



Yellosys

DEVOPS SYNC

YELLOSYS SOFTWARE INDIA PRIVATE LIMITED
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1 DOCUMENT OBJECTIVE

The objective of this document is to describe the customization developed in Microsoft Dynamics 365 Finance and Operations (D365FO) that enables users to store recorded tasks directly into Azure DevOps as either Issues or Test Cases, along with step details and the task recording XML attachment.

2 OVERVIEW OF CUSTOMIZATION

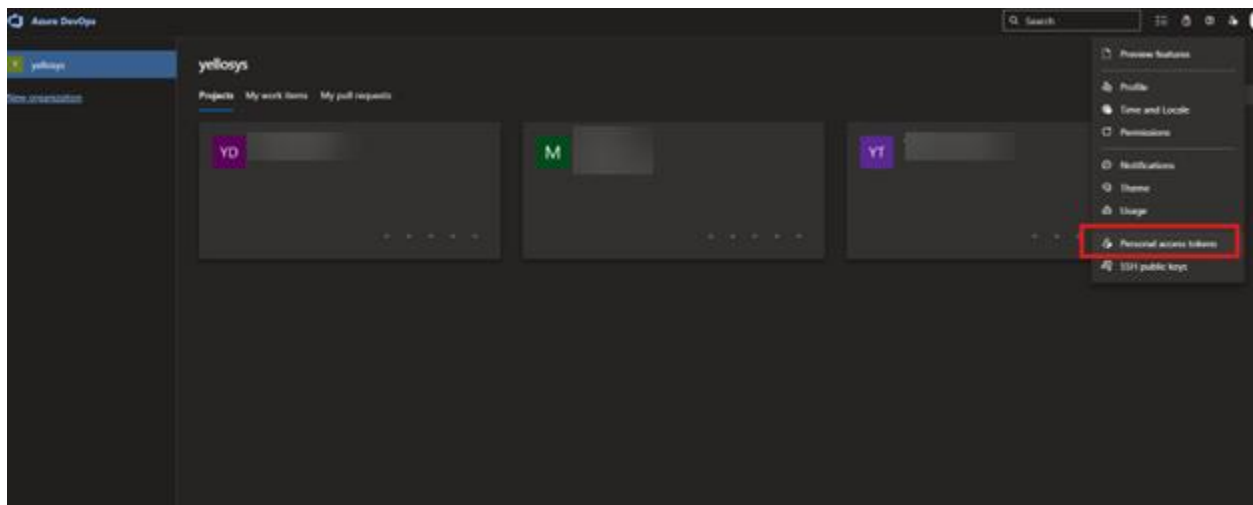
In the standard D365FO system, the Task Recorder functionality allows users to capture steps within a business process, but it does not provide a native option to upload or link these recordings to Azure DevOps.

2.1 OVERALL PROCESS

- Record a task using task recorder.
- Choose the work item type (Issue or Test case)
- Automatically push the recording details and steps to Azure DevOps.
- Attach the XML recording file as an attachment to the created work item.

2.2 GENERATE A PERSONAL ACCESS TOKEN (PAT)

- Sign in to your Azure DevOps account.
- Navigate to User Settings -> Personal Access Tokens.



- Create a new token with the required scopes (typically Work Items (Read & Write)).

Edit a personal access token ✕

Name
Devops Integration

Organization
yellosys

Expiration (UTC)
Custom defined 11/15/2025

Scopes
Authorize the scope of access associated with this token
Scopes ☐ Full access ☒ Custom defined

User Profile
Write to profile
☐ Read ☐ Read & write

Variable Groups
Read, create and manage
☐ Read ☐ Read & create ☐ Read, create, & manage

Wiki
Read, create, and update
☐ Read ☐ Read & write

Work Items
Work items, queries, backlogs, plans, and metadata
☒ Read ☒ Read & write ☒ Read, write, & manage

[Show less scopes](#)

Save **Cancel**

- Copy the token immediately after creation (it won't be shown again).

2.3 STORE PAT IN AZURE KEY VAULT

- Create a new Azure Key Vault in your Azure subscription (if not already available).
- Add a new secret to the

Microsoft Azure

Search resources, services, and docs (0/0)

Capilot

Create a secret

Upload options: Manual

Name: Devops

Secret value: ***

Content type (optional):

Set activation date: ☐

Set expiration date: ☐

Enabled: Yes No

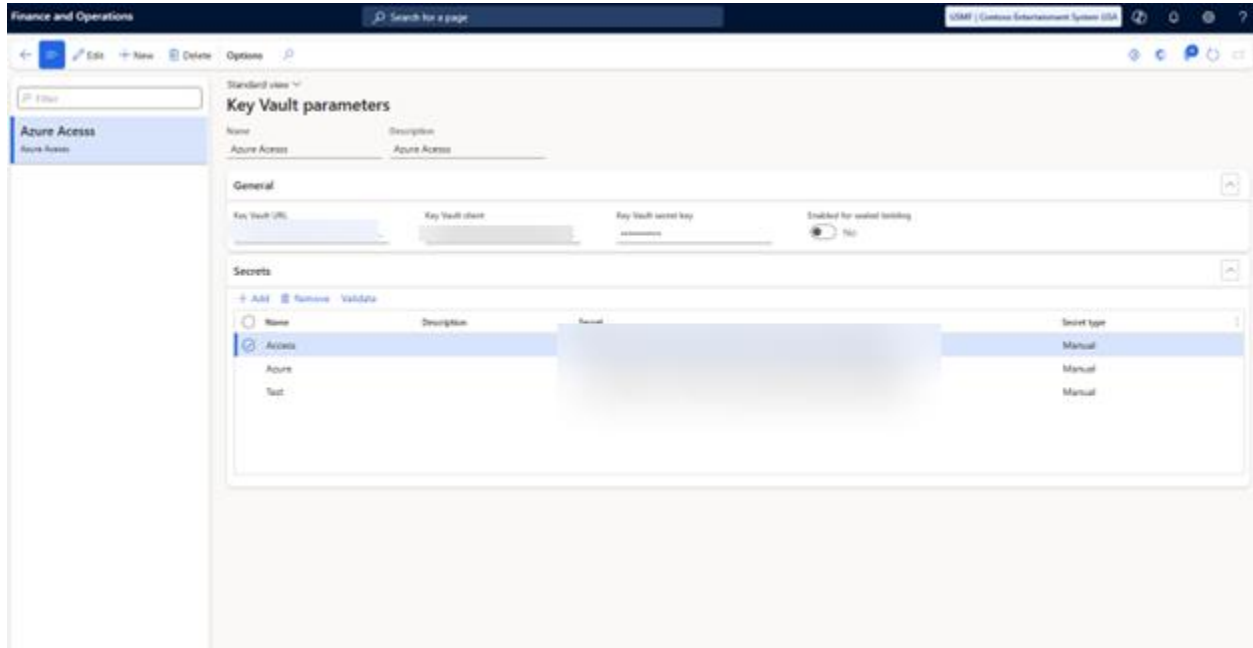
Tags: 0 tags

Create Cancel

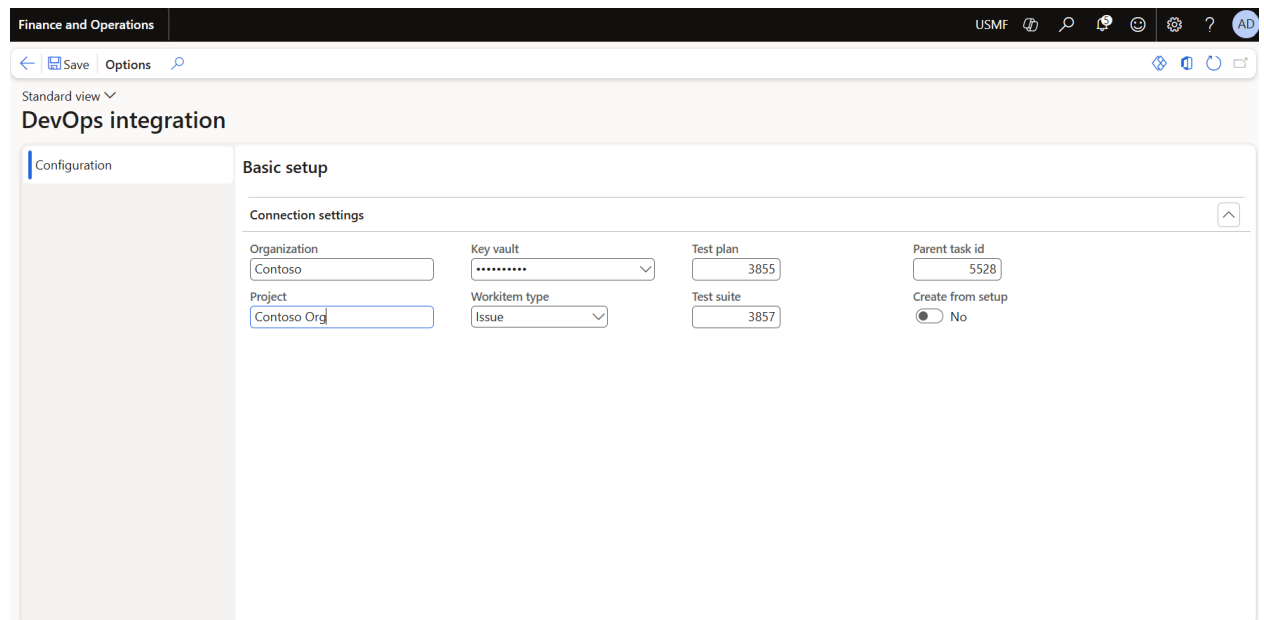
- Key Vault: Name: (e.g., DevOpsPAT)
- Value: Your Personal Access Token

2.4 CONFIGURE DEVOPS INTEGRATION PARAMETERS IN D365FO

- Add the key vault in D365FO under System Administration -> Setup -> Key Vault parameter.



- Navigate to: System Administration -> Setup -> DevOps integration parameters
- In that page, Setup the project, Organization, Key vault access token and default values.



2.5 CREATE AND RECORD A TASK

- initiate task recording.
- Provide a meaningful name and description for the recording.
- After completing the recording, click the “Sync to DevOps” button.

Standard view 

Workitem settings

Type

Issue 

Test plan

3855

Test suite

3857

Parent workitem

5528

Process

Cancel

 ?



Task recorder

Your recording is ready

[↓ Save to this PC](#)
[☁ Save to Lifecycle Services](#)
[📄 Export as Word document](#)
[🔗 Save as developer recording](#)
[🔄 Sync to devops](#)

Any information that you enter into the application while you are recording is captured and included in the recording file. If you decide to share the recording file, others may be able to see the information that was captured.

||

Return to main menu

- Based on the “Create from Setup” option in the DevOps parameter setup:
- The setup form allows the system administrator to define and manage integration settings.
 - The system auto-populates fields on the next screen.
 - The recorded process is converted into a work item in Azure DevOps (e.g., a Test Case or Issue).
 - Attachments (e.g., recording steps) are uploaded automatically.

TEST CASE 5530

5530 Customer issue

Viswanath Muruganantham

0 Comments Add Tag

Save

Follow

Updated by Viswanath Muruganantham: Oct 9

Stat: Design

Area: Yellosys D365

Reason: New

Iteration: Yellosys D365

Steps Summary Associated Automation

Steps

Recent test results

Related Work

Add link

Add an existing work item as a parent

Status

Priority: 2

Automation status: Not Automated

Parameter values

Steps

1. Go to Accounts receivable > Setup > Customer groups.

2. Click New.

3. In the Customer group field, type a value.

4. In the Description field, type a value.

5. In the Terms of payment field, enter or select a value.

6. Click Save.

Click or type here to add a step