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Microsoft

AB-250

Transforming Contact Center
Experiences with AI in
Dynamics 365

Exam Topic: Deploy Dynamics 365 Contact Center (Question Set 1)**QUESTION: 1**

DRAG DROP (Drag and Drop is not supported)

A company uses security roles to ensure that its customer service representatives (CSRs) have access only to the features and data required to perform their duties.

However, default roles currently grant excessive permissions to CSRs.

The company requires that access be limited as follows:

- Reduce permissions to just the features and data that are required for each CSR role.
- Allow non-administrators to assign roles to CSRs without full system access.

You need to configure the minimal security access for each requirement.

Which action should you perform first for each requirement? To answer, move the appropriate actions to the correct requirements. You may use each action once, more than once, or not at all. You may need to move the split bar between panes or scroll to view content.

Note: Each correct selection is worth one point.

Select and Place:**Actions**

Assign an additional default security role.
Create a custom role for delegated role assignment.
Create a custom security role with required privileges only.
Create a new role by using the System Administrator role as a template.

Security role design and delegated administration**Requirement**

Reduce permissions to what is required for each CSR role.

Allow non-administrators to assign roles to CSRs full system access.

Action

A. See Explanation section for answer.

Answer(s): A

Explanation:

Actions

Assign an additional default security role.

Create a custom role for delegated role assignment.

Create a custom security role with required privileges only.

Create a new role by using the System Administrator role as a template.

Security role design and delegated administration**Requirement**

Reduce permissions to what is required for each CSR role.

Allow non-administrators to assign roles to CSRs full system access.

Action

Create a custom security role with required privileges only.

Create a custom role for delegated role assignment.

Box 1: Create a custom security role with the required privileges only

To solve this problem, you should create a custom security role with the required privileges only. Principle of Least Privilege: When default security roles grant excessive permissions, the standard best practice in Microsoft Dynamics 365 is to create a custom security role. This allows you to granularly define exactly which privileges (Read, Write, Append, etc.) and access levels (User, Business Unit, Organization) your customer service representatives (CSRs) need to perform their duties.

How to Implement Safely: It is highly recommended to copy/clone the existing default role, rename it with your organization's prefix (e.g., Contoso CSR - Restricted), and then scale back and remove the excessive permissions. This protects the integrity of the original built-in security roles.

Box 2: Create a custom security role for delegated role assignment. You can create a custom security role for delegated role assignment. To enable a non-administrator to manage and assign security roles to customer service representatives (CSRs) without granting full System Administrator access, you must configure specific table privileges within the custom role and adhere to Microsoft Dataverse privilege elevation rules.

Required Privileges for the Custom Role Configure the custom delegated assignment role with the following explicit permissions under the Business Management tab:

Security Role (role) Table: Grant Read and Assign privileges. This enables the user to view available roles and execute the "Manage Roles" command.

User (systemuser) Table: Grant Read and Write privileges so they can access and modify user profiles.

Reference:

<https://www.dynamicpeople.nl/news/tips-for-setting-up-user-security-roles-d365-sales>

<https://learn.microsoft.com/en-us/power-platform/admin/assign-security-roles>

QUESTION: 2