



Data Archival and Long-Term Retention (LTR) in Dynamics 365 F&O

Purvesh Vaghasia (Senior Solution Architect)

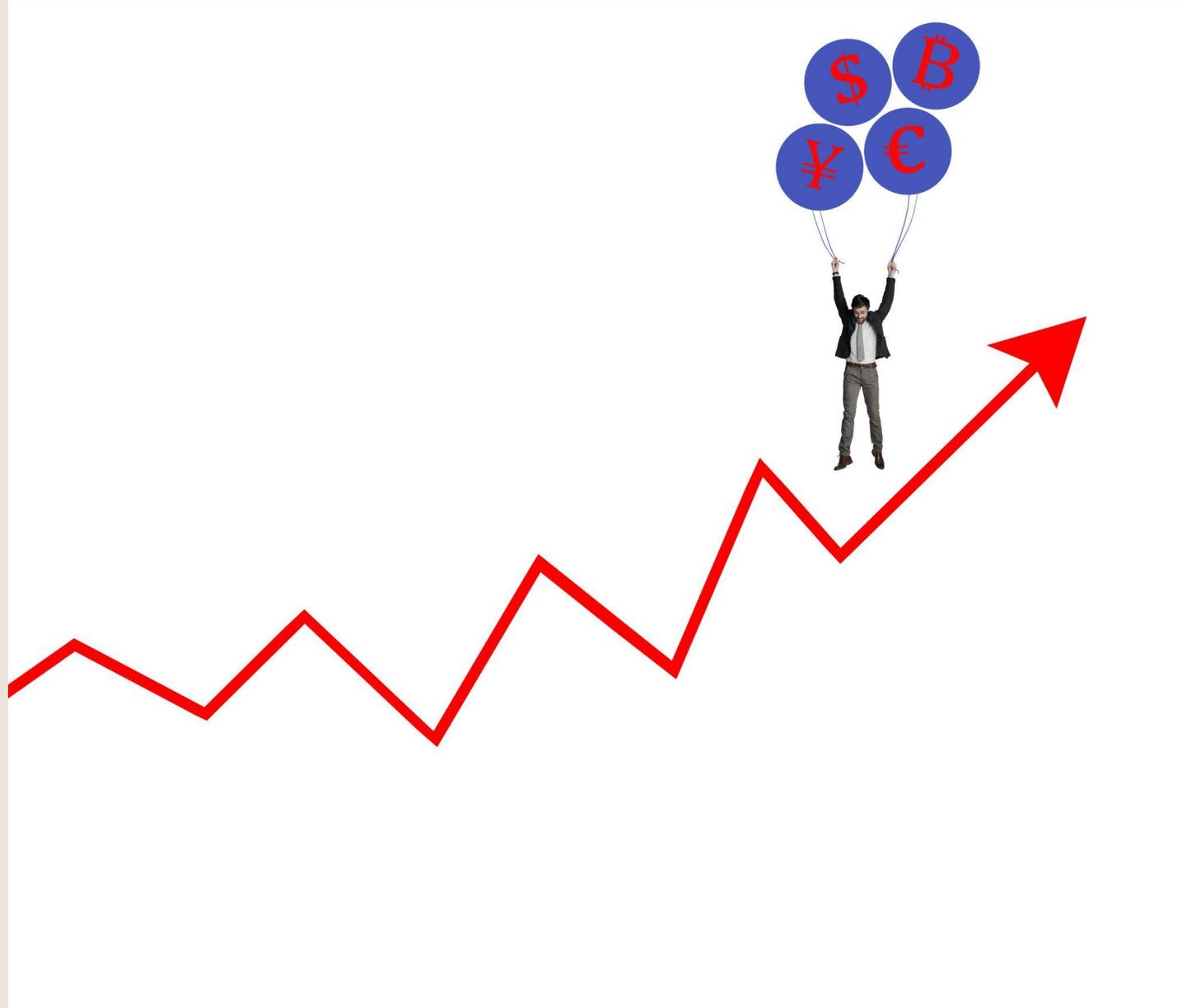
Ajay Kumar Singh (Principal R&D Solution Architect)

Harish Jayaprakash (R&D Solution Architect)

Agenda

-
- Business Challenge
 - Introduction to Archive Framework
 - Archive Scenarios
 - Demo
 - Q&A

Business Challenge and Importance of Data Archival



Business Challenge

Business case:

- Dynamics 365 Finance and Operations applications customers naturally generate business data at a regular cadence over time.
- On an average, medium to upper-mid market businesses accumulate >1TB of data in less than 5 years.
- The data growth is directly proportional to the age of the business and the number of transactions made YoY.

Challenges:

- Maintaining the huge volume of historical data alongside live data creates performance issues.
- Performance of existing processes degrade over time when older data remains.
- SQL server indexing can only help up to a certain limit.
- Concerns about the database expansion and ability of ERP/CRM systems to support the transaction growth expected in their near future

Track Storage capacity

aka.ms/ppac – power portal admin center

Microsoft Dynamics 365 for Operations Lab

Power Platform admin center

Some of your added capacity is temporary and will expire on 04/30/2025. [Manage added capacity.](#)

Capacity

Summary Dataverse Microsoft Teams Add-ons Trial Finance and operations

[Export to CSV](#)

Environment	Type	Finance and operations database usage	Finance and operations file usage	Last updated
d365perflab	Production	1.58 TB	8.27 GB	05/15/2024 5:44:55 PM

Capacity

Track Storage capacity

aka.ms/ppac – power portal admin center

Finance and operations database usage - d365perflab

[View as chart](#) | [Export to CSV](#)

Finance and operations database usage - d365perflab

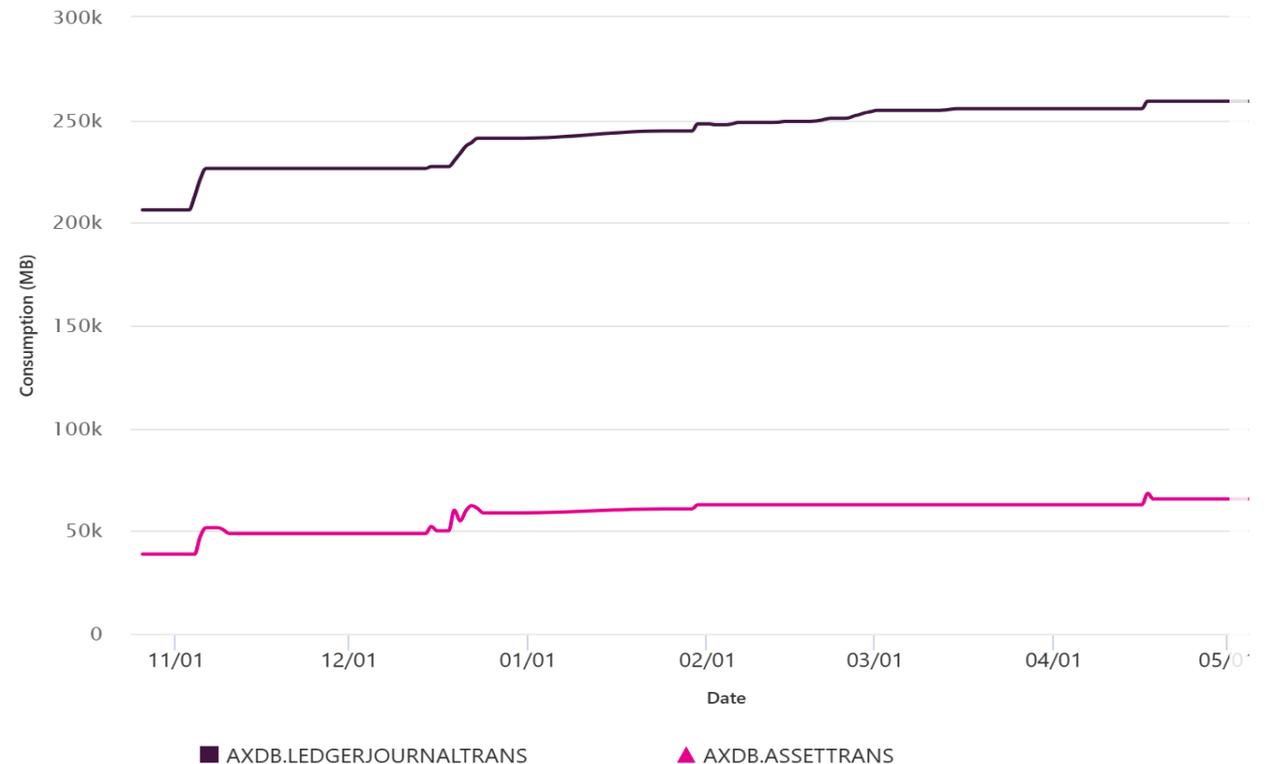
Select up to 9 entities.

[View as table](#)

Entities

AXDB.LEDGERJOURNALTRANS × AXDB.ASSETTRANS × Select entities from foll...

Entity name	Consumption ↓
AXDB.LEDGERJOURNALTRANS	259183.2 MB
MRDB.Fact	135147.6 MB
AXDB.CREDITCARDAUTHTRANS	131206.5 MB
AXDB.RETAILTRANSACTIONPAYMENTTRANS	126309.5 MB
AXDB.GENERALJOURNALACCOUNTENTRY	117795.9 MB
AXDB.GENERALJOURNALENTRY	66408.67 MB



Data Clean up in F&O

- Use necessary clean up routines [Cleanup routines in Dynamics 365 Finance and Dynamics 365 Supply Chain Management - Finance & Operations | Dynamics 365 | Microsoft Learn](#)
- Make the easy way the right way
 - Default enabling certain clean up routines
 - SysDataBaseLog – feature release in 10.0.32 (Show database log cleanup reminder when configuring database logging)
 - By default, job history entries and related staging table data that are older than **90 days** will be automatically deleted (10.0.36)
 - **Batch job** clean up routine (10.0.39)

Importance of Data Archival and LTR



Data Volume



System
Performance



Database cost



Data retention

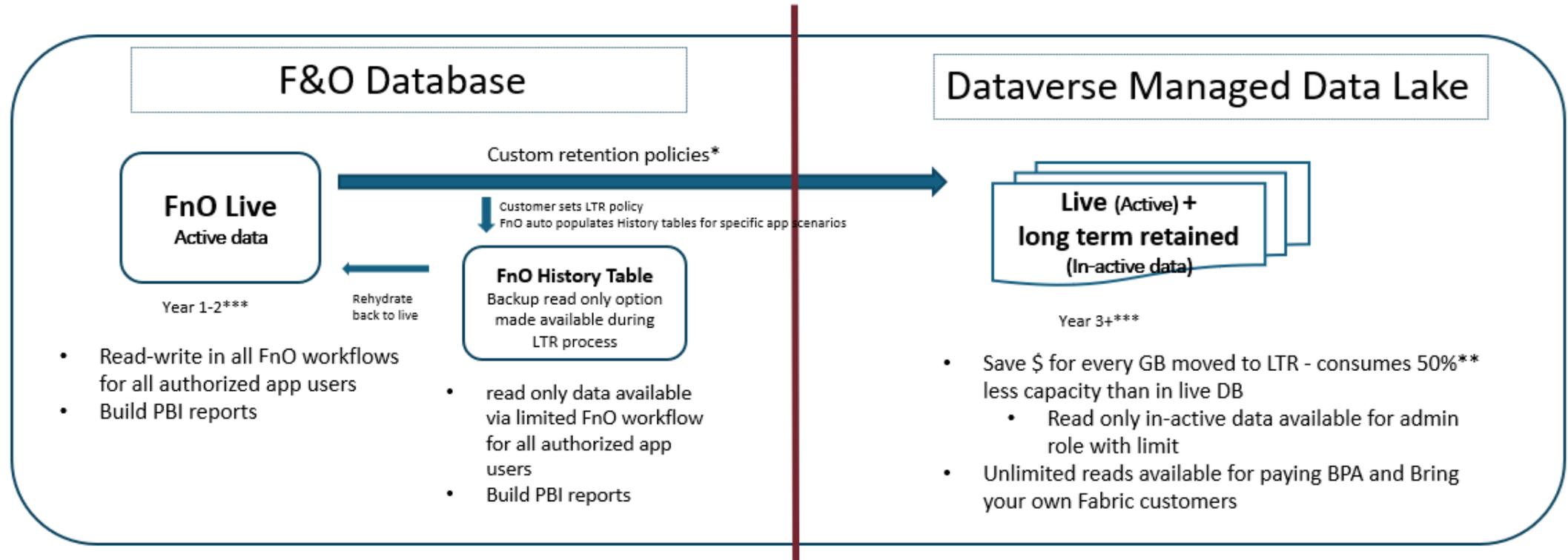


Database
maintenance

Archive Framework and Architecture



Archive Framework – Data Flow



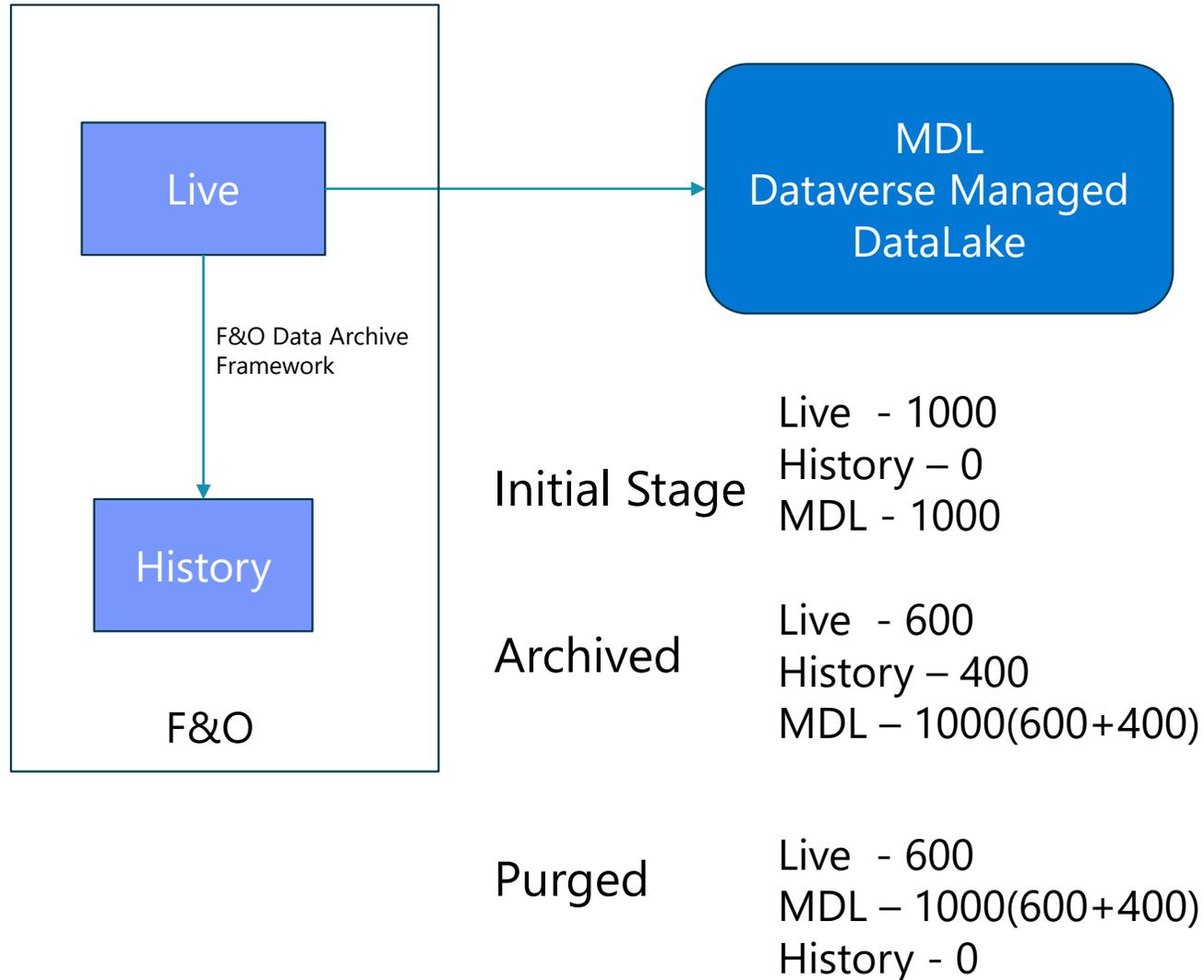
^{***} For illustration purpose only. Customer decides time period.

* LTR policies can
 1. ONLY be defined for FnO entities enabled for retention.
 2. be set from FnO app UI or Power Apps maker portal.
 3. be viewed from FnO and maker portal retention policies dashboard

Single FnO entity used for data lake movement

** Dependency on data type in source table .
 DB capacity savings from 25 Athena production customers,

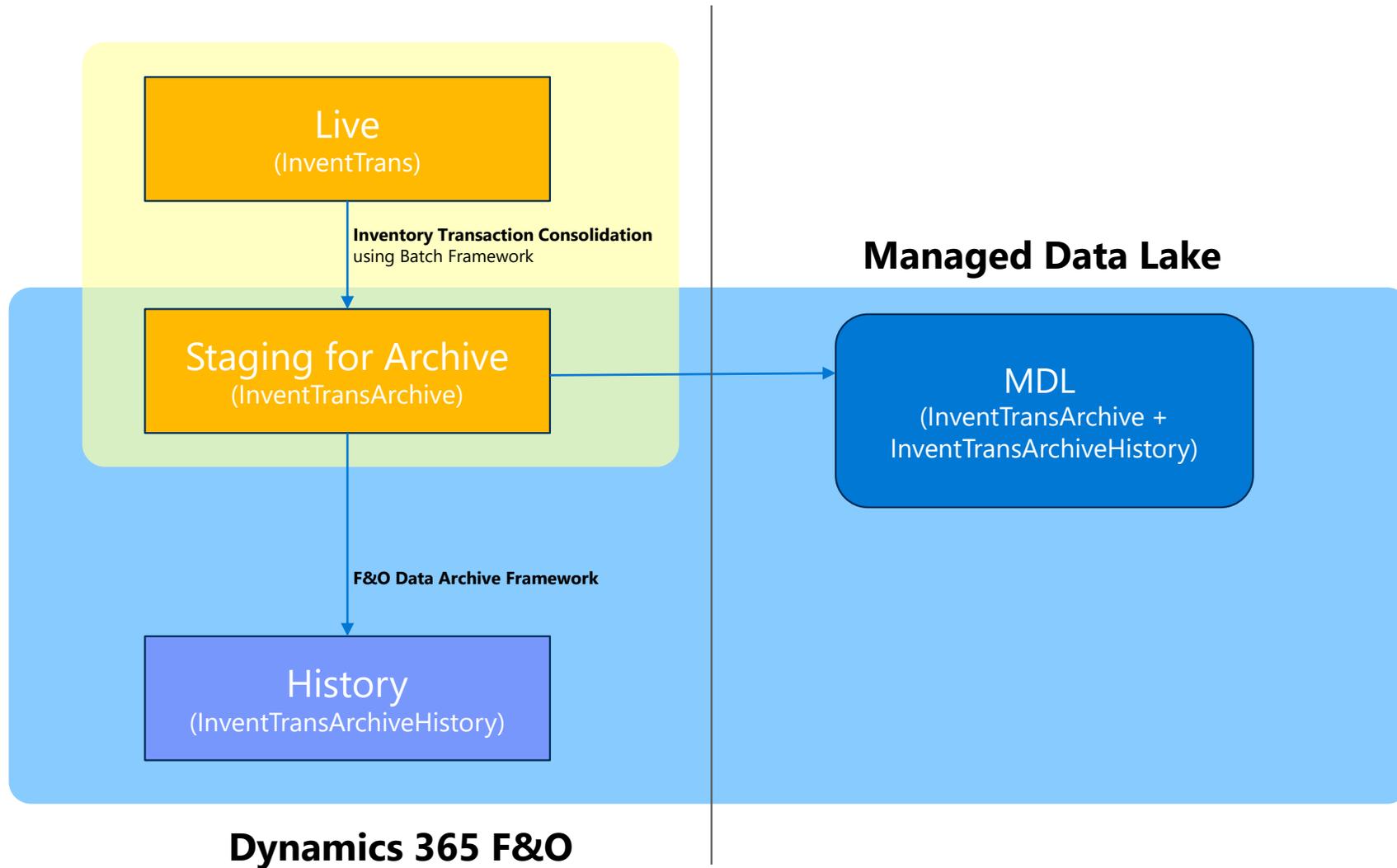
Archive Framework – Data Flow



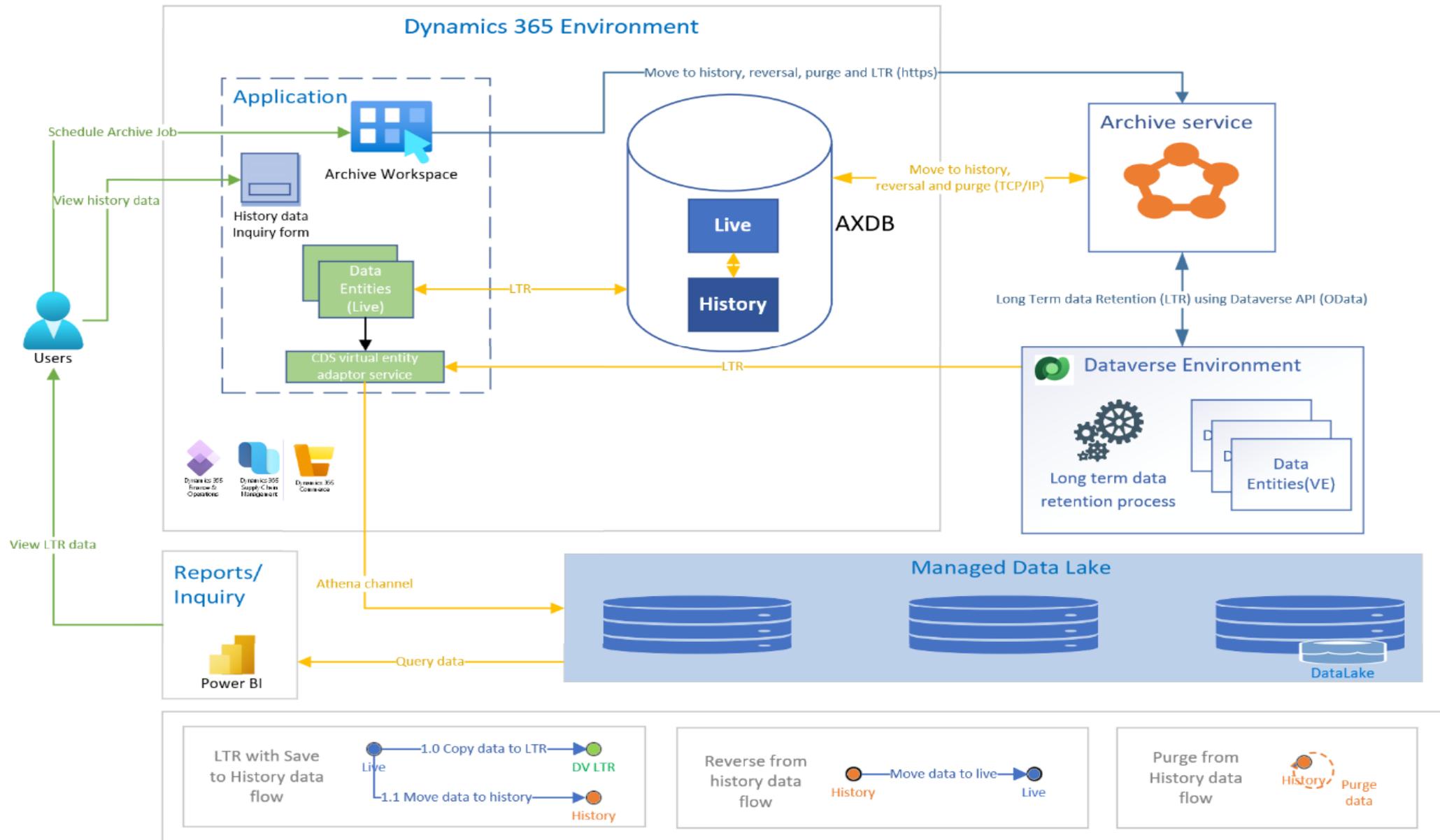
BPA

Microsoft Fabric

InventTrans Archive Data Flow



Architecture overview



Archive Scenarios

Public Preview (10.0.39)

- General Ledger
- Sales Order
- Inventory Transactions
- Inventory Journal
- Tax Trans

Future Release (10.0.40*)

- Retail Transactions

Prerequisites for Archive Scenarios

- General ledger & Tax Transactions
 - Archive can only occur for fiscal years that have run the year-end-close process
 - Years must also be run in chronological order.
- Inventory transactions & Inventory Journals
 - The ledger period must be closed.
 - Inventory closing must be completed for the period of archive dates.
 - The period must be at least one year before the from-period date of the archive.
 - There must not be any existing inventory recalculations.
- Sales orders
 - Archives all invoiced sales orders created within the user-provided date range criteria.

Demo



Welcome to Finance and Operations

Search people ...

< April 2024 >

Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Work items assigned to me

- Cash advance request : Record returned
- Expense reports : Record returned
- Catalog : catalog approval
- Expense reports : Expense report approval
- Cash advance request : Cash advance
- Approve travel requisition
- Catalog : catalog approval

To-do list

You're all caught up on your tasks.

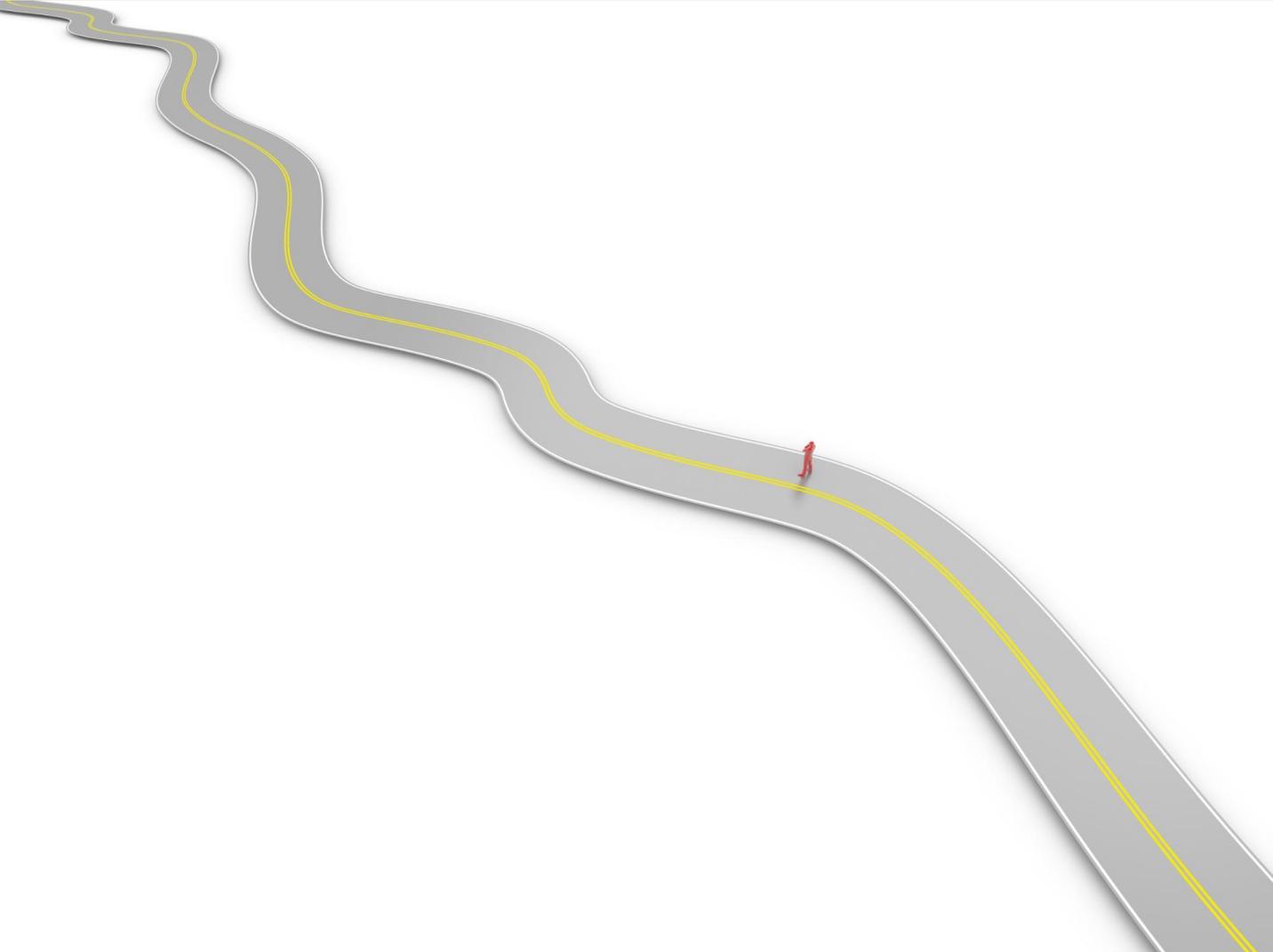
APPS

- Business performance analytics (preview)
- Business performance planning
- Invoice capture

WORKSPACES

Bank management	Catalog management	Cost administration	Distributed order management	Financial period close	Maintenance request management	People	Purchase order preparation	Store financials	Vendor invoice entry
Benefits	Category and product management	Cost analysis	Electronic reporting	Fixed asset management	Master planning	Personnel management	Purchase order receipt and follow-up	Store management	Vendor payments
Budget planning	Channel deployment	Cost control	Employee development	General journal processing	My business processes	Product readiness for discrete manufacturing	Recruitment management	Supply risk assessment	Warehouse implementation tasks
Business document management	Channel merchandising configuration validator	Customer credit and collections	Employee self service	Globalization studio	Optimization advisor	Product readiness for process manufacturing	Released product maintenance	System administration	Work order management
Business processes for human resources	Commerce pricing and discount management	Customer invoicing	Expense management	Invoicing	Outbound work monitoring	Product variant model definition	Resource lifecycle management	Task management	
Business processes for payroll	Compensation management	Customer payments	Feature management	Learning	Outbound work planning	Production floor management	Retail and Commerce IT	Vendor bidding	
Cash overview - all companies	Confirmed purchase orders with changes	Data management	Financial analysis - all companies	Leave and absence	Payment workspace	Project management	Sales order processing and inquiry	Vendor information	
Cash overview - current company	Cost accounting ledger administration	Data validation checklist	Financial analysis - current company	Ledger budgets and forecasts	Payroll management	Purchase order confirmation	Sales return processing	Vendor invoice automation	

Roadmap



Roadmap

Entity	Private Preview	Public preview	General Availability
General Ledger	10.0.38	10.0.39	TBA
Sales Orders	10.0.38	10.0.39	TBA
Inventory Transactions	10.0.38	10.0.39	TBA
Tax Transactions	10.0.38	10.0.39	TBA
Inventory Journal	10.0.38	10.0.39	TBA
Retail Transactions*	10.0.40	TBA	TBA

Reference



Reference

- **Overview of Data Archive feature**

<https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/archive-data>

- **Setup and manage archive data**

<https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/archive-setup-manage?source=recommendations>

- **Archive customization**

<https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/archive-custom>

- **Yammer**

[Archive - Move to History and Dataverse Long-term retention storage: All Conversations](#)

- **Inventory transaction consolidation**

<https://learn.microsoft.com/en-us/dynamics365/supply-chain/inventory/archive-inventory-transactions#view-archived-inventory-transactions>

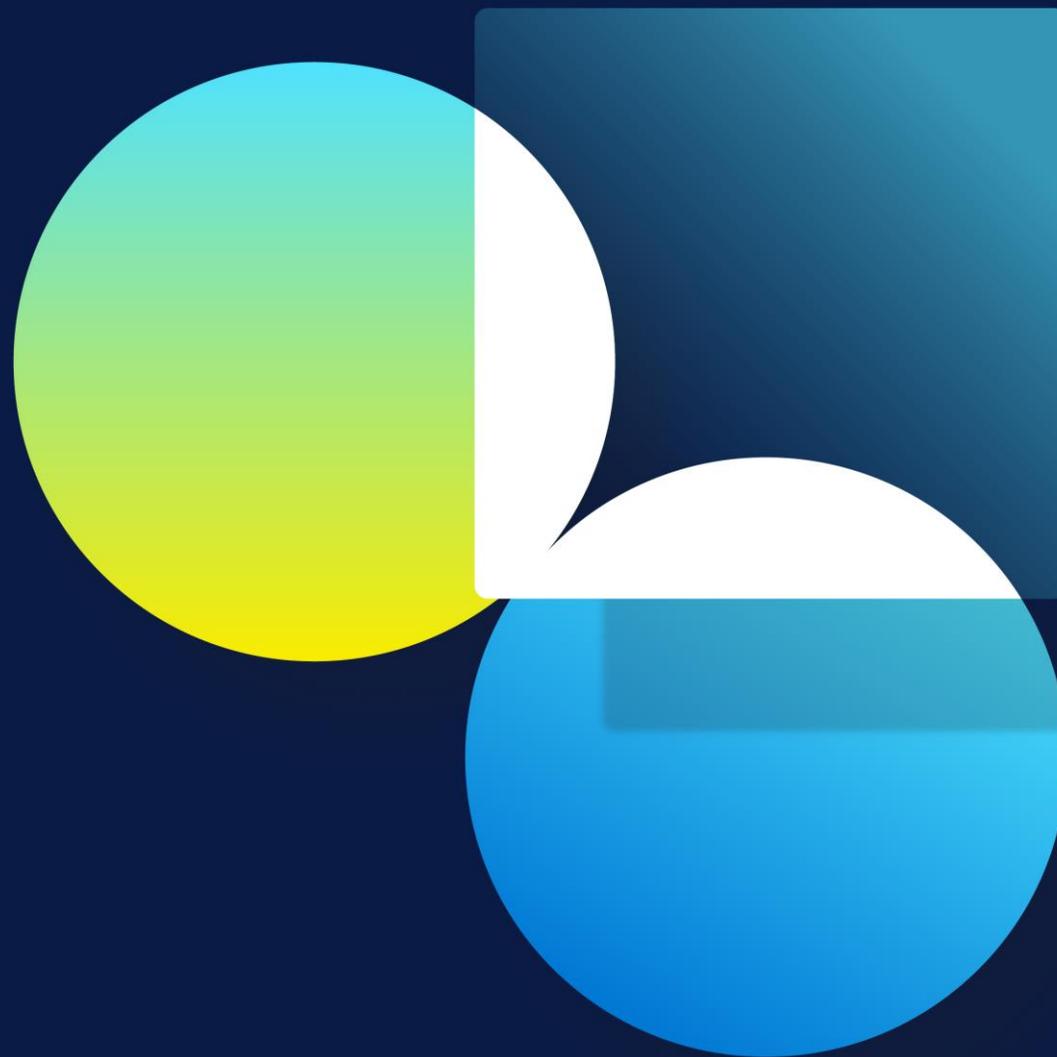
What's next

- TechTalk Series Sessions
 - **May 23rd**: Overview of Dataverse Long-Term Retention within Dynamics 365 CE apps
 - **May 29th**: Extension options available for Data Archival and Long-Term Retention within Dynamics 365 F&O apps

Q&A



Q&A

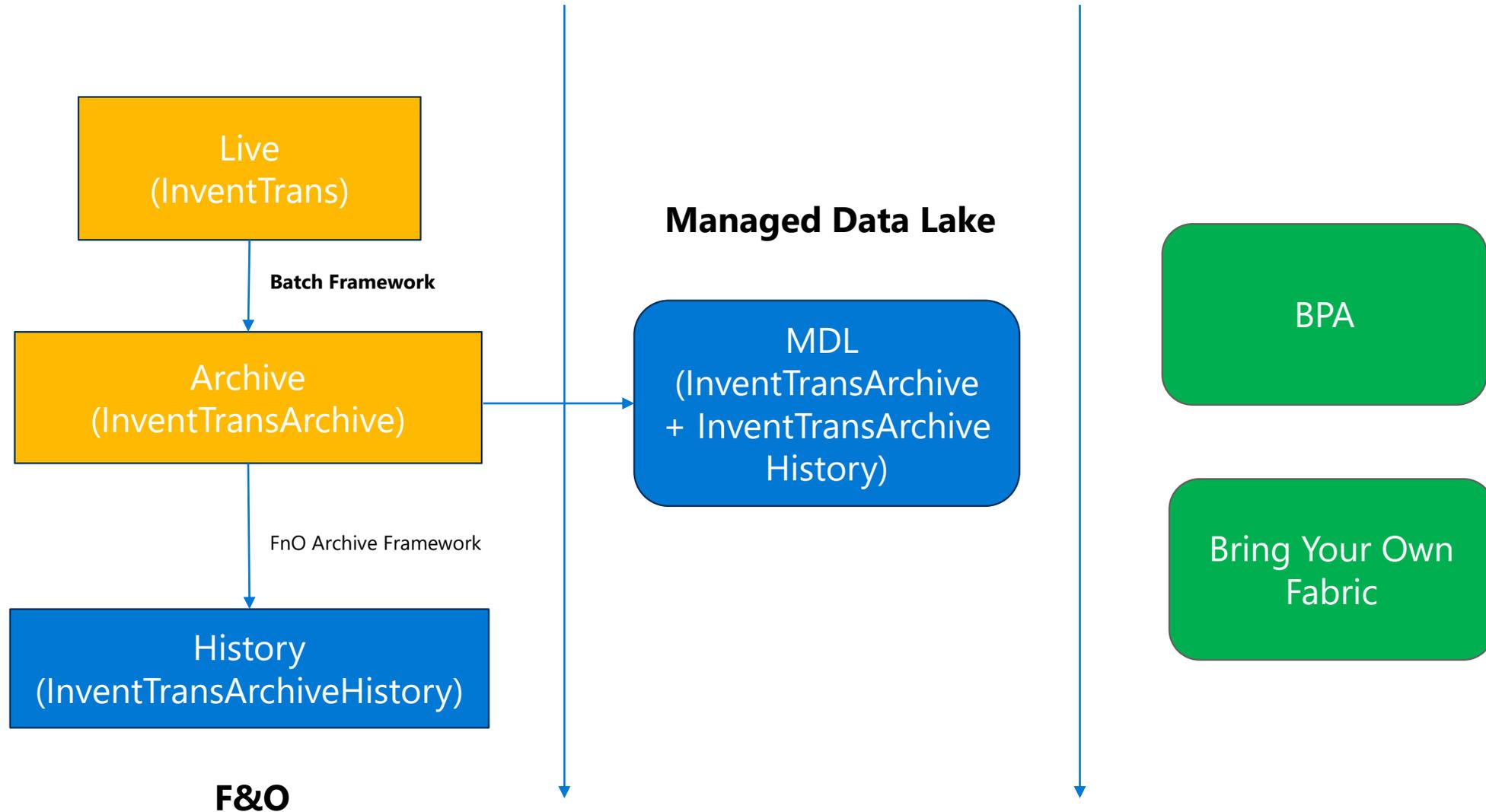


Thank you

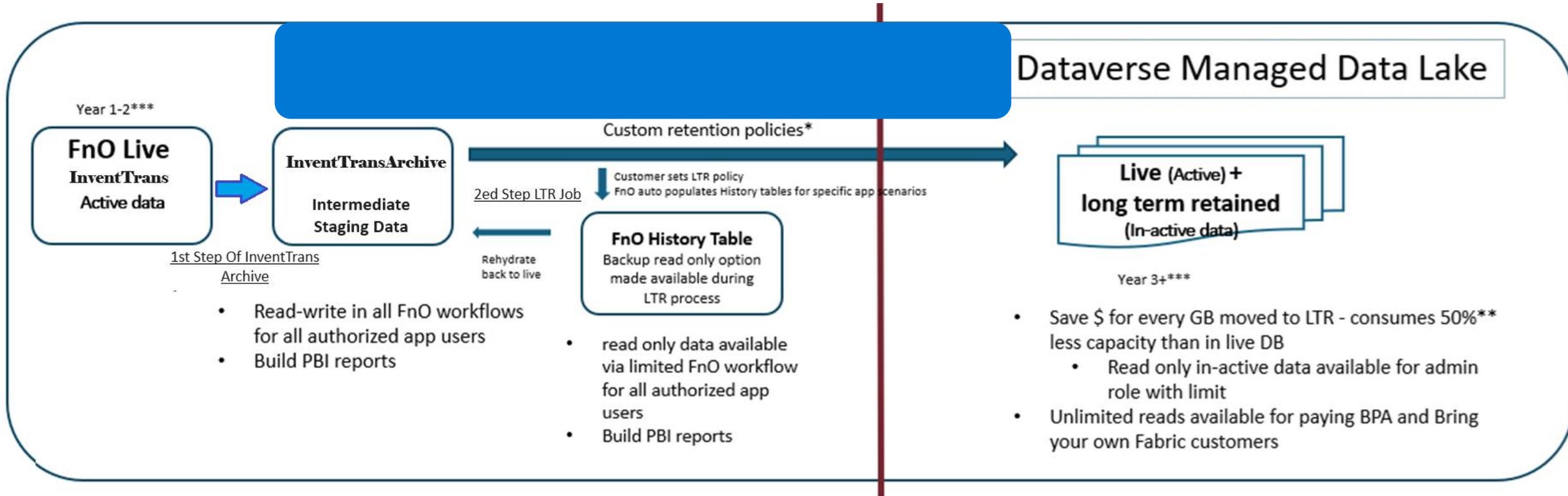
FAQ

FAQ

InventTrans Archival



InventTrans Archive- Data Flow



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Extension Options



Extension options

1. Extension fields scenario - Data that is desired to be archived included in table(s) that are already included in an existing archive type, but there are just additional fields that are desired to be included in the archive.

Example: Your data exists in fields that are a part of core Sales tables. Those fields reside as extensions to existing core tables.

2. Extension tables scenario - Data that is desired to be archived stored in tables that are directly related to an existing archive.

Example: Your data exists in tables that are directly related to core tables and the data in those tables should be included when the core tables are archived.

3. New archive type - Data that is desired to be archived a part of a new archive type that is not currently covered by an existing archive solution provided OOB.

Example: Your data exists in tables that are OOB tables or solely owned by your extension but not part of OOB Archive Solution, and the data stored in those tables can/should be safely Archived and purged to LTDR together as a unit.