Microsoft Dynamics 365

Storage optimization for Finance and Operations

Dynamics 365 FastTrack
Architecture Insights Series

Edgars Nuksa, Senior Specialist GBB

Agenda

- Why is storage management important?
- How can I check my consumption?
- How can I reduce storage consumption?
- How can Microsoft help?

Why?

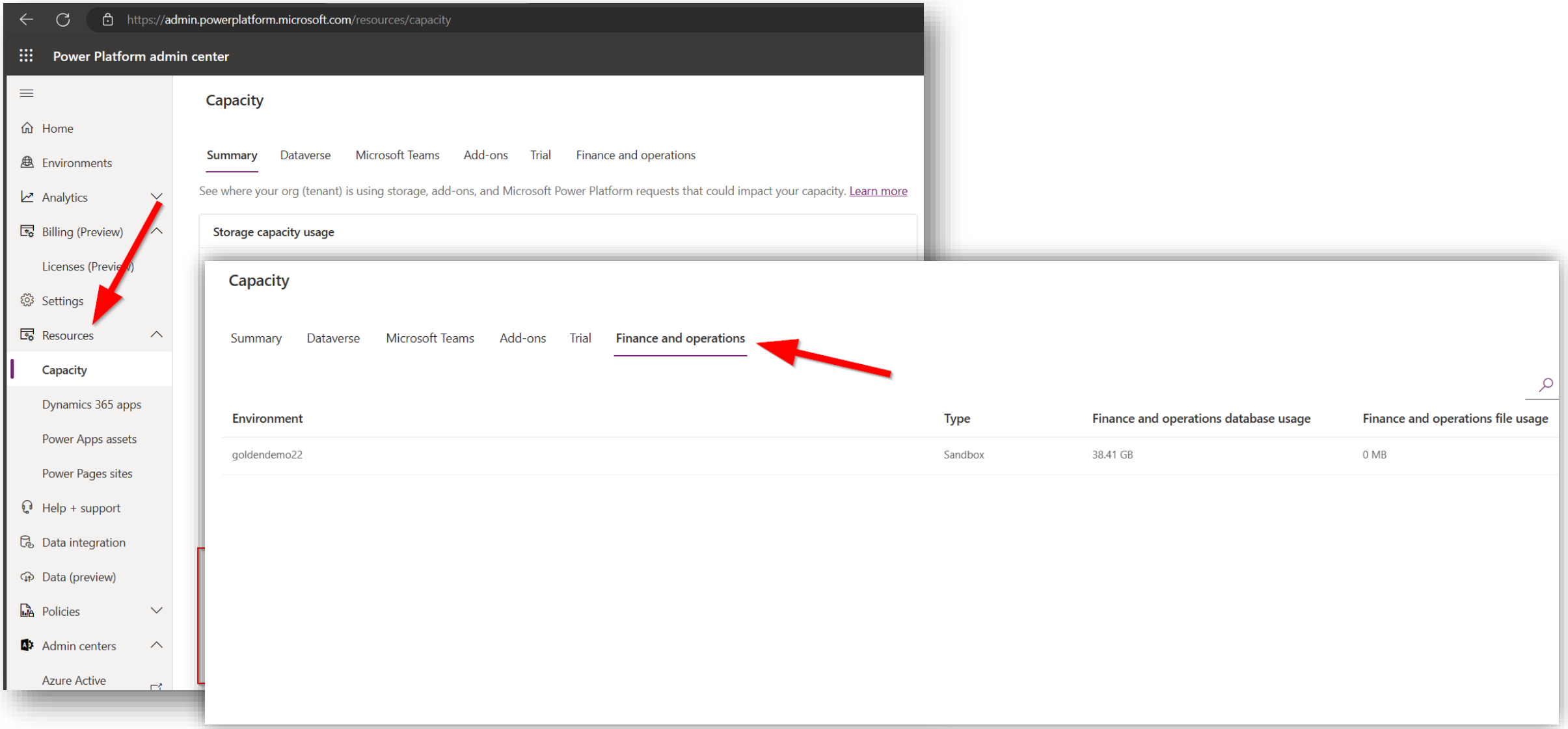
What can we accomplish?

Increase performance

Reduce costs

Checking Storage

Power Platform Admin Center



Directly in Sandbox Database

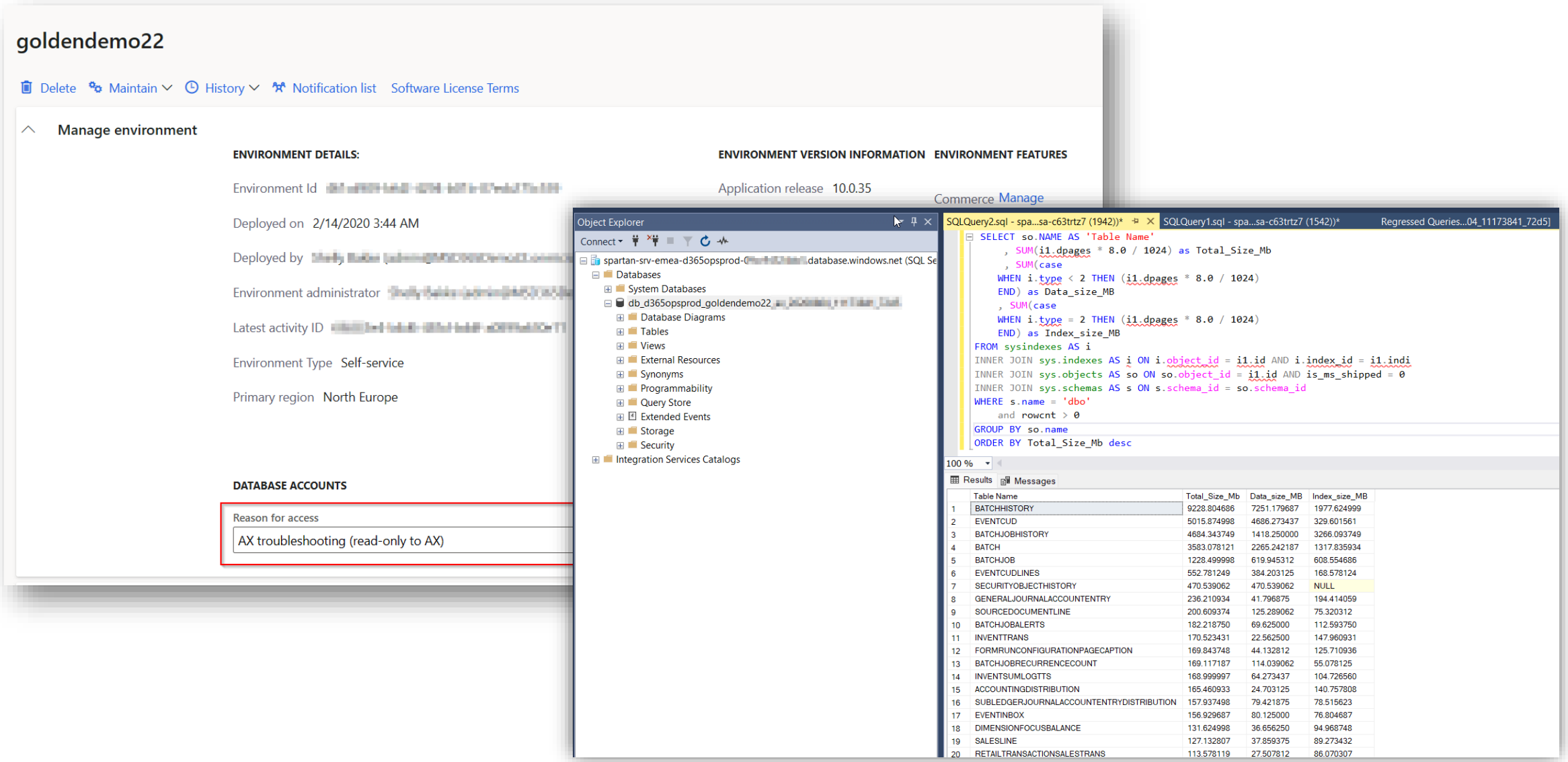


	Table Name	Total_Size_Mb	Data_size_MB	Index_size_MB
1	BATCHHISTORY	9228.804686	7251.179687	1977.624999
2	EVENTCUD	5015.874998	4686.273437	329.601561
3	BATCHJOBHISTORY	4684.343749	1418.250000	3266.093749
4	BATCH	3583.078121	2265.242187	1317.835934
5	BATCHJOB	1228.499998	619.945312	608.554686
6	EVENTCUDLINES	552.781249	384.203125	168.578124
7	SECURITYOBJECTHISTORY	470.539062	470.539062	NULL
8	GENERALJOURNALACCOUNTENTRY	236.210934	41.796875	194.414059
9	SOURCEDOCUMENTLINE	200.609374	125.289062	75.320312
10	BATCHJOBALERTS	182.218750	69.625000	112.593750
11	INVENTTRANS	170.523431	22.562500	147.960931
12	FORMRUNCONFIGURATIONPAGECAPTION	169.843748	44.132812	125.710936
13	BATCHJOBRECURRENCECOUNT	169.117187	114.039062	55.078125
14	INVENTSUMLOGTTS	168.999997	64.273437	104.726560
15	ACCOUNTINGDISTRIBUTION	165.460933	24.703125	140.757808
16	SUBLEDGERJOURNALACCOUNTENTRYDISTRIBUTION	157.937498	79.421875	78.515623
17	EVENTINBOX	156.929687	80.125000	76.804687
18	DIMENSIONFOCUSBALANCE	131.624998	36.656250	94.968748
19	SALESLINE	127.132807	37.859375	89.273432
20	RETAILTRANSACTIONSALESTRANS	113.578119	27.507812	86.070307

Ask us

- Contact your account team
- Contact Fast Track (if applicable)
- Contact Cloud Solution Architect (if applicable)

Additional resources

Finance and operations storage capacity

Finance and operations storage capacity - Power Platform | Microsoft Learn

Enable just-in-time database access

https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/database/database-just-in-time-jit-access

How to get Dynamics 365 Finance and Operations table sizes

https://community.dynamics.com/blogs/post/?postid=adeedfe3-6d41-ee11-bdf3-000d3a55bb34

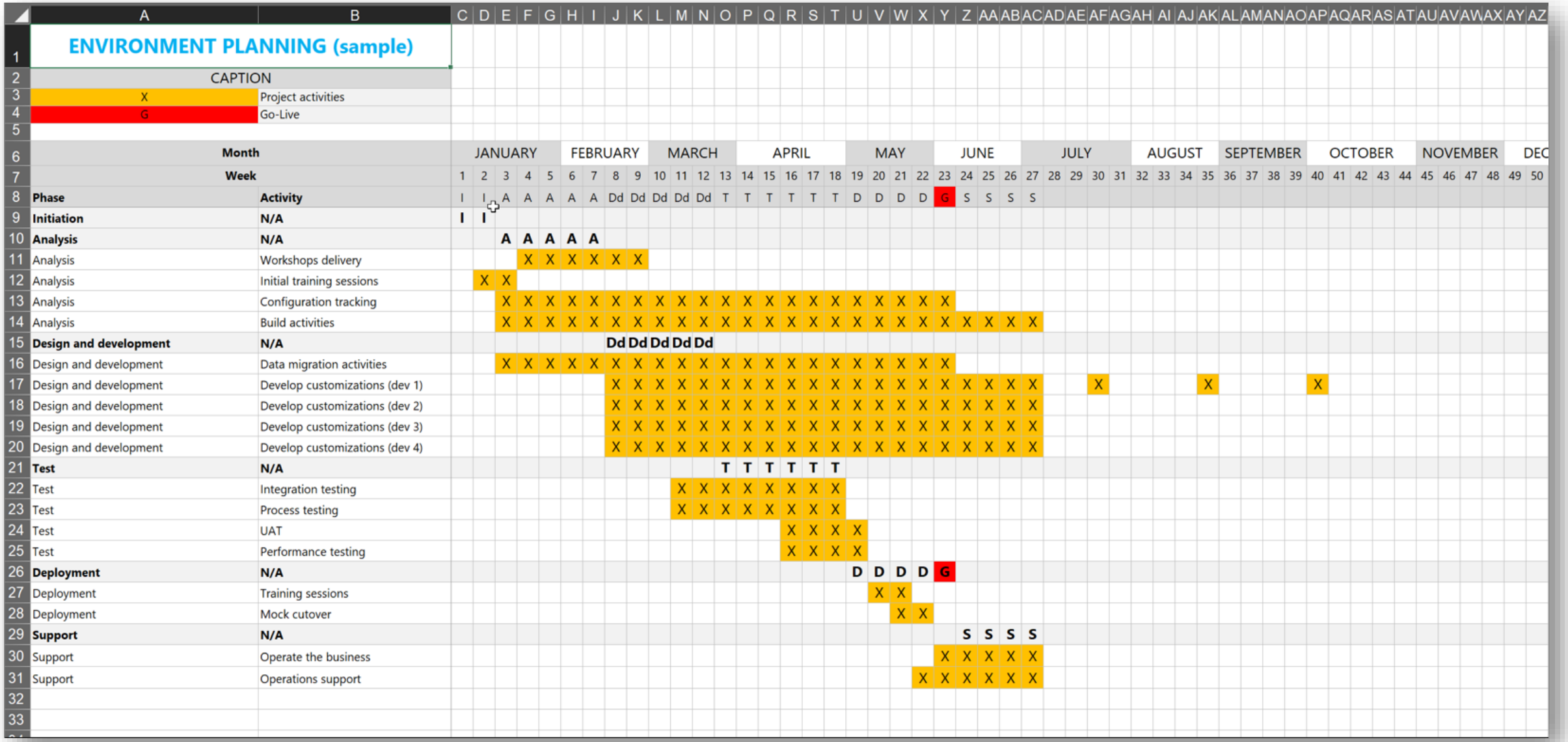
Reduction tactics

Optimization targets

Reduction tactics

Sandboxes

Quick win: Reduce number of full Production copies

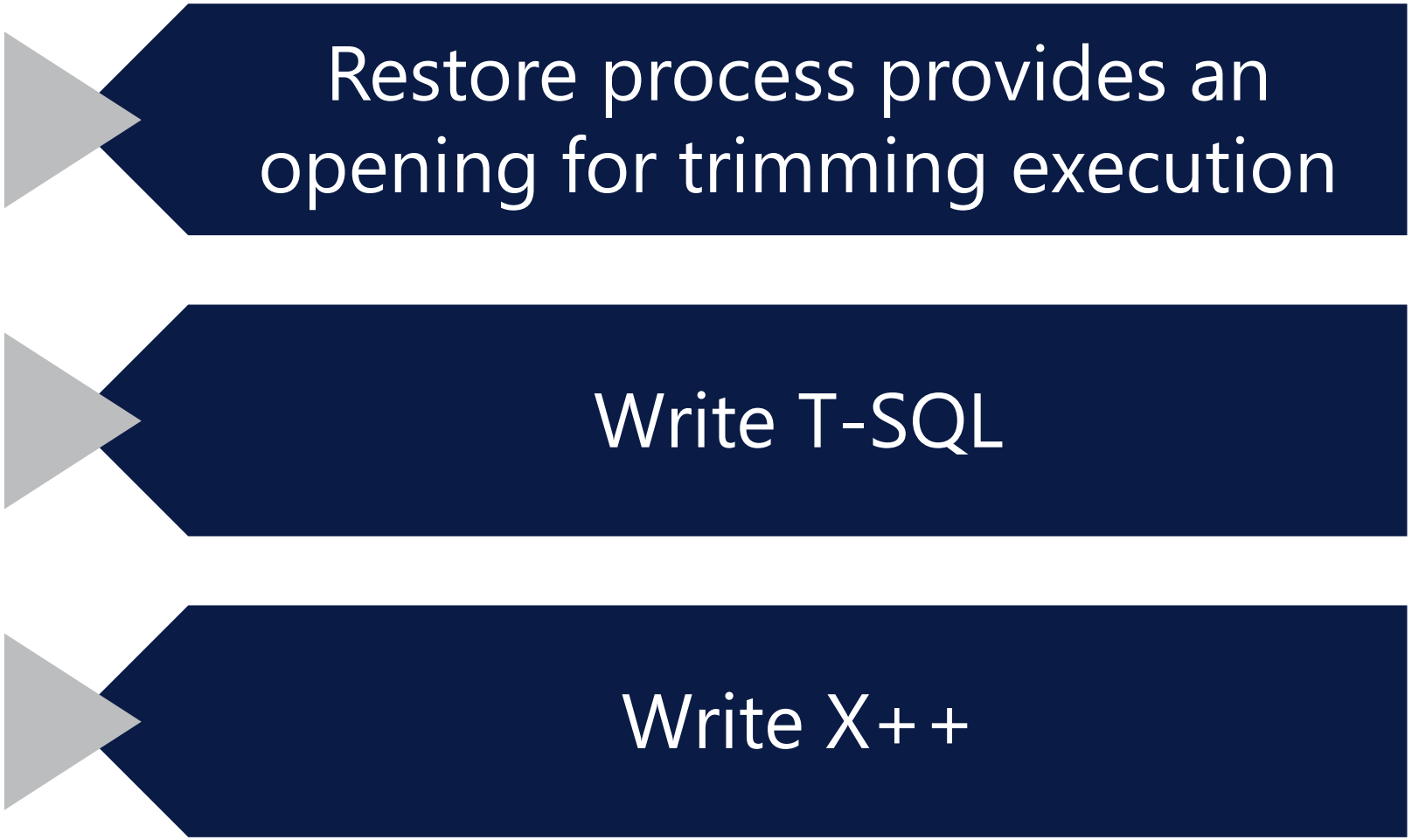


ENVIRONMENT PLANNING (sample)

CAPTION	
X	Project activities
G	Go-Live

Month		JANUARY					FEBRUARY				MARCH				APRIL					MAY				JUNE				JULY				AUGUST				SEPTEMBER				OCTOBER				NOVEMBER				DEC
Week		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48	49	50
Phase	**Activity**	I	I	A	A	A	A	A	Dd	Dd	Dd	Dd	Dd	T	T	T	T	T	T	D	D	D	D	G	S	S	S	S																						
Initiation	**N/A**	**I**	**I**																																															
Analysis	**N/A**			**A**	**A**	**A**	**A**	**A**																																									
Analysis	Workshops delivery				X	X	X	X	X	X																																								
Analysis	Initial training sessions		X	X																																												
Analysis	Configuration tracking			X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X																										
Analysis	Build activities			X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X																						
Design and development	**N/A**								**Dd**	**Dd**	**Dd**	**Dd**	**Dd**																																							
Design and development	Data migration activities			X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X																										
Design and development	Develop customizations (dev 1)								X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X			X					X						X								
Design and development	Develop customizations (dev 2)								X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X																						
Design and development	Develop customizations (dev 3)								X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X																						
Design and development	Develop customizations (dev 4)								X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X																						
Test	**N/A**													**T**	**T**	**T**	**T**	**T**	**T**																															
Test	Integration testing											X	X	X	X	X	X	X	X																															
Test	Process testing											X	X	X	X	X	X	X	X																															
Test	UAT																X	X	X	X																														
Test	Performance testing																X	X	X	X																														
Deployment	**N/A**																			**D**	**D**	**D**	**D**	**G**																										
Deployment	Training sessions																				X	X																											
Deployment	Mock cutover																					X	X																										
Support	**N/A**																								**S**	**S**	**S**	**S**																						
Support	Operate the business																							X	X	X	X	X																					
Support	Operations support																						X	X	X	X	X	X																					

Trim data in sandbox environments



Additional resources

Environment strategy

https://learn.microsoft.com/en-us/dynamics365/guidance/implementation-guide/environment-strategy-overview

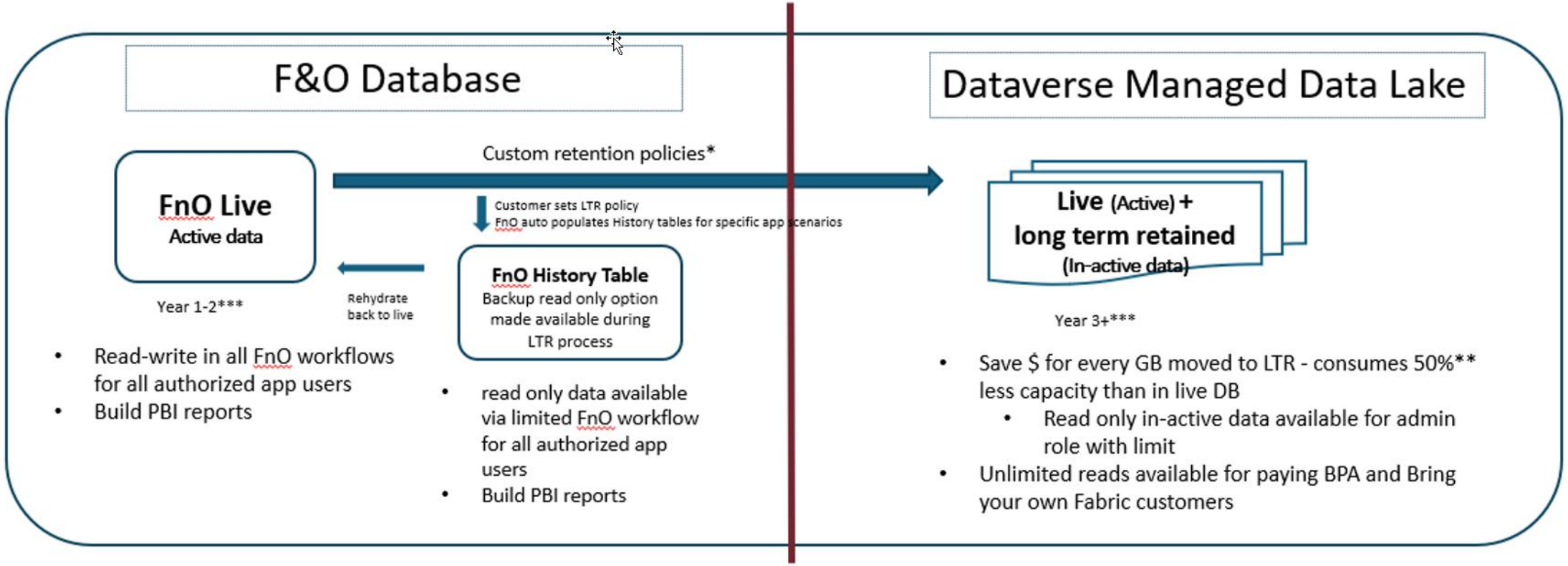
Point-in-time restore of the production database to a sandbox environment

https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/database/database-pitr-prod-sandbox

Reduction tactics

Production - archiving

Archiving overview



*** For illustration purpose only.
Customer decides time period.

* LTR policies can
1. ONLY be defined for FnO entities enabled for retention.
2. be set from FnO app UI or Power Apps maker portal.
3. be viewed from FnO and maker portal retention policies dashboard

Single FnO entity used for data lake movement

** Dependency on data type in source table .
DB capacity savings from 25 Athena production customers,
PIMCO in LTR public preview
JADE – FnO SCM Sales order private preview

Archiving strategy

Live data

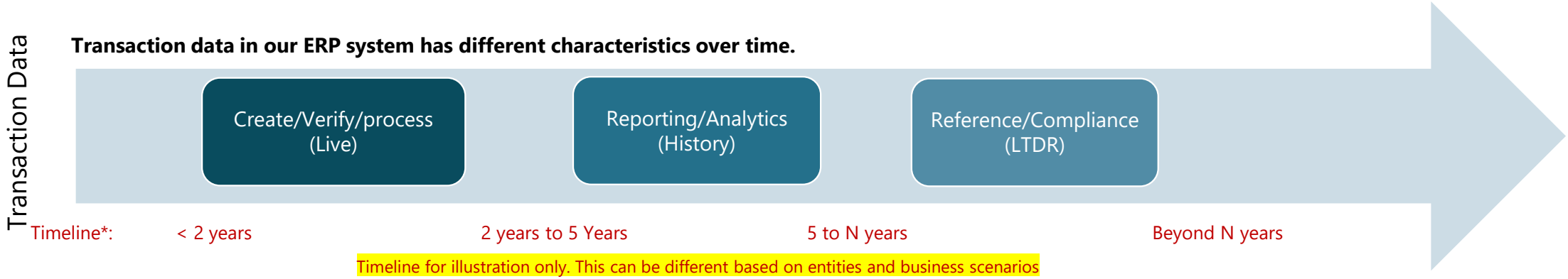
- Data that requires frequent access, ability to modify or remove and the needs to support a wide variety of search criteria.
- Live data will exist in SQL Azure at this stage.

History data

- Over time, data is used for reference and/or analytics only and data cannot be modified. The access frequency and the variety of search criteria are greatly reduced.
- Data will be copied over to History table in parallel with move to LTR.
- History data will remain in the SQL Azure database but cannot be modified.
- You will have an option to reverse the archived data to Live table as long as the data resides here.

Long term data retention(LTR)

- Over more time, the need to reference this data or use it in analytics decreases.
- Customer can remove the data from historical tables freeing up space in SQL Azure database, while retaining data in LTR
- Data available



Archiving roadmap

Entity	Private Preview	Public preview	General Availability
General Ledger Voucher	10.0.38	10.0.39*	TBD
Sales Orders	10.0.38	10.0.39*	TBD
InventTrans	10.0.38	10.0.39*	TBD
Tax Transactions	10.0.38	10.0.39*	TBD
Ledger Journal	10.0.38	10.0.39*	TBD

How to begin?

Please join the previews and Yammer group:

https://www.yammer.com/dynamicsaxfeedbackprograms/#/threads/inGroup?type=in_group&feedId=69826658304

Reduction tactics

Production – clean-up

What’s out-of-the box (highlights)

System administration

- Batch Job History
- Alert history

General Ledger

- Posted Journals

Data management

- Staging tables

Sales and marketing

- Sales orders
- Sales update history
- Order event history

Procurement and sourcing

- Purchase update history
- Requests for quotation (RFQs) and RFQ replies

…

Warehouse management

- Work creation history
- Wave batch cleanup
- Work user session log cleanup

…

What’s out-of-the box (highlights)

Inventory management

- Posted inventory journals
- Closed or deleted inventory settlements
- Inventory dimensions cleanup

…

Production control

- Unused journals
- Ended production orders

…

Cost management

- Costing sheet cache

…

Full list

https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/sysadmin/cleanuproutines

“Extras”

Archive credit card transaction data

https://learn.microsoft.com/en-us/dynamics365/commerce/dev-itpro/archive-cc-data

Document attachment retention

https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/organization-administration/configure-document-management#configuration-of-document-attachment-history

Write custom cleanups as necessary

Avoid storing logs

Move SysDatabaseLog to somewhere less transactional

Keep data migration lean and mean

Reduction tactics

Production - customizations

Customizations

- Does this have to be in the ERP transactional database?
- Is this a log?
- Is this IoT data?
- Use Fabric (or it’s components – storage, Power BI, etc)
- Use embedded Power Apps
- Archive framework roadmap will support custom tables!

Unified support

and the Dynamics 365 Storage Capacity Assessment

Dynamics 365 Finance and Operations Storage Capacity Assessment

Identify possibilities to optimize the storage of the application

OVERVIEW

A proactive engagement designed to provide **insight into the health of your Dynamics 365 Finance and Operations database**.

Optimization strategies to improve **storage efficiency and performance** based on your specific usage patterns.

LOGISTICS

- Duration: 3 days
- Delivery: Remote

PREREQUISTIES

- Unified Support
- Access to the target Dynamics Lifecycle Services project
- Access to collect configuration and telemetry data from the targeted Dynamics 365 production and sandbox instances

OUTCOME

- Expert analysis and guidance on your Finance and Operations database capacity and performance with prioritized remediation activities. ▪
- In-depth review of assessment details with a subject matter expert.

[1] Reach out to your CSAM for full details of the engagement.
[2] Scoping call is required to make sure the engagement is suitable and to explain the engagement in detail.
[3] A similar assessment exists for Dynamics 365 Customer Engagement

Summary

Final thoughts

Don’t get bogged down – use Pareto principle, prioritize, avoid “boiling the ocean”

Analyze carefully

Look for low hanging fruit

Be aware that there might not always be a silver bullet

The earlier you start – the easier it is

Plan for time – sometimes, it can take a while

Thank you

Microsoft Dynamics 365

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