



**CORTERRA
SOLUTIONS**

BYOD Automation

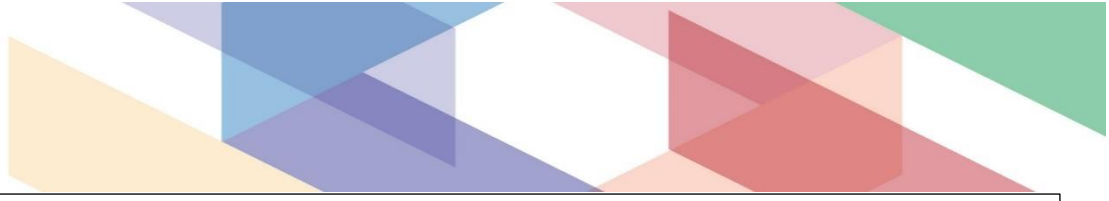
**Dynamics 365 Finance and Supply
Chain Management**

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.

Data management

Import / Export

Buttons: Import, Export, Configure entity export to database, Data entities, Copy into legal entity, Data task automation, **BYOD Automation**, Templates, Configure data source, Framework parameters, Set up roles for data projects, Dual-write, Job history cleanup.

BYOD Group

Enabled	Name	Schedule	Description	Last Configured Date
<input type="radio"/>	CRTA-DW-PBIEndUser	CED PBI End User Schedule	CED end user PBI export group	12/28/2021
<input type="radio"/>	CRTA-DW-01-Setup	01-Once at 9 PM	Setup records synced once a da...	12/28/2021
<input type="radio"/>	CRTA-DW-02-Master-Vendor	02-Every 6 Hours	Vendor master data and suppor...	12/28/2021
<input type="radio"/>	CRTA-DW-02-Master-Customer	02-Every 6 Hours	Customer master data and supp...	12/28/2021
<input type="radio"/>	CRTA-DW-02-Master-Product	02-Every 6 Hours	Product master data and suppor...	12/28/2021
<input type="radio"/>	CRTA-DW-02-Master-Project	02-Every 6 Hours	Project master data and suppor...	12/28/2021
<input type="radio"/>	CRTA-DW-02-Master-Other	02-Every 6 Hours	Other master data (employees. ...	12/28/2021
<input type="radio"/>	CRTA-DW-03-TransSlowMoving...	03-Once An Hour	Project transactional data that c...	12/28/2021
<input type="radio"/>	CRTA-DW-03-TransSlowMoving...	03-Once An Hour	Purchase transactional data that...	12/28/2021
<input type="radio"/>	CRTA-DW-03-TransSlowMoving...	03-Once An Hour	Production transactional data th...	12/28/2021
<input type="radio"/>	CRTA-DW-03-TransSlowMoving...	03-Once An Hour	All other transactional data that ...	12/28/2021
<input type="radio"/>	CRTA-DW-04-TransFastMoving...	04-Twice An Hour	Project transactional data that c...	12/28/2021
<input type="radio"/>	CRTA-DW-04-TransFastMoving...	04-Twice An Hour	Purchase transactional data that...	12/28/2021

BYOD Configuration

Group	Data Source	Description	Entity	Change Tracking Type	Enable Across ...
zTester	DataWarehouse	CRTADivPartyContact	CRTADivPartyContactEntity	Primary table	✓
zTester	DataWarehouse	CRTARouteOp1	CRTA Route Operations V2	Primary table	✓
zTester	DataWarehouse	ctarouteop2	CRTA Production Route	Primary table	✓

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.