

Executive Automats

FOR SECURITY
& COMPLIANCE





Executive Automats

Executive Automats you can secure, support, test and discover your business processes in Dynamics 365 maximum efficiency, cost reduction and safety — all in one platform.

How can we help manage your business processes?

➤ Security & Compliance

Meet and maintain SOX compliance standards for ERP and reduce licensing costs with custom roles

➤ Discovery

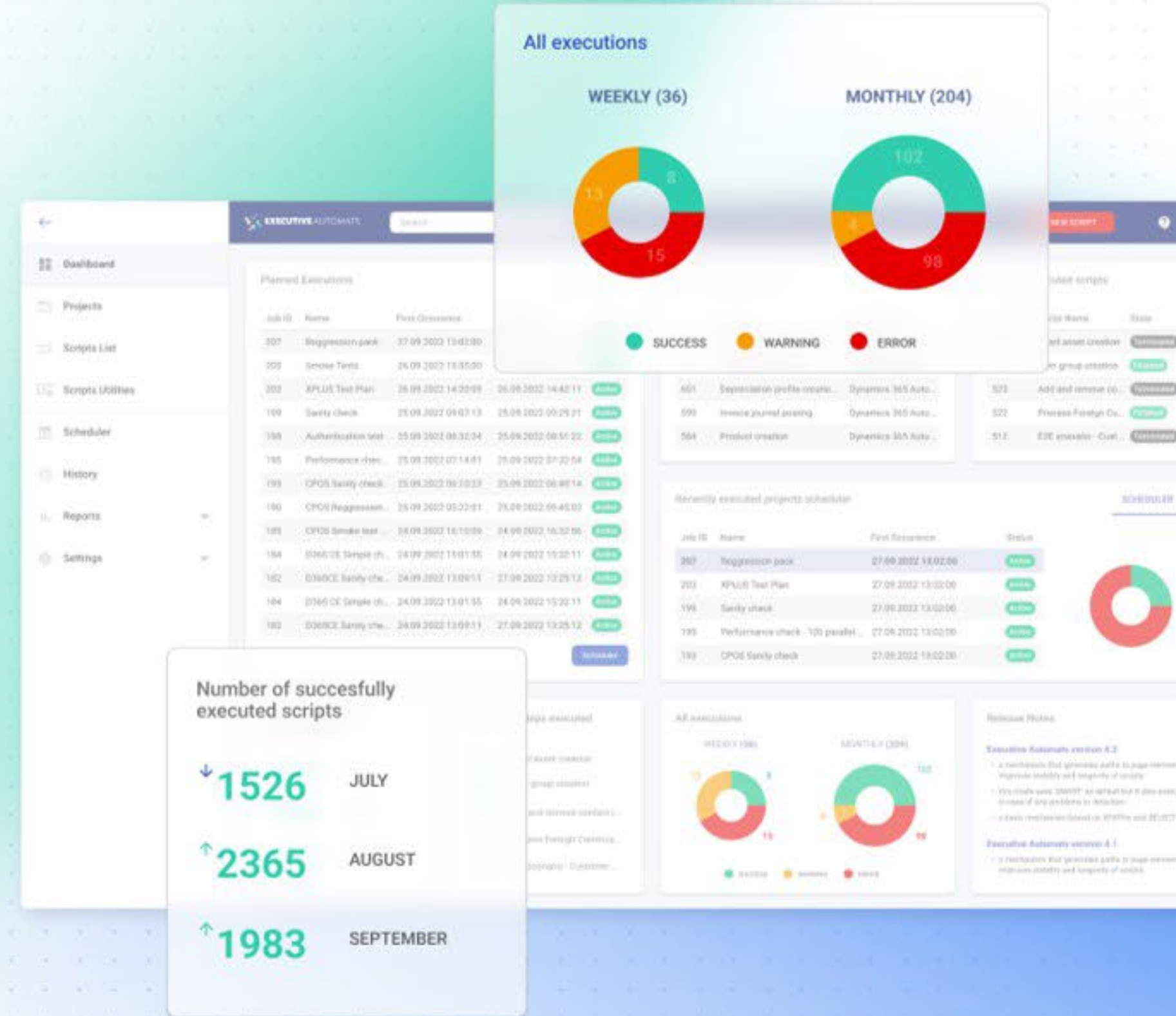
Optimize your ERP to save costs, improve efficiency, and streamline processes without engaging your business

➤ Testing

Solve your OneVersion challenges and cover other events quickly with automated tests

➤ Support

Proactively support your business' continuity and prevent system's failure with ML-Driven Automation





How standard role definition & licensing works in Microsoft Dynamics 365

Security configuration in Dynamics 365 for Finance and Operations is based on „Entry points“ which are the smallest access points in the system.

In other words we can say that every: table, button, function etc. contain entry point which defines access to particular element.

Entry points are group with Privileges and then privileges are grouped in Duties. Then Security Roles inside Dynamics are combination of Duties and Privileges to define end access for the user. Of course user can use combination of roles too.

Entry points and actions performed on those entry points define also license type required for this element and activity on it.

TYPES OF LICENCES IN DYNCAMIS 365 FSCM:

- **Basic Finance/SCM/Commerce/Project**
- **Team members**
- **Activity**





Introduction

— User Security Governance
(USG) module

DID YOU KNOW?

**USG module was designed
by XPLUS.**

USG MODULE

Extension to Microsoft Dynamics 365 FSCM (old F&O) addressing the security roles generation issue. The tool helps convert the actual business processes into precise duties/ roles, optimized with regard to both licensing, access areas and segregation of Duties/privileges challenges to meet SOX compliance criteria.

MAIN GOALS ARE:

- **Security role creation**
- **Security role maintenance**
- **Enhance segregation of duties/privileges task**
- **SOX Compliance support**





STEP 01
select



STEP 02
record



PROCESS #01



PROCESS #02



PROCESS #03



STEP 03
build



CUSTOM ROLE



STEP 04
assign



STEP 05
rework

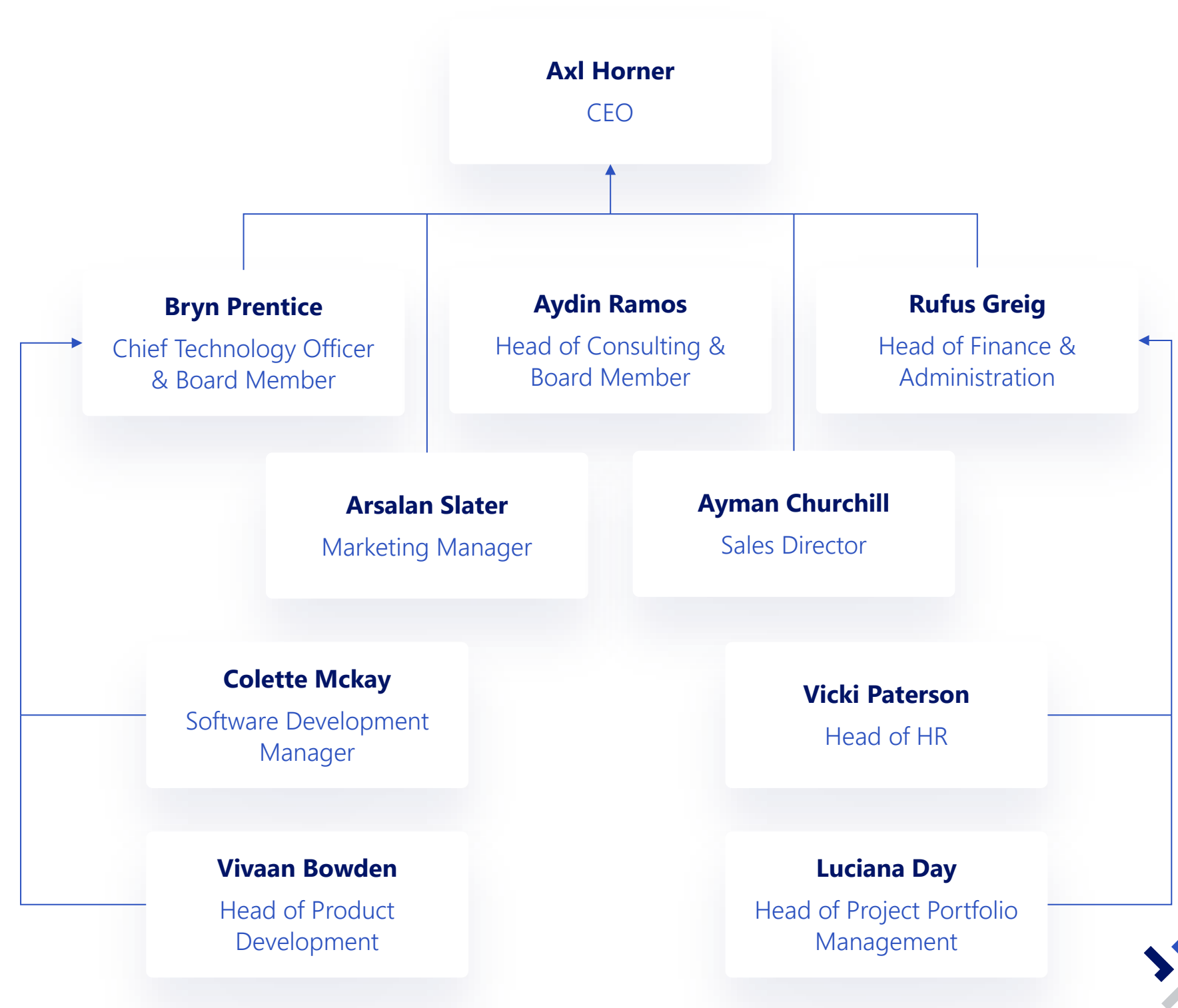


BUSINESS PROCES CARDS


Our own process-oriented security role generation tool. Thoroughly tested and delivered already as full


security development project for 5 different global Microsoft Dynamics 365 Clients.

How User Security Governance (USG) works:



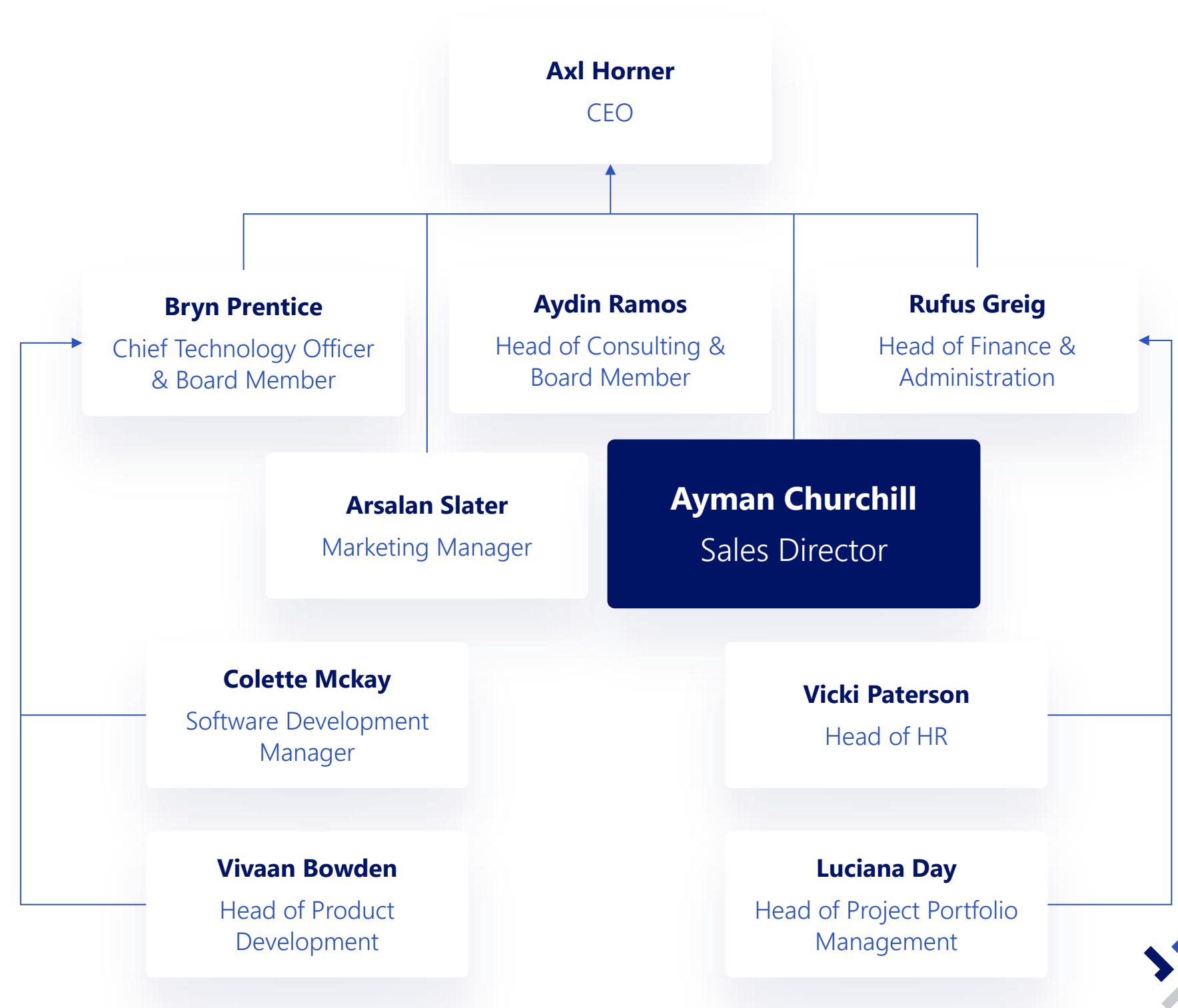
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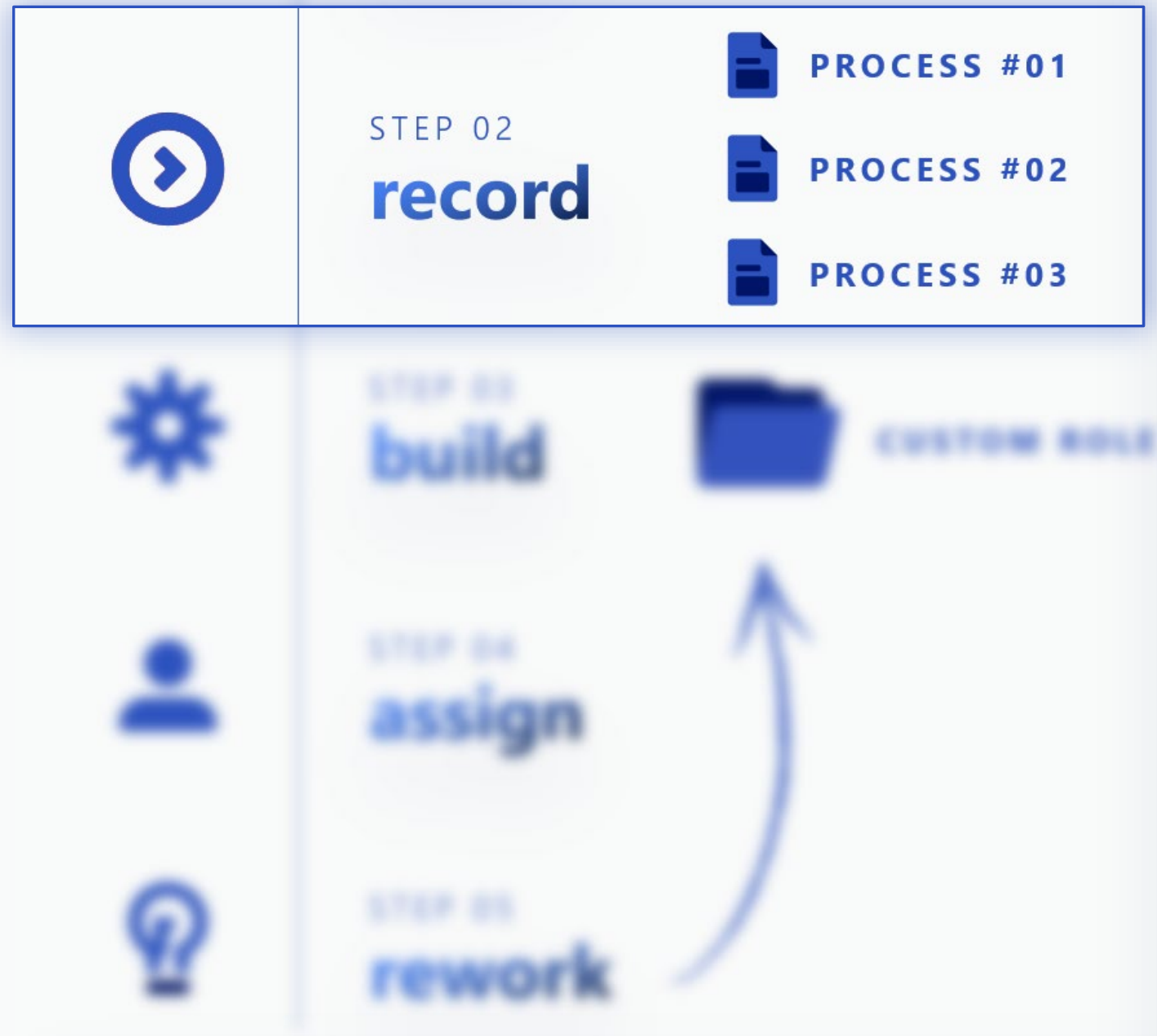
How User Security Governance (USG) works:



How User Security Governance (USG) works:

RECORD

Extract processes and record them with Task Recorder or via Executive Automats

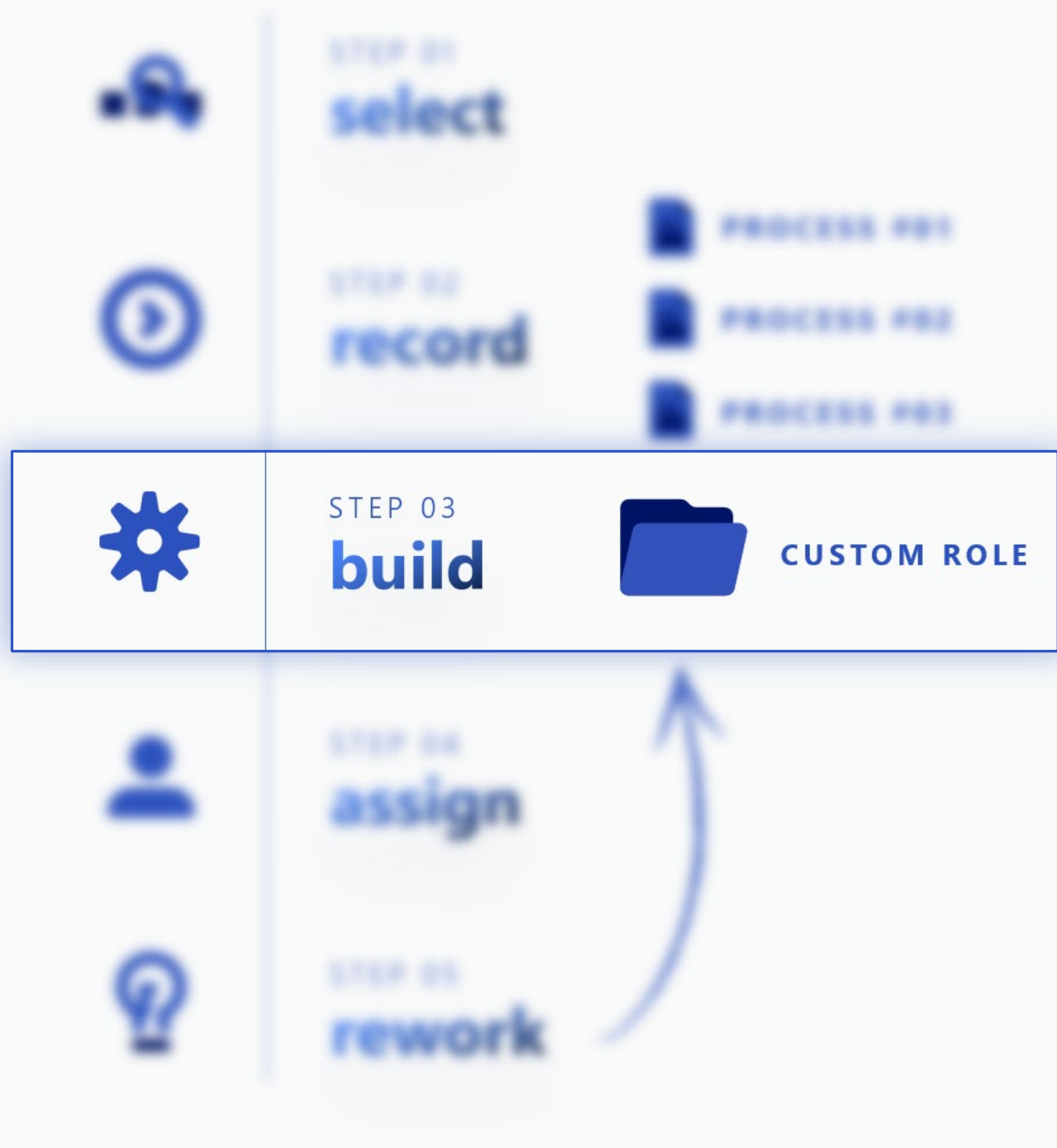


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How User Security Governance (USG) works:

BUILD

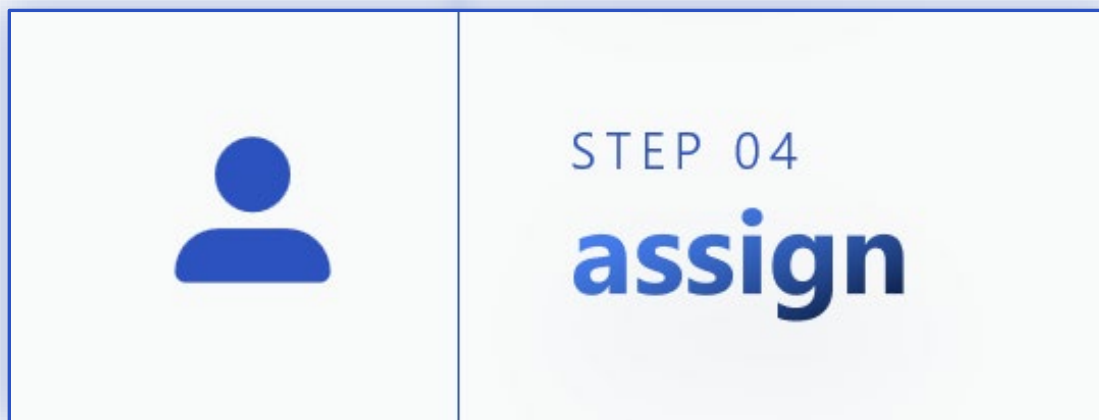
Build roles with SSW per each position or add onto existing duties



How User Security Governance (USG) works:

ASSIGN

Assign the roles and check security compliance with automated security suite or manually



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How User Security Governance (USG) works:

REWORK

Rework the roles with more objects in case tests detect gaps



STEP 05
rework

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Processes based role vs. Standard role

Recorded test cases can be converted to role/duty/privilege. Microsoft Dynamics 365 FSCM role-based security makes the security development one of the most time-consuming processes. Thanks to extension to Executive Automats tool, users can convert every business process into Role/ Duty/ Privilege, which means that instead of standard access roles, roles can reflect actual business processes.

EXAMPLE:

SMART PROCES CONVERSION USING EASS:

One tailored role named by user "Sales representative" (around 20 security objects)

RESULT:

OPERATIONAL VS TEAM MEMBER LICENSE COST DIFFERENCE + RISK OF HUMAN ERROR AND DATA FRAUD

With a standard role, a user with that role (with 1000+ security objects might cost more than a role with less security. Apart from the license costs, users can get distracted with number of unused functions.



- KEY RESULTS
- **Optimized license**
 - **Mitigated risk**
 - **Clean UI = Higher effectiveness**



Standard vs Advanced package comparison

STANDARD

- Provides enhanced governance frameworks
- Ensures rigorous control over financial processes, role management and security protocols
- Reduces the risk of fraud, errors and non-compliance
- Secures role-based access control, segregation of duties validation, and advanced audit trails
- Simplifies role management and cost optimization with its licensing and security setups



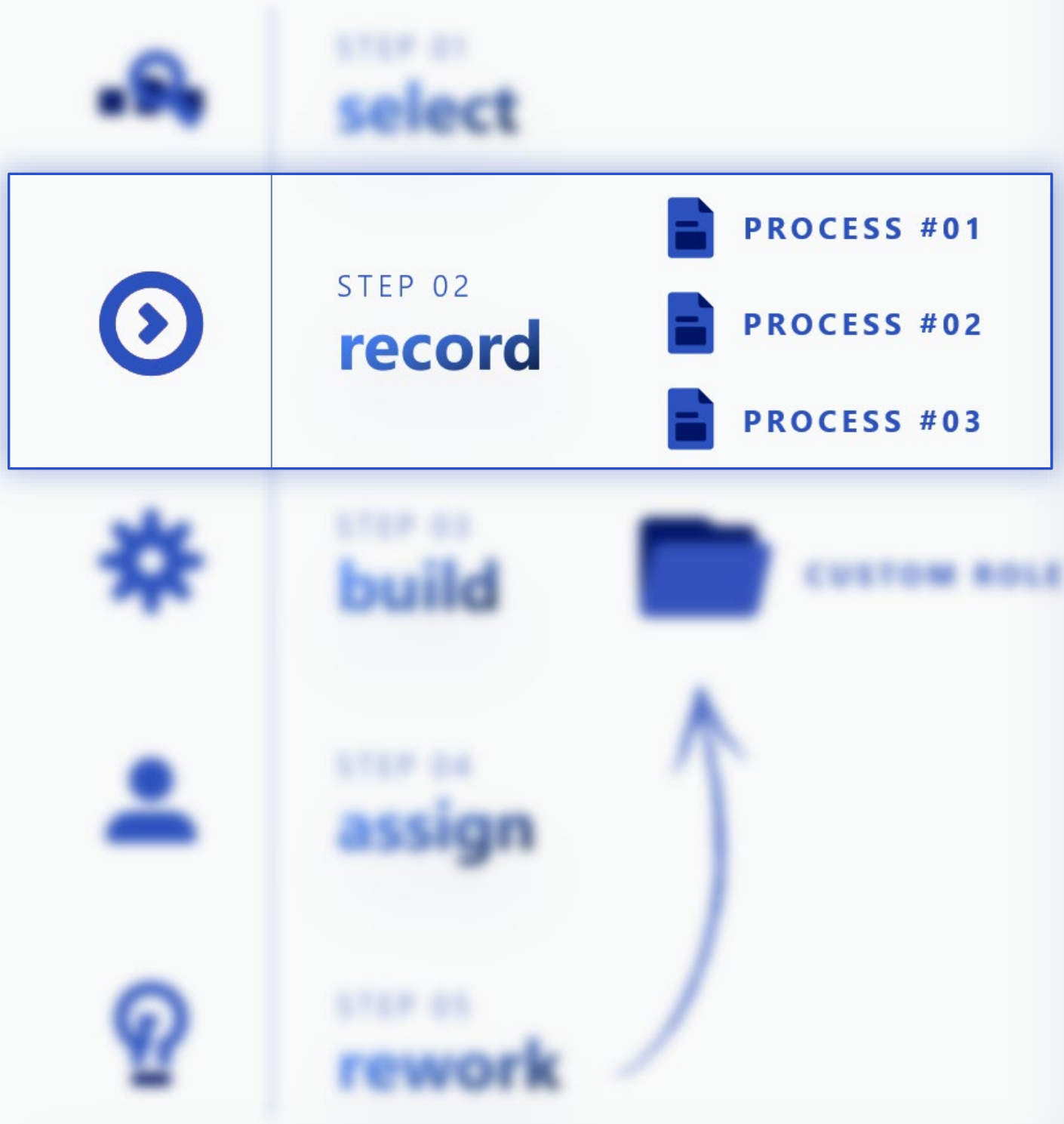
This package is now part of D365 standard



ADVANCED

- Enables real-time failure prevention thanks to alarms on modules and critical configurations
- Tracks vulnerable places in system for improved security
- Gives full history transparency, allowing for quick problem identification and resolution
- Creates complete audit trail for auditors verifying data consistency and accuracy when combined with Executive Automats for Discovery application
- Advanced reduction of licensing costs with custom Microsoft Dynamics 365 roles.
- Create tailored cost optimized role in less than 5 minutes with 90% less user time involvement due to automatization





BUSINESS PROCES CARDS

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How User Security Governance (USG) works:

RECORD

User activities tracking happens in the background





The universe of Security & Compliance

Service by Executive Automats

by combining these two products and Executive Automats support you are ready to optimize licensing and ensure SOX compliance in the ERP space.

Security & Compliance Advanced

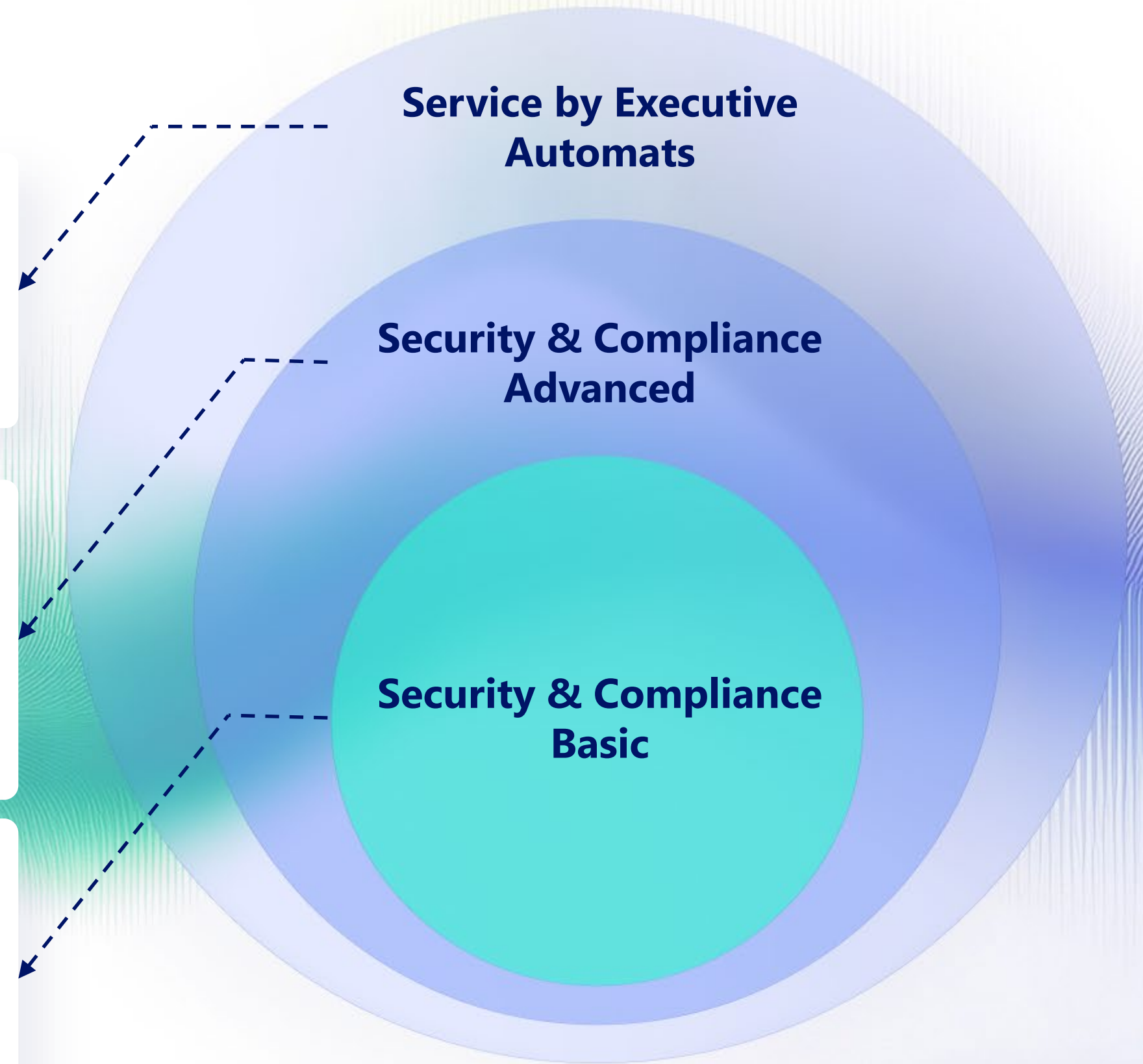
(formerly Executive Explorer)

expanded audit capabilities, allows tracking user actions and provides a full audit trail for auditors to verify data integrity and accuracy.

Security & Compliance Basic

(acquired by Microsoft)

provides features for creating authorizations and reporting functions to maintain compliance and manage application TCO.





Executive Automats

for Security & Compliance(LCO) includes:

Advanced:

Our product **extends the functionalities of Standard User Security Governance by providing increased visibility into user actions.** Auditors need enhanced oversight, especially for emergency access and daily activity checks, to prevent fraud and ensure compliance.

With our solution, organizations can monitor user actions **in real-time, gaining detailed insights into access patterns and identifying suspicious activities.**

Crucially, the tool enables organizations to build roles based on tracked user sessions, significantly enhancing security and mitigating risks of unauthorized access while fostering accountability among users.

License Cost Optimization:

Our project-based service targets common high-cost positions within organizations.

Through a rapid audit process lasting 4 to 8 hours, we provide a clear assessment of current user roles and responsibilities.

This evaluation identifies opportunities for optimization, highlighting which roles can be restructured to maximize value and reduce costs.

By focusing on critical positions, our service enables organizations to streamline operations, enhance efficiency, and achieve significant savings, leading to improved productivity and better alignment of resources with business objectives.





What problems we can solve?

Role creation:

- Behavior Patterns Tracking for Role Creation
- Expertise in Security Management

Licence Cost Optimization:

- Licenses are allocated effectively, aligning costs with actual usage
- Unnecessary expenditures are minimized

Role redesign for access management:

Streamlining the system prevents errors, accelerates learning, and builds confidence in the ERP implementation

Enhanced Compliance and Accountability

- Tracking user actions ensures compliance through detailed logs
- It fosters accountability and encourages adherence to security policies

Improved Security Posture

- Optimizing roles and licenses boosts security
- Managing roles and identifying vulnerabilities reduce access risks





Standard vs Advanced package comparison

AS A SERVICE

By combining these unique tools with our knowledge and experience from SOX projects, we can build your roles for SOD Compliance or licensing cost reduction goals. Instead of purchasing a license for the tool, you can opt for our service where we take care of everything for you.

You can choose between two paths:

achieving holistic Role redesign that helps you get compliance with license cost optimization or just reducing user role costs and enhancing security.

We've got you covered either way. We can:

- **Help you with holistic role redesign to make your audit SOD free**
- Deliver tailored security roles to the process that are fully documented for auditors
- Optimize your license cost - pay exactly for what you use
- Greatly speed up your Security design project
- Apply necessary controls and processes like Temporary role assignment and fire fighter/Emergency access management



Why trust our expertise & coverage

With our expertise and deep knowledge of the Dynamics 365 F&O we help organizations optimize their processes, improve efficiency, and tailor solutions to meet specific business needs.

We support our clients at every stage of implementation and system maintenance, ensuring continuous improvement in process quality.

200+	100+
Microsoft certificates	Partners across the globe
92.1M	200+
Completed business cases	Dynamics 365 customers worldwide



We were impressed with the technology from XPLUS SA and excited to incorporate it within the ERP portfolio of Microsoft Dynamics 365 to deliver robust governance, efficient user management, and cost-effective licensing strategies for our customers."



MIKE EHRENBERG

MICROSOFT TECHNICAL FELLOW
& CTO OF DYNAMICS 365
APPLICATIONS



Thank You

