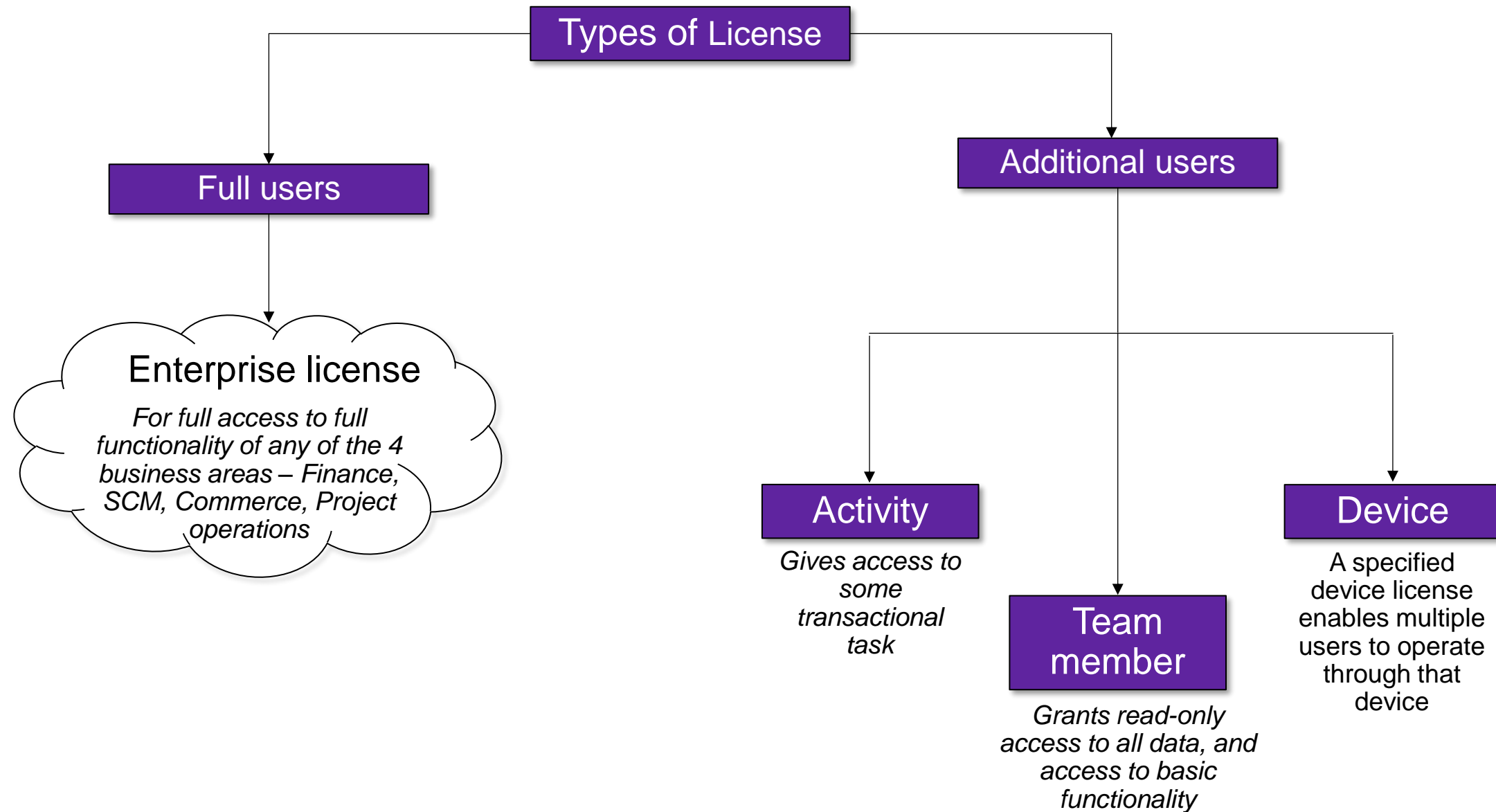


Streamline User Access & Licensing costs with Security Insights for D365 FO

D365 FO Licensing options



Pricing info available at: <https://www.microsoft.com/en-au/dynamics-365/products/finance/pricing>

Dynamics 365 Finance & Operations User access & security challenges

Challenges the ISV aims to resolve:



How can I cut down costs on user licensing?



How many licenses have I assigned to users?



How many users specifically have Enterprise licenses allocated to them?



Are users using the capabilities of Enterprise licenses?



Are users utilizing all roles allocated to them?



What is the role utilization rate (%) for users?

Security Insights for D365FO

Provides insights on user access and security control in D365 FO



Challenge

- Ensure optimized utilization of enterprise license users
- Remove unused/unnecessary security access, thus saving costs



Solution

- Security Insights for D365FO ingests user behavior data from Azure Application Insights for security analysis.
- Actively monitor user role assignments & utilization, thus enabling power users to optimize licensing and security of end users.



Results

- Gain insights on user access and security
- Identify and maintain underutilized/unused roles, duties, privileges that have enterprise licenses attached.
- Supports Active Directory Security groups

Prerequisite: Azure Application Insights Instance

MS Licensing

What is Microsoft communicating to Customers?

- Microsoft is implementing user licensing changes to Dynamics 365 Finance and Operations (F&O) requiring all customers to proactively review users and assign licenses in the Microsoft 365 admin center. **Unassigned users will not be granted access to the system from November 1, 2025.**
- Your F&O customers may see **notification banners in their F&O daily usage September 1, 2025.** Users will see this notification if they are not assigned a license. The notification will direct users to contact their IT administrator to take actions on M365 admin center. IT administrators have already received 4 messages from Microsoft.
- Instruction to **customers are to act and self-service user assignments** by using the guidance in the customer Playbook and FAQ.
- Exception period: **Customers that have a renewal date from present to September 30, 2025, will receive up to one year grace period for in-product notification and enforcement.** This only relates to notifications and in-product user license (USL) assignment validation.

How to Manage: Power Platform admin center User License Level Overview Report

- Shows all the active users in each environment, what role they're assigned, and what licenses they're triggering all in one report.
- Must be run as Global Admin with role of Power Platform Administrator
- Download csv and use pivot table count on "Role License"

<https://admin.powerplatform.microsoft.com/billing/licenses#overview#financeandoperations>

User License Level	Available Seats	Assigned Seats	Required Seats	License Utilization Status
Supply Chain Management View users / View role licenses	168	80	82	112 licenses can be assigned
Commerce View users / View role licenses	76	58	0	87 licenses can be assigned
Team Members View users / View role licenses	94	82	100	You are using 88 more licenses
Finance View users / View role licenses	144	49	35	130 licenses can be assigned
Base - Commerce, Finance, Supply Chain Management View users / View role licenses	412	144	12	400 licenses can be assigned
Operations - Activity View users / View role licenses	180	68	45	25 licenses can be assigned
Base - Human Resources, Project Operations View users / View role licenses	145	40	5	110 licenses can be assigned
Project Operations View users / View role licenses	85	35	17	40 licenses can be assigned
Human Resources Self Service View users / View role licenses	240	0	62	178 licenses can be assigned
Human Resources View users / View role licenses	15	1	19	You are using 4 more licenses
Attach View users / View role licenses	140	25	0	144 licenses can be assigned

Security Insights vs standard Security Governance & PPAC reporting

Complements each other and meets different requirements

	DXC Security Insights	MS Security Governance & PPAC reporting
Aimed at	Companies that are looking at reducing their user licensing cost. E.g. due to security updates with unintended licensing implications since their last security audit.	Set of advanced features which provides useful tools to System administrators for role management, licenses auditing, enhanced audit trails and versioning, supported with some useful reports around license usage, separation of duties violations etc.
Ability to minimize subscription cost	Yes. Allows you to identify over-licensed users. Identify what privileges they are using vs what they are licensed for	No. Only indicates what licenses would apply to users and if they have logged on recently to D365, not what they accessed/require.
Group similar users	Yes. AI can group users based on roles or privileges similarities making role reduction decisions easier.	PPAC: User license level, which is manually assigned to users.
Prerequisites	Azure Applications Insights – identify actual user accessed menu items	No – doesn't compare to actual user accessed menu items

Security Insights for D365 FO: Overview

Finance and Operations

USMF

Save Synchronize user roles and access Initiate user security groups Fetch interaction data from application Insights Calculate utilization rates Options

Filter

Group 1

Group 2

Group 3

Group 4

System administrators

Standard view

Insights for user access and security

ID	Name	Company	Overall role utilization (%)	Operations	Finance	SCM	Commerce	Project	HR	Activity	Functional Users	Server	Team Members	Self serve	Task	None
psharma348	Patrick Sharma	USMF	7.60	70	109	0	0	0	0	58	0	33	212	0	0	120
REINA	REINA	USMF	0.00	0	0	0	0	1	0	4	0	34	160	0	0	62
RenataK	RenataK	USRT	0.00	2	0	0	3	0	0	112	0	18	371	0	0	224
RetailServiceAccount	RetailServiceAccount	dat	0.00	412	476	332	16	0	0	1405	0	70	3321	0	0	1214
RICARDO	RICARDO	USMF	0.00	2	0	20	0	0	0	2	0	35	494	0	0	93
SAMMY	SAMMY	USMF	0.00	0	0	0	0	0	0	45	0	37	821	0	0	145

User roles

Role name	Role description	Role utilization (%)	Operations	Finance	SCM	Commerce	Project	HR	Activity	Functional ...	Server	Team Mem...	Self serve	Task	None
System user	System role for all users	5.48	0	0	0	0	0	0	0	0	17	22	0	0	36
Accounts payable manager	Reviews vendor invoice p...	1.24	69	109	0	0	0	0	58	0	16	189	0	0	80
DocuSign Administrator		5.56	1	0	0	0	0	0	0	0	0	1	0	0	0
DocuSign user		0.00	0	0	0	0	0	0	0	0	0	0	0	0	0
DXC Insights administrator		33.33	0	0	0	0	0	0	0	0	0	0	0	0	3
Data anonymization administrator	Responsible for managin...	0.00	0	0	0	0	0	0	0	0	0	0	0	0	1

Duties for selected user roles

Privileges for selected user roles

Assign privileges to duty Assign privileges to role Manage privilege assignments

Privilege name	Privilege description	Privilege utilizat...	Operations	Finance	SCM	Commerce	Project	HR	Activity	Functional ...	Server	Team Mem...	Self serve	Task	None
Vendor invoice entry		100.00													
View the occurrence weekly view	View scheduled occurrences on the occurrence weekly view	100.00													
Maintain payment calendars		66.67		✓											
View payment calendars		66.67												✓	
Maintain vendor payment calendar rules		50.00		✓											
Maintain accounts payable parameters	Set up parameters for the Accounts payable module	50.00	✓												

Menu items for selected privilege

Unused menu items	Accessed menu items	Interaction count	Last interaction date
CITYHOLIDAY	PAYMCALENDAR	1	5/30/2024 12:28:37 AM
	STATEHOLIDAY	1	5/30/2024 12:28:41 AM

Groups of similar users

License allocation for user

Role utilization for current user

License allocation for role

Privilege utilization by user

Security Insights for D365 FO: Visual recommendations

Ability to highlight unused license types

Finance and Operations

System administration > Insights for user access and security > Security insights by user

USMF

← Edit Synchronize user roles and access Initiate user security groups Fetch interaction data from application insights Calculate utilization rates Options

AccountsPayable

Security insights for D365FO (Accounts Payab...

ProductAdmin

Security insights for D365FO (Product admini...

License type ▾

Insights for user access and security

Users

ID	Name	Company	Title	Overall user utilization (%)	Operations	Finance	SCM	Commerce	P
\$0771	Marketing Staff	USMF	Marketing Staff	23.86	209	251	0	0	
\$6F88	Test user 5	USMF	Dispatcher	0.00	176	2	0	0	
\$924E	Project Manager	USMF	Project Manager	0.00	176	2	0	0	
\$B8DB	Test user 6	USMF		0.00	176	2	0	0	
\$DA28	Test user 4	USMF		4.48	347	726	0	0	

User roles

Role name	Role description	Role utilization (%)	Operations	Finance	SCM	Commerce	Project
Accounting supervisor	Reviews accounting process per...	0.00	33	249	0	0	0
Information technology manager	Maintains servers and software f...	4.00	161	0	0	0	0
System user	System role for all users	1.69	0	0	0	0	0
EDI freight forwarder landed cos...	Documents freight forwarder la...	0.00	1	0	0	0	0
EDI freight forwarder landed cos...	Documents freight forwarder la...	0.00	0	0	0	0	0

Security Insights for D365 FO: Unassigned users

When Initiating security group using **User groups** or **Microsoft Entra ID security groups**, an extra security group **Not assigned** will be created for users that doesn't fall within any of the existing groups.

The screenshot displays the 'Security insights by user' page in Dynamics 365 Finance and Operations. The left sidebar lists various user groups, with 'Unassigned users' highlighted in a red box. The main area shows 'Insights for user access and security' with a table of users and their utilization across different departments.

Users Table:

ID	Name	Company	Title	Overall user ut...	Operations	Finance	SCM	Commerce
\$COBA	\$COBA	dat		0.00	0	0	0	0
ALICIA	ALICIA	USMF	Purchasing Ag...	0.00	12	0	22	0
APRIL	APRIL	USMF		0.00	76	319	0	0
axrunner	axrunner	DAT		0.00	0	0	0	0
BENJAMIN	BENJAMIN	USMF	Marketing Ma...	0.00	155	0	186	0
BROOKE	BROOKE	USMF	HR Assistant	0.00	16	37	0	0

User roles Table:

Role name	Role description	Role utilization...	Operations	Finance	SCM	Commerce	Project
Budget clerk	Documents budget events and r...	0.00	0	0	0	0	0
Employee	Worker in employment relations...	0.00	0	0	0	0	0
System user	System role for all users	0.00	0	0	0	0	0

Security Insights for D365 FO: Role utilization %

Role utilization % on **Assign users to roles** assist with determining which users utilized the role within the fetched period.

Finance and Operations

System administration > Security > Assign users to roles

Filter

Accountant

Accounting manager

Accounting supervisor

Accounts payable centralized payments

Accounts payable clerk

Accounts payable manager

Accounts payable payments clerk

Accounts payable positive payment clerk

Accounts receivable centralized payment

Accounts receivable clerk

Accounts receivable manager

Accounts receivable payments clerk

Applicant anonymous (external)

Auditor

Batch job manager

Benefits management assistant

Benefits management eligibility process

Benefits management flex credit assistan

Budget clerk

Standard view

Assign users to roles

Rules for dynamically assigning users to role

Add rule

Remove rule

Edit query

Assign organizations

Membership rule name	Membership rule description	Query preview
<div><div></div><div>We didn't find anything to show here.</div></div>		

Users assigned to role

Manually assign / exclude users

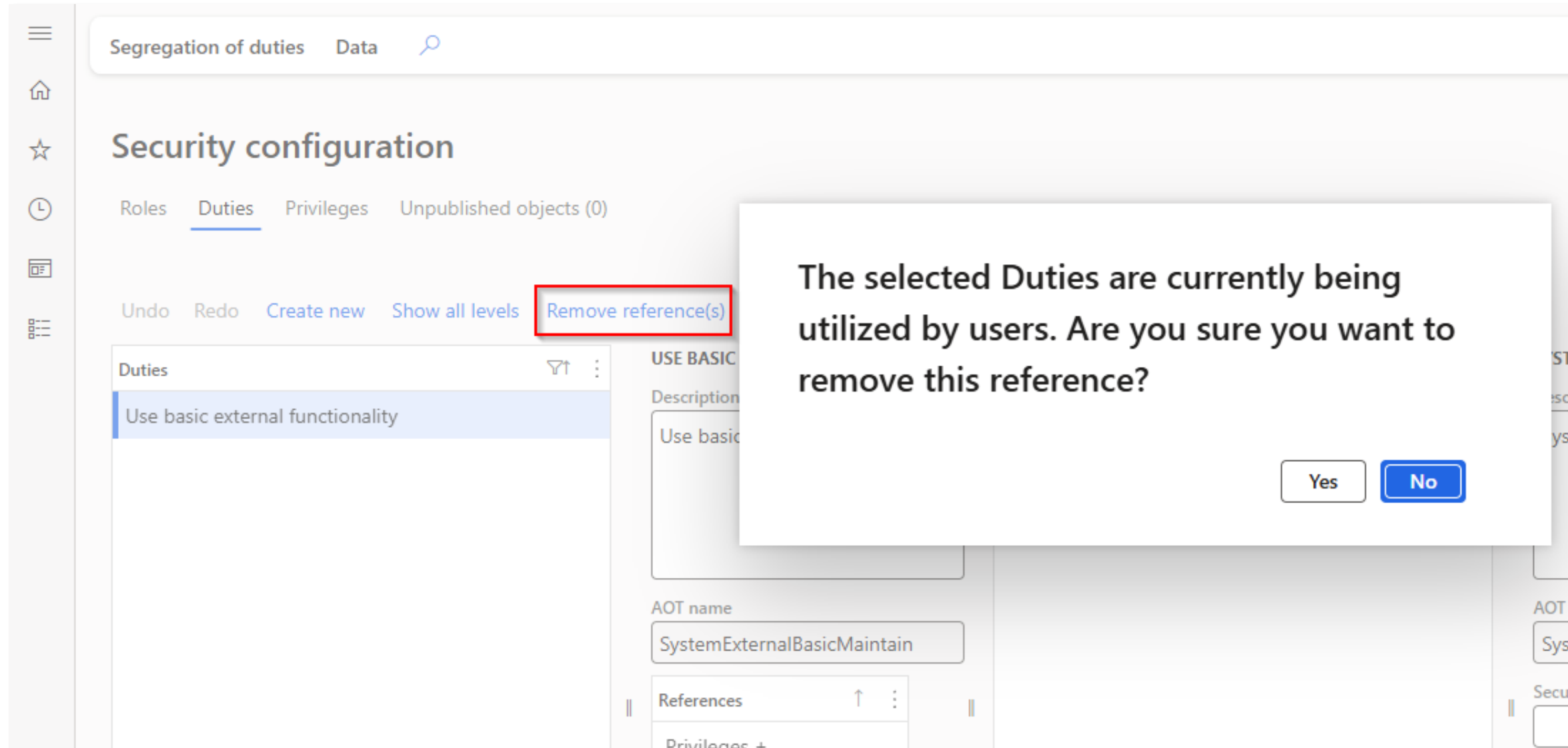
Assign organizations

Remove

ID	User name	Alias	Assignment mode	Role utilization (%)
OSCAR	OSCAR	OSCAR@contoso...	Manual	0.00
PHYLLIS	PHYLLIS	PHYLLIS@contos...	Manual	0.00
			Manual	10.85
SARA	SARA	SARA@contosoa...	Manual	0.00

Security Insights for D365 FO: Remove permission

Parameter option to warn when user selects **Remove reference** in Security configuration and fetched utilization exists for the role/duty/privilege combination



Security Insights for D365 FO: Security diagnostics

1. Context \ Resource license: License for the Menu item
2. License: License for the Role

Standard view ▾
Security diagnostics

This is the list of security objects that grant the active security entry point.

[Add roles to user](#) [Show object identifiers](#)

Filter

Object type	Label	Context \ Resource	License
Role	Collections agent	Team Members	Finance
Role	Collections manager	Team Members	Finance
Role	Credit management...	Team Members	Finance
Role	Credit management...	Team Members	Finance
Role	Accounts receivable...	Team Members	Finance
Role	Accounts receivable...	Team Members	Finance
Role	Accountant	Team Members	Finance
Role	Accounting manager	Team Members	Finance
Role	Financial controller	Team Members	Finance
Role	Accounts receivable...	Team Members	Finance
Role	Accounts receivable...	Team Members	Finance
Role	Treasurer	Team Members	Finance
Role	Project assistant	Team Members	Project
Role	Project manager	Team Members	Project
Role	Production planner	Team Members	SCM
Role	Retail service	Team Members	Commerce

View permissions
Standard view * ▾
Licence
SCM
Filter

Role	Sub role	Duty	Privilege	Resource type	Context \ Resource	Read	Update	Create	Delete	Correct	Invoke	Licence
Production planner		Inquire into sales order ...	View sales order details	Menu ite...	SALESTABLELISTPAGE	Grant	Unset	Unset	Unset	Unset	Unset	Team Members
		000776	US-027	Birch Company	Sales order		US-027					
		000783	US-001	Contoso Retail San Diego	Sales order		US-001					
		000784	US-003	Forest Wholesales	Sales order		US-003					
		000785	US-004	Cave Wholesales	Sales order		US-004					
		000810	US-003	Forest Wholesales	Sales order		US-003					
		000811	US-004	Cave Wholesales	Sales order		US-004					
		000860	US-001	Contoso Retail San Diego	Sales order		US-001					

