

Data entity documentation initiative

Eric Pegors
FastTrack Solution Architect
epegors@microsoft.com



Agenda

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- Background
 - Data management
 - Data entities
 - Other improvements
 - Demo



Background

Background

Goal was to optimize
the Dynamics 365
implementation
experience

“Implementation
optimization” is used
to describe the overall
effort

Data migration was an
area we found where
better documentation
could help

Data management



Data management findings

Usability issues

- Locating errors when importing a lot of records
- Extra challenging when the errors are unique

Lacking basic information

- Can't get an entity's key fields without a development machine

Data management usability



Hard to find to the records that failed

- Can't filter the **Staging to target status** field

Have to view the error messages one at a time

- Message control is outside the grid

The example is 4000 records imported with 100 failed

- Each of the 100 errors is unique

Can't filter to the records that failed

Customer definitions : | Customer import 0623-2023-06-23T21:10:14-6AA00CBD7BD8441ABA

Standard view * ▾

Filter

Show duplicates

☐ No

Select	Staging to target status ▾	Customer account	ABC code	Address role	City	
	<div><div>↑ Sort first to last</div><div>↓ Sort last to first</div><div>Staging to target status</div><div>is not</div><div>Duplicate</div><div>Apply</div><div>Clear</div></div>		None	Business	Denver	
			None	Business	Denver	
		Completed	XC00010003	None	Business	Denver

Use the main filter

Documentation to be updated

Customer definitions : | Customer import 0623-2023-06-23T21:10:14-6AA00CBD7BD8441ABA

Standard view * ▾

🔍 Error

Select: "Error"

✓ Staging to target status: "Error"

Customer account: "Error"

ABC code: "Error"

Address role: "Error"

Show duplicates

☐ No

Customer account	ABC code	Address role
XC00010001	None	Business

Have to click on each row to see the error




Customer definitions : | Customer import 0623-2023-06-23T21:10:14-6AA00CBD7BD8441ABA

Standard view * 

 Error

Show duplicates

☐ No

Select	Staging to target status 	Customer account	ABC code	Address role
	Error	XC00012097	None	Business
	Error	XC00012098	None	Business

Message

Results. The value '1001' in field 'Customer group' is not found in the related table 'Customer groups'.
Results. validateField failed on field 'CustCustomerBaseEntity.CustomerGroupId'

Error Information field added to the grid (10.0.35)

Customers V3 : | Customers import 0407-2023-06-08T20:38:37-C5FDAA4E0CA0405AA

Standard view * ∨

Search Show duplicates ☒ No

Error Information	Select	Staging to target status ∨	Customer account	ABC code
Results. The value '1001' in field 'Customer group' is not found in the related table 'Customer groups'.		Error	XB00012097	None
Results. The value '1002' in field 'Customer group' is not found in the related table 'Customer groups'.		Error	XB00012098	None
Results. The value '1003' in field 'Customer group' is not found in the related table 'Customer groups'.		Error	XB00012099	None

Data entities



Data entity findings

Finding the correct entity can be difficult

Using an entity correctly can be challenging

Can't get information about an entity without a development machine

Problem: finding the correct entity



Entities with multiple alternatives are difficult to discover and understand

Related entities are also difficult to discover due to inconsistent naming and a lack of documentation

Problem: using an entity



What fields are required?

Which fields are foreign keys?

What is the correct value for this field?

Are there options to improve its performance?

Entity documentation: finding the correct entity

Start with an abstraction

- For example, customer or sales order

Context and problem for the entity

- Information on when to use each entity including pros/cons

Related entities

- Entities (related and alternatives)
- Next steps

Entity documentation: using an entity

Summary including the various names and related menu item

Explanation of the performance characteristics

List of fields that are required, foreign keys, and with special requirements

Issues and considerations

Call to action



What other data management improvements are needed?



What other entity information is needed?

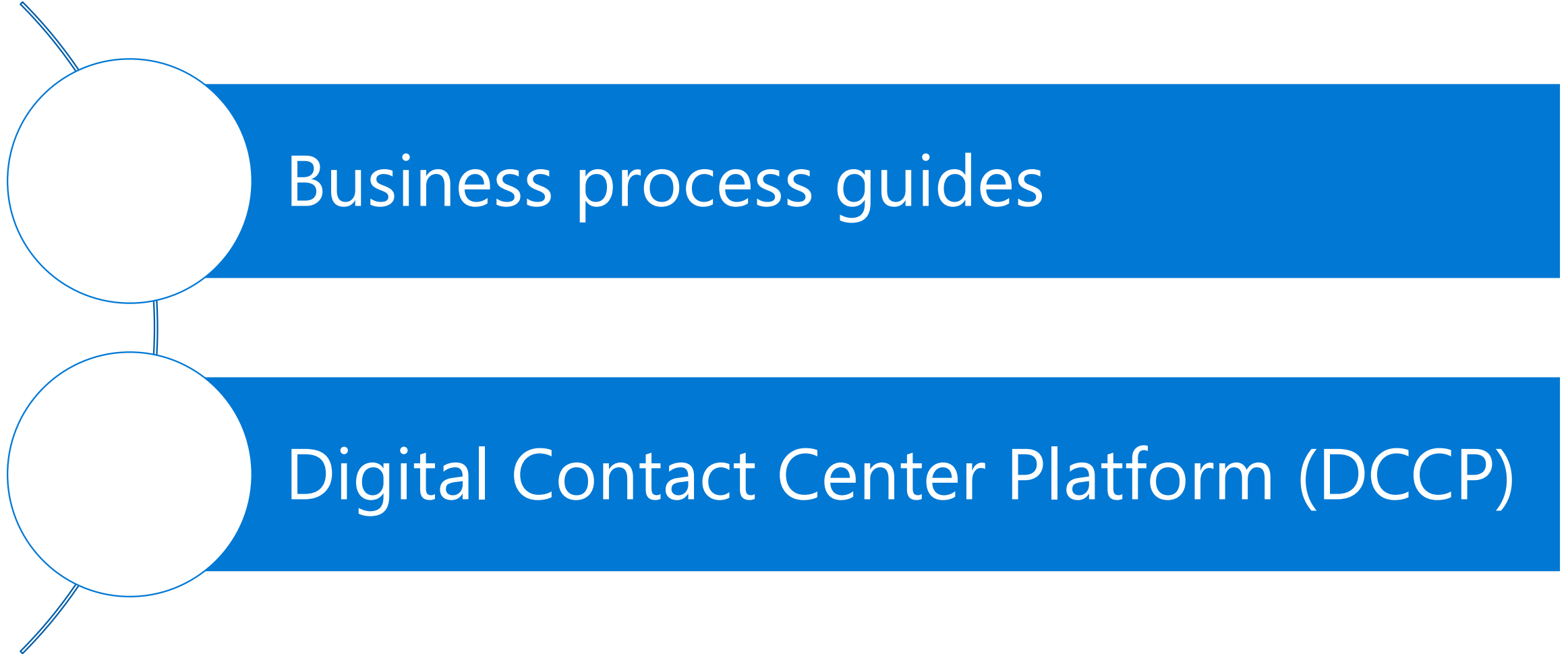


What other entities should be documented?



Other improvements

Other improvements



Digital Contact Center Platform

DCCP Testing Work Group

- Testing Strategy Template
- Automation Testing Tutorial (incl. automation samples)
- Load Test Tutorial (incl. load testing samples)

DCCP CIF v2 Work Group

- Click to Dial Control
- CIF v2 Simulator

DCCP Component Library Work Group

- Sample Multilingual PVA Bot
- DTMF Aggregation via Bot Framework
- Send Links to Secure Blob Stores for Speech Playback
- Summarization by Open AI of KB Article when Searched via PVA Bot
- AI Case Deflection
- Channel Based Presence
- How customize Record Identification

Business Process Guides Work Group

- 13 E2E Business Processes
- 39 E2E Articles
- 5 Process Areas
- 1800 Processes
- 1400 Patterns

DCCP ALM Work Group

- Solution Component Validator Tool
- ALM Step by Step Guide
- Backup and Restore Guide
- Configuration Migration Guide

DCCP Analytics Work Group

- DCCP Analytics Playbook

FINANCE/SCM/DIXF Work Group

- Documentation on 12 Data Entities
- DMF Updates for Error Handling
- DMF Updates for Key Fields

Demo

References

- [Migrate data | Microsoft Learn](#)
- [Implementation tools and samples | Microsoft Learn](#)

Thank you

