

Factsheet

Create, enrich, manage, and distribute trustworthy data for enhanced data governance in Dynamics 365



Data Governance Solution

Microsoft Dynamics 365 for Finance and Supply Chain Management

Data Governance Solution for Dynamics 365 Finance & Supply Chain Management

Introduction



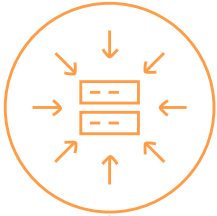
STAEDEAN Data Governance Solution is an end-to-end data management, data quality, data migration, and data governance software designed to help you control your master data and define data ownership, in line with your company's data governance program. Built within Dynamics 365 F&SCM, this no-code solution helps you migrate, integrate, create, update, validate, de-duplicate, distribute, clean, prepare, and extract data in D365, without any need for development.

How can our embedded **Data Governance Solution** help your business?

Our solution can help you:

- ✔ Achieve a single source of truth through centralized or decentralized master data ownership
- ✔ Easily distribute master data among D365 F&SCM companies and across external systems from within D365 F&SCM
- ✔ Ensure uniform, manageable, accurate, consistent, and accountable data in D365 F&SCM
- ✔ Easily create and update master data using flexible data entry forms in D365 F&SCM
- ✔ Simplify data preparation and extraction and empower key business users to drive analytics
- ✔ Achieve seamless, low-risk data migration from any legacy system into D365 F&SCM
- ✔ Simplify the configuration, management, and monitoring of unlimited integrations between D365 F&SCM and other business systems
- ✔ Easily add a layer of content-based and record-based table and field security to master data records in D365 F&SCM

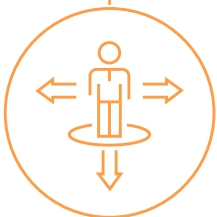
Benefits you gain from our Data Governance Solution



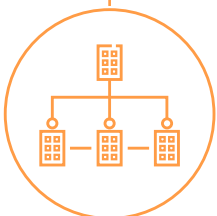
Centralize data management to a single master copy for data stewards to manage and oversee. Consequently, business users get consistently high-quality data



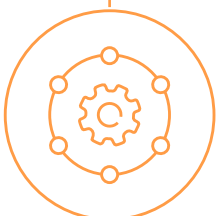
Eliminate duplicate data by automating the data quality process. Automation saves costs and enables standardization across multiple sources to create one source of the truth



Ensure smooth processing of data entry by guiding users with only the fields they are responsible for and have a data steward or data owner approve the whole record before releasing it



Manage the master data; centrally (when there is one owner of the master data) and de-centrally (when different legal entities or companies own the data)



Improve operational productivity by eliminating poor data quality across departments, companies, and application landscapes



Enable non-technical data owners and data stewards to manage master data flows, set up validation rules, and collaborate with the IT team effectively



Enable control of master data and ensure data integrity with a formalized approach to making changes to master data



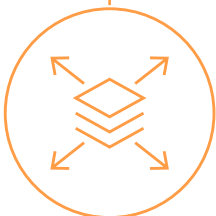
Synchronize the central master data with different systems, companies, and applications securely



Gain insights into the status of master data creation and enable field-based security to prevent local companies from changing the master data records locally

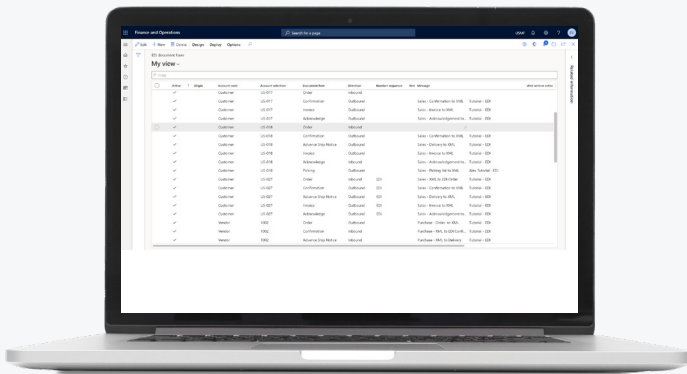


Execute data quality rules during data migrations or do an assessment post migration to validate data



Ensure data segregation during an integration and import data into multiple companies simultaneously using a mapping specific to each company

Key Features – Master Data Management

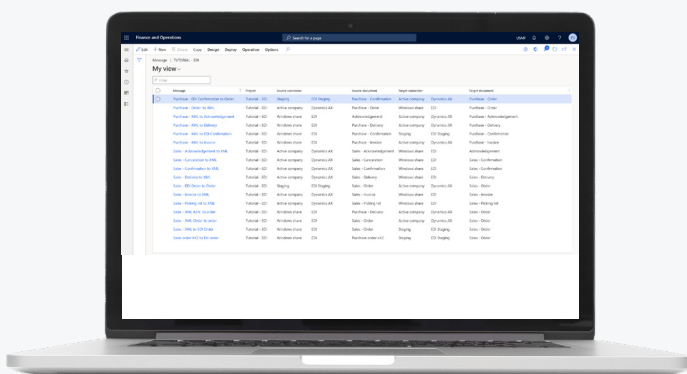
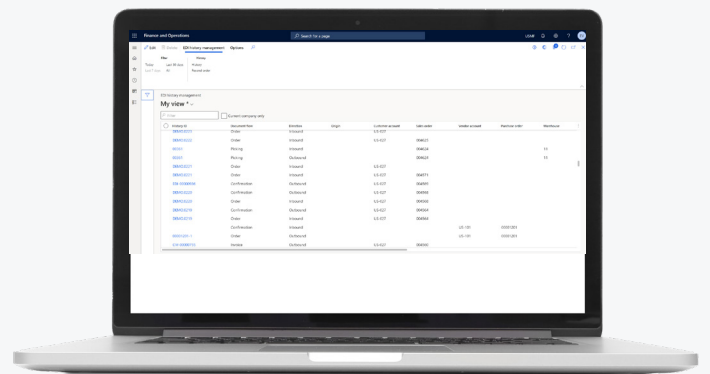


Empower data stewards

By making data owners and data stewards responsible for the management and proficiency of the data stored, our Data Governance Solution ensures control, quality, and approval of master data updates and changes. Data stewards can ensure that data access is only given on a role-based or need-based case and that users cannot make modifications without approval.

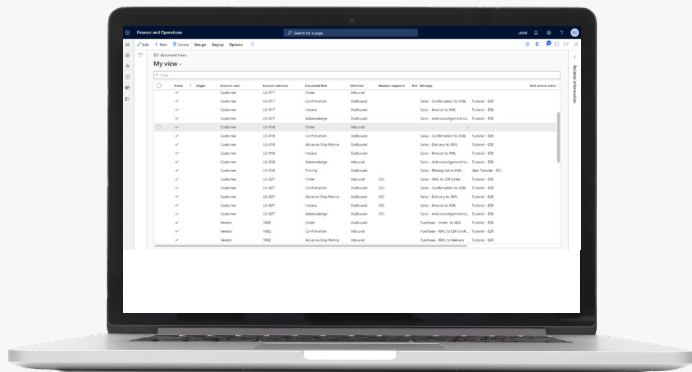
Enhanced change request management

Ensure master data change requests pass through appropriate approvals before being implemented. Manage changes in data structures, value lists, the inclusion of new data sources, changes in new regulations, etc. All these organizational means are comprised in the design for data governance, including the organization model and assigned responsibilities.



Dynamic field security

A feature that allows you to control which fields are allowed to be changed depending on the user, a lifecycle stage, or other conditions of the record. You can also control the fields available in local companies. As this feature is built as a framework, it can be used for field-based security on other entities as well.

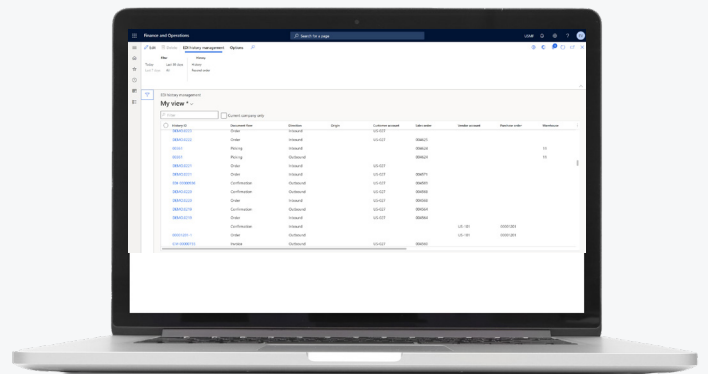


Flexible data mapping

The recording option enables you to easily pick the fields that need to be used to get specific access levels. You can highlight secured fields and select the individual fields in any form. Effortlessly apply the required field access to one or more roles with a single action.

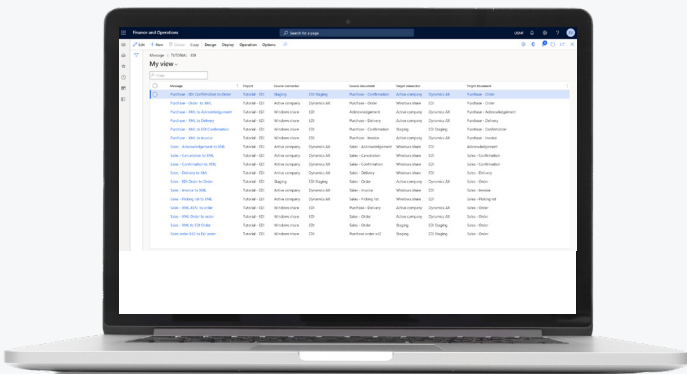
Dynamic staging tables

The optional use of dynamic staging tables provides an additional mechanism to validate data and automate the release processes. When a staging area is used, the data stewards can validate the inbound master data and receive it from a central inbox.

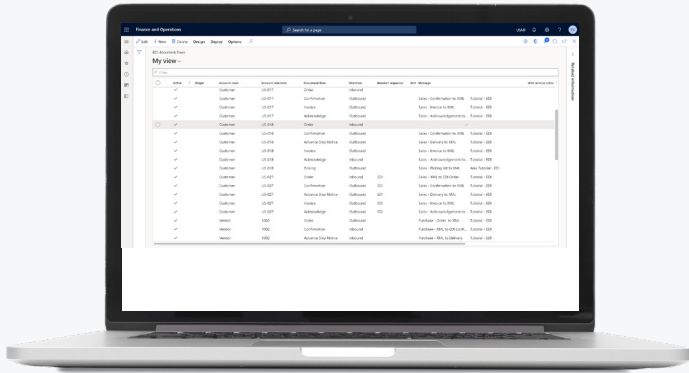


Multiple MDM entities

Determine and model the master data you would like to share like items, products, customers, vendors, employees, projects, and more. You can also set up groups on different parameters.



Key Features - Data Quality Management

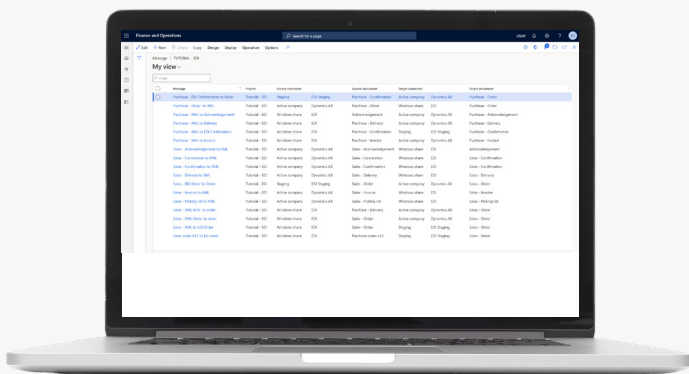
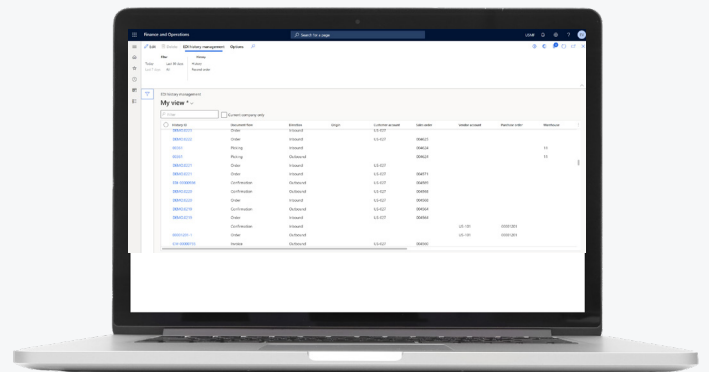


Data quality policies

Set up additional validation or enrichment rules at the field or record level to ensure employees enter the correct values. These rules can be set conditionally for legal entities or based on the value/content in fields or tables.

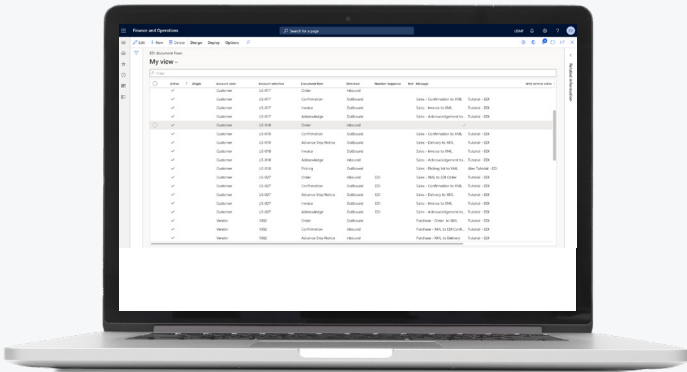
Data patterns & web services

Set up your data patterns in the data validation rules to enforce the correct formatting of the data entered. Create integrations with own or third-party web services to check for valid data or data enrichment from a trusted source.



Data cleansing and enrichment

You can set up data actions which allows you to auto complete fields with certain values. They can be set up as conditional, so the values can be different according to your business requirements.

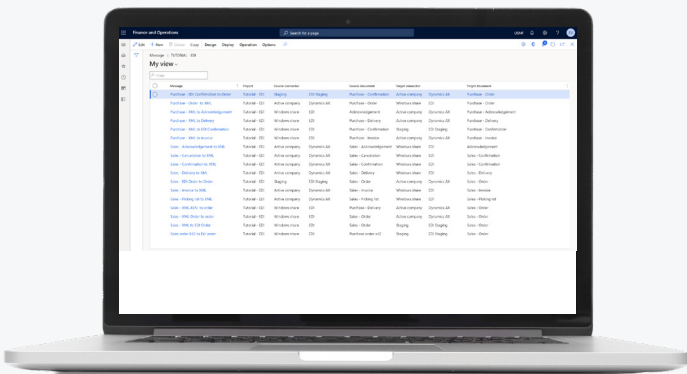
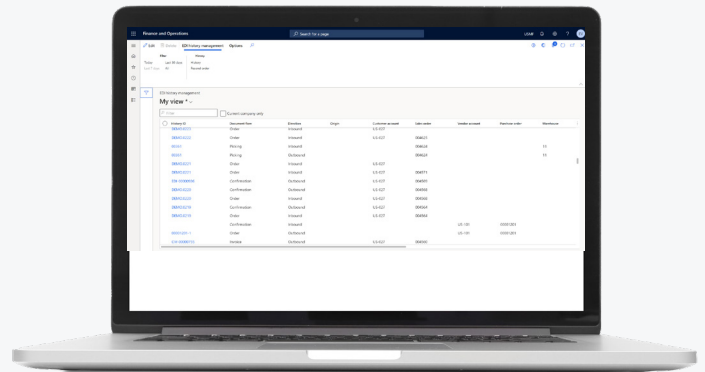


Data validation

On field- or record-level, you can set up additional validation rules which will ensure the correct values are entered by the employees. These rules can be set conditional per legal entity, user, or data contents in other fields or tables.

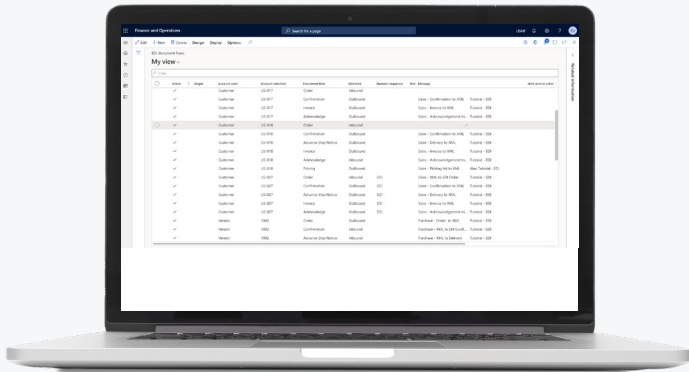
Duplicate check

Set up comparison rules on data content to prevent duplicate records from being entered in the application.



Periodic governance checks

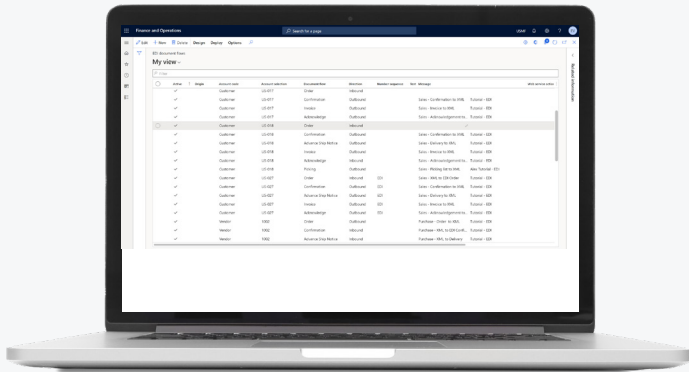
Set up periodic quality assessments to see if there are records in the application which do not meet the validation rules. This can be used to comply with new or changed setup or when the cleansing and validation rules are not directly enforced during data entry.



User interaction

Monitor data entry by users according to data quality policies. In case of an error, users get a clear message and can focus on correcting the error.

Key Features - Data Entry Workflow

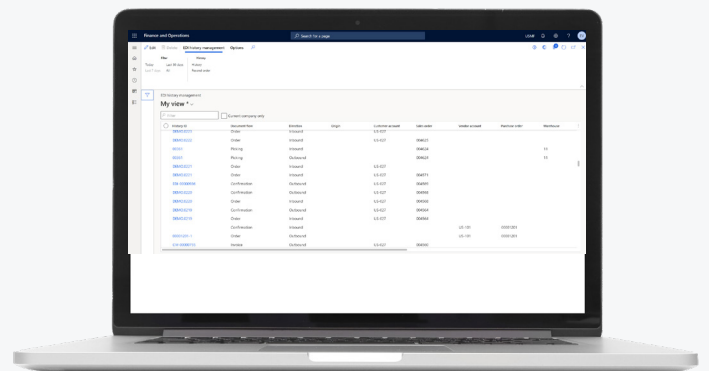


Modern form-recording tool

Enable non-technical users to easily create data entry workflow templates by selecting fields from the standard application forms, without any need for in-depth technical knowledge.

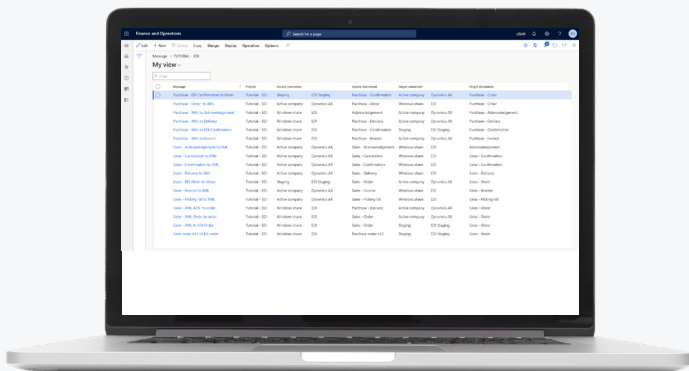
Data entry experience

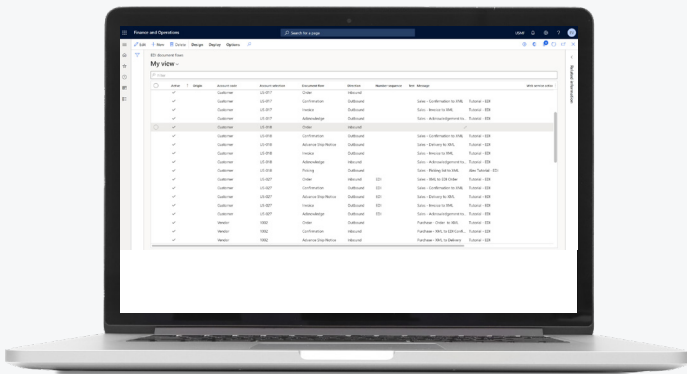
The business user will have an easy-to-understand, compact data entry form instead of standard master data forms which could be overwhelming to end users. They receive notifications on assigned tasks and will have the option to complete a step at once or to complete it in multiple iterations.



Data entry workflow template designer

With the help of the designer, you can define various steps with the required fields, set up user assignments, set time limits, and manage the approval process. With the dynamic integration setup on standard master data forms, you can also determine which templates can be started from existing forms in the application.



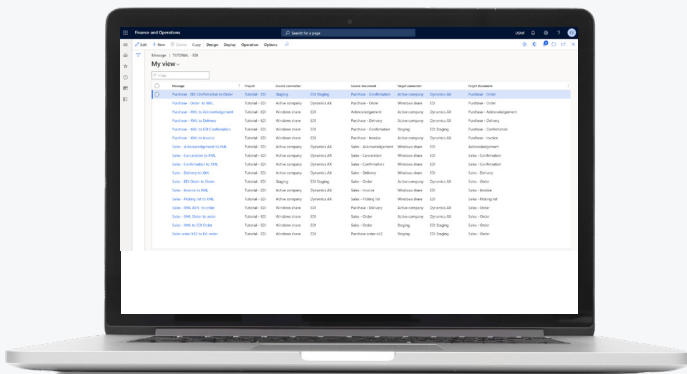
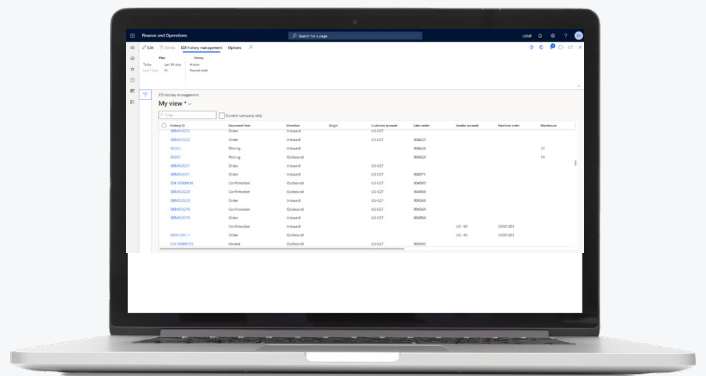


Approval steps

An approver will be able to validate the most important fields, and where required, request for a change. Other possible actions are approval, rejection, or delegating to another user. Any data entry provided by users will be logged with a timestamp and template step details for audit purposes.

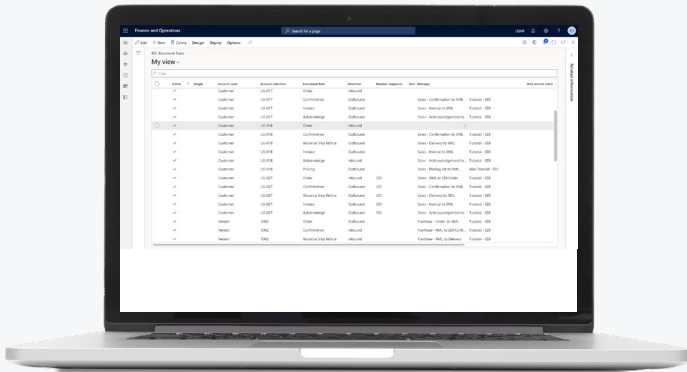
Step assignments

Set up assignments for users and legal entities on each workflow step. Before distributing data, the workflow will ensure that the steps are completed. When another legal entity receives a new master record, a data entry workflow instance can be started to complete data, specific to that company.



Step notifications

The standard alert functionality can be used to notify users of new step assignments and tasks that are due based on the time limits.

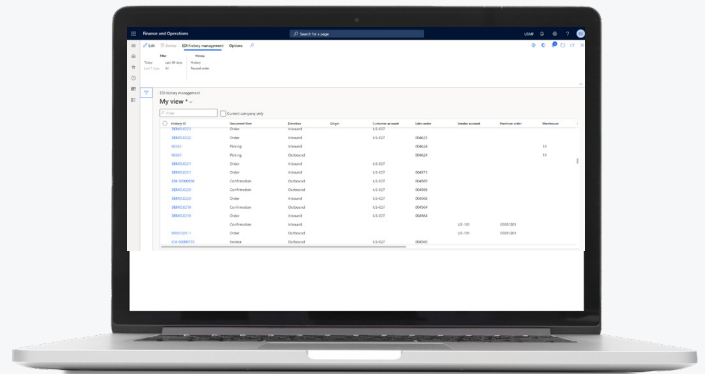


Copy data entry workflow templates

There might be a requirement to have multiple templates for the same entity with some slight changes. For that purpose, you can copy existing data entry workflow templates which offer easy and quick maintenance.

Version management

The workflow templates support version management, and intermediate changes can be restored with change sets. Templates and their versions can also be deployed to other environments with the help of export and import functionality as well as with the synchronization of change sets.



More features



Application integration

The solution's advanced mapping capabilities ensure configuration of integrations between D365 F&SCM and any business system. You also gain full support for third-party software, existing ISV solutions, and your customizations.

Integration Monitoring

Easily monitor, debug, and improve the overall performance of business-critical integrations and business processes with simplified integration monitoring. Gain real-time access to integration health, optimize slow-performing integrations, and trigger quicker error resolutions.

High speed data export

: Export large volumes of cross-company, cross-domain specific data at high speed from D365 F&SCM to a BYOD (Bring Your Own Database), from where it can be picked up by a data warehouse.

Multiple options for data import

Use tables, views, entities (including custom/ISV ones), or a combination in our document setup to support a complex data structure in a flexible and easy way, without the need for development. Using our solution, you can set a relation (join) between these which will be used during the import.

All-in-one data preparation

Easily collect, clean, transform, prepare, encrypt, classify, model, and extract data from within D365 F&SCM to realize faster speed to analytics.



staedean

Last mile solutions to peak your business performance

At STAEDEAN, we transform businesses worldwide with our purposeful, intelligent solutions embedded in the Microsoft ecosystem. Our deep domain expertise helps companies in the Equipment Rental, Life Sciences, and Manufacturing industries maximize their ERP potential. Additionally, our comprehensive Data Management solutions provide a solid foundation for organizations across various industries.

[Schedule a Demo](#)