



Extension options available for Data Archival and Long-Term Retention within Dynamics 365 F&O apps

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Agenda

-
- Extension Options
 - Customize Data Archive Scenarios
 - Demo
 - Q&A

Data Archive TechTalk Series



TechTalk: Archive with Dataverse Long-Term Retention within Microsoft Dynamics 365 F&O apps
Date: May 22nd, 2024



TechTalk: Overview of Dataverse Long-Term Retention within Dynamics 365 CE apps
Date: May 23rd, 2024



TechTalk: Extension options available for Data Archival and Long-Term Retention within Dynamics 365 F&O apps
Date: May 29th, 2024

Available Data Archive Scenarios

Public Preview (10.0.39)

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

Future Release (10.0.40*)

- Retail Transactions



Extension Options

Extension Options



1. Custom fields in Out of Box Data Archive scenario



2. Add Custom tables in Out of Box Data Archive scenario



3. Build your own custom archive scenario*



1. Custom fields in Out of Box Data Archive scenario

Mapping of Live-History-BiEntity

Scenario	F&O			Dataverse
	Live Table	History Table	Bi Entity	Dataverse Virtual Entity
Sales Order Archive	MCRRETURNSALESTABLE	MCRRETURNSALESTABLEHISTORY	McrreturnsalestableBiEntity	mserp_McrreturnsalestableBiEntity
	MCRSALESLINE	MCRSALESLINEHISTORY	McrsaleslineBiEntity	mserp_McrsaleslineBiEntity
	MCRSALESTABLE	MCRSALESTABLEHISTORY	McrsalestableBiEntity	mserp_McrsalestableBiEntity
	RETAILSALESLINE	RETAILSALESLINEHISTORY	RetailsaleslineBiEntity	mserp_RetailsaleslineBiEntity
	RETAILSALESTABLE	RETAILSALESTABLEHISTORY	RetailsalestableBiEntity	mserp_RetailsalestableBiEntity
	SALESLINE	SALESLINEHISTORY	SaleslineBiEntity	mserp_SaleslineBiEntity
	SALESLINE_BR	SALESLINEHISTORY_BR	SaleslinebrBiEntity	mserp_SaleslinebrBiEntity
	SALESLINE_IN	SALESLINEHISTORY_IN	SaleslineinBiEntity	mserp_SaleslineinBiEntity
	SALESLINE_W	SALESLINEHISTORY_W	SaleslinewBiEntity	mserp_SaleslinewBiEntity
	SALESTABLE	SALESTABLEHISTORY	SalestableBiEntity	mserp_SalestableBiEntity
	SALESTABLE_BR	SALESTABLEHISTORY_BR	SalestablebrBiEntity	mserp_SalestablebrBiEntity
	SALESTABLE_RU	SALESTABLEHISTORY_RU	SalestableluBiEntity	mserp_SalestableluBiEntity
	SALESTABLE_W	SALESTABLEHISTORY_W	SalestablewBiEntity	mserp_SalestablewBiEntity

<https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/archive-custom#finance-table-names-in-live-history-and-dataverse-managed-data-lake-tables>

Custom fields in Out of Box Data Archive scenario

- **Validate archive table schema SQL Script**

📌 Note

Before you schedule an archive job, check for custom fields in archive tables by running the [validate archive table schema script](#). If custom fields are found, follow the instructions in [Archive customization](#) to include those fields in the data archive.

Column exclusion rule: `SysRowVersion` and `SysDataState` columns are added by the platform these columns don't have to be added to the history tables.

- **Extension History table:** Create custom fields manually in corresponding History table via Table Extension
- **Extension BiEntity:** Create custom fields manually in corresponding BiEntity via Data Entity Extension

Extension: System Generated User Tracking Fields

- **History tables:** Modify table properties through Table Extension on Corresponding History Table
- **BiEntities:** Create Custom fields through Data Entity Extension using the following naming convention:

TableField	BiEntityField
CreatedDateTime	CreatedOn
ModifiedDateTime	SysModifiedDateTime
CreatedBy	SysCreatedBy
ModifiedBy	SysModifiedBy

Refresh virtual entity metadata

Maker portal-> Settings gear-> Advanced Settings-> Advanced find-> select '**Available finance and operations entities**' in the Look for drop-down then search for name of the BiEntity need to be refreshed -> Select the Refresh check box, then save your change.

The screenshot shows the configuration interface for a virtual entity. At the top, there is a toolbar with icons for Save, Save & Close, New, Delete, and Refresh. Below the toolbar, the entity name is 'SalesTableBiEntity' with a status of '- Unsaved' and a description 'Available Finance and Operations Entity'. There are two tabs: 'General' (selected) and 'Related'. The 'General' tab contains the following settings:

Property	Value
Name	* SalesTableBiEntity
Visible	<input checked="" type="checkbox"/>
Refresh	<input checked="" type="checkbox"/>
Change Tracking	<input checked="" type="checkbox"/>

<https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/power-platform/enable-virtual-entities#refresh-virtual-entity-metadata>

Demo

The background features a dark blue field with large, overlapping circular shapes in orange and light blue. A teal vertical bar is on the left, and a white corner element is in the top right.

Filter by title

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 - Dynamics 365 archive with Dataverse long term retention FAQ (preview)
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Set up and manage archive data in Dynamics 365 Finance (preview)

Article • 05/16/2024 • 6 contributors

Feedback

In this article

- Prepare the environment
- Set up Finance to archive data with Dataverse long-term retention
- View archive job progress

[This article is prerelease documentation and is subject to change.]

This article describes how to set up and manage archive data in Microsoft Dynamics 365 Finance.

Prepare the environment

To prepare your environment to archive data, follow these steps.

- To align it with your production instance, refresh your PROD data in your sandbox instance.
- Ensure that your sandbox instance is on the latest version of Dynamics 365 Finance version 10.0.39 or later. Be sure to apply the latest quality updates for the version.
- Under license configuration, ensure that **SQL row version change tracking** is enabled. If it isn't enabled, follow these steps:
 - In Microsoft Dynamics Lifecycle Services, select the environment, and go to **Maintain > Enable Maintenance Mode**.
 - Sign in to Finance, and go to **System administrator > Setup > License configuration**. Select the **SQL row version change tracking** checkbox, and then select **Save**.
 - In Lifecycle Services, select the environment, and then select **Maintain > Disable Maintenance Mode**.

Note

If the Microsoft Power Platform environment isn't set up for the sandbox instance, complete the setup in Lifecycle Services.

Additional resources

Training

Module
[Explore archiving and records management in Microsoft 365 - Training](#)

This module examines how Microsoft 365 supports data governance by enabling organizations to archive content by using archive mailboxes, and manage their high-value content...

Documentation

[Archive data in Dynamics 365 finance and operations apps with Dataverse \(preview\) - Finance & Operations | Dynamics 365](#)

Learn about how to archive data in Microsoft Dynamics 365 finance and operations apps, including an overview on business application data lifecycles.

[Dynamics 365 Finance archive with Dataverse long term retention FAQ \(preview\) - Finance & Operations | Dynamics 365](#)

Access answers to frequently asked questions about archiving data in Microsoft Dynamics 365 Finance with Dataverse.

[Archive customization \(preview\) - Finance & Operations | Dynamics 365](#)

Learn about how the archive feature in Microsoft Dynamics 365 Finance supports table customizations, including code examples.

Show 5 more



2. Add Custom Tables in Out of Box Data Archive scenario

Adding Custom Tables in Out of Box Data Archive scenario

- Create a new history table that mirrors all fields from the corresponding live table
 - Column exclusion rule: SysRowVersion and SysDataState columns are added by the platform these columns don't have to be added to the history tables.
 - Don't mirror indexes from the live table in the history table.
- Create a new BiEntity that mirrors all fields from the corresponding live table
- Extend the **ArchiveAutomationJobRequestCreator** class for a scenario to add the new table to data archive scenario.

Custom tables: Important Table properties in F&O

Set: Allow Retention & Allow Archival properties Only on Live Table and BiEntity to enable Data Archival and Long-Term Retention (LTR).

Set: Allow Row version change tracking property Only on table and BiEntity

- If it set to 'Yes', this option enables Microsoft Dataverse to be used for incremental synchronization of data.
- SysRowVersion column will be created in database table , and it will be used for row version change tracking

Data	
Allow Archival	Yes
Allow Change Tracking	Yes
Allow Override	No
Allow Retention	Yes
Allow Row Version Change Tracking	Yes

Code example

```
[ExtensionOf(classStr(SalesOrderArchiveAutomationJobRequestCreator))]
final class SalesOrderArchiveAutomationJobRequestCreator_MSFTDataArchiveTest_Extension
{
    1 reference
    public ArchiveJobPostRequest createPostJobRequest(SalesOrderArchiveTrans _archiveTrans)
    {
        ArchiveJobPostRequest postRequest = next createPostJobRequest(_archiveTrans);
        ArchiveServiceArchiveJobPostRequestBuilder builder = ArchiveServiceArchiveJobPostRequestBuilder::constructFromArchiveJobPostRequest(postRequest);

        DictTable MSFTSODataArchiceTestTable = new DictTable(tableNum( MSFTSODataArchiceTest));
        DictTable MSFTSODataArchiceTestHistory = new DictTable(tableNum(MSFTSODataArchiceTestHistory));
        TableName MSFTSODataArchiceTestTableName = MSFTSODataArchiceTestTable.name(DbBackend::Sql);
        TableName MSFTSODataArchiceTestHistoryTableName = MSFTSODataArchiceTestHistory.name(DbBackend::Sql);
        TableName parentSourceTableName = salesTable.name(DbBackend::Sql);
        var MSFTSODataArchiceTestSourceTable = ArchiveServiceSourceTableConfiguration::newForSourceTable(
            MSFTSODataArchiceTestTableName,
            MSFTSODataArchiceTestHistoryTableName,
            tableStr(MSFTSODataArchiceTestBiEntity));

        MSFTSODataArchiceTestSourceTable.parmParentSourceTableName(parentSourceTableName);
        builder.addSourceTableForLongTermRetention(MSFTSODataArchiceTestSourceTable)
            .addJoinCondition(MSFTSODataArchiceTestTableName,
                MSFTSODataArchiceTestTable.fieldName(fieldNum( MSFTSODataArchiceTest, SalesId), DbBackend::Sql),
                salesTable.fieldName(fieldNum(SalesTable, SalesId), DbBackend::Sql))
            .addPartitionWhereCondition(MSFTSODataArchiceTestTableName)
            .addDataAreaIdWhereCondition(MSFTSODataArchiceTestTableName, _archiveTrans.SalesOrderDataAreaId);
        return builder.finalizeArchiveJobPostRequest();
    }
}
```

Generate virtual entities in Power Platform

Maker portal-> Settings gear-> Advanced Settings-> Advanced find-> select '**Available finance and operations entities**' in the Look for drop-down then search for name of the BiEntity need to be enabled -> Select the Visible check box, and then save your change.

← Save Save & Close + New Delete Refresh

MSFTSODataArchiceTestBiEntity - Saved
Available Finance and Operations Entity

General Related ▾

Name * MSFTSODataArchiceTestBiEntity

Visible

Refresh ---

Change Tracking

<https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/power-platform/enable-virtual-entities#generate-virtual-entities>

Custom tables: Table properties in Power Platform

Maker portal->Tables-> All->Select a table->Properties ->Advanced options

For this table

- Apply duplicate detection rules ⓘ
- Track changes ¹ ⓘ
- Allow knowledge management ⓘ
- Provide custom help ⓘ
- Audit changes to its data ⓘ
- Leverage quick-create form if available ⓘ
- Enable long term retention ⓘ

Help URL

Demo

The background features a dark blue field with large, overlapping circular shapes in orange and light blue. A teal vertical bar is on the left. A white corner graphic is in the top right.

MSFTSODataArchiveTestHistory MSFTSODataArchiveTest SalesOrderArchiveA...Test_Extension.xpp MSFTSODataArchiveTestBiEntity

Search ...

MSFTSODataArchiveTest (cus) [MSFTDataArchiveTest]

- Fields
 - SalesId
 - TextData
- Field groups
- Indexes
- Full Text Indexes
- Relations
- Delete Actions
- State Machines
- Mappings
- Methods
- Events

Solution Explorer

Search Solution Explorer (Ctrl+J)

- Solution 'MSFTDataArchiveCustomTableDemo' (1 of 1 projects)
- MSFTDataArchiveCustomTableDemo (CUS) [MSFTDataArchiveTest]
- References
- Classes
 - SalesOrderArchiveAutomationJobRequestCre...
- Data Entities
 - MSFTSODataArchiveTestBiEntity
- Tables
 - MSFTSODataArchiveTest
 - MSFTSODataArchiveTestHistory


- Home
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- Chatbots
- Azure Synapse Link
- Retention Policies
- Dataflows
- More


- Power Platform
- Ask a virtual agent


+ New table | Import | Export | Analyze


Search

Tables

 Describe the new table

 Create with SharePoint list PREVIEW

 Create with Excel or .CSV file

 Start with a blank table

Recommended
 Custom
 All

Table ↑	Name	Type	Managed	Customizable	Tags
Account	account	Standard	Yes	Yes	Core
Address	customeraddress	Standard	Yes	Yes	Standard
Appointment	appointment	Activity	Yes	Yes	Productivity
Attachment	activitymimeattachment	Standard	Yes	Yes	Productivity
Business Unit	businessunit	Standard	Yes	Yes	Standard
Contact	contact	Standard	Yes	Yes	Core
Currency	transactioncurrency	Standard	Yes	Yes	Standard
Email	email	Activity	Yes	Yes	Productivity
Email Template	template	Standard	Yes	Yes	Standard
Fax	fax	Activity	Yes	Yes	Productivity
Feedback	feedback	Standard	Yes	Yes	KB
Knowledge Article	knowledgearticle	Standard	Yes	Yes	Standard
Letter	letter	Activity	Yes	Yes	Productivity
Mailbox	mailbox	Standard	Yes	Yes	Configuration
Organization	organization	Standard	Yes	Yes	System
Phone Call	phonecall	Activity	Yes	Yes	Standard
Position	position	Standard	Yes	Yes	System
Product	product	Standard	Yes	Yes	Core
Recurring Appointment	recurringappointmentmas...	Activity	Yes	Yes	Standard
<input type="radio"/> Task	task	Activity	Yes	Yes	Productivity
Team	team	Standard	Yes	Yes	System
Team template	teampointer	Standard	Yes	Yes	Standard

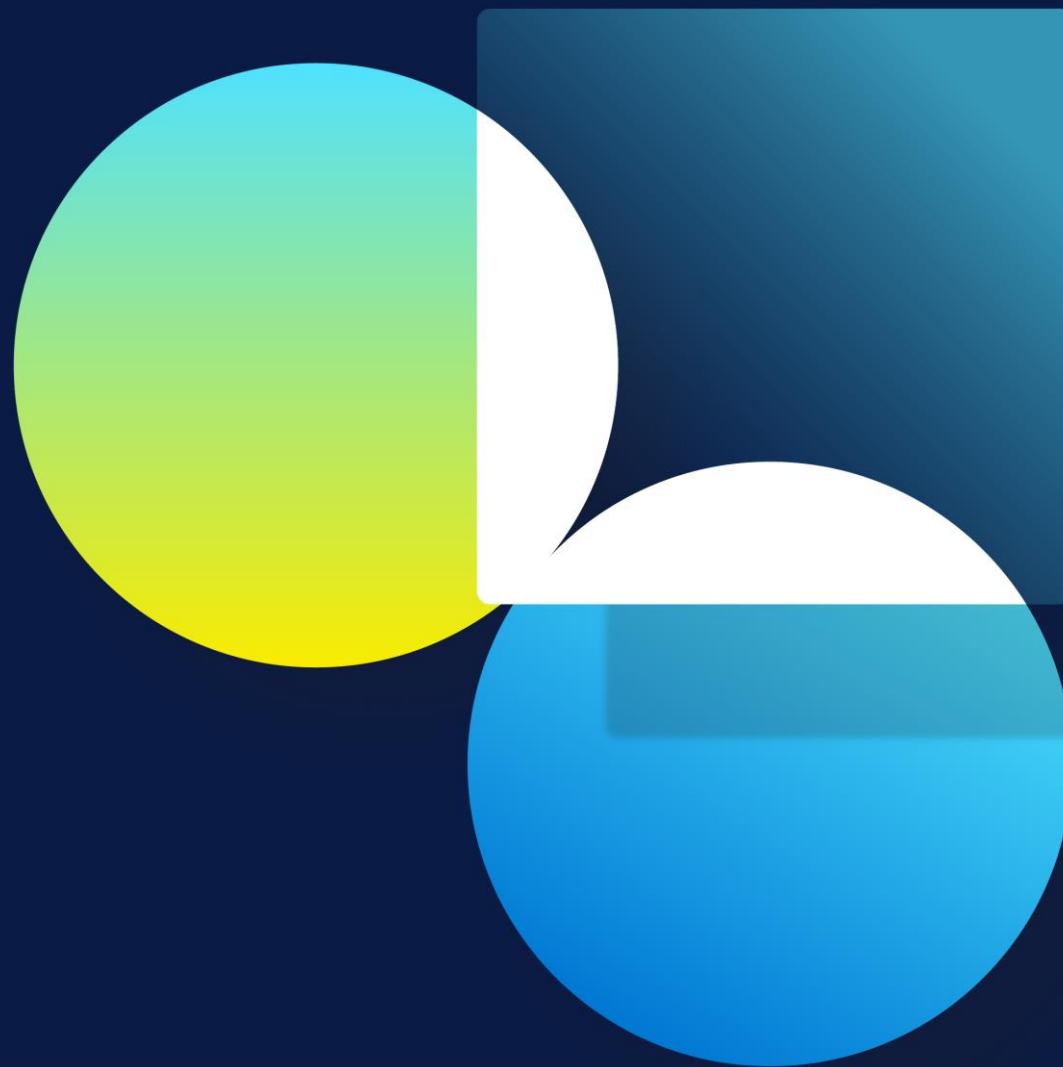


Reference

Reference

- **Archive Customization**
<https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/archive-custom>
- **Validate Table Schema Using SQL Script to Identify Custom Fields**
[D365FnOArchiveWithDataverseLongTermRetention/Finance and Operations/SQL Scripts/ValidateArchiveTableSchema.sql at main · MicrosoftDocs/D365FnOArchiveWithDataverseLongTermRetention · GitHub](https://github.com/MicrosoftDocs/D365FnOArchiveWithDataverseLongTermRetention/Finance%20and%20Operations/SQL%20Scripts/ValidateArchiveTableSchema.sql)
- **Generate/Refresh Virtual Entity**
<https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/power-platform/enable-virtual-entities#generate-virtual-entities>
- **Link your Dataverse environment to Microsoft Fabric**
<https://learn.microsoft.com/en-us/power-apps/maker/data-platform/azure-synapse-link-view-in-fabric>
- **Yammer**
[Archive - Move to History and Dataverse Long-term retention storage: All Conversations](#)

Q&A



Thank you