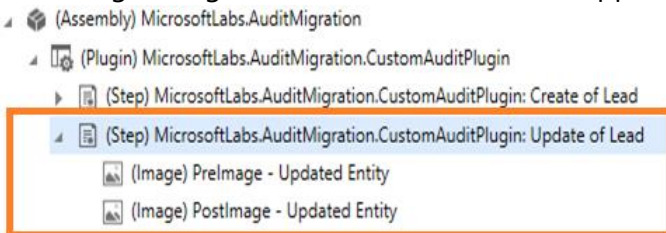
Name: PreImage

Entity Alias: PreImage

Parameters: All Attributes

Register Image Cancel

4. Once image is registered the final version will appear as below.



Delete Audit History

Deleting the existing settings is very similar to setting up a new Audit History.

1. Right-click on the **MicrosoftLabs.AuditMigration** assembly and select **Register New Step**.
2. Enter the following details and click on **Register New Step** button.
 - Message : Delete
 - Primary Entity : Lead/Custom Entity/System Entity
 - Event pipeline stage : PreOperation

- Execution mode : Synchronous

Update Existing Step

General Configuration Information

Message: Delete

Primary Entity: lead

Secondary Entity: none

Filtering Attributes: Message does not support Filtered Attributes

Event Handler: (Plugin) MicrosoftLabs.AuditMigration.CustomAuditPlugin

Step Name: MicrosoftLabs.AuditMigration.CustomAuditPlugin: Delete of incident

Run in User's Context: Calling User

Execution Order: 1

Description: MicrosoftLabs.AuditMigration.CustomAuditPlugin: Delete of incident

Event Pipeline Stage of Execution: Pre-validation Pre-operation Post-operation Delete AsyncOperation if StatusCode = Successful

Execution Mode: Asynchronous Synchronous

Deployment: Server Offline

Unsecure Configuration

Secure Configuration

Update Step Close

3. Right-click on the **MicrosoftLabs.AuditMigration** assembly and select on **“Register New Image”**. Provide the exact same details as shown below and click on **“Register Image”** button.

Image Type

Pre Image Post Image

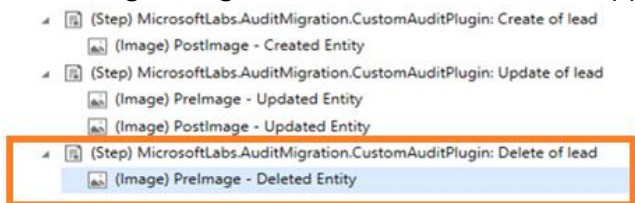
Name: Prelmage

Entity Alias: Prelmage

Parameters: All Attributes

Register Image Cancel

4. Once image is registered the final version will appear as below.



Disable Custom Audit for Entities

Users can disable the Custom Audit when no longer required. For the scenario below describes the steps to this process.

Scenario: The “Account” entity is already enabled for custom auditing, however it is no longer required.

Steps:

1. Open, Plugin Registration tool (...\\SDK\\Tools\\PluginRegistration\\PluginRegistration.exe)

- a. Click "CREATE NEW CONNECTION" button in the upper blade of the plugin registration tool.



- b. Set the Deployment Type and Online Region, provide a valid User Name and Password, and then click "Login".

Login

Deployment Type: On-premises Office 365

Display list of available organizations
 Show Advanced

Advanced

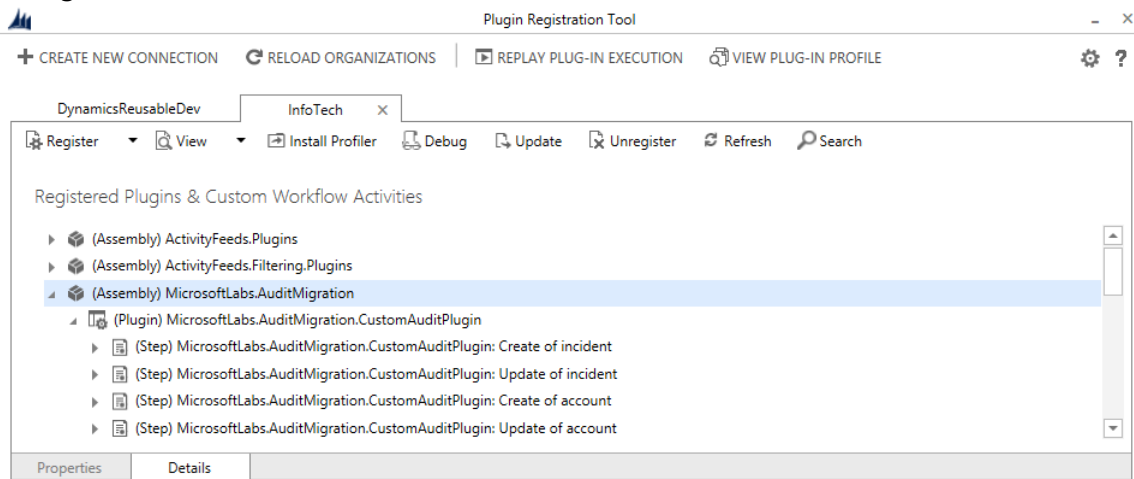
Online Region: Don't Know

User Name: abc@abc.com

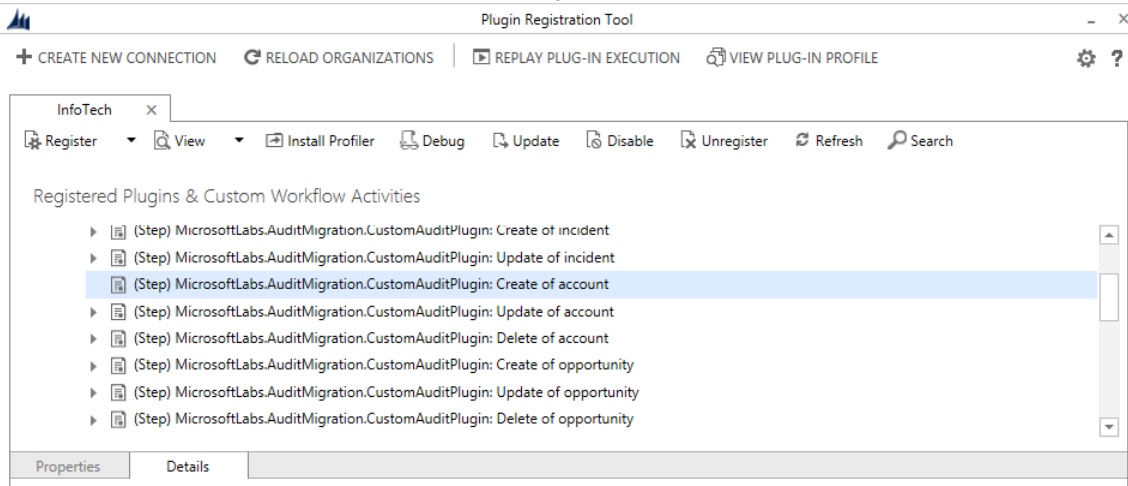
Password: ●●●●●●

Login Cancel

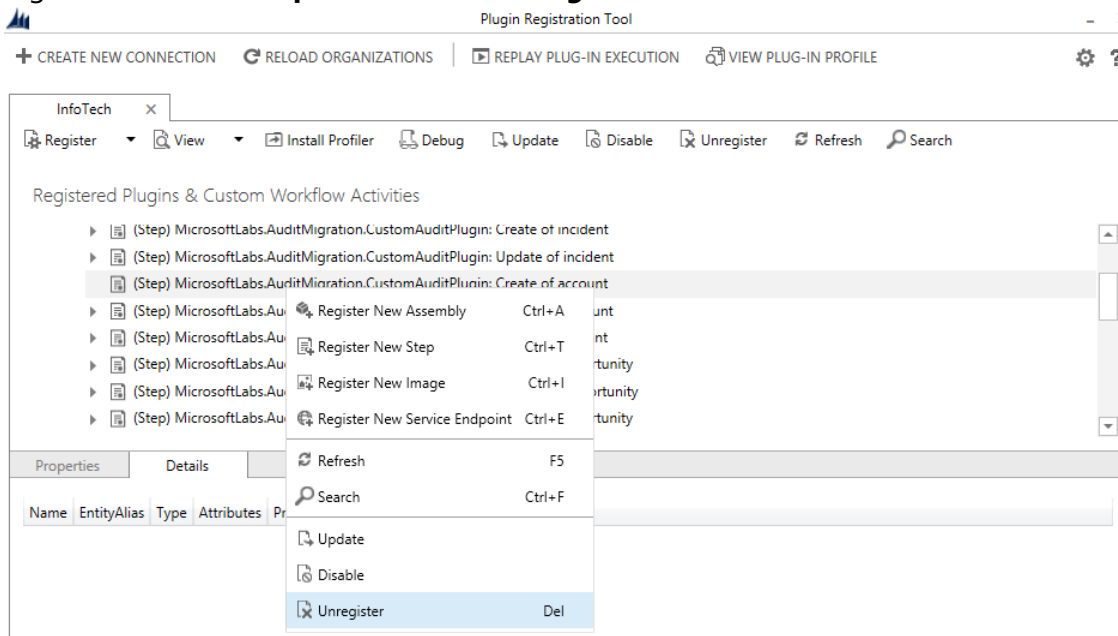
2. After logging in, select the **MicrosoftLabs.AuditMigration** assembly, then access to audit-configured entities will be available.



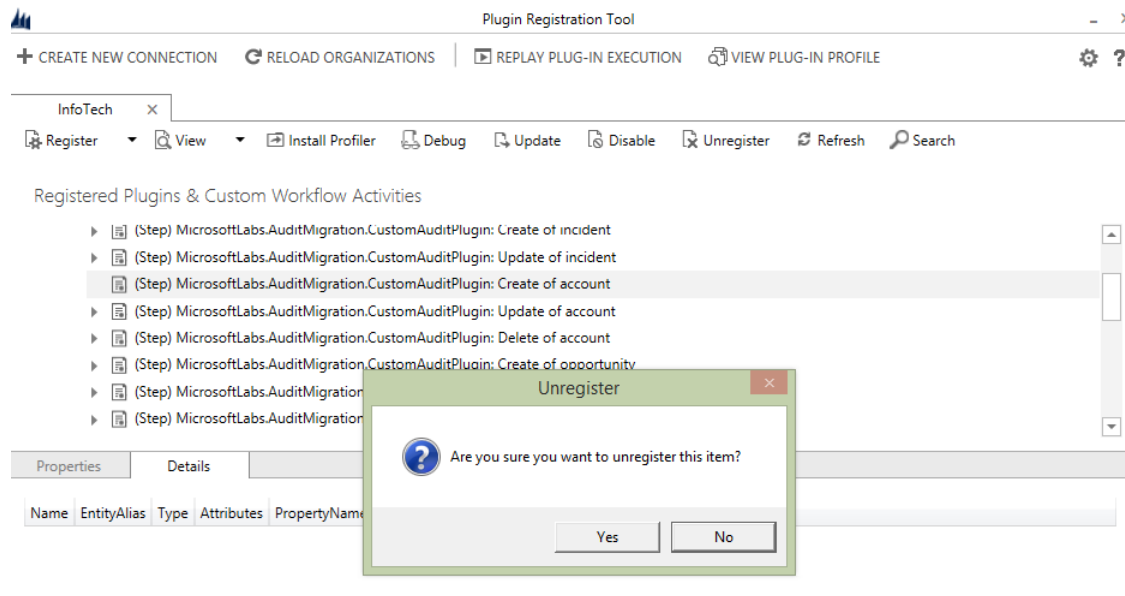
3. Select the **Step** for **Create of account** entity as shown below...



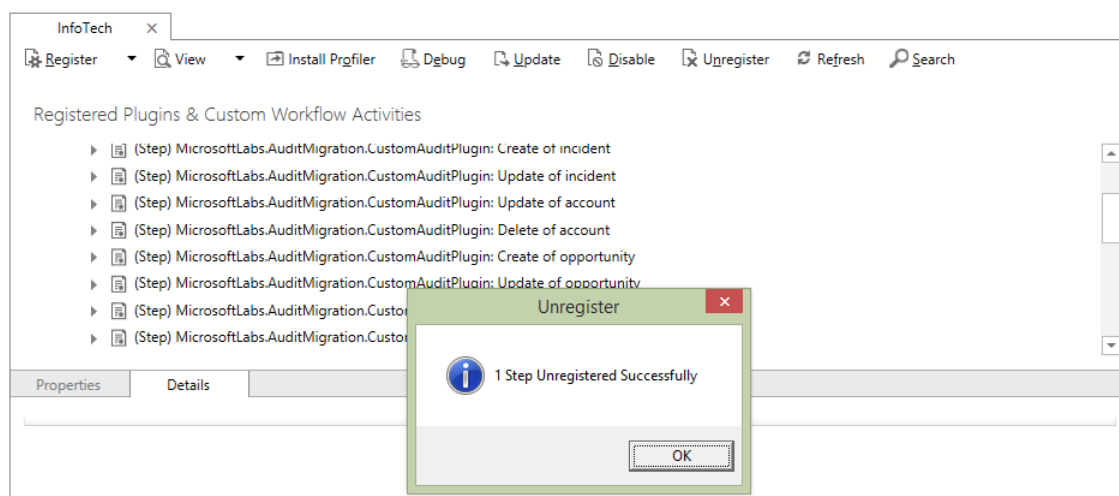
4. Right-click on that **Step** and select on **Unregister** as shown below.



CRM will prompt to confirm the action.



5. Click on Yes to complete the action.



Note: Users have to follow the same steps for both Update and Delete steps for Account as well to completely disable auditing. Otherwise, whenever users update or delete accounts, the changes will be captured in the Custom Audit History.

Audit History Migration ISH Configuration

This section describes how to configure the Custom Audit web resource in ISH which controls how the audit history of a particular entity record is displayed.

msdyn_audithistory.html: The web resource listing all the attribute changes on the form itself.

1. Edit the Entity Main form (Form-type: Main – Interactive Experience) to create a new tab, then insert "**msdyn_audithistory.html**" as the name of the web-resource. Complete the fields as

displayed below.
Add Web Resource
Add an existing web resource to the Form.

General Formatting Dependencies

Web resource

Web resource * msdyn_audithistory

Field Name and Properties

Name * WebResource_customaudit

Label * customaudit

Display label on the Form

Visibility

Visible by default

Web Resource Properties

Custom Parameter(data)

Restrict cross-frame scripting, where supported.

Pass record object-type code and unique identifier as parameters.

Enable for tablet

OK Cancel

2. Save and publish the changes made, then go to case entity in ISH and open case form. Users should be able to see the tab as below.

Dynamics 365 Service Cases Case Test

Case Test SAVE & ROUTE + NEW CREATE CHILD CASE MORE

SUMMARY CUSTOM AUDIT INFO DETAILS CASE RELATIONSHIPS ...

1/20 IDENTIFY QUALIFY RESEARCH

CUSTOM AUDIT INFO

Search for records SEARCH EXPORT TO CSV

FIELD	OPERATION	OLD VALUE	NEW VALUE	CHANGED BY	TIMESTAMP
Survey Participation	Create	(no value)	No		8/28/2017, 5:47:13 PM

End User Experience

Once the solution is imported and configured in the Dynamics 365 organization, users can see the custom audit history for each and every record of entities where custom audit is enabled. The following steps describe how it works...

1. Go to a Business Entity (for example, Case).



2. Create a record and Save it. Users will see the custom audit info as shown below.

Test Case | Priority: Normal | Created On: 8/30/2017 2:08 PM | Status: In Progress | Owner: Sai Krishna

Identify (Active for 1 minute) → Qualify → Research → Resolve

- Find Customer* | A. Datum | Determine Priority | Normal | Parent Case [click to enter](#)
- Confirm Email Address | No | Product [click to enter](#) | Add Description [click to enter](#)
- Review Social Details | No | Entitlement [click to enter](#) | Activities Complete | No

Phone to Case Process (Active for 1 minute) **Next Stage** ➔

Audit History

FIELD	OPERATION	OLD VALUE	NEW VALUE	CHANGED BY	TIMESTAMP
Survey Participation	Create	(no value)	No		8/30/2017, 2:08:32 PM
Case Number	Create	(no value)	CAS-00019-N3H5C0		8/30/2017, 2:08:32 PM
UpSell Referral	Create	(no value)	No		8/30/2017, 2:08:32 PM
Status Reason	Create	(no value)	In Progress		8/30/2017, 2:08:32 PM
Satisfaction	Create	(no value)	Neutral		8/30/2017, 2:08:32 PM
First Response SLA Status	Create	(no value)	In Progress		8/30/2017, 2:08:32 PM
Service Stage	Create	(no value)	Identify		8/30/2017, 2:08:32 PM

- Update any field on that record. For example, change the priority field value from Normal to High. The updated field will display the same in the grid as shown below.

The screenshot displays the Microsoft Dynamics 365 interface for a 'Test Case' record. The record details show 'Priority' as 'High', 'Created On' as '8/30/2017 2:08 PM', 'Status' as 'In Progress', and 'Owner' as 'Sai Krishna'. Below the record is a process flow with stages: Identify (Active for 4 minutes), Quality, Research, and Resolve. The 'Quality' stage is currently active, with tasks like 'Find Customer*', 'Confirm Email Address', and 'Review Social Details'. The 'Research' stage has tasks like 'Determine Priority', 'Product', and 'Entitlement'. The 'Resolve' stage has tasks like 'Parent Case', 'Add Description', and 'Activities Complete'. Below the process flow is an 'Audit History' table.

FIELD	OPERATION	OLD VALUE	NEW VALUE	CHANGED BY	TIMESTAMP
Priority	Update	Normal	High		8/30/2017, 2:12:50 PM
Survey Participation	Create	(no value)	No		8/30/2017, 2:08:32 PM
Case Number	Create	(no value)	CAS-00019-N3H5C0		8/30/2017, 2:08:32 PM
UpSell Referral	Create	(no value)	No		8/30/2017, 2:08:32 PM
Status Reason	Create	(no value)	In Progress		8/30/2017, 2:08:32 PM
Satisfaction	Create	(no value)	Neutral		8/30/2017, 2:08:32 PM
First Response SLA Status	Create	(no value)	In Progress		8/30/2017, 2:08:32 PM

- The Actionable Audit information is easily exportable: Click on Export to CSV, and the CSV file will download to the User's local machine.

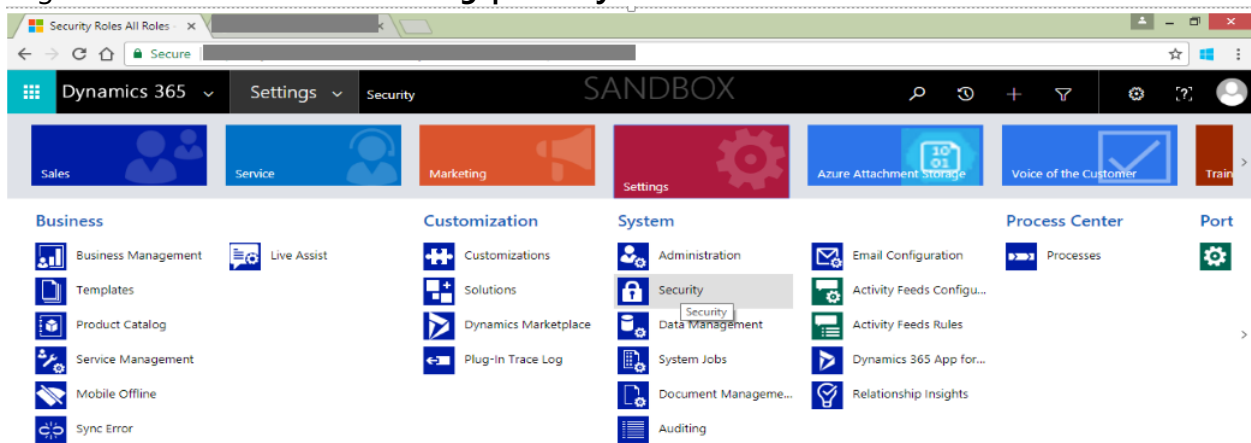
Attribute Name	Operation	Oldvalue	Newvalue	Entity Name	Logical Name	User	Date	Time	Auditid
Priority	Update	Normal	High	Test Case	incident		8/30/2017	2:12:50 PM	7a887aa3-b0d6-461e-9606-e1022ccac8a0
Survey Participation	Create	(no value)	No	Test Case	incident		8/30/2017	2:08:32 PM	2a5f2d31-9399-46eb-aa04-cb61a55d8a66
Case Number	Create	(no value)	CAS-00019-N3H5CO	Test Case	incident		8/30/2017	2:08:32 PM	989b7f03-d4e5-4b4e-8fdc-3b18f85b8713
Upsell Referral	Create	(no value)	No	Test Case	incident		8/30/2017	2:08:32 PM	076897fe-9972-48b8-b7a1-d59526307d1a
Status Reason	Create	(no value)	In Progress	Test Case	incident		8/30/2017	2:08:32 PM	cdc00a16-7eb1-4496-9db2-5610afda8d1
Satisfaction	Create	(no value)	Neutral	Test Case	incident		8/30/2017	2:08:32 PM	16175d9d-2e07-44de-8b6e-950b0e0b4f29
First Response SLA Status	Create	(no value)	In Progress	Test Case	incident		8/30/2017	2:08:32 PM	ef1997f3-a026-4ea5-b48e-5d5aa38125ad
Service Stage	Create	(no value)	Identify	Test Case	incident		8/30/2017	2:08:32 PM	80310452-a047-47d0-86e7-b7b2c06624f4
Exchange Rate	Create	(no value)		1 Test Case	incident		8/30/2017	2:08:32 PM	a55104ed-85d3-43c0-8f9c-4d35216e592d
Activities Complete	Create	(no value)	No	Test Case	incident		8/30/2017	2:08:32 PM	f8510182-1ab3-40e2-991e-86140dea4b76
Case Title	Create	(no value)	Test Case	Test Case	incident		8/30/2017	2:08:32 PM	b91a8220-0007-4928-b8bf-a97e69bf3d75
Blocked Profile	Create	(no value)	No	Test Case	incident		8/30/2017	2:08:32 PM	a71bc331-df2b-4d99-a5b9-326693ce2464
First Response Sent	Create	(no value)	No	Test Case	incident		8/30/2017	2:08:32 PM	e1d45dc5-b61b-4493-bded-9d6f05bdc7f2
IsEscalated	Create	(no value)	No	Test Case	incident		8/30/2017	2:08:32 PM	d32fa100-2d5a-4fd8-b6b0-93db8a93d1a3
Check Email	Create	(no value)	No	Test Case	incident		8/30/2017	2:08:32 PM	14fb9e9e-87a7-463b-a2d1-0e67f9f24913
Customer	Create	(no value)	A. Datum	Test Case	incident		8/30/2017	2:08:32 PM	8c74e086-c76e-4825-897a-bba74fcc259
Decrement Entitlement Terms	Create	(no value)	Yes	Test Case	incident		8/30/2017	2:08:32 PM	8a3c7551-c0be-4fc8-afe0-621be940f12f
Currency	Create	(no value)	US Dollar	Test Case	incident		8/30/2017	2:08:32 PM	88c2b63c-4189-4dcb-80b3-930bfb840c74
Route Case	Create	(no value)	No	Test Case	incident		8/30/2017	2:08:32 PM	def6fb57-ab56-4c82-8393-5a2bc57408a3
Survey Participation	Create	(no value)	No	Test Case	incident		8/30/2017	2:08:32 PM	16d8d70d-457f-4e74-bba0-2db3afa0a751
Owner	Create	(no value)	Sai Krishna	Test Case	incident		8/30/2017	2:08:32 PM	c287da17-7c45-4eab-985b-0e94faea57c2
Internal Use Only	Create	(no value)	No	Test Case	incident		8/30/2017	2:08:32 PM	a4c6b66f-fe7d-4342-baa2-de04c84f30b0
Severity	Create	(no value)	Default Value	Test Case	incident		8/30/2017	2:08:32 PM	cdaa7499-3170-4565-9095-aaa7cfd65dc
Resolve By SLA Status	Create	(no value)	In Progress	Test Case	incident		8/30/2017	2:08:32 PM	ddabe5bf-6f70-4635-80b5-18fffd53576b
Decrementing	Create	(no value)	No	Test Case	incident		8/30/2017	2:08:32 PM	3b325f7-48d0-4ec7-ab67-a88d9244562a
Status	Create	(no value)	Active	Test Case	incident		8/30/2017	2:08:32 PM	1aed7c17-ed48-43db-a7f1-40a9850e09b1
Case Stage	Create	(no value)	Default Value	Test Case	incident		8/30/2017	2:08:32 PM	d01693df-34ae-424b-b724-01dd40d00478
Customer Contacted	Create	(no value)	No	Test Case	incident		8/30/2017	2:08:32 PM	7e3dfc3b-ce24-45af-8157-1ebcb5b358bf
Priority	Create	(no value)	Normal	Test Case	incident		8/30/2017	2:08:32 PM	a599cae8-8154-4156-9ddf-1eeb8f08e851
Follow up Task Created	Create	(no value)	No	Test Case	incident		8/30/2017	2:08:32 PM	912eed2e-25ab-4a42-ac7b-6848ecd5d5ed

Access to the Custom Entities for other Roles

This section describes how to provide custom entity access (Custom Audit History) to all roles except System Admin.

Scenario: System Admin wants to provide Audit related info access to Sales Manager role.

- Login to the CRM and Go to **Settings|Security**.



2. Click **Security Roles**|**Sales Manager** role as shown in the below screenshot.

The screenshot shows the Dynamics 365 interface. At the top, there are navigation tabs for 'Dynamics 365', 'Settings', and 'Security'. Below this is a yellow notification banner. The main heading is 'Security Roles'. Underneath, there is a 'Business Unit' dropdown menu set to 'dynamicsreusabledev'. A toolbar contains 'New', 'Print', 'Refresh', 'Close', and 'More Actions'. The main content is a table of roles. The 'Sales Manager' role is highlighted with a blue border. At the bottom, there is a pagination indicator '1 - 25 of 25 (0 selected)' and a filter menu with 'All' selected and letters # through I.

Name ↑	Business Unit
Activity Feeds	dynamicsreusabledev
CEO-Business Manager	dynamicsreusabledev
Coaching Administrator	dynamicsreusabledev
CSR Manager	dynamicsreusabledev
Customer Service Representative	dynamicsreusabledev
Delegate	dynamicsreusabledev
Knowledge Manager	dynamicsreusabledev
Live Assist Administrator	dynamicsreusabledev
Live Assist Agent	dynamicsreusabledev
Live Assist Supervisor	dynamicsreusabledev
Marketing Manager	dynamicsreusabledev
Marketing Professional	dynamicsreusabledev
Sales Manager	dynamicsreusabledev
Salesperson	dynamicsreusabledev
Schedule Manager	dynamicsreusabledev
Scheduler	dynamicsreusabledev
Survey Administrator	dynamicsreusabledev
Survey Designer	dynamicsreusabledev
Survey Feedback Publisher	dynamicsreusabledev
Survey Service	dynamicsreusabledev
Survey User	dynamicsreusabledev
System Administrator	dynamicsreusabledev
System Customizer	dynamicsreusabledev

3. Select **CORE RECORDS**|**Miscellaneous Privileges**, and set the privileges displayed below.

Security Role: Sales Manager Working on solution: Default Solution

Details	Core Records	Marketing	Sales	Service	Business Management	Service Management	Customization	Missing Entities	Business Process Flows	Custom Entities
Subject			○	●	○	○	○	●		
Sync Error		○	○	○	○	○	○	○	○	○
Text Analytics Entity Mapping		○	○	○	○	○	○			
Trace		●	●	○	○	●	●			
User Chart		○	○	○	○	○		○	○	
User Dashboard		○	○	○	○	○		○	○	
User Entity Instance Data		○	○	○	○	○		○	○	
User Entity UI Settings		○	○	○	○	○			○	
User Mapping		○	○	○	○	○				
Web Wizard		○	○	●	○	○				
Web Wizard Access Privilege		○	○	●	○	○				
Wizard Page		○	○	●	○	○				

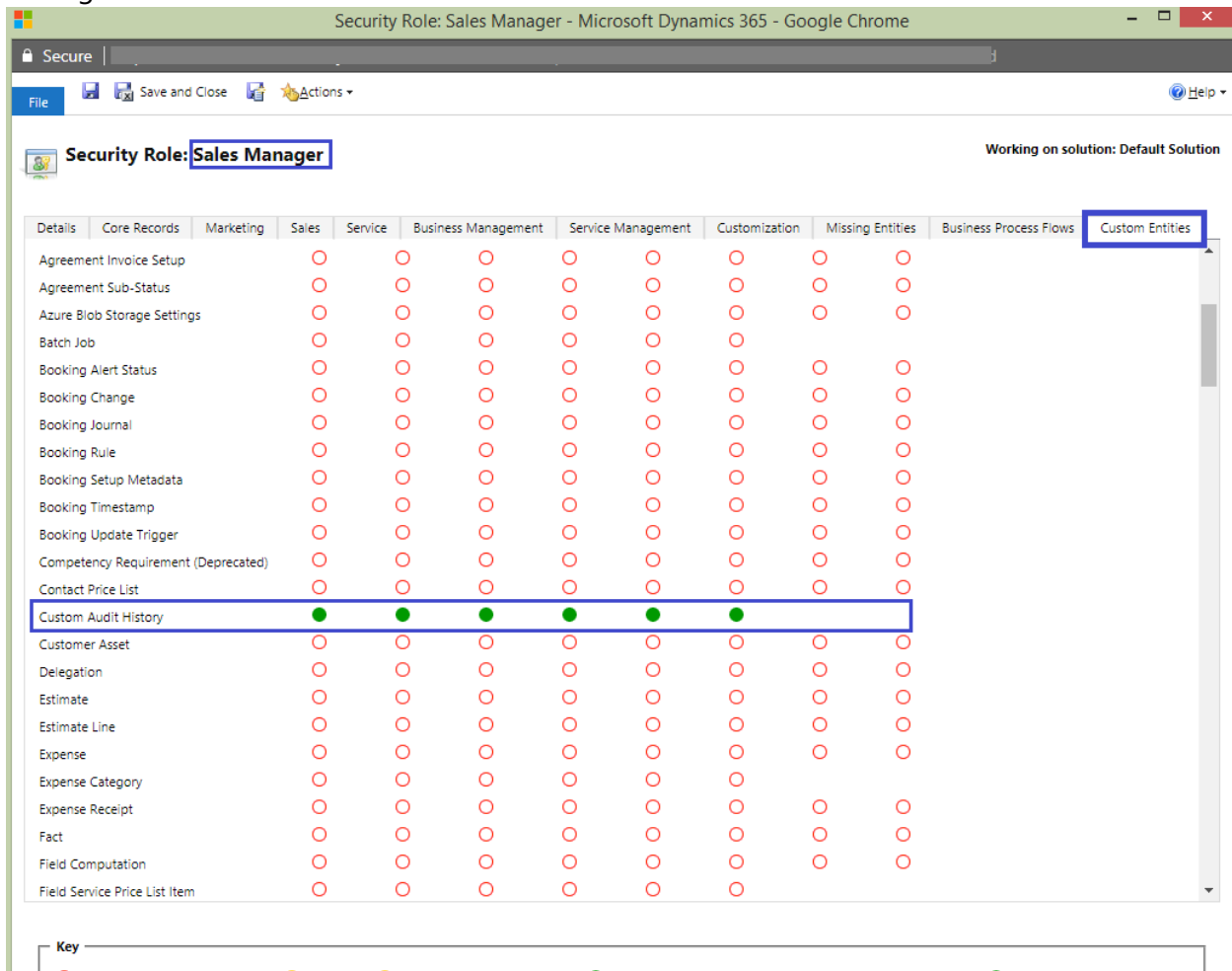
Miscellaneous Privileges

Add Reporting Services Reports	○
Delete Audit Partitions	●
Manage Data Encryption key - Change	○
Manage User Synchronization Filters	○
Publish Duplicate Detection Rules	○
Publish Mail Merge Templates to Organization	○
Run SharePoint Integration Wizard	○
View Audit History	●
View Audit Summary	●
Bulk Delete	○
Manage Data Encryption key - Activate	○
Manage Data Encryption key - Read	○
Promote User to Microsoft Dynamics 365 Administrator Role	○
Publish Email Templates	●
Publish Reports	○
Turn On Tracing	○
View Audit Partitions	●

Key

- No Access
- Read Only
- Write Only
- Full Control
- Full Control

- Go to **Custom Entities** tab and set **read/write/update/assign/assigned** permissions for Sales Manager as shown below.



End of Document