

Security Audit - User Guide

Before you can begin to monitor security events within your organisation, you must add Security Audit to your Sitemap.

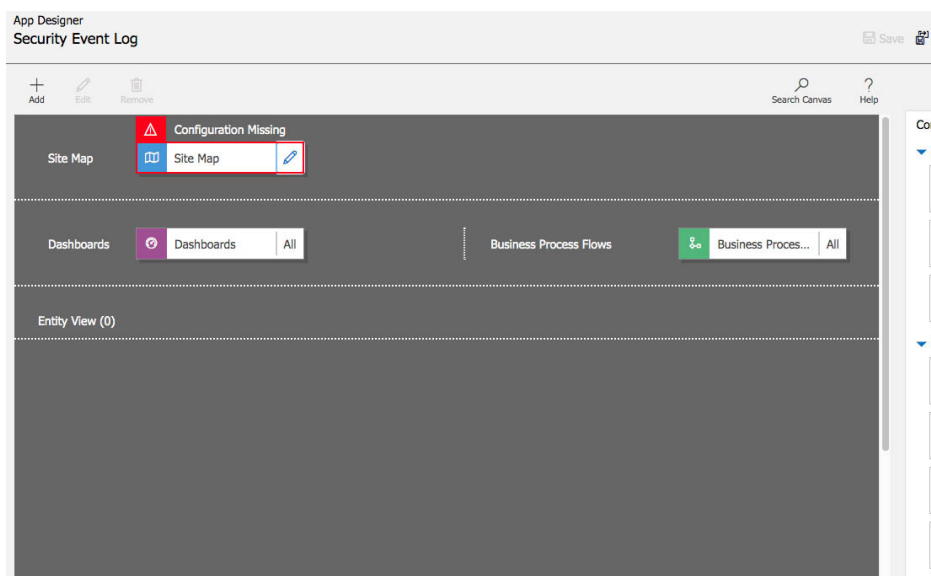
XRM offer free support calls for getting setup with Security Audit. We will run through a quick setup and onboarding process to familiarise you with the features of Security Audit. We can also discuss tailoring the solution to your organisations specific needs to further extend the benefits of Security Audit. Please contact us at sales@xrm.je or call us at +44 1534 50 50 10 and we will be happy to assist you with any enquiries you have.

For those opting to setup the solution themselves, we have outline a few of methods of doing so below:

Create a Model Drive App

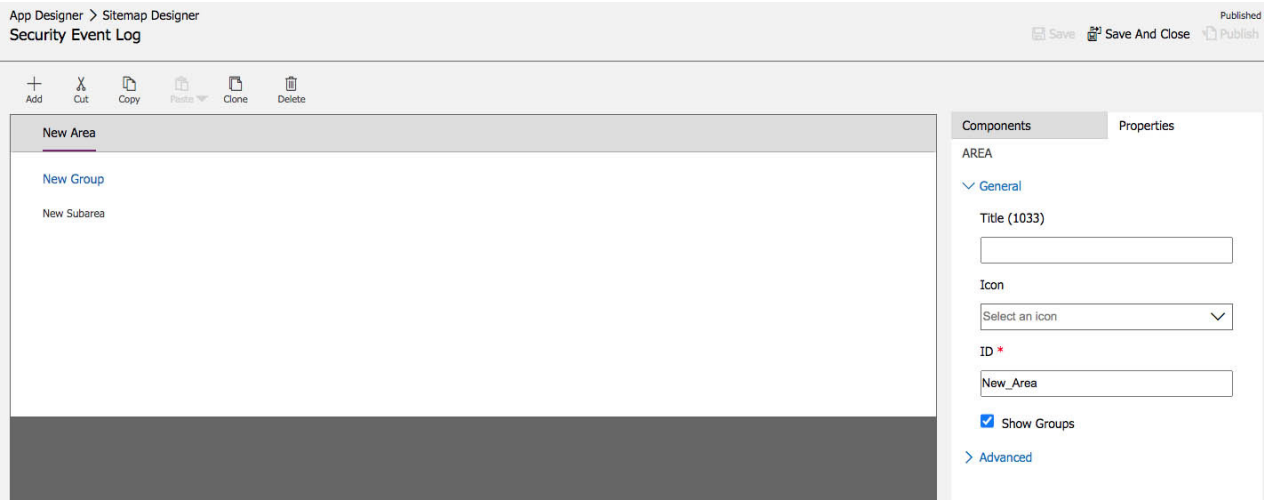
One of the quickest and most simple methods of adding Security Audit to your sitemap is to create or edit one of your current Model Driven Apps already in use. Follow the steps below for assistance in creating a new Model Driven App:

1. Go to make.powerapps.com, click create in the sidebar and click, "Create model driven app from blank," on the following page. Give your app a name and click done. You will then be brought to the App Designer screen

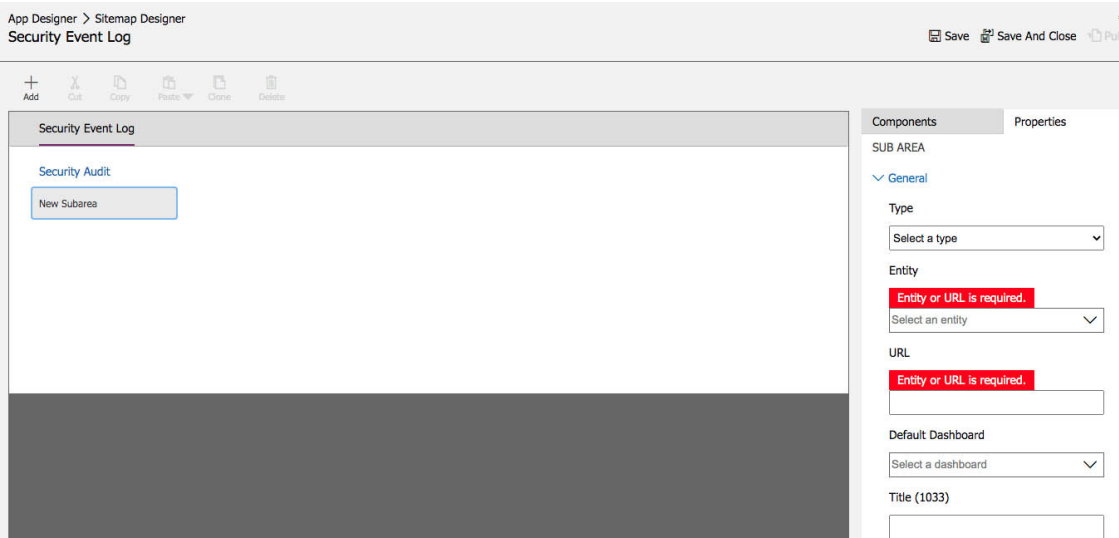


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2.From here, click the pen icon on the Site Map button to get started on adding our Security Audit link. By default, the editor opens with a New Area, Group and Subarea. Click the pen icon to edit and add a title in the properties tab of the Area and Group. In our case, we'll call them Security Event Log and Security Audit. The titles here can be named to suit your organisation and are simply to denote the areas usage internally.



3. Click on the Subarea and go to the entity field on the properties tab and type, "Security Event Log," to search for the entity. Click on the entity name to add the type and URL automatically. Click Save and Publish in the header, followed by Save and Close to exit the Sitemap Designer.



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4. Back in the App Designer, click Save and Publish in the header and click play to see your newly created Model Driven App. This will create a Model Driven App in United Interface. The same can be followed with an app in the classic interface. An example use case is to edit the, "Dynamics 365 Mobile - custom," the default/legacy app within Dynamics.

Dynamics 365

Security Event Log

Security Event Log

Security Event Logs

SANDBOX

Show Chart

New

Delete

Refresh

Email a Link

Run Report

Excel Templates

Export to Excel

Search this view

Active Security Event Logs

Created On	Name	Entity Name	Entity Schema Name	Entity ID
14/07/2020 13:16	Security Role was added to User by SYSTEM 0	Power App	systemuser	47bd1c27-2798-e911...
11/06/2020 14:09	Security Role 'Entity Customiser' (BU:orgc81aebf5) Privilege: 'Entity Customiser' (BU:orgc81aebf5)	role	35ac1e29-aa9a-ea11-...	
11/06/2020 14:05	Security Role 'Entity Customiser' (BU:orgc81aebf5) Privilege: 'Entity Customiser' (BU:orgc81aebf5)	role	35ac1e29-aa9a-ea11-...	
10/06/2020 12:25	Security Role was added to User by Marcel Filipowicz (Marc Power App	systemuser	47bd1c27-2798-e911...	
10/06/2020 12:15	Security Role 'Entity Customiser' (BU:orgc81aebf5) Privilege: 'Entity Customiser' (BU:orgc81aebf5)	role	35ac1e29-aa9a-ea11-...	
10/06/2020 11:53	System User was added to Team by Marcel Filipowicz (Mar Security Audit	team	2f7ca074-2ea0-ea11-...	
10/06/2020 11:52	System User was added to Team by Marcel Filipowicz (Mar Security Audit	team	2f7ca074-2ea0-ea11-...	
10/06/2020 11:51	System User was added to Team by Marcel Filipowicz (Mar Security Audit	team	2f7ca074-2ea0-ea11-...	
31/05/2020 22:54	Security Role was added to User by Marcel Filipowicz (Marc Power App	systemuser	47bd1c27-2798-e911...	
31/05/2020 17:28	Security Role 'Entity Customiser' (BU:orgc81aebf5) Privilege: 'Entity Customiser' (BU:orgc81aebf5)	role	35ac1e29-aa9a-ea11-...	
31/05/2020 17:26	Security Role 'Entity Customiser' (BU:orgc81aebf5) Privilege: 'Entity Customiser' (BU:orgc81aebf5)	role	35ac1e29-aa9a-ea11-...	
31/05/2020 17:14	Security Role 'Entity Customiser' (BU:orgc81aebf5) Privilege: 'Entity Customiser' (BU:orgc81aebf5)	role	35ac1e29-aa9a-ea11-...	

All

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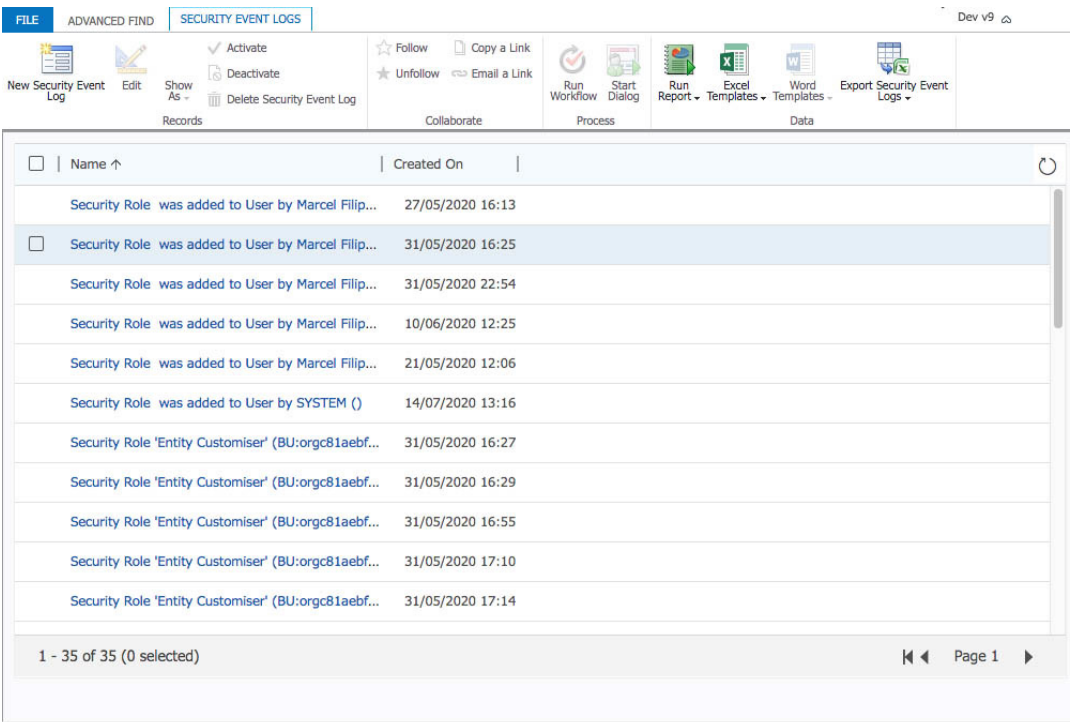
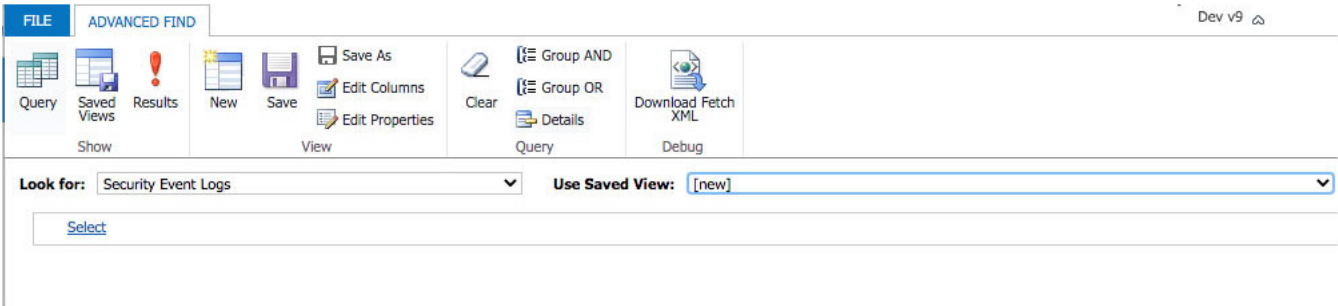
1 - 35 of 35 (0 selected)

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Advanced Find

A simplified method of using Security Audit records is using advanced find. Click the filter icon in the navbar of Dynamics to open up advanced find. This will open up a new window where you can chose which entity to search with, conditions to filter by, the ability to save the filter as a view etc. Click Look for and search for, "Security Event Log," and click Results to see a list of records within this entity.

For information, please check out the official Microsoft Docs:
<https://docs.microsoft.com/en-us/dynamics365/customerengagement/on-premises/basics/save-advanced-find-search>



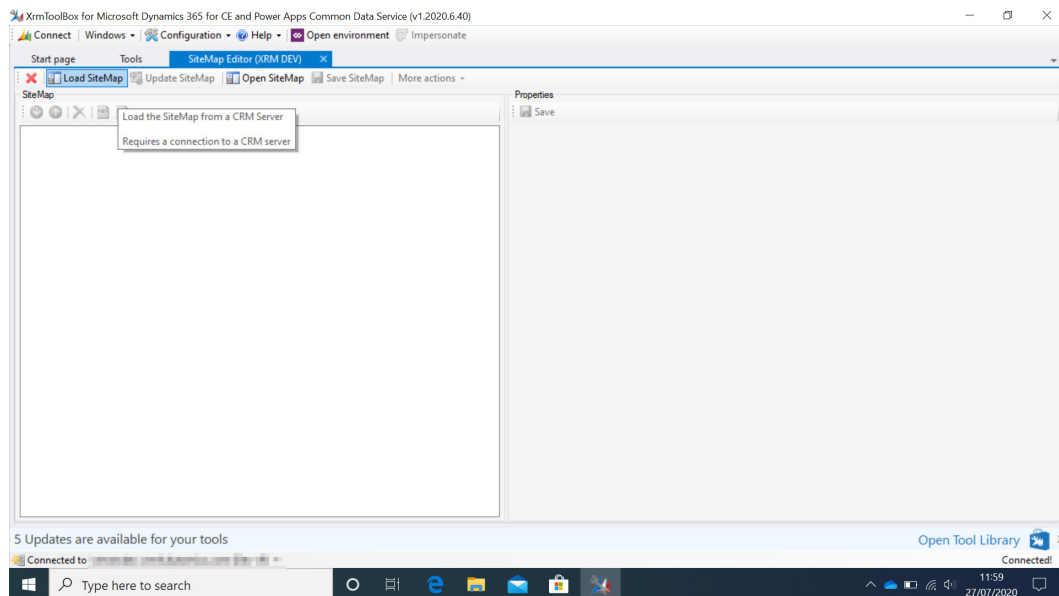
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Sitemap Editor (XrmToolBox)

For those with a little bit more developer experience, another recommended method is to use XrmToolBox for changing the site map. Using the SiteMap Editor tool, this offers another level of customisation not found on the above methods and allows you to export, update and change Sitemaps.

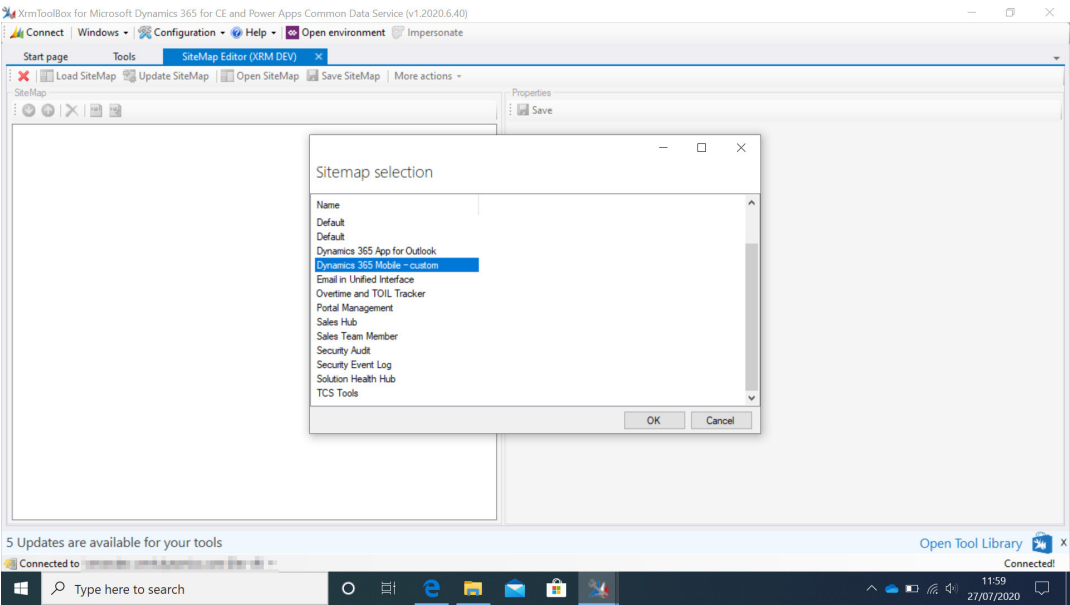
We will not detail all the customisations available here, but encourage you to further explore the benefits of this tool yourself.

1. Connect to your organisation and install the SiteMap Editor tool. Open the tool and click Load SiteMap to chose which sitemap you wish to edit.

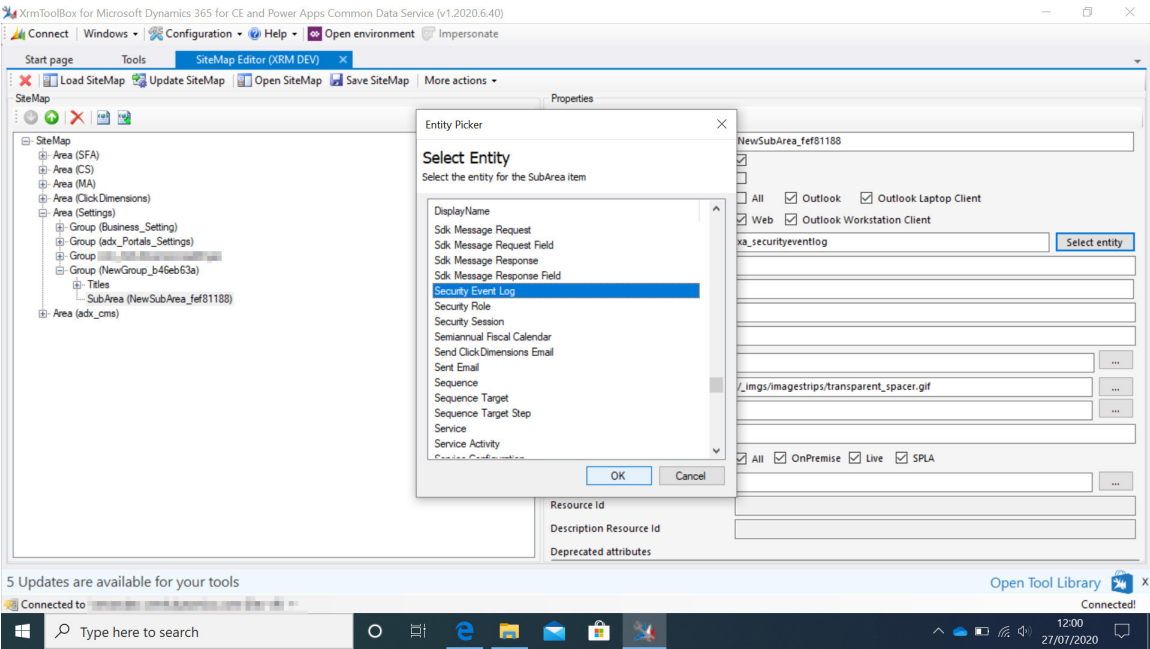


2. Once your sitemap has loaded, chose the area you wish to add to or add a new Area or Group to your sitemap. Add a Subarea to your desired Group, for example Security Audit under Settings.

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3. Customise the subarea to your liking, such as adding it to offline and web clients, update the ID if required etc. The main field we need to update is the Entity. Click Select Entity and search for Security Event Log and click ok.



4. Click save in the properties editor and click Update SiteMap to save your changes and push it to your desired instance.

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How it works

When a security event occurs, such as when a user changes business unit or a security role's privileges are changed, a new security event log is created describing the event.

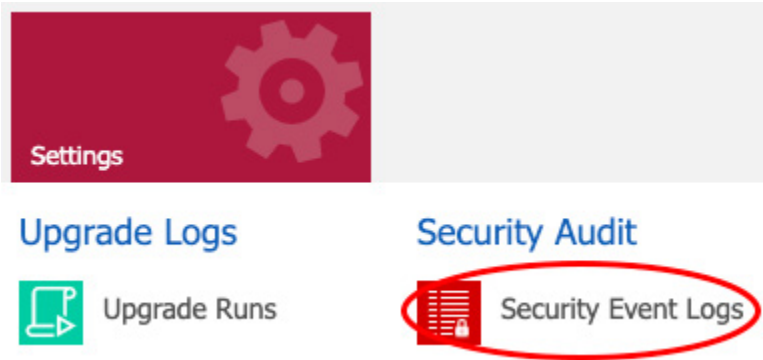
Events audited by the app:

- New user added
- User is disabled
- User is enabled
- User role assigned
- User role removed
- User business unit changed
- User joins a team
- User leaves a team
- New team is created
- Team role assigned
- Team role removed
- Security role created
- Security role permission(s) removed
- Security role permission(s) assigned
- Security role permission(s) changed

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Accessing Security Audit Logs

Within Dynamics 365, go to Settings, Security Audit section and click the Security Event Logs button.



You will see a list of your security event logs, in descending order. Each entry shows the date it was created on, name with a quick insight into the event, name of the entity affected along with its ID, and the entity schema name.

<input type="checkbox"/>	Created On ↓	Name	Entity Name	Entity Sc...	Entity ID
	11/06/2020 1...	Security Role 'Entity Customiser' (BU:orgc81aebf...	'Entity Customiser' (BU:orgc81...	role	35ac1e29-aa...
	11/06/2020 1...	Security Role 'Entity Customiser' (BU:orgc81aebf...	'Entity Customiser' (BU:orgc81...	role	35ac1e29-aa...
	10/06/2020 1...	Security Role was added to User by Marcel Filip...	Power App	systemus...	47bd1c27-27...
	10/06/2020 1...	Security Role 'Entity Customiser' (BU:orgc81aebf...	'Entity Customiser' (BU:orgc81...	role	35ac1e29-aa...
	10/06/2020 1...	System User was added to Team by Marcel Filip...	Security Audit	team	2f7ca074-2ea...
	10/06/2020 1...	System User was added to Team by Marcel Filip...	Security Audit	team	2f7ca074-2ea...
	10/06/2020 1...	System User was added to Team by Marcel Filip...	Security Audit	team	2f7ca074-2ea...
	31/05/2020 2...	Security Role was added to User by Marcel Filip...	Power App	systemus...	47bd1c27-27...
	31/05/2020 1...	Security Role 'Entity Customiser' (BU:orgc81aebf...	'Entity Customiser' (BU:orgc81...	role	35ac1e29-aa...

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Clicking on any single event will reveal audit information, such as who carried out the change, at what time, and change details.

In the following example, the “Entity Customiser,” Security Role had its privileges changed for the Connection and Category entities. An arrow points from the old value to the new value. Blank space under privileges mean that the privilege wasn’t changed.

Name *

Security Role 'Entity Customiser' (BU:orgc81aebf5) Privileges updated by user Marcel Filipowicz (Marcel@xrm.je)

CONNECTION

CreateReadWriteDeleteAppendAppend ToAssignShare

CATEGORY

CreateReadWriteDeleteAppendAppend ToAssignShare

A tooltip on each privilege access level indicates whether it's an old or a new value:

Diagram illustrating a database connection bar with buttons for **Create**, **Read**, **Write**, **Delete**, and **Append**. Below the buttons are icons for a green circle, a blue arrow, and a yellow circle, followed by a black box labeled **Old Value**.

Users can also tell what each access level means by referring to the legend at the bottom of the page:

Key

	None		User		BU		Parent BU		Org
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