

Azure Archival Process User Guide

Version 1.0.0

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1. Dynamics 365 Data Archival

1.1 Introduction

Using relatively cost efficient Azure table and block storage, this solution allows Dynamics 365 organizations to effectively manage and archive their data. Information that is not current or relatively not likely to be used frequently can be configured with simple steps to be stored external to Dynamics 365 and easily viewed when required.

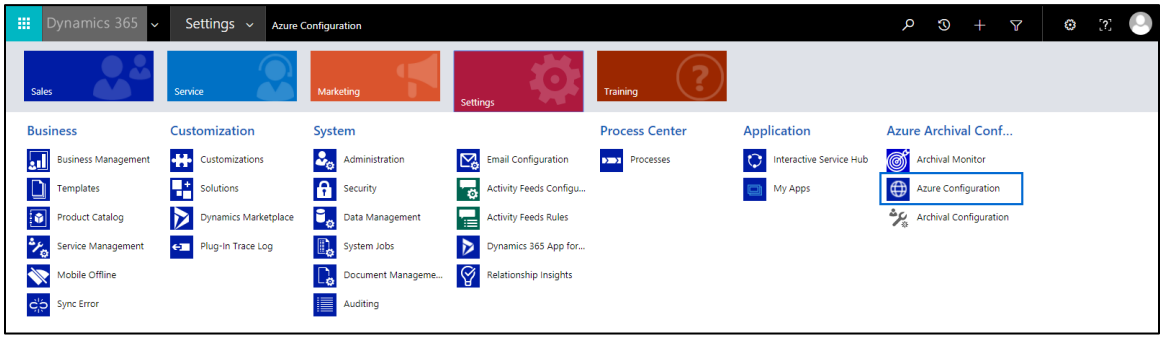
1.2 Benefits

- Simple configuration steps allows CRM admins to quickly create rules to archive specific data
- Cloud based solution with Single Sign On
- Cost-efficient
- Investment and/or management of alternate systems such as Sharepoint, On-premise database etc removed
- Audit History from Dynamics 365 transformed and stored in Azure in a much more user friendly format

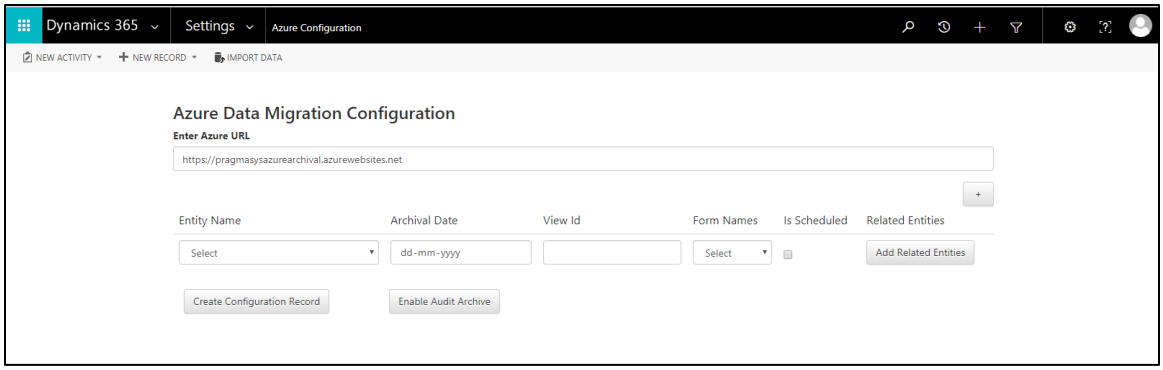
2. Dynamics 365 data archival configuration steps

Let us assume that we want to archive data from Accounts entity. Below simple steps are all it requires to configure archival of Account entity records.

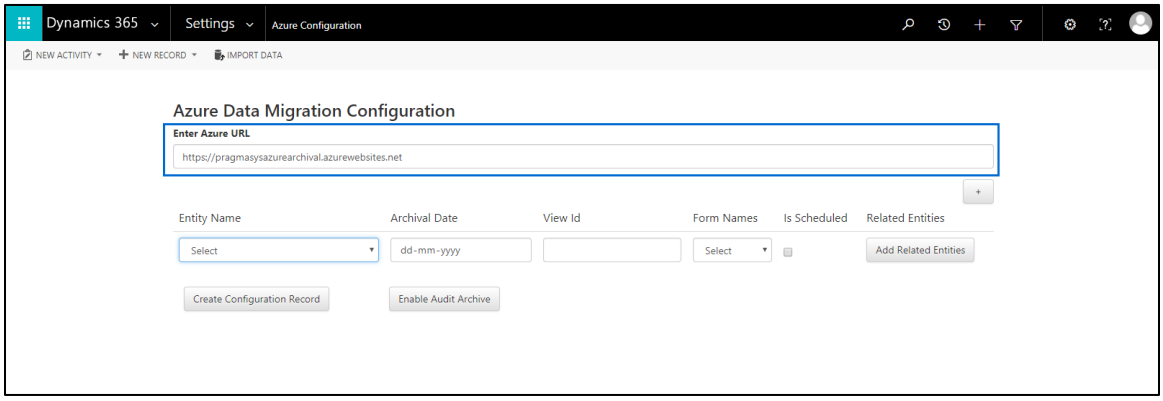
1. Login into Microsoft Dynamics 365 with a user having appropriate security permissions.
2. Go to **Settings >> Azure Configuration**



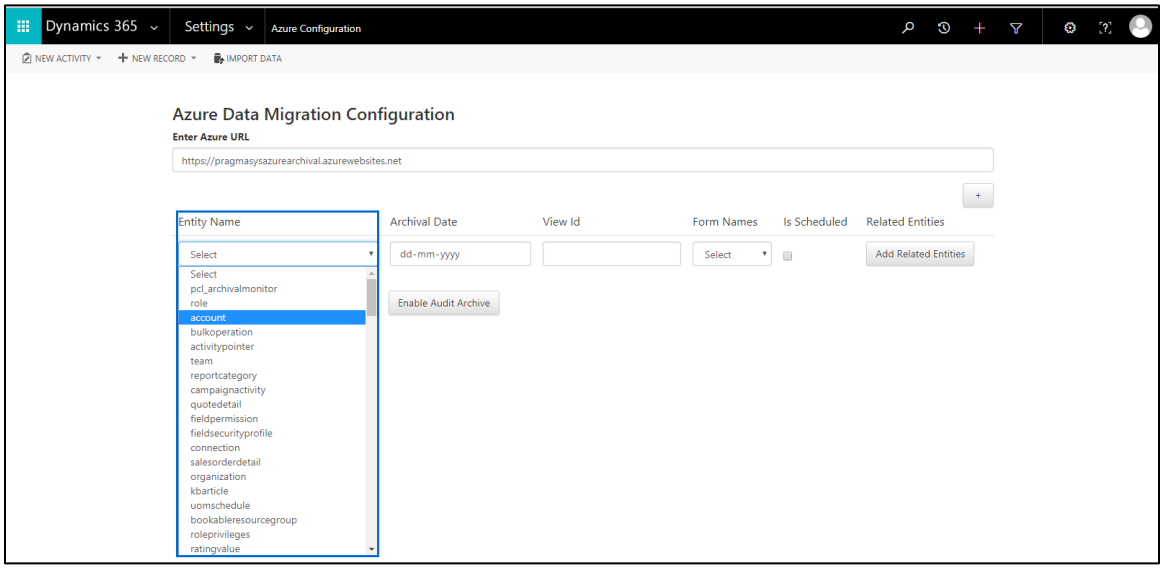
3. This will open Azure Data Migration Configuration page.



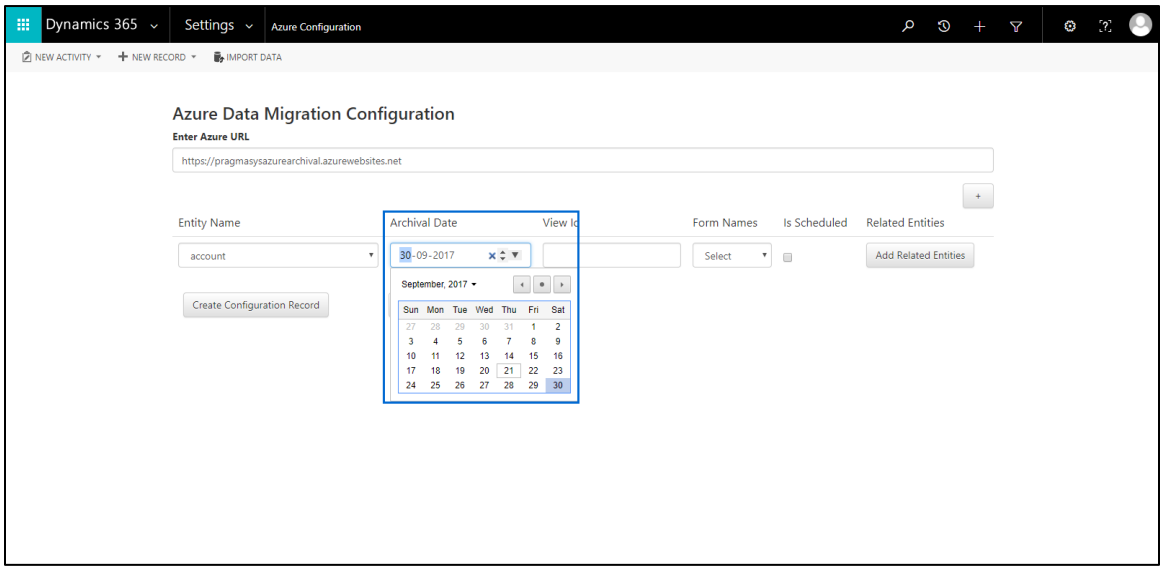
4. Enter Azure URL as captured in document “Azure Archival Installation Guide” in section 2.1 step 2.5. **Important: Protocol should be https.**



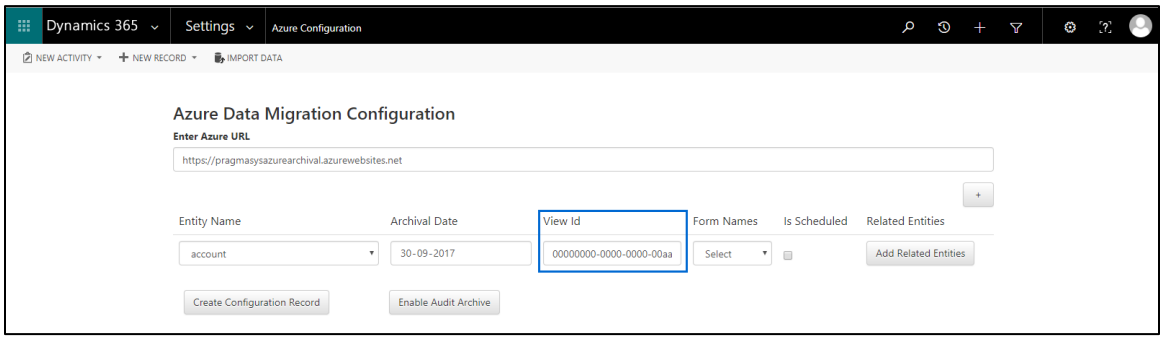
5. Select the account in **Entity Name** field since we want to archive Account records.



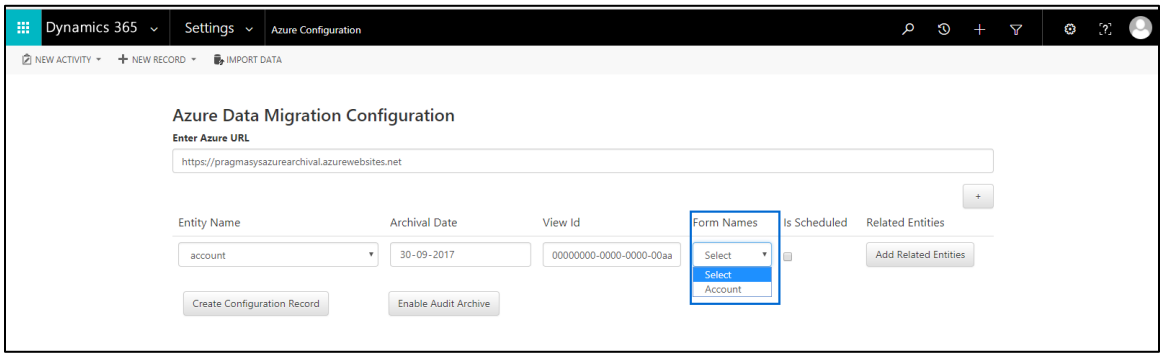
6. Select date in **Archival Date** field. Records created on or before this date will be archived.



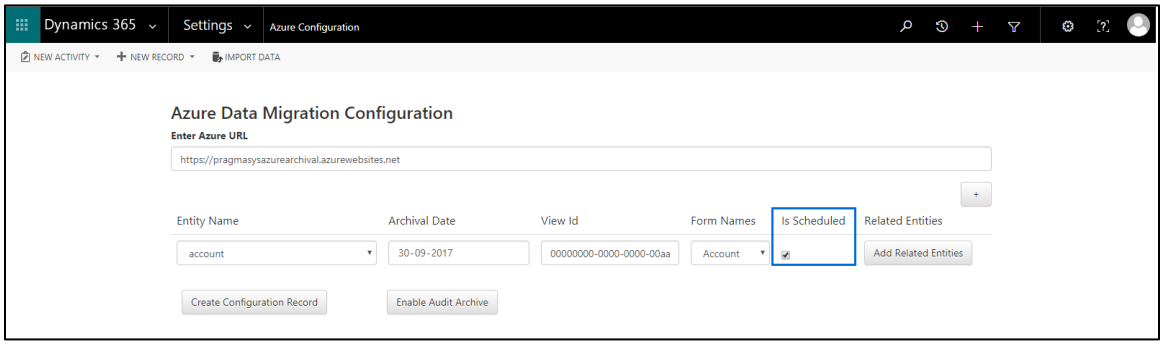
7. Enter GUID of the view in **View ID** field. Metadata of this view will be saved in Azure and it's format will be used to display archived records.



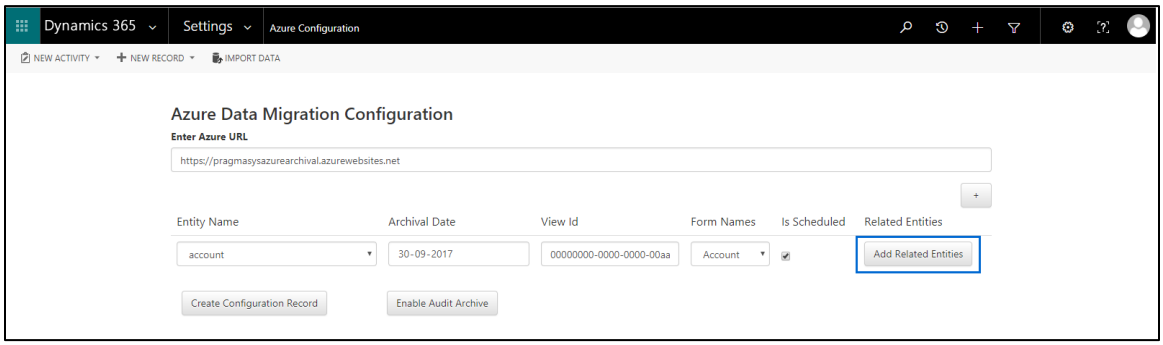
8. Enter name of the form in **Form Names** field. Schema of this form will be saved in Azure so archived records can be viewed in that format.



9. **Is Scheduled** field determines if the job is supposed to execute on a recurring. If this field is checked, records will be archived on a daily basis.



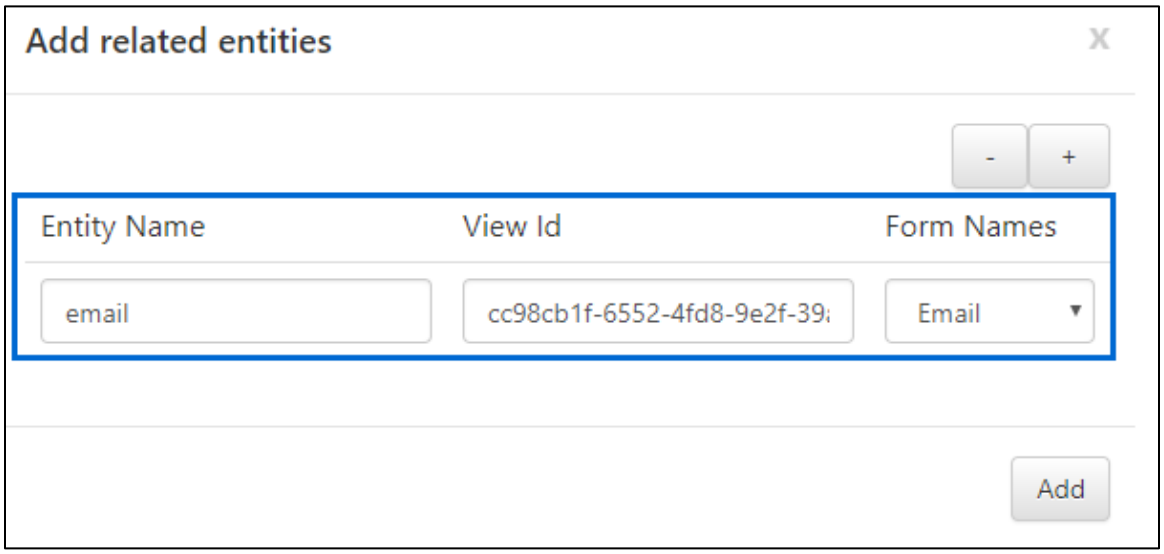
10. Click on **Add Related Entities** to specify related records that also need to be archived.



11. **Add related entities** popup window opens where we can specify related entities to be archived.



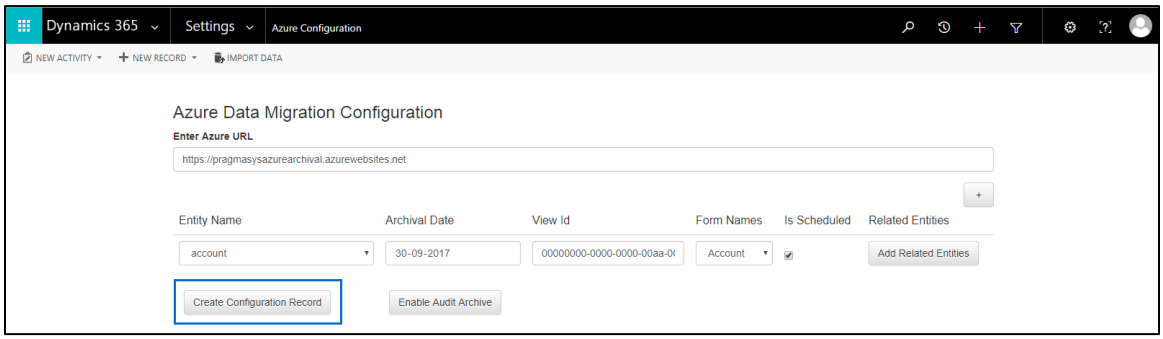
12. Enter **Entity Name**, **View ID** and select **Form Names**.



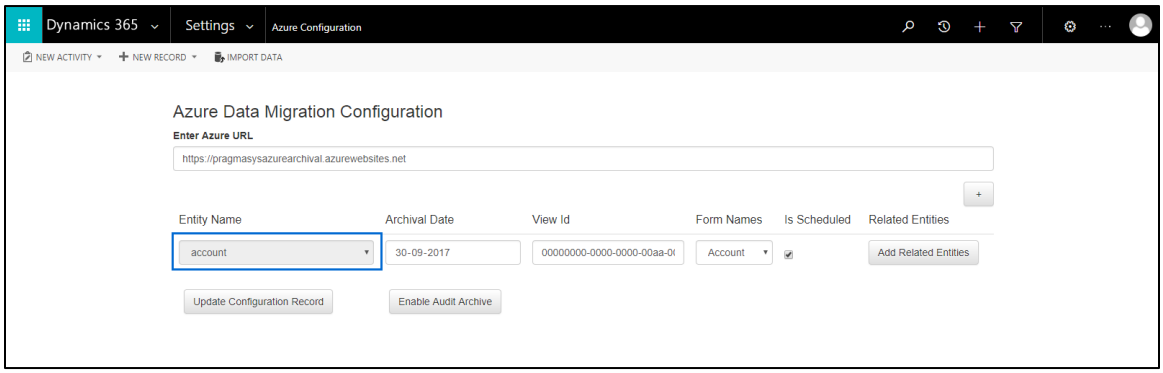
13. Click on **Add**.



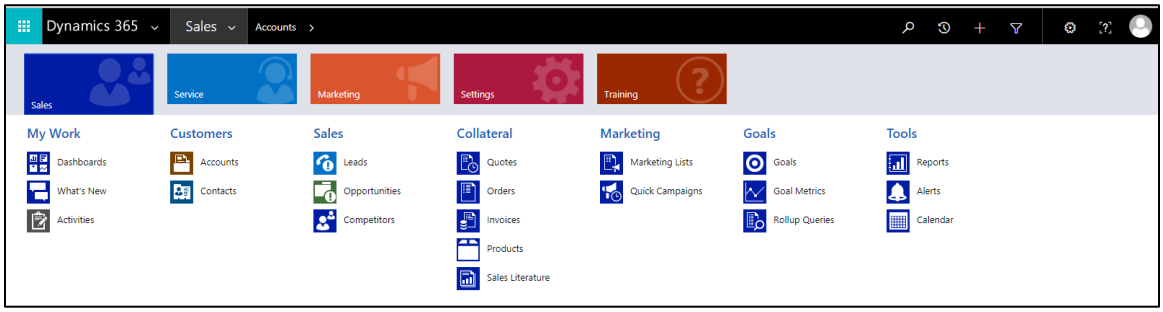
14. Click on **Create Configuration Record** to save your archival configuration rules/settings.



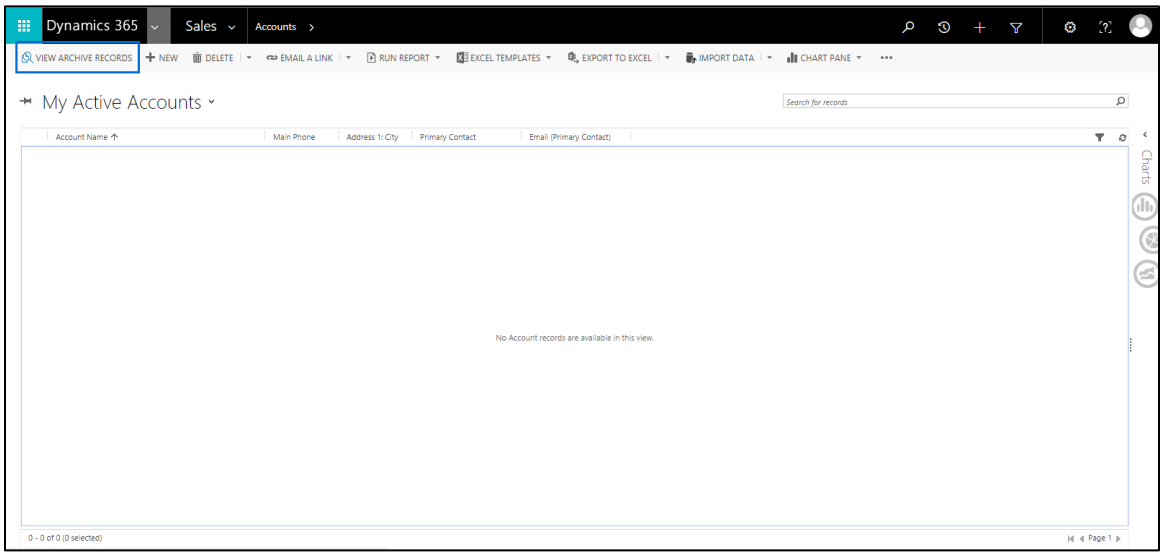
15. Once the Azure Data Migration Configuration record is created, the Entity Name field becomes read only while other settings are still available for update.



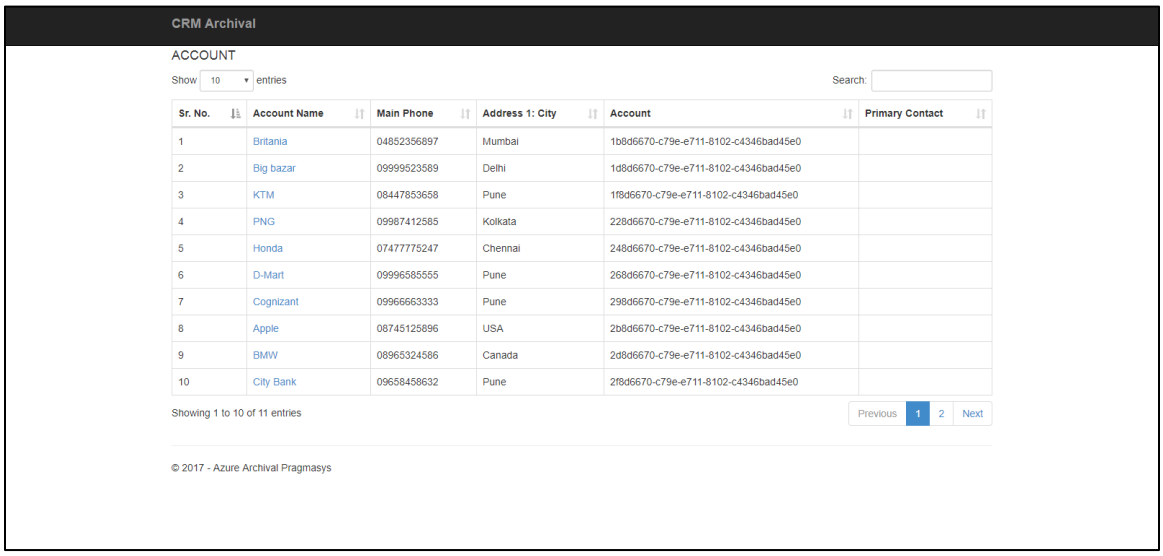
16. To view archived Accounts, go to **Sales >> Accounts**



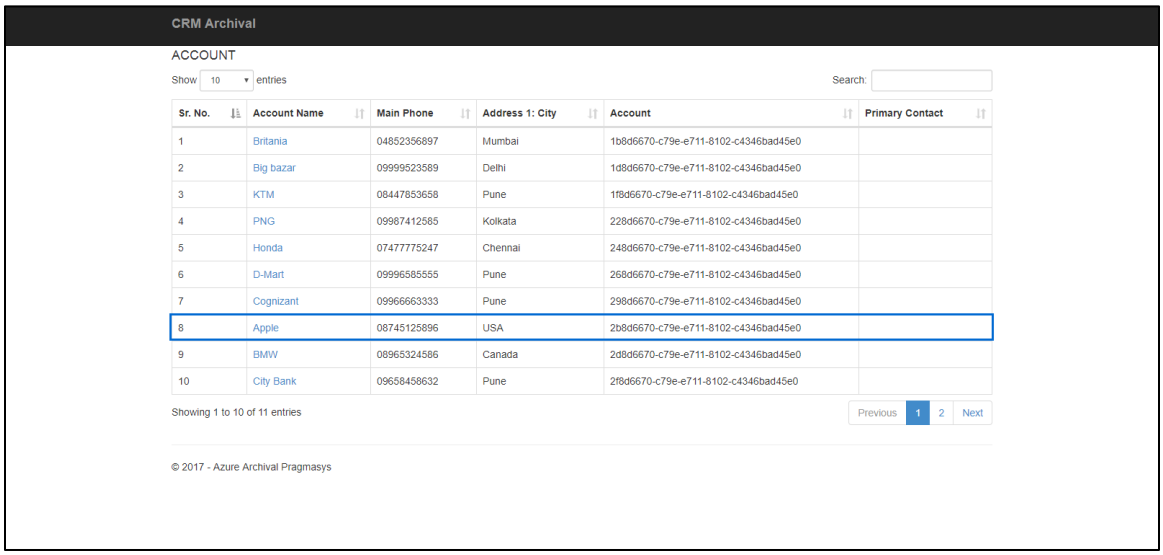
17. Click on **View Archive Records**.



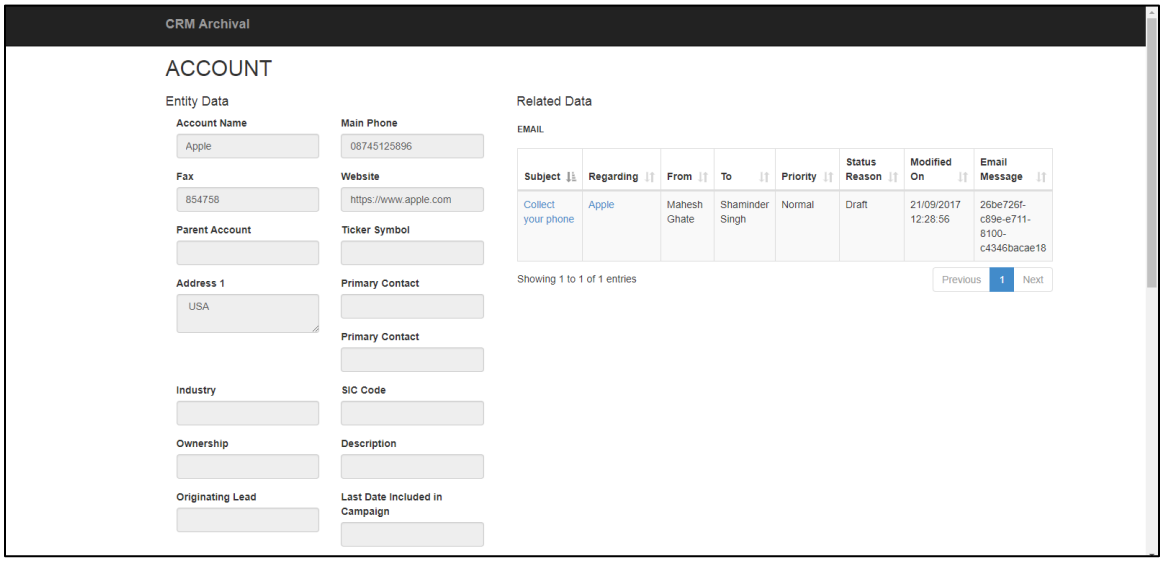
18. This will open CRM Archival window where archived records are displayed.



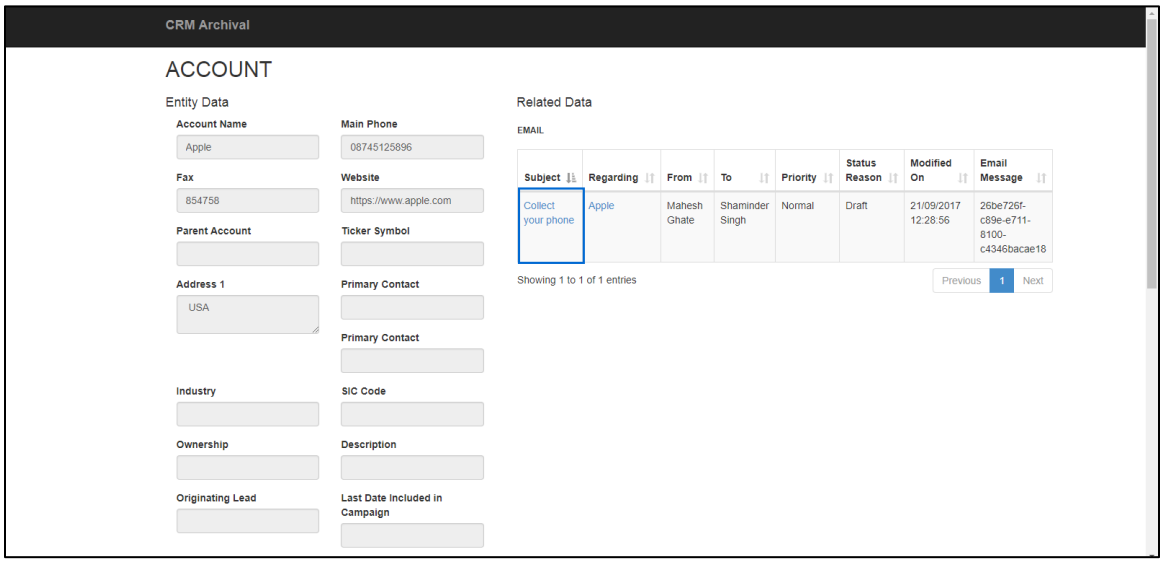
19. Click on Account link to open in detailed record information.



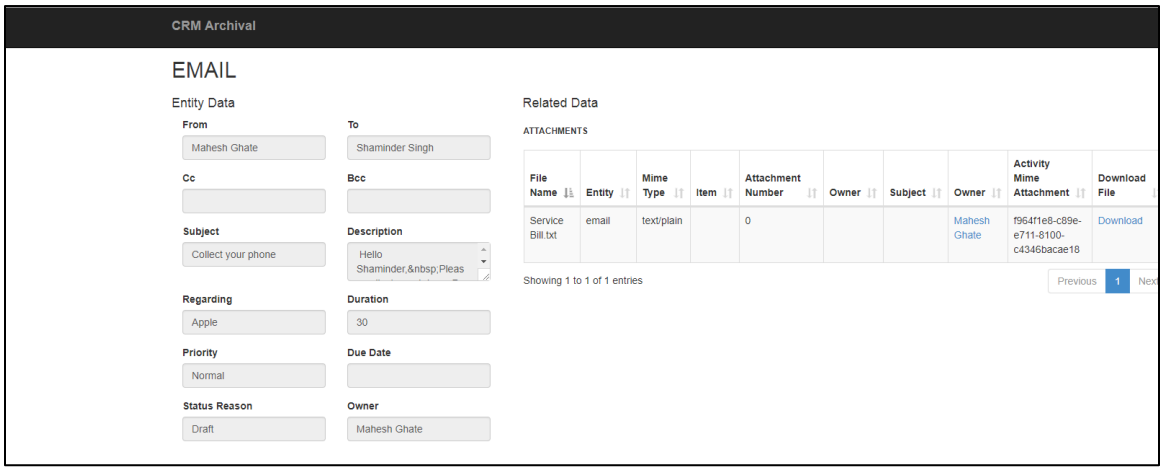
20. Account details & related entity data will be displayed as below.



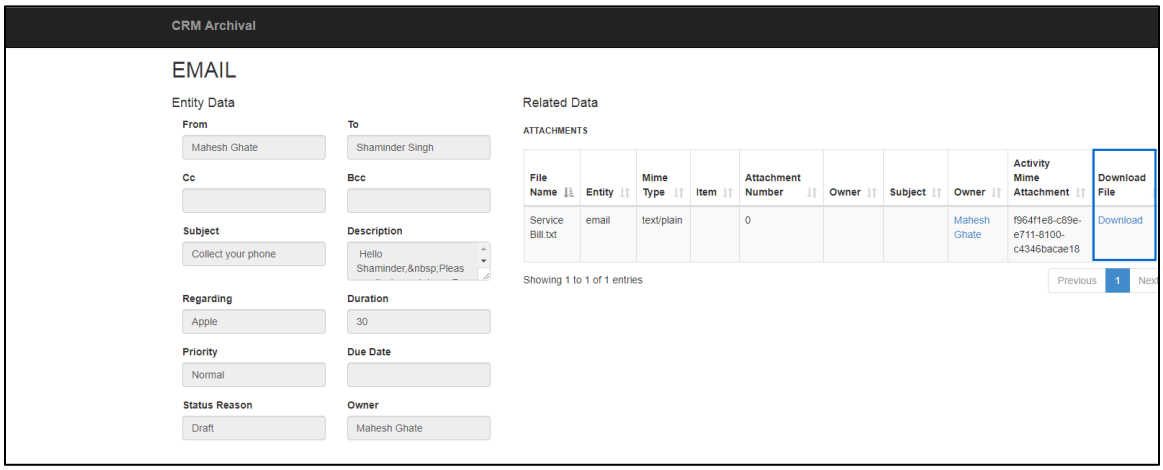
21. To view related records in detail, click on hyperlinked text to open related entity records.



22. In this example Email record details are displayed as in below screenshots along with it's attachment(s).

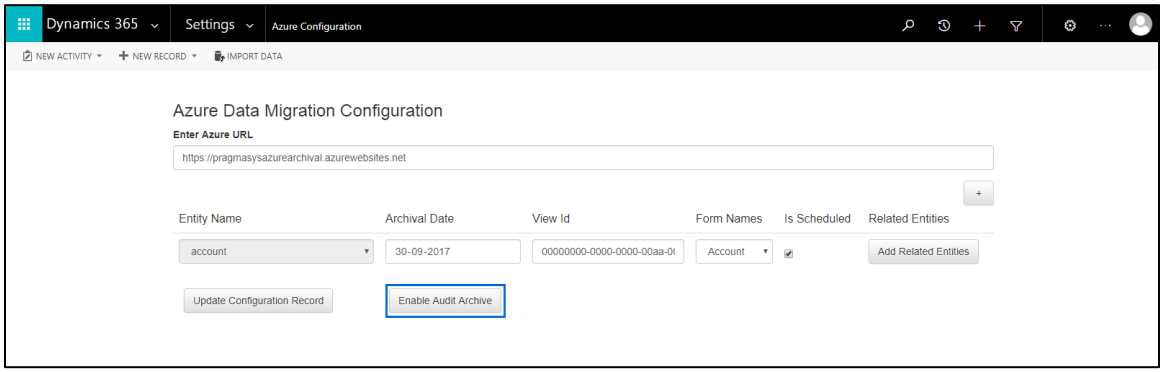


23. Click on attachment download link to download file attached to the email.

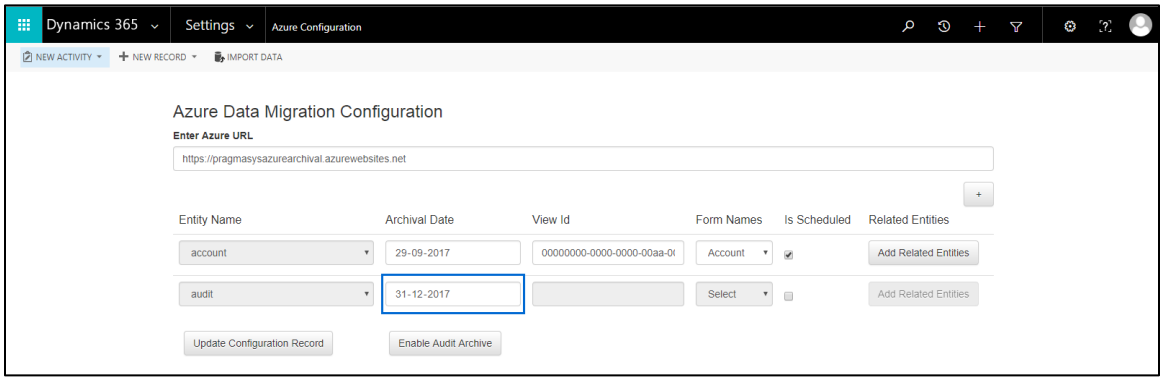


3. Dynamics 365 Audit data archival configuration steps

1. Click on **Enable Audit Archive** button to configure rule for audit archival.

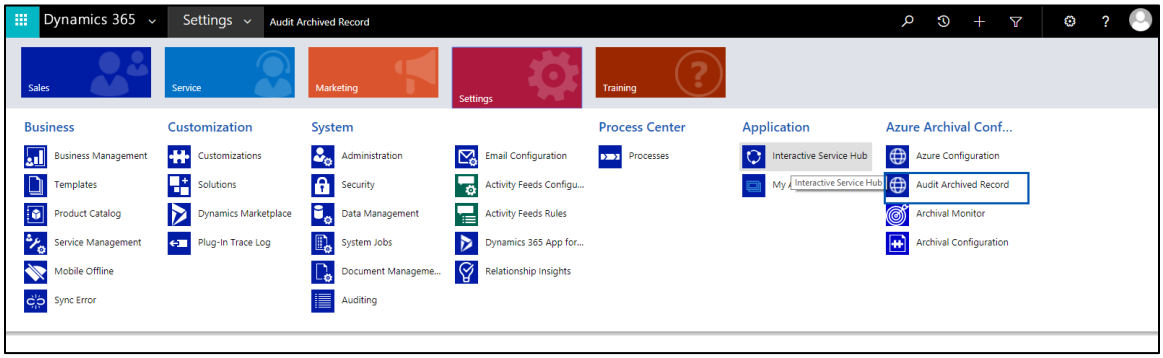


2. Select **Archival Date** and click on **Update Configuration Record**.

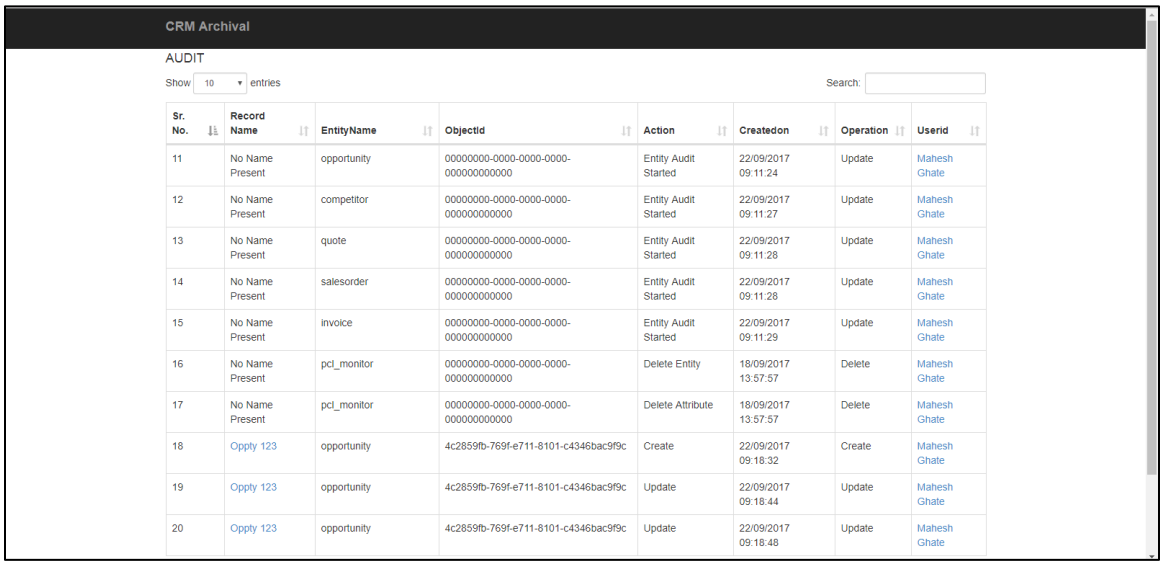


3. Except for current active partition, all pre-existing partitions before the date specified in **Archival Date** field will be archived to Azure.

4. To view archived audit data, go to **Settings >> Audit Archived Records**



5. This will open CRM Archival window where archived partition audit records are displayed in a simplistic user interface.



Sr. No.	Record Name	EntityName	ObjectId	Action	Createdon	Operation	Userid
11	No Name Present	opportunity	00000000-0000-0000-0000-000000000000	Entity Audit Started	22/09/2017 09:11:24	Update	Mahesh Ghate
12	No Name Present	competitor	00000000-0000-0000-0000-000000000000	Entity Audit Started	22/09/2017 09:11:27	Update	Mahesh Ghate
13	No Name Present	quote	00000000-0000-0000-0000-000000000000	Entity Audit Started	22/09/2017 09:11:28	Update	Mahesh Ghate
14	No Name Present	salesorder	00000000-0000-0000-0000-000000000000	Entity Audit Started	22/09/2017 09:11:28	Update	Mahesh Ghate
15	No Name Present	invoice	00000000-0000-0000-0000-000000000000	Entity Audit Started	22/09/2017 09:11:29	Update	Mahesh Ghate
16	No Name Present	pcl_monitor	00000000-0000-0000-0000-000000000000	Delete Entity	18/09/2017 13:57:57	Delete	Mahesh Ghate
17	No Name Present	pcl_monitor	00000000-0000-0000-0000-000000000000	Delete Attribute	18/09/2017 13:57:57	Delete	Mahesh Ghate
18	Oppty 123	opportunity	4c2859fb-769f-e711-8101-c4346bac9f9c	Create	22/09/2017 09:18:32	Create	Mahesh Ghate
19	Oppty 123	opportunity	4c2859fb-769f-e711-8101-c4346bac9f9c	Update	22/09/2017 09:18:44	Update	Mahesh Ghate
20	Oppty 123	opportunity	4c2859fb-769f-e711-8101-c4346bac9f9c	Update	22/09/2017 09:18:48	Update	Mahesh Ghate