

Factsheet

Simplify and speed up data migrations. Manage data quality during and after moving to Dynamics 365 F&SCM



Data Migration Solution

Microsoft Dynamics 365 for Finance and Supply Chain Management

Data Migration Solution for Dynamics 365 Finance and Supply Chain Management

Introduction



Our Data Migration Solution is an advanced data migration and data export solution that can handle complex scenarios and is embedded in Dynamics 365 F&SCM

How can our **Data Migration Solution** help your business?

- ✔ Enable data import from ANY legacy system (including Dynamics AX 4.0, 2009, and 2012) and/or Excel spreadsheets or flat files into D365 F&SCM
- ✔ Simplify the setup and testing of data migration projects from legacy ERPs to D365 F&SCM using low-code/no-code
- ✔ Improve data quality by automating de-duplication detection and preventing duplicates while you move data to D365 F&SCM
- ✔ Activate data quality rules that ensure accurate data is transferred between ERPs. Additionally, rules can also work for non-ERP data sources (ie. xls or flat files)
- ✔ Our solutions are built to execute the business logic on tables in D365 F&SCM upon data import
- ✔ Since our solutions are embedded in D365 F&SCM, implementation is faster
- ✔ Functionality to migrate a high volume of data out of Microsoft Dynamics 365 ERP to your BYOD (Bring Your Own Database)
- ✔ An advanced platform for migrating data including customized data entities, or data from other solutions using data transformations

Benefits you can gain from our Data Migration Solution prior to and during your move to Dynamics 365 ERP



Transfer a lot of data from files or databases quickly by using the split functionality, parallel processing, and multi-threading



Support for multi-company imports simultaneously with options to have company-specific data



While running imports if any of your records have errors, our solution will not stop the import but allow you to continue and display the record with errors that need to be fixed. Once the error is fixed, the solution will re-import the file



Our solution can help you migrate transactional data with financial dimensions which is not easy to do with the standard tools in D365 F&SCM

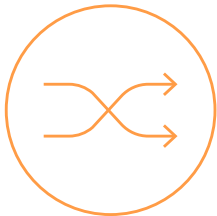


Set up data quality rules during migrations and check for data duplicates



Enable data migrations with various out-of-the-box connectors for data sources, predefined import configurations for standard D365 objects (eg. Customer, Product, etc.), and data movement methods that are updated regularly

Benefits you gain after you have successfully moved to Dynamics 365 F&SCM



Simplify cross-company, cross-domain specific high-volume data exports from Dynamics 365 to a data warehouse



Design workflow templates using a stepwise approach to ease data entry or data enrichment after import

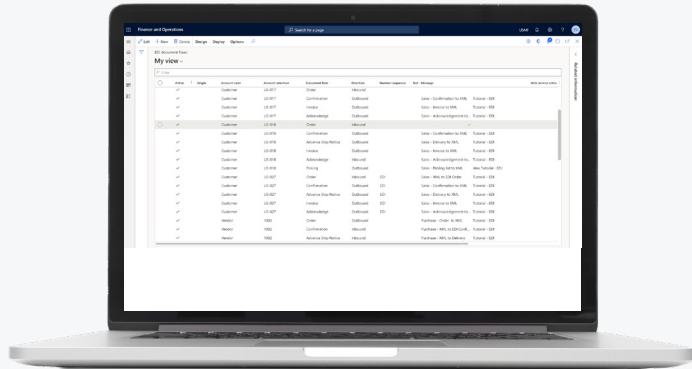


Ensure data quality post-migration with options to add action rules, validation rules, run periodic quality assessments, and more after you move your data to D365 F&SCM



Set up integrations from D365 F&SCM to your business systems and applications and monitor integration performance on the go

Key Features

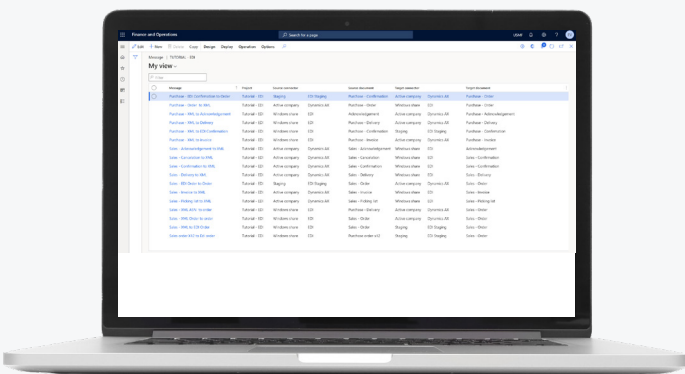
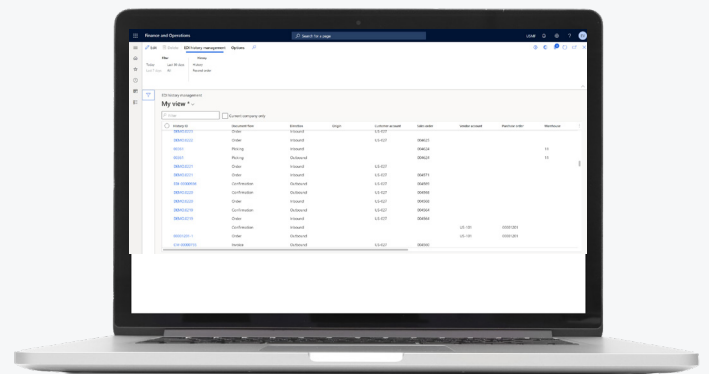


Multiple options for data import

Use tables, views, data entities including custom/ ISV ones, or a combination in our document setup to support a complex data structure flexibly and easily, without the need for development.

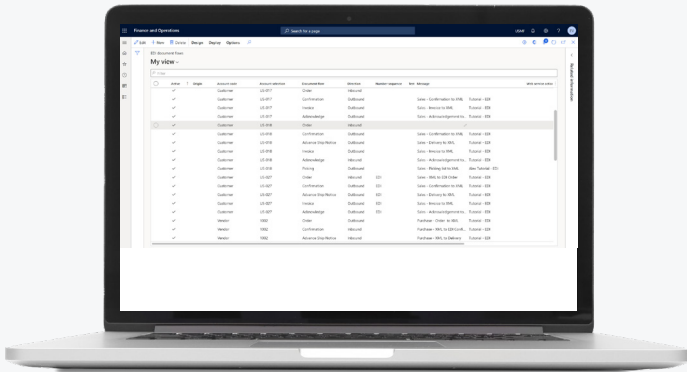
Data transformations

Our solution offers advanced mapping options like conversions, transformations, conditions, etc. to alter the incoming data so it will be correctly imported in D365.



Form mapping

The form mapping function helps you to find (record) the table and field by selecting fields on a form. This process makes it easier for functional users to create a mapping without detailed knowledge of the D365 database structure.

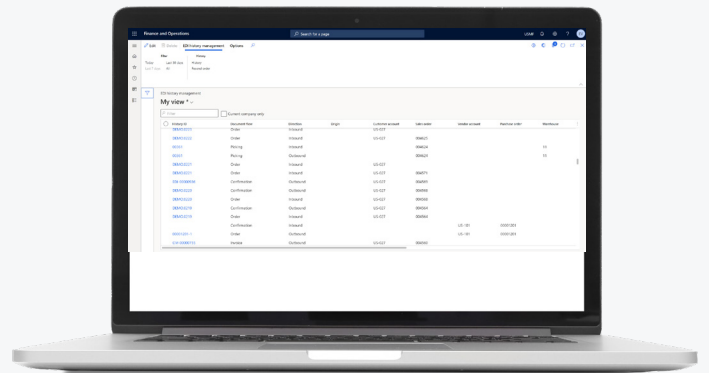


Work with various formats

Move data using different file formats including but not limited to - Microsoft Excel, XML, fixed text, CSV, etc.

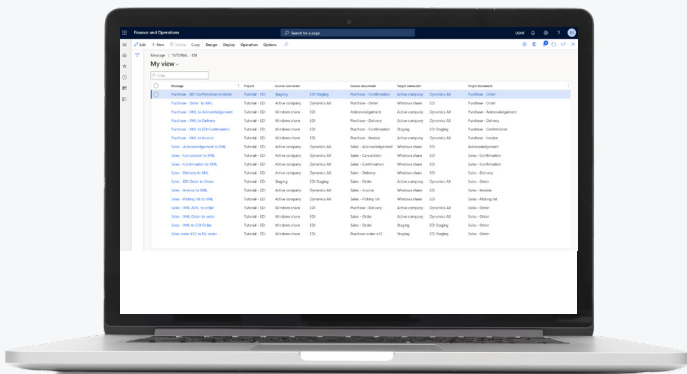
Manages new data entities

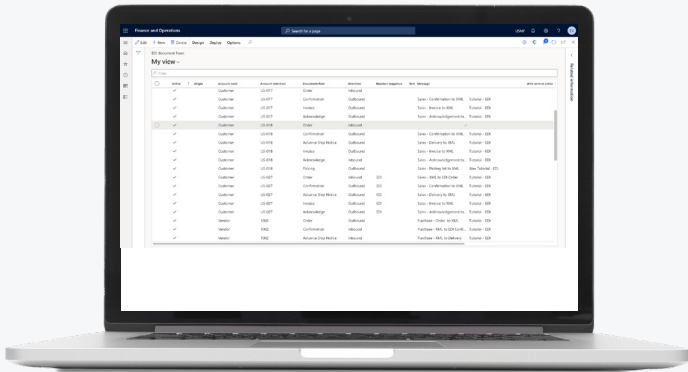
When Microsoft introduces new data entities, the raw schema doesn't need to be renewed, our solution takes care of that after the data set is updated.



Structure your imports

Structure your data imports and migrate dependent data first to ensure that required related information exists before records are created. This gives you the option to perform a complete data migration using a "one-click" start.



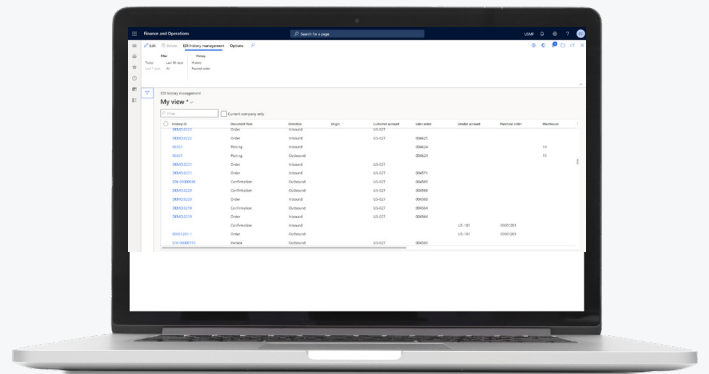


External RecID relations

Our solution offers functionality to set up cross-ref information, so the correct (recID) record relations are used for transactional data that needs to be migrated.

Uninterrupted data migrations

In case of errors, you can analyze and solve any data problems and only re-process those instead of processing the entire data set.



More features



Features that you can use prior to and during a data migration

Data validation	For any kind of changes or corrections to data, incoming data can be stored in a staging table before import. The data can be edited or validated in the staging area before processing.
Track migrations	The system logs all data exchanges in the message history for every data exchange to track your data migrations.
Duplicate check	Set up comparison rules on data content to prevent duplicate records from being migrated to D365 F&SCM using Data Quality Studio.
Connectors	Carry out technical imports by using the D365 F&SCM file system (folders) or data connection with ODBC.
Data quality policies	Configure rules at the field or record level to ensure accurate data is being migrated. You can set up these rules conditionally for specific legal entities or based on the value/content in fields or tables.
Data validation and enrichment	During data migrations, you might find fields with missing data. To ensure you have complete data in your system, you can set up rules that allow you to autocomplete fields with certain values.
Works with upgrades	In case Microsoft introduces new tables or features, it will not impact your data migrations and you can continue to use custom tables and existing functionality of our solutions. We work closely with Microsoft and test each functionality before each release.

More features



Features you can use post migrating your data to Microsoft Dynamics365

End-to-end data monitoring	Use our data monitoring tools to help you monitor your data integrations and we also offer functionality to monitor exports to your database.
Data security	Add a layer of security to your data exports to a warehouse by adding encryption or anonymization to sensitive data. Our solution also offers master data validations for data exports
Data integrations	Set up comparison rules on data content to prevent duplicate records from being migrated to D365 F&SCM using Data Quality Studio.
Data patterns	Carry out technical imports by using the D365 F&SCM file system (folders) or data connection with ODBC..
Web services	Configure rules at the field or record level to ensure accurate data is being migrated. You can set up these rules conditionally for specific legal entities or based on the value/content in fields or tables.
Data quality rules	During data migrations, you might find fields with missing data. To ensure you have complete data in your system, you can set up rules that allow you to autocomplete fields with certain values.
Configurable lookups	In case Microsoft introduces new tables or features, it will not impact your data migrations and you can continue to use custom tables and existing functionality of our solutions. We work closely with Microsoft and test each functionality before each release.
Streamline data entry and approval	Assign multiple users only for the fields they are responsible for in the workflow for data entry or data validation in parallel or subsequent steps.
Optimize processes	Enable alerts and notifications on new and due tasks and assign time limits for workflows.



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Last mile solutions to peak your business performance

At STAEDAN, 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.

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