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Permission Impossible? Demystifying Security for Dynamics 365 Customer Insights







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Customer Insights: Security Basics and Beyond

- Why does a security matter?
- Microsoft provided security features
- Model-driven app release checklist
- Coffee + Dunn Insights
- Suggested testing procedures
- CI-Data Security Roles



Managing Security Without a Plan



Why does security matter?

- Restrict data access/visibility
- Prevent unwanted behavior
- Protect your data
- Enable compliance and governance
- Support unique team or user driven behaviors



We may not be perfect but the safest hands are still our own.



 Customer Insights – Journeys (CIJ) Security Roles

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- Customer Insights Journeys (CIJ) Security Roles
- Modern Security Role Designer

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- Customer Insights Journeys (CIJ) Security Roles
- Modern Security Role Designer
- Feature Switches



- Customer Insights Journeys (CIJ) Security Roles
- Modern Security Role Designer
- Feature Switches
- Designer Feature Protection

Dynamics 365	ustomer Insights - Journeys	♀ Search	SANDBOX 🛛	+ 0 © ? @ 65
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- Customer Insights Journeys (CIJ) Security Roles
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- Feature Switches
- Designer Feature Protection
- Application Users

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A+ Achisor Security L= Analytics G Bailing Copilot G Copilot G Resources P Help + support C bata integration C bata (preview) Ba Toticies		 ✓ E Enail Email settings, Email tracking, Maliboxes, Server profiles ✓ ■ Integration Document management settings, Synchronization, Teams integration settings, Yammer ✓ B Data management Auto numbering. Automatic record creation policies, Bulk deletion, Data import wizard ✓ @ Encryption Data encryption ✓ B Resources All legacy settings, Dynamics 365 App for Outlook
Admin centers	App update settings (Preview)	

- Customer Insights Journeys (CIJ) Security Roles
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- Feature Switches
- Designer Feature Protection
- Application Users
- Access + Owner Teams
- Entra (AD) Groups and D365 Security Teams

	Power Pl	latform admin center			or settings, pages, and more		New admin center 🌑 🕆 🚳
Home + Create team C Refresh							O Search
(C) Actions	•	Environments > C+D De	v 2 > Settings > Teams				
in age	¢	Manage teams to share busines	s objects and collaborate across b	usiness units in a secure and ea	isy manner. <u>Learn more</u>		
0	¢.	All teams	×				
Copilot		Name ↑	Modified	Business unit	Team type	Administrator	
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		40d34fe66a2f4f9	2024-10-02T02:48:22Z	orgd7ccacdc	Owner	SYSTEM	
		4f76ee73b9e441	2025-02-24T08:57:39Z	orgd7ccacdc	Owner	SYSTEM	
		564ea7442d80ef	2024-10-01T19:42:33Z	orgd7ccacdc	Owner	SYSTEM	
		575fd86eed42ef	2024-07-15T21:01:44Z	orgd7ccacdc	Owner	SYSTEM	
		Saa2e506b13fef1	2024-07-11T18:11:53Z	orgd7ccacdc	Owner	SYSTEM	
		7262c291ebf5ee	2024-04-08T21:04:34Z	orgd7ccacdc	Owner	SYSTEM	
		981c530b1480ef	2024-10-01T16:42:07Z	orgd7ccacdc	Owner	SYSTEM	
		b07b2a2d18cb4	2024-04-23T03:02:05Z	orgd7ccacdc	Owner	SYSTEM	
Admin		be59182676ec44	2022-04-19T23:52:55Z	orgd7ccacdc	Owner	SYSTEM	



- Check for updates
- Review: "What's New with Customer Insights Journeys"





- Check for updates
- Review: "What's New with Customer Insights – Journeys"



- Check for updates
- Review: "What's New with Customer Insights – Journeys"
- Take a security role snapshot before updating

Start page Tools Role Documenter (CD Demo) ×										
Close 🗹 Export 🗹 Export Dataverse Layout										
🔿 None 😞 User 🍦 Business Unit 🔮 Parent: Child Business Unit 🌒	Organization									
Role By Table										
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dx_portaicomment			0	0	0	0	0	0	Go Offline in Outlook	
dx_portallanguage		•	•	-	•	•	0	•	ISV Extensions	
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- Check for updates
- Review: "What's New with Customer Insights – Journeys"
- Take a security role snapshot before updating
- Create a testing plan, update, check feature switches, and then test



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• Related table nuances





- Related table nuances
- Security model approach





- Related table nuances
- Security Model Approach
- ALM Strategy

STRATEGERY



- Related table nuances
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- ALM Strategy
- Column Level Security



- Related table nuances
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- ALM Strategy
- Column Level Security
- Business Unit Scoping



- Related table nuances
- Security Model Approach
- ALM Strategy
- Column Level Security
- Business Unit Scoping
- Modern Business Units

Connect, code, and grow Microsoft Build - May 19–22, 2025	Join developers and Al innovators one To exit full scr	een, press and hold esc Rygister now >		×
Learn Discover V Product documentation V	Development languages 🗸 🛛 Topics 🗸			۹ 😥
Dynamics 365 Customer Insights Get started \vee Gui	dance Troubleshooting Release plans Support Resources \sim			Free trial
S Filter by title				Additional resources
Welcome to Customer Insights - Journeys Customer Insights - Journeys documentation	Support for moderniz	zed business units		🗊 Events
> Get started				Join Al Skills Fest Challenge
> What's new		\mathbf{k}		Apr 8, 10 AM - May 28, 2 AM
> Transition from outbound marketing	In this article	~		Sharpen your AI skills and enter the sweepstakes to win a free
> Install and manage				Certification exam
				Register now!
Quickstart setup guide				
Browser and system requirements				🕫 Training
Manage user accounts, licenses, and roles	Show 6 more			Module
Permissions for out-of-the-box roles	Sometimes, users need access to data across multiple	husiness units. For example, a marketer responsib	le for leading the	
Integrate with Dynamics 365 Customer Insights - Data	marketing initiatives across both US and European sub			Training The ability to build business rules that ensure consistent business
Create consistent branding with brand profiles	Dataverse, needs access to data from both the busine	s units. With modernized business units, Dataver	se now allows	logic whatever app is accessing that data set is imperative to a
Import data	users to have security roles from different business un	its at the same time.		successful business operation. This module will show you how
Export data	When modernized business units are turned on for an	anvironment that has buriness unit scoping anal	lad already users	Certification
> Domain Authentication	need a way to specify which business unit they're crea			Microsoft Certified: Dynamics 365 Business Central Functional Consultant Associate - Certifications
✓ Business units	business unit is set to the user's business unit. However			As a functional consultant, you implement core application setup
Business unit support in real-time journeys				processes for small and medium businesses. You configure the application in collaboration with the implementation team to
Support for modernized business units	Emails: If the user selects a template, the email's		nplate. If the user	approactor in consociation with the implementation team to
Business units and compliance profiles for multi-brand	 skips template selection, then the email's busine. Journeys: 	ss unit is set to the user's business unit.		
	 For a trigger-based journey, the business unit 	is set to the user's business unit		Documentation
Business units FAQ for Customer Insights - Journeys	 For a segment-based journey, the business ur 			Use business units to control access to Customer Insights -
> Develop and extend				Learn how business units affect users and record visibility in Dynamics 365 Customer Insights - Journeys.
Download PDF	Journeys			

- Related table nuances
- Security Model Approach
- ALM Strategy
- Column Level Security
- Business Unit Scoping
- Modern Business Units
- Non-Marketing users



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- Model-driven app configuration





• Use Level up for Dynamics 365/Power Apps





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Edge

Chrome

- Use Level up for Dynamics 365/Power Apps
- The Console App is your best friend

::: Dynamics 365 Cus	stomer Insights - Journeys	ch		Saindrox	v + a @ ? vo
=	← 😬 Focused view 🛱 Show Chart + New journey 🖒 Refres	h 🚽 Visson To exit full screen, press and hold esc	•		🙆 Share 🗸
⇔ Home			_		ilters 🔎 Filter by keyword
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🖈 Pinned 🗸	Name ~	Status ~	Created On ~	Forward	Version number ~
Marketing Planning	Contoso Coffee General Lead Interest	Stopped	5/5/2025 2:34 PM	Reload Save As	1
Campaigns	Contoso Coffee Product Lead Series	Draft	3/17/2025 4:55 PM	Print	1
Engagement	Anonymous Donors	Draft	3/10/2025 12:31 PI	Cast Search with Google Lens	1
Get started	Brew & Bloom Post Event	Completed	4/14/2025 1:12 PM	Open in Reading Mode Send to Your Devices	1
纾 Journeys	Brew & Bloom Waitlist Added to	Stopped	4/11/2025 1:25 PM	Create QR Code for this Page	1
⅔ Triggers	Brew & Bloom Waitlist Moved from	Stopped	4/10/2025 9:14 PM	Translate to English	1
an solary tes	Brew & Bloom Registration Confirmation	Stopped	4/9/2025 3:25 PM	Adabe Acrobat: PDF edit, convert, sign tools > Save To Pocket	1
Audience	Brew & Bloom Invite	Completed	4/9/2025 2:57 PM	View Page Source	1
© Segments	Brew & Bloom Social Media Session Announcement	Draft	4/10/2025 9:09 PM	4/15/2025 1:22 PM	1
Contacts	Copy of Event Invite	Draft	4/9/2025 2:35 PM	4/14/2025 8:33 AM	1
Consent center	TEST Brew & Bloom Invite	Live	4/10/2025 8:03 PM	4/10/2025 8:15 PM	1
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∃ Emails	Event Invite	Draft	11/15/2024 4:12 PM	4/9/2025 2:30 PM	1
Push notifications	[demo] Event Confirmation	Draft	10/18/2022 10:36 A	M 4/9/2025 2:28 PM	1
Text messages	Event Invitation Journey v2	Draft	7/11/2024 3:42 PM	4/9/2025 11:56 AM	1
E Forms	Series 2 Journey: Onboarding	Draft	9/11/2024 9:20 AM	4/7/2025 11:50 AM	1
③ More channels	Contoso Coffee Promo Email	Completed	4/2/2025 4:26 PM	4/3/2025 4:30 PM	1
ssets	Contoso Coffee Case Closed	Completed	4/2/2025 1:24 PM	4/3/2025 1:26 PM	1
1 Library	Contoso Coffee Case Created	Completed	4/2/2025 11:43 AM	4/3/2025 11:48 AM	1
Real-time journeys	Rows: 110				



- Use Level up for Dynamics 365/Power Apps
- The Console App is your best friend
- We can not live without XRM Toolbox



- Use Level up for Dynamics 365/Power Apps
- The Console App is your best friend
- We can not live without XRM Toolbox
- Internet search/Phone a friend



Cheat Sheet: Security Roles in CI - Data

Roles to Know



Viewer



Marketing Contributor



Contributor



Admin



Potato, Potahto: CI – Data Security vs. Others

Four Notable Differences in Customer Insights – Data (CID) Security

- 1. One role per user. (yes, that's it)
- 2. Each role grants access to specific pages/tasks.
- 3. CI Data roles are for CI Data only.
- 4. There are only <u>four</u> security roles in CI Data.

1. Treat the Admin role like a System Admin (x2).



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- 2. Business units are optional but especially affect the Marketing Contributor role.



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- 2. Business units are optional but especially affect the Marketing Contributor role.
- 3. Contributors are your go-to for most "advanced" tasks.
- 4. Customer Insights Configuration Viewer



Coffee + Dunn Sessions

- By the Power of Data! Unleashing Marketing Forms in D365 Customer Insights – Journeys
 - Today 1-2pm, Randolph 3-East Tower
- 50 Tips in 50 Minutes: Dynamics 365 Customer Insights Journeys
 Tomorrow 9:45 10:45am, Randolph 3-East Tower
- Copilot Wizardry in Dynamics 365 Customer Insights
 - Friday 10:15 11:15am, Roosevelt 3AB-East Tower



Coffee + Dunn Resources



Blog



Knowledge Hub



Thank you for attending!

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