

Process Data Packages: EDGE for Operations

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This document contains guidelines and highlights for consuming the Process Data Package for EDGE for Operations Solution.

When you consume the data package in this Process Data Package, we recommend that you also open a Dynamics 365 for Operations client to the same environment in which you are consuming the data package. In **Data management** you will then be able to monitor the execution status of these data packages. In the main **Data management** workspace you will see Data Packages when they have been deployed and the running status.

Overall guidelines for applying these data packages:

1. All these data packages should apply without errors and without manual intervention, with one exception (see **#Error! Reference source not found.**) to a Dynamics 365 for Operations instance with an initially empty database.
2. Data packages have a numbering convention and should be applied in increasing alphanumeric order unless there is an explicit dependency on a numerically later Data Package, see below for these. For instance, data package 01.1.000 should be applied first, followed by 01.1.001 and then 01.1.002. The first number in the data package name designates the module, the setup (1) or master data (4), and the third is a sequence number within that group.
3. Data packages are, for the most part, implicitly dependent on earlier data packages in the module/type/sequence number order so you should endeavor to only run one data package at a time. You can consume data packages rapidly from LCS and Dynamics 365 for Operations batch processing may then attempt to run those concurrently which could result in some errors (in that case, you can use **Data management > [Job] > Execution details, View staging data, and Copy data to target** for the data records that have errors to apply the failed records).
4. There are a few data packages with explicit dependencies—applying these only after the package they depend on. The current LCS release does not enforce this dependency rule—we have listed these below under “Explicitly Dependent Data Packages” and these are also identified in the Process Data Package.
5. You should first apply data packages to the ‘DAT’ company until the ‘USMF’ company becomes available (after applying “01.1.006 SYS - Legal entities”) which you should use for the remainder of the data packages.
6. Some data packages will take longer to apply than others. We have listed those with noticeably longer times on average – more than 2 minutes – in the section “Expected Run Time”
7. If you need to change number sequences, review both data packages. The first contains all number sequences with some where the Manual property has been set to “Yes” though they should be “No”. The latter contains the number sequences where Manual property is changed to “No”. The Data Packages are “01.1.010 SYS - Number sequences” and “99.1.001 SYS - Number sequences reset”.

8. If you need to make changes to Vendors or Customers, review both Data Packages. The first Data Package for each is run earlier in the sequence and provides most fields, you will need to add new records to these Data Packages. If you need to also supply the additional data fields, then you will need to put these same records in the later Data Package. For Vendors the Data Packages are: “10.1.004 AP - Vendors - USMF” and “99.4.001 AP - Vendors - USMF”; for Customers the Data Packages are: “11.1.003 AR - Customers” and “99.4.002 AR - Customers - USMF”.
9. **Important.** This Process Data Package does not contain item costing prices since a standard Data Entity did not exist that was able to import these and we chose not to write a custom one at this time. For these items, to create inventory and do some processing, you may need to calculate the item cost and activate that cost.

Explicitly Dependent Data Packages

There are five Data Packages in this Process Data Package that have explicit dependencies in addition to the implicit dependency of the number order, these are:

Data Package	Depends On
15.1.001 COS - Costing Setup - USMF	19.4.001 INV - Charge Groups - USMF
19.4.104 INV - EDGE Test associations	24.4.006 PIM - Released Products
20.4.001 MP - Item Coverage - USMF	24.4.006 PIM - Released Products
23.1.007 PRO - Vendor Setup - USMF	24.4.006 PIM - Released Products
23.1.010 PRO - Price Tol Setup - USMF	24.4.006 PIM - Released Products

Under “Data Package Order”, where all Data Packages are listed in order, these Data Packages are shown in **bold** type.

Expected Run Time

All data packages in this Process Data Package should each take 2 minutes or less to apply, including up to 60 seconds of Batch job service polling time (the Dynamics 365 for Operations 7 batch job service wakes up once every 60 seconds to check for new jobs to run) with the exception of the following data packages. The ‘Expected run time’ column shows ‘Medium’ for data packages that take 2-6 minutes, ‘Long’ data packages can be expected to take 6-15 minutes and ‘Very long’ data packages can be expected to take 15-60 minutes. The given expected run times assume you have deployed Dynamics 365 for Operations 7 to at least a recommended Azure machine specification of D13 or better.

Data Package	Expected run time
01.1.000 SYS - Initialize entities	Medium
01.1.003 SYS - Address Basic setup for Legal Entities	Medium
01.1.005 SYS - Address setup	Very long
01.1.010 SYS - Number sequences	Medium
01.1.011 SYS - Organizational Calendar - USMF	Long
02.1.002 GAB - Post address setup	Long
02.1.003 WF - Workflow - SHARED	Medium
03.1.001 GL - Chart of Accounts - Shared	Medium
05.1.001 HR - Foundation Setup - USMF	Medium

05.1.015 HR - Employee related associations - USMF	Medium
19.1.002B INV - Warehouse Setup - USMF	Medium
24.4.002 PIM - Products	Very long
24.4.004 PIM - Product Variants - Shared	Long
25.1.001 PRC - Production Calendars - USMF	Very long

Data Package Order

There are still some ordering issues with the LCS Consume Process Data Package form. The correct order to apply the Data Packages is as follows; the Data Packages that are not in numeric sequence are in bold:

Data Package	Note
01.1.000 SYS - Initialize entities	
01.1.001 SYS - Currencies	
01.1.002 SYS - System Parameters	
01.1.003 SYS - Address Basic setup for Legal Entities	
01.1.004 SYS - Address Pre-req for Legal Entities	
01.1.005 SYS - Address setup	
01.1.006 SYS - Legal entities	After this, apply to company "USMF"
01.1.007 SYS - Operating units	
01.1.008 SYS - Organization hierarchies	
01.1.009 SYS - Units	
01.1.010 SYS - Number sequences	
01.1.011 SYS - Organizational Calendar - USMF	
01.1.012 SYS - Users Roles and Groups - SHARED	
01.1.013 SYS - Document types - USMF	
01.1.100 EDGE Electronic Signature Setup	
02.1.001 GAB - Teams	
02.1.002 GAB - Post address setup	
02.1.002B GAB - Post address for Legal Entities	
02.1.003 WF - Workflow - SHARED	
03.1.001 GL - Chart of Accounts - Shared	
03.1.002 GL - Account Structures - Shared	
03.1.003 GL - Fiscal Calendar - Shared	
03.1.004 GL - Ledger Setup - USMF	
03.1.005 GL - Ledger Journals - USMF	
03.1.006 GL - Allocations - USMF	
03.1.007 BANK - Bank Setup - USMF	
03.1.008 BANK - Bank Accounts - USMF	
05.1.001 HR - Foundation Setup - USMF	
05.1.002 HR - Competencies - USMF	
05.1.003 HR - Jobs - USMF	
05.1.004 HR - Pay - USMF	

Data Package	Note
05.1.005 HR - Employees - USMF	
05.1.006 HR - Contractors - USMF	
05.1.007 HR - Positions - USMF	
05.1.008 HR - Worker details - USMF	
05.1.009 HR - Compensation - USMF	
05.1.010 HR - Absence - USMF	
05.1.011 HR - Benefits - USMF	
05.1.012 HR - Performance - USMF	
05.1.013 HR - Courses - USMF	
05.1.014 HR - Recruitment - USMF	
05.1.015 HR - Employee related associations - USMF	
05.1.016 HR - Human resources parameters - USMF	
05.1.017 HR - Shared human resources parameters - USMF	
05.1.100 Update Admin User	
07.1.100 EDGE - CAPA Processes	If you attempt to update an existing CAPA process template, some records may fail due to update not allowed for last edit date, you may ignore these errors.
07.4.100 CAPA Process template approval	
10.1.001 AP - AP and AR Shared Setup - USMF	
10.1.002 AP - Vendor Payment Setup - USMF	
10.1.003 AP - Vendor Attributes - USMF	
10.1.004 AP - Vendors - USMF	Before running: In Dynamics 365 for Operations open "1099 fields" (Accounts payable > Periodic tasks > Tax 1099)
10.1.005 AP - AP Parameters - USMF	
10.1.006 TAX - Sales Tax Setup - USMF	
10.1.007 TAX - Sales Tax CodeGroups - USMF	
10.1.008 TAX - Sales Tax Parameters - USMF	
11.1.001 AR - Customer payment setup - USMF	
11.1.002 AR - Customer attributes	
11.1.003 AR - Customers	
11.1.004 AR - Accounts Receivable Parameters - USMF	
19.1.001 INV - Site Setup - USMF	
19.1.002A INV - Warehouse location profiles - USMF	
19.1.002B INV - Warehouse Setup - USMF	
19.1.003 INV - Group Setup	
19.1.004 INV - Journal Setup - USMF	
19.1.005 INV - Packing Setup - USMF	
19.1.006 INV - Posting Definitions - USMF	

Data Package	Note
19.1.007 INV - Price Discount Setup - USMF	
19.1.007B INV-EDGE Flexible sampling setup	
19.1.007C INV-EDGE Calibration setup	
19.1.008 INV - Inventory Parameters	
19.1.100 INV - EDGE Test instrument setup	
19.4.001 INV - Charge Groups - USMF	
19.4.100 INV - EDGE Flexible sampling prep	
19.4.101 INV - EDGE Test instruments	
19.4.102 INV - EDGE Flexible sampling plans	
19.4.103 INV - EDGE Test group COA requirements	
15.1.001 COS - Costing Setup - USMF	Depends on: 19.4.001 INV Charge Groups - USMF
20.1.001 MP - Item Coverage Groups - USMF	
20.4.002 MP - Plan Groups - USMF	
23.1.001 PRO - Summary Parameters - USMF	
23.1.002 PRO - Purchase Order Setup - USMF	
23.1.003 PRO - Distribution Setup - USMF	
23.1.004 PRO - Form Setup - USMF	
23.1.005 PRO - Prices Discounts Setup - USMF	
23.1.006 PRO - External Item Setup - USMF	
23.1.008 PRO - Supp Item Setup - USMF	
23.1.011 PRO - Discount Groups Setup - USMF	
23.1.012 PRO - Policies Setup - USMF	
23.1.013 PRO - Purchase Agreement Classification - USMF	
23.4.001 PRO - Charges Setup - USMF	
23.4.002 PRO - Purchase Agreements - USMF	
23.4.003 PRO - Purchase Agreement Lines - USMF	
24.1.001 PIM - Dimension Groups - Shared	
24.1.002 PIM - Product Variant Groups -Shared	
24.1.003 PIM - Size Assignments - Shared	
24.1.004 PIM - Color Assignments - Shared	
24.1.005 PIM - Style Assignments - Shared	
24.1.006 PIM - Category Setup - Shared	
24.1.007 PIM - Attribute Types - Shared	
24.1.008 PIM - Product Attributes - Shared	
24.1.009 PIM - Warehouse product setup	
24.1.100 PIM-EDGE Approved item groups	
24.4.001 PIM - Attributes	
24.4.002 PIM - Products	
24.4.003 PIM - Conversions	
24.4.004 PIM - Product Variants - Shared	

Data Package	Note
24.4.006 PIM - Released Products	
24.4.007 PIM - Released Product Variants - USMF	
24.4.008 PIM - Category Attributes - USMF	
24.4.009 PIM - Attribute Values - USMF	
24.4.010 PIM - Item batch attributes	
24.4.011 PIM - Default order settings	
24.9.001 PIM-EDGE Approved customer list	
19.4.104 INV - EDGE Test associations	Depends on: 24.4.006 PIM - Released Products
20.4.001 MP - Item Coverage - USMF	Depends on: 24.4.006 PIM - Released Products
23.1.007 PRO - Vendor Setup - USMF	Depends on: 24.4.006 PIM - Released Products
23.1.010 PRO - Price Tol Setup - USMF	Depends on: 24.4.006 PIM - Released Products
25.1.001 PRC - Production Calendars - USMF	
25.1.002 PRC - Production Journals and Burden Cost	
25.1.003 PRC - Production groups	
25.1.004 PRC - Bulk item Setup	
25.1.005 PRC - BOM Journal Names	
25.1.006 PRC - Route Setup	
25.1.010 PRC - Production Parameters	
25.4.001 PRC - Production order sequencing	
25.4.002 PRC - Operation resources	
25.4.003 PRC - Bills of material	
25.4.004 PRC - Formulas	
25.4.005 PRC - Routes	
28.1.001 SLM - Activities - USMF	
28.1.002 SLM - Campaigns - USMF	
28.1.003 SLM - Contacts - USMF	
28.1.004 SLM - Leads - USMF	
28.1.005 SLM - Mailings - USMF	
28.1.006 SLM - Opportunities - USMF	
28.1.007 SLM - Prospects - USMF	
28.1.008 SLM - Quotations - USMF	
28.1.009 SLM - Telemarketing - USMF	
28.1.010 SLM - Responsibility - USMF	
28.1.011 SLM - Commissions Setup - USMF	
28.1.012 SLM - Summary Parameters - USMF	
28.1.013 SLM - Sales Order Setup - USMF	
28.1.014 SLM - Distribution Setup - USMF	

Data Package	Note
28.1.015 SLM - Form Setup - USMF	
28.1.016 SLM - Prices Discounts Setup - USMF	
28.1.017 SLM - External Item Setup - USMF	
28.1.018 SLM - Customer Setup - USMF	
28.1.019 SLM - Supp Item Setup - USMF	
28.1.020 SLM - Returns Setup - USMF	
28.1.021 SLM - Discount Groups Setup - USMF	
28.1.022 SLM - Policies Setup - USMF	
28.1.023 SLM - SLM Parameters - USMF	
28.1.024 SLM - Sales Agreement Classification - USMF	
28.4.001 SLM - Leads main - USMF	
28.4.002 SLM - Contacts main - USMF	
28.4.003 SLM - Prospects main - USMF	
28.4.004 SLM - Business classification of parties - USMF	
28.4.005 SLM - Prospect statistics default values - USMF	
28.4.006 SLM - Charges Setup - USMF	
99.1.001 SYS - Number sequences reset	
99.1.002 EDGE Activation	
99.4.001 AP - Vendors - USMF	
99.4.002 AR - Customers - USMF	