

D365FO Admin Toolkit Overview

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 Option

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/>

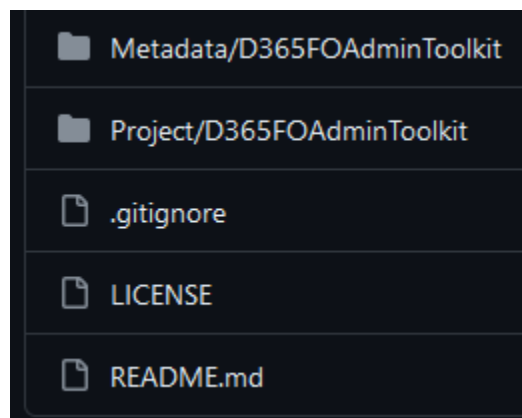
Implement Code Option

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

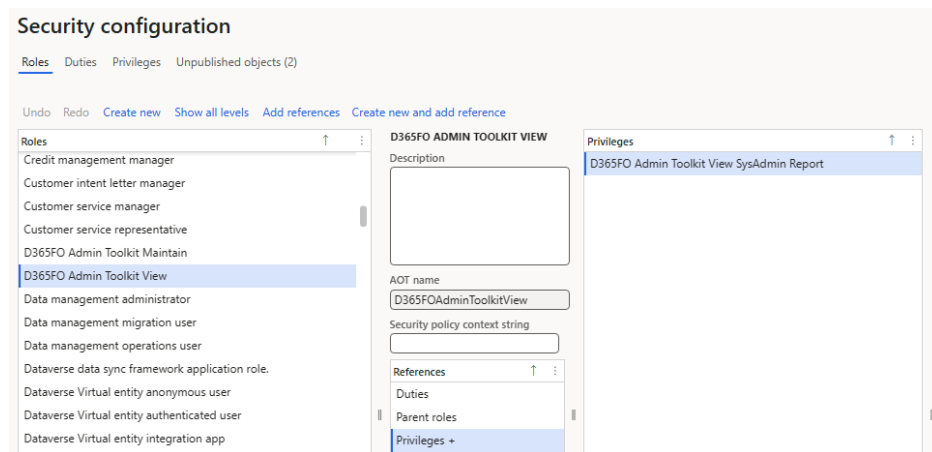
Two security roles are created as part of the solution:

- D365FO Admin Toolkit View
- D365FO Admin Toolkit Maintain

D365FO Admin Toolkit View

This security role allows for:

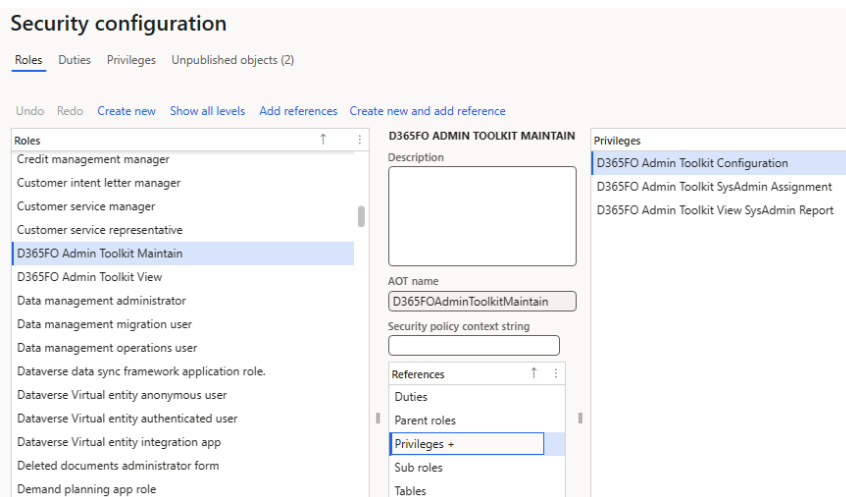
- Viewing of the SysAdmin Report.
- Exporting all role access



D365FO Admin Toolkit Maintain

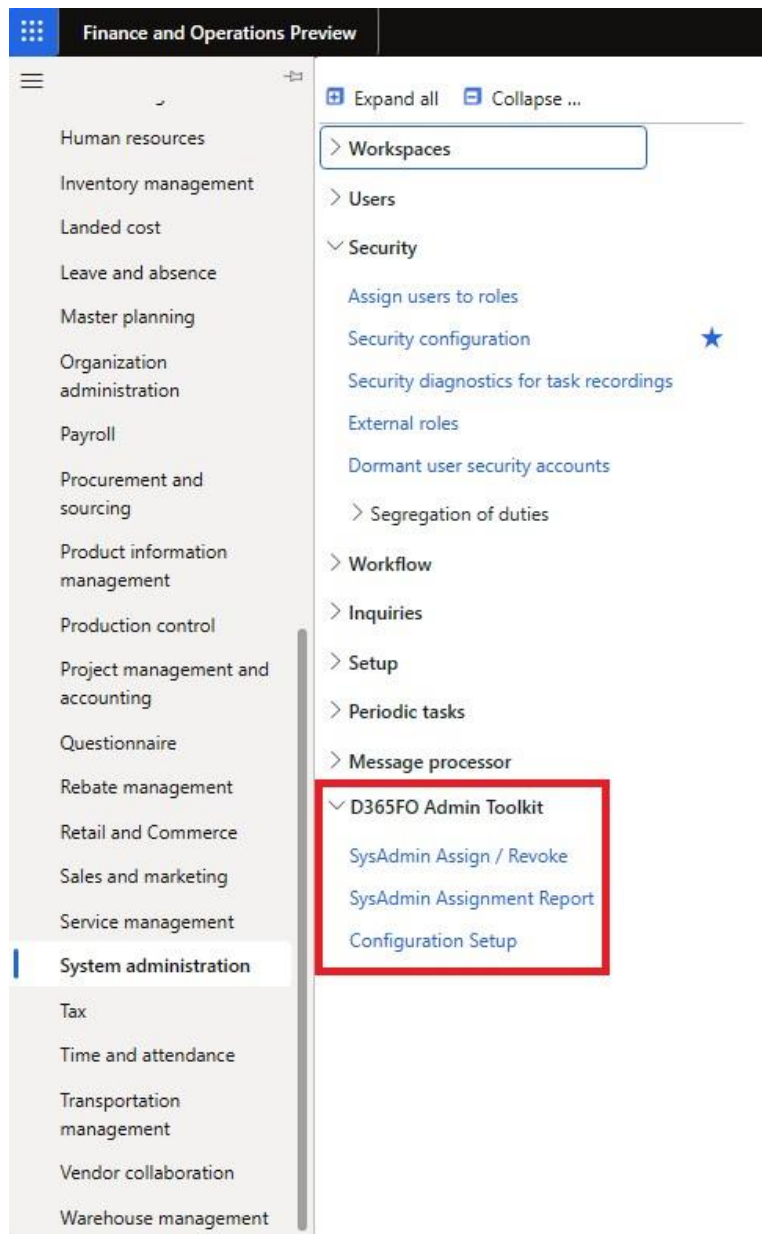
This security role allows for:

- Configuring the D365FO Admin Toolkit
- Assigning/Revoking the SysAdmin role functionality
- Viewing the SysAdmin Report



Current Features

New entry created in the System Administrator module called D365FO Admin Toolkit:




Configuration Setup

Security Required: You will need to be assigned the 'D365FO Admin Toolkit Maintain' security role to be able to utilize this feature.

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 to
- 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)

Standard view 

Configuration Setup

Default Number of Days for Rep...

Show Reason Dialog for SysAdmin

☒ Yes

Assign / Revoke SysAdmin Access

Security Required: You will need to be assigned the 'D365FO Admin Toolkit Maintain' security role to be able to utilize this feature.

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

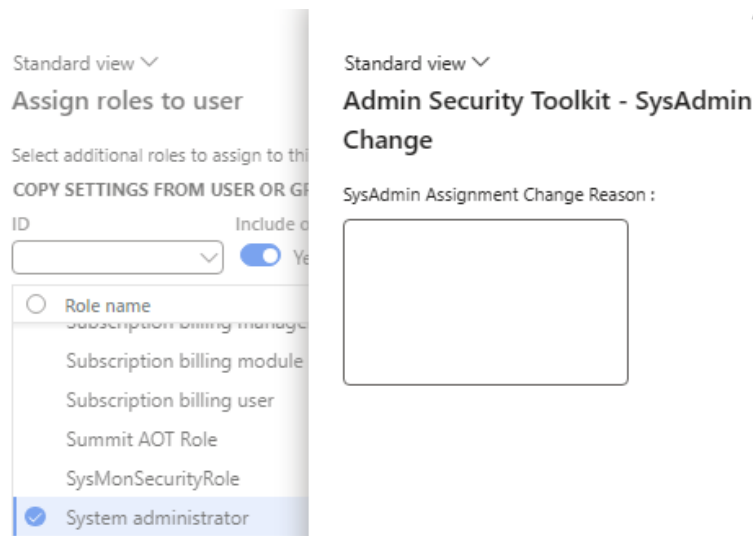


If you would like to assign the SysAdmin role to your user, click on the 'Assign SysAdmin' button.

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:



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

Security Required: You will need to be assigned the 'D365FO Admin Toolkit Maintain' or 'D365FO Admin Toolkit View' security role to be able to utilize this feature.

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

Finance and Operations Preview

System administration > D365FO Admin Toolkit > SysAdmin Assignment Report

<

Options

SysAdmin Report

Standard view

Filter

Start Date :

11/25/2023

End Date :

1/10/2024

Date Time	User	Reason	Action	Modified By
1/9/2024 3:50:47 AM	test	Testing SysAdmin assignment	Assigned	test
1/9/2024 3:49:35 AM	test		Revoked	test

RoleIdentifier	RoleName	SubRoleIdentifier	SubRoleName	DutySystemName	DutyName	PrivilegeSystemName	PrivilegeName	SecurityObject	SecurityType	Menu Item display	Invoke	Read	Update	Create	Delete	CompulsoryAccess
LedgerAccountingManager	Accounting manager			CustInvoiceInvoice	Inquire into I/CustBillingClassification	View billing classifications in setup	CUSTOMBILLINGCLASSIFICATION	CUSTOMBILLINGCLASSIFICATION	Menu item display	Allow	Unset	Unset	Unset	Unset	Unset	Universal
LedgerAccountingManager	Accounting manager			CustInvoiceInvoice	Inquire into I/CustBillingCodeView	View billing codes in setup	CUSTOMBILLINGCODE	CUSTOMBILLINGCODE	Menu item display	Unset	Allow	Unset	Unset	Unset	Unset	Universal
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LedgerAccountingManager	Accounting manager			CustInvoiceInvoice	Inquire into I/CustFormaterParameters	View report configuration for sales orders	CUSTOMFORMATPARAMETERS	CUSTOMFORMATPARAMETERS	Menu item display	Unset	Allow	Unset	Unset	Unset	Unset	Universal
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Feedback

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