



**CORTERRA
SOLUTIONS**

BYOD Automation

Dynamics 365 Finance and
Supply Chain Management

Summary

With an enterprise grade platform like Dynamics 365, there are numerous ways to get data out of the system for integration and reporting. Data lakes may be the future, but many times a user needs to export data to a SQL database. This is where Bring Your Own Database (BYOD) configuration comes in handy. Yet, the problem with BYOD, it can take a lot of time to configure as the number of data entities to export increases. For our clients, it is common to have hundreds of data entities for reporting and integration solutions. With this many data entities, we needed a more efficient option than configuring each entity one by one. Introducing.... BYOD Automation.

Problem

To export data to a SQL database using BYOD, there are numerous steps. To successfully configure an entity, one must regenerate the mapping (if an updated entity), publish the entity, enable change tracking, add to a data project, and create a batch job to schedule the export. For 100 entities, this would be four steps per entity or over 400 clicks. While this is tedious, the worst part is the opportunity for mistakes. With 400 steps to go through, it is easy for someone to skip a step or complete the steps out of order, resulting in failures. Not accounting for these mistakes, if you assume each entity and the four steps takes one minute, that is over 100 minutes to configure all the entities. What a huge amount of time and we have not even validated the data yet! Corterra asked, how can we make this easier? Keep reading to see how we solved this problem, automated the steps, and saved hundreds of hours over the life of an implementation and post implementation support.

Solution

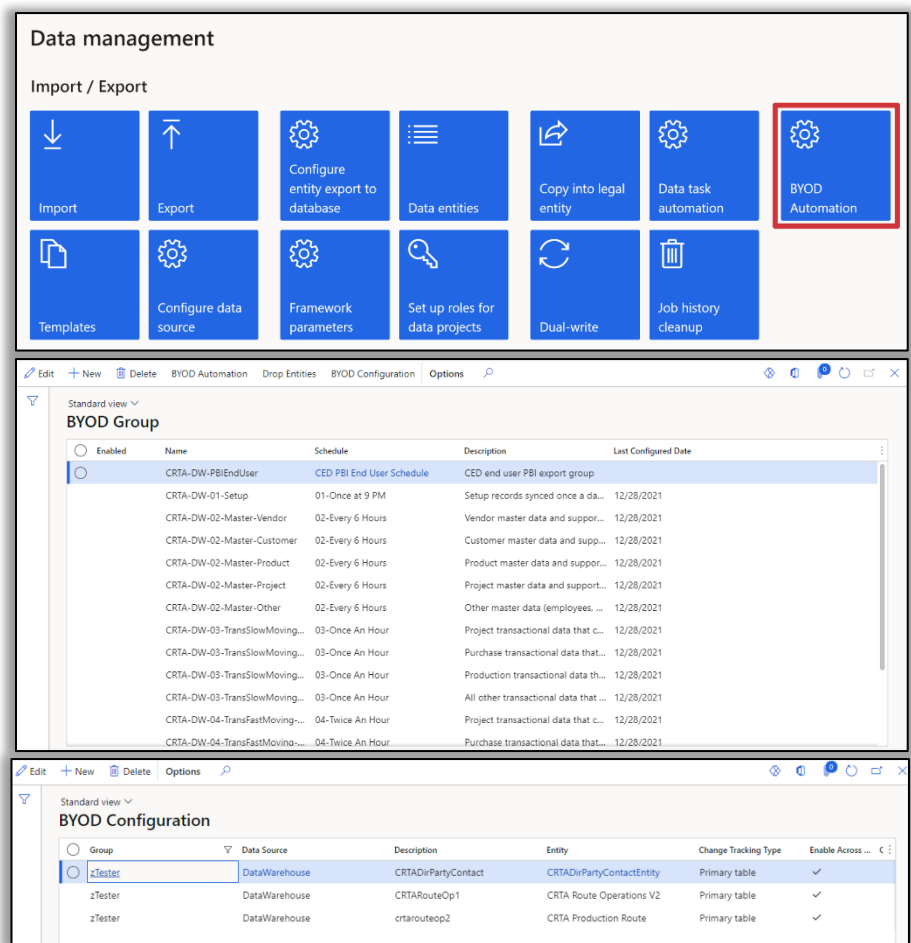
Our solution entailed developing a set of tables and processes to automate the steps to configure an entity for BYOD, as well as add the entity to distinct groups. Effectively making the configuration as easy as loading three tables via data management and clicking a single button.

- **BYOD Schedule** defines the recurrence for the batch job
- **BYOD Group** defines the data project and batch job to group similar entities or entities that should be exported at the same time, together. The entire group can be configured in one click or individual entities can be reconfigured
- **BYOD Configuration** defines the data entity to configure and the group

Results

Hundreds of hours saved. For one client, over 400 hours, or 10 weeks, of time has been saved throughout the life of the implementation. The time savings allowed our team to focus on the value-added activities, rather than administrative and configuration.

Quality of life improves for our team. No longer does someone need to click a multitude of times to reconfigure an entity when a new field is added. They simply need to click a button to *Reconfigure*, and all the steps are automated.



The screenshot displays the 'Data management' interface. At the top, there is a 'Data management' header and an 'Import / Export' section. Below this, a grid of blue buttons is shown. The 'BYOD Automation' button, located in the top right of the grid, is highlighted with a red border. Below the buttons, there are two screenshots of the application's data tables.

The first screenshot shows the 'BYOD Group' table with the following columns: Enabled, Name, Schedule, Description, and Last Configured Date. The table contains 15 rows of data, including entries like 'CARTA-DW-PBIEndUser' and 'CARTA-DW-01-Setup'.

The second screenshot shows the 'BYOD Configuration' table with the following columns: Group, Data Source, Description, Entity, Change Tracking Type, and Enable Across. The table contains 3 rows of data, including entries like 'zTester' and 'DataWarehouse'.

ABOUT CORTERRA SOLUTIONS

Corterra Solutions offers IT infrastructure, ERP implementation, cloud migration, cybersecurity, and analytics services that help small, medium, and large businesses operate and grow securely, efficiently, and intelligently. As a Microsoft Partner, Corterra has extensive experience with Microsoft technologies, including Dynamics 365, Microsoft 365, Power Platform, Azure, and Teams. Our deep partnerships with clients, coupled with our reputation for outstanding service, give clients freedom to focus on meaningful work that drives their companies' success. For more information, please visit www.corterrasolutions.com.