

D365FO Admin Toolkit User Guide

Overview

This toolkit was designed for the Dynamics 365 FinOps (D365FO) community by members of the community. Its purpose is to help improve the user experience for administrators of the D365FO application.

It is based off the GitHub project located at: <https://github.com/ameyer505/D365FOAdminToolkit>

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Installation

Installing the toolkit can be done either via the deployable package or by implementing the code directly.

Deployable Package Options

The deployable package can be found here:

<https://github.com/ameyer505/D365FOAdminToolkit/releases>

Instructions for installing a deployable package can be found here:

<https://dynamics365musings.com/install-a-package-in-d365/>

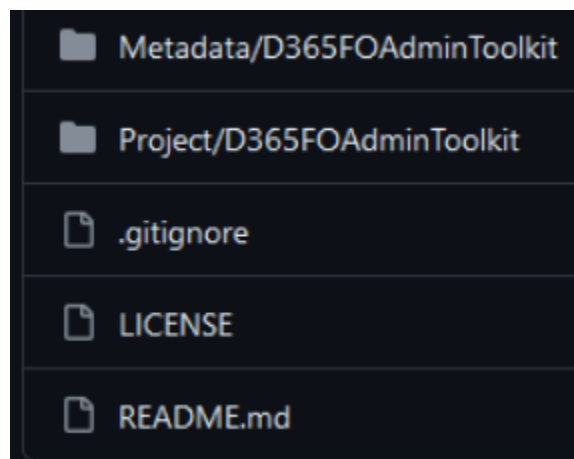
Implement Code Option

Microsoft does not currently support CI/CD from GitHub, so the process is slightly manual.

The contents of the Metadata/D365FOAdminToolkit folder should be copied to the AOSService/PackagesLocalDirectory folder within a development instance of D365FO.

The contents of the Project/D365FOAdminToolkit folder can be copied to any code development directory within the same D365FO development instance.

Launch an instance of Visual Studio, open the D365FO Admin Toolkit solution, build the project, and then perform a database sync.



Security

Two security roles are created as part of the solution:

- D365FO Admin Toolkit View
- D365FO Admin Toolkit Maintain

D365FO Admin Toolkit View

This security role allows for:

- View SysAdmin Assignment Report
- Export environment configuration / role access data
- View Disabled Users Report

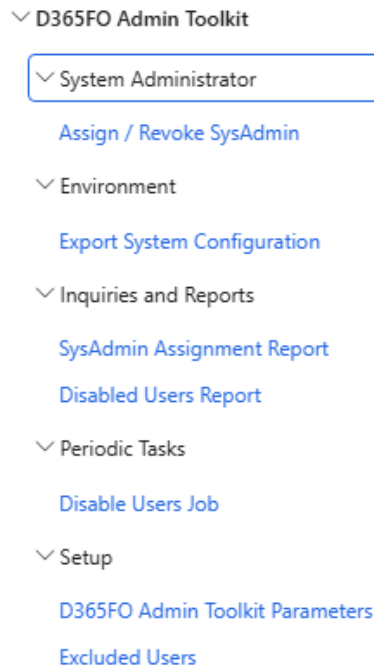
D365FO Admin Toolkit Maintain

This security role allows for:

- All access of the 'D365FO Admin Toolkit View' role
- Assign / Revoke SysAdmin functionality
- Disable Users batch job under Periodic Tasks
- Ability to modify D365FO Admin Toolkit Parameters
- Ability to configure Excluded Users

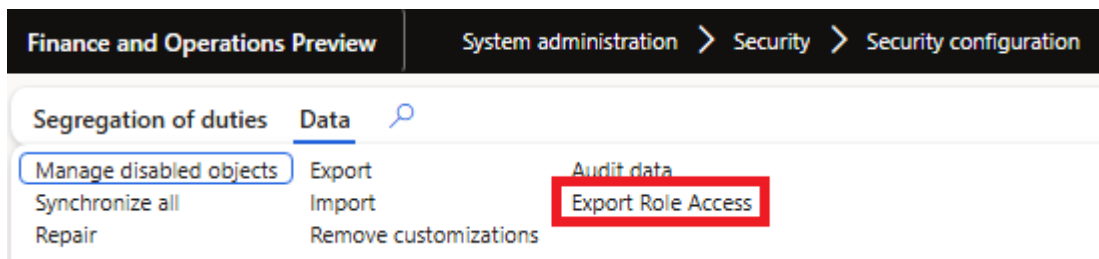
Current Features

Submenu created under System Administration module.




Export Role Access

This feature will exports the same data that is available in the 'View Permissions' report in the System Administration -> Security -> Security Configuration form for all roles in the system. The export will include out of box roles and custom role access.



Assign / Revoke SysAdmin Access

This feature allows for the assignment or revocation of the SysAdmin role from a user without needing elevated access:

Standard view 


Assign / Revoke SysAdmin

If you would like to assign the SysAdmin role to your user, click on the 'Assign SysAdmin' button.

If you would like to revoke the SysAdmin role from your user, click on the 'Revoke SysAdmin' button.

If you would not like to perform either action, click on the 'Cancel' button.

If the 'Show Reason Dialog for SysAdmin' configuration is enabled, during the assignment of the SysAdmin role you will be prompted with the following dialog:

Standard view 

**Admin Security Toolkit - SysAdmin
Change**

SysAdmin Assignment Change Reason :

This allows you to provide a 'reason' explanation on why you are elevating this user's access to SysAdmin. Any value provided will be visible on the SysAdmin Assignment Report.

SysAdmin Assignment Report

This feature allows for the reporting of when the SysAdmin role is either assigned or revoked for a user.

This report will capture anytime the SysAdmin role is assigned to the user whether it comes from the D365FO Admin Toolkit functionality, or through a standard user role assignment process within D365FO.

The report has the following columns:

- Date Time – when the assign/revoke event occurred
- User – the user that the SysAdmin role was assigned or revoked from
- Reason – the reason for assigning the SysAdmin role provided by the user performing the assignment
- Action – shows whether the SysAdmin role is ‘Assigned’ or ‘Revoked’
- Modified By – the user that is assigning / revoking the SysAdmin role from the impacted user

SysAdmin Assignment Report					
Standard view					
Filter		Start Date :	End Date :		
		3/23/2024	6/23/2024		
Date Time	User	Reason	Action	Modified By	
6/22/2024 4:21:31 PM	ALICIA	test	Assigned	Admin	
6/22/2024 4:21:15 PM	ALICIA		Revoked	Admin	
5/10/2024 5:14:57 PM	test		Revoked	test	
5/5/2024 3:09:02 PM	APRIL		Assigned	Admin	

Last Login Added to Users

Add ‘Last Login’ column to the UserInfo form located at System Administration -> Users -> Users:

Users							
Standard view							
Filter							
User ID	User name	Email	Company	Person	Telemetry ID	Last Login	Enabled
\$COBA	\$COBA	\$COBA@contosoax7.onmicrosoft.com	dat		{D82B6BFF-58C6-4E04-A...		
Admin	Admin	me@alexitguyoutlook.onmicrosoft.com	DAT	Julia Funderburk	{715C5450-A08B-4791-92...	6/23/2024 2:12:42 PM	✓
ALICIA	ALICIA	ALICIA@contosoax7.onmicrosoft.com	USMF	Alicia Thornber	{9314EDD0-8FC2-4E27-A...	5/4/2024 7:03:17 PM	✓
APRIL	APRIL	APRIL@contosoax7.onmicrosoft.com	USMF		{E67372B1-AB55-4674-8F...	5/4/2024 7:03:56 PM	✓
ARNIE	ARNIE	ARNIE@contosoax7.onmicrosoft.com	USMF		{53414A42-C4E1-40AA-A...	5/4/2024 7:04:06 PM	✓

Export System Configuration

This feature will export system data from a D365FO environment. You can then use a separate comparison tool to compare data / configurations between D365FO environments, available here: <https://github.com/ameyer505/D365FOEnvironmentComparisonUtility>

When executed, a zip file is created and downloaded:

This PC > Downloads

<input type="checkbox"/>	Name	Date modified	Type	Size
<input checked="" type="checkbox"/>	usnconeboxax1aos-17-06-2024-Export	6/17/2024 9:26 PM	Compressed (zipp...	5,049 KB

Once extracted, the data will be separated into different CSV files:

This PC > Downloads > usnconeboxax1aos-17-06-2024-Export

<input type="checkbox"/>	Name	Date modified	Type	Size
	RoleAccess	6/22/2024 8:22 PM	Microsoft Excel C...	100,178 KB
	SecurityUserRoleAssociation	6/22/2024 8:22 PM	Microsoft Excel C...	20 KB
	SecurityUserRoleOrganization	6/22/2024 8:22 PM	Microsoft Excel C...	1 KB
	User	6/22/2024 8:22 PM	Microsoft Excel C...	9 KB

Currently this feature supports the exporting and comparison of the following data:

- Security role access
- User role assignments
- User role company / organization assignments
- Users

For a complete overview of the comparison solution please refer to this blog post:

<https://alexdmeyer.com/2024/03/13/release-of-d365fo-environment-comparison-utility/>

Disable Users Job

This feature will automatically disable users that have not logged in for a set number of days.

The process of disabling users will not process users who are assigned the SysAdmin security role.

Before the executing you have the ability to set the number of days to utilize to determine if a user should be disabled or not based on the last time they logged in.

This job can also be scheduled as a batch job to run automatically.

Disable Users Job

Number of Days Since Last Login :

120

Disabled Users Report

This report will report on users that have been disabled from either executing the disabled user process or running it as a batch job:

Disabled Users Report

Standard view ▾

Filter			Start Date :	End Date :
			3/23/2024	6/23/2024
<input type="radio"/> Date Time	<input type="radio"/> User	Reason		
<input checked="" type="radio"/> 5/5/2024 8:00:20 PM	yoichiroo	YOICHIROO disabled because they have not logged in 120 days.		
<input type="radio"/> 5/5/2024 8:00:20 PM	Wayne	Wayne disabled because they have not logged in 120 days.		
5/5/2024 8:00:20 PM	VINCE	VINCE disabled because they have not logged in 120 days.		
5/5/2024 8:00:20 PM	TRICIA	TRICIA disabled because they have not logged in 120 days.		
5/5/2024 8:00:20 PM	TONY	TONY disabled because they have not logged in 120 days.		
5/5/2024 8:00:20 PM	TomP	Tom Perham disabled because they have not logged in 120 days.		
5/5/2024 8:00:20 PM	TIML	TIML disabled because they have not logged in 120 days.		
5/5/2024 8:00:20 PM	TIM	TIM disabled because they have not logged in 120 days.		

Excluded Users

This functionality allows you to specify certain users from not being processed as part of the disable user feature.

Any users within the 'Excluded User List' will not be disabled as part of executing the disable users job:

The screenshot shows a web interface for managing excluded users. At the top, there are navigation buttons: 'Add / Remove Selected Users', 'Populate Excluded Users', and 'Options'. Below this is a 'Standard view' dropdown and the title 'Excluded Users'. The interface is divided into two main sections: 'User List' and 'Excluded User List'. Each section contains a table with 'User Id' and 'User Name' columns. In the 'User List', 'BROOKE' is selected. In the 'Excluded User List', '\$COBA' is selected.

User Id	User Name
BROOKE	BROOKE
BrunoD	BrunoD
CASSIE	CASSIE
CHARLIE	CHARLIE
CHRIS	CHRIS
CHRISTIP	CHRISTINA
CLAIRE	CLAIRE
CONNIE	CONNIE

User Id	User Name
\$COBA	\$COBA
Admin	Admin
ALICIA	ALICIA
APRIL	APRIL
ARNIE	ARNIE
axrunner	axrunner
BENJAMIN	BENJAMIN

To use the page, simply select the users you would like to add to the 'Excluded User List' from the 'User List' grid and click the 'Add / Remove Selected Users' button.

If you would like to remove a user from the 'Excluded User List' select the user and click the 'Add / Remove Selected Users'.

The 'Populate Excluded Users' button will automatically add the following service accounts to the 'Excluded User List':

- Admin
- Axrunner
- Cdsaurorauser
- Cdscapuser
- Cdscapuser2
- Cdsdevuser1
- Cdsdevuser2
- D1assem
- DataSyncFrameworkApp
- DynamicsMaintAppUser
- FinancialReportsApp
- FRServiceUser
- PowerPfScvUser
- PowerPlatformApp
- RetailServiceAccount
- ScaleUnitManagement
- ScaleUnitPipeline
- SysHealthServiceUser
- Guest

This list can be modified in the ADMEExcludedUsers.xpp file.

D365FO Admin Toolkit Parameters

This page allows for configuring the different settings of the toolkit. Currently it has the following options:

- Default Number of Days for Reporting
 - This is the number of days the reports of the toolkit will use for filtering results based on date time the event occurred.
- Show Reason Dialog for SysAdmin
 - If enabled, a dialog is presented during the assignment or revoking of the SysAdmin role to allow for the user to give a reason as to why they are making the access change. This value is stored and then displayed in the SysAdmin report.
 - If you plan on assigning/revoking the SysAdmin role via a process that is not interactive (Data Management Framework, external tooling, etc) please leave this value as 'No'.
 - Please note, enabling this feature will cause this dialog to be shown for all assignments of the SysAdmin role not only through the D365FO Admin Toolkit (will not show on revoking the SysAdmin role).
- Disable User Number of Days
 - This is the number of days that is used to determine if a user should be disabled based on the last time they logged into D365FO.

D365FO Admin Toolkit Parameters

General

D365FO Admin Toolkit Parameters

General

Default Number of Days for Rep...

Show Reason Dialog for SysAdmin☒ Yes

Disable User Number of Days

Feedback

All feedback or questions can be directed to d365fotoolkit@outlook.com.