Cloud ETL with Azure Data Factory & Microsoft Dataverse

Joe Griffin

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Agenda

- About Me
- Reviewing the Dataverse ETL landscape
- Overview of Azure Data Factory V2
- **Demo**: A 15-minute data migration from CRM On-Premise 2013 to CDS! 😅 🙏
- “Notes from the Field”: Limitations and Caveats with ADF
- Closing thoughts

Joe Griffin

CEO, proMX UK

- Business Applications MVP & MCT
- Holds 50+ certifications covering Dynamics 365 Customer Engagement, Power Platform and Microsoft Azure
- D365 / Power Platform User Group Committee Member
- 5+ years experience working with these products, and the following technologies:
  - Dynamics CRM / CE / Power Platform
  - Microsoft 365
  - SQL Server / T-SQL
  - C# / .NET
- Industry experience:
  - Print/Direct Mail
  - Energy & Utilities
  - Housing Associations
  - Retail
  - Managed Services
  - Construction

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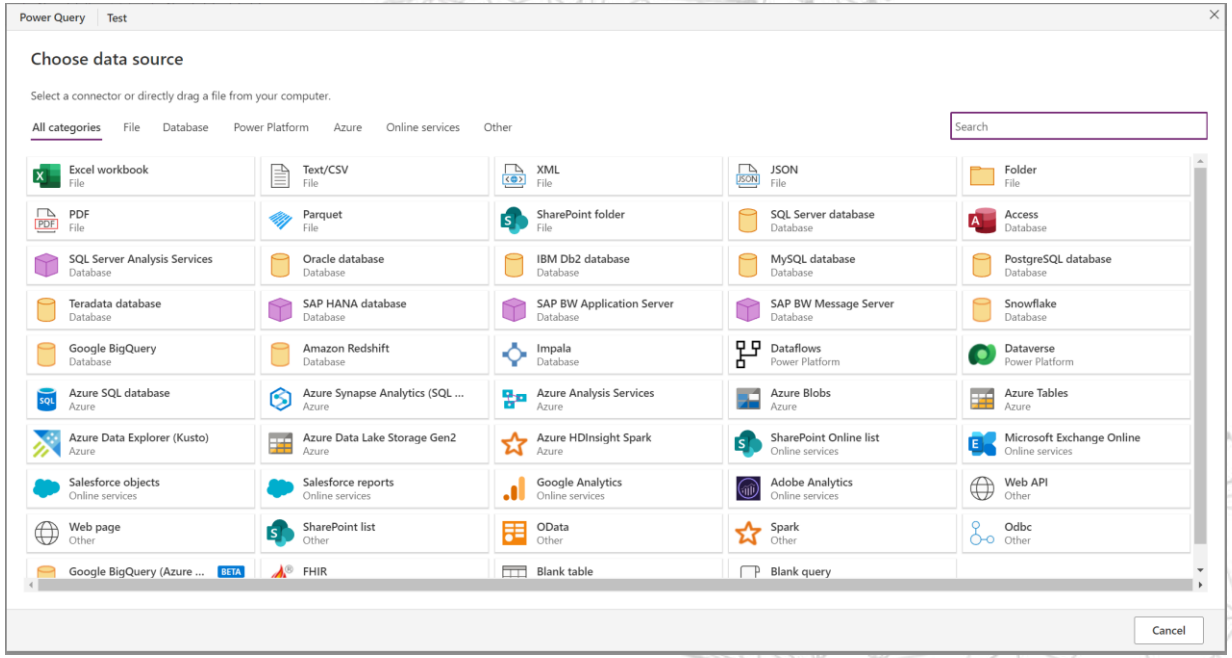
THE DATAVERSE ETL LANDSCAPE

KingswaySoft

TIBCO™



Microsoft SQL Server Integration Services

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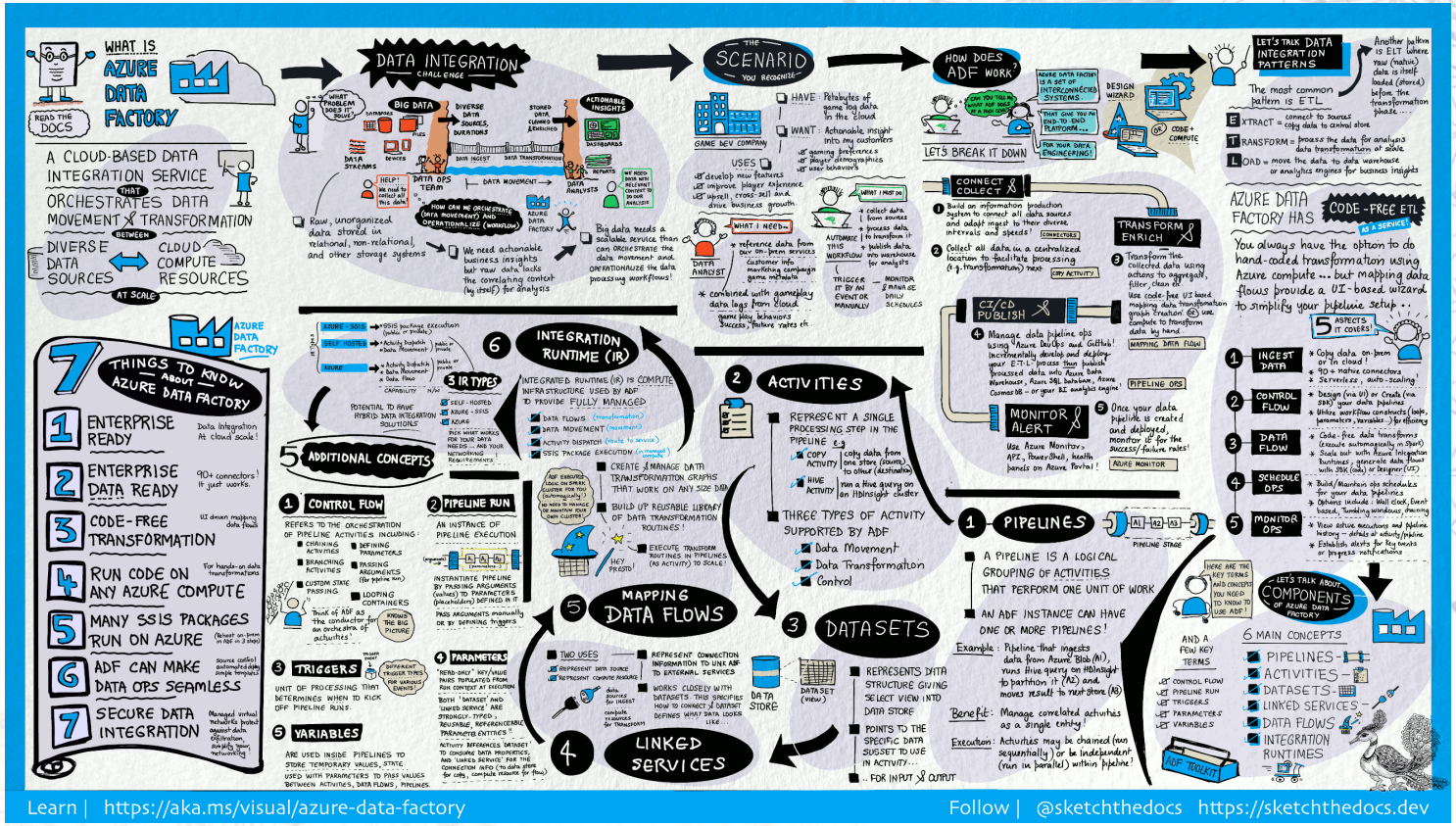
INTRODUCING AZURE DATA FACTORY



KEY FEATURES

"LOW CODE" SOLUTION

- Intuitive, drag and drop interface
- Wide range of activity/tasks available, such as Copy Data, Execute Stored Procedure, Filter data, Lookups and more!
- Affords flexible development options – in browser, Visual Studio or even via manual JSON modification.
- Data Flows offer almost complete feature parity with SSIS.

FULL STACK EXTENSIBILITY

- Over 80+ supported data sources, both Microsoft and non-Microsoft (Salesforce, SAP etc.) – including Dynamics 365 online/on-premise
- Full support for leveraging Azure Functions, Azure Databricks, U-SQL, Machine Learning etc. within pipelines.
- Also has full support for running existing SSIS package in-cloud, allowing for a streamlined migration to cloud.

KEY FEATURES

FULL DEVOPS INTEGRATION

- Link directly to a GitHub/Azure DevOps repository form within Azure Data Factory.
- Create branches and pull requests with ease.
- Automatically compiles Azure Templates, that can then be leveraged as part of a Pipeline deployment.

FLEXIBLE PRICING OPTIONS

- Over 80+ supported data sources, both Microsoft and non-Microsoft (Salesforce, SAP etc.) – including Dynamics 365 online/on-premise
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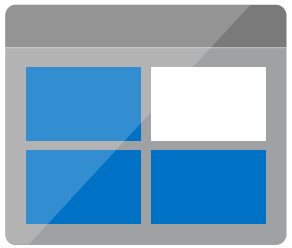
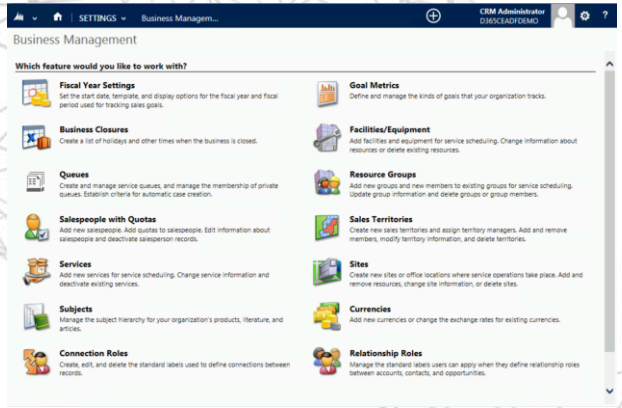
DEMO: THE SCENARIO

- Our organisation is currently migrating from Dynamics CRM 2013 on-premise to the Power Platform.
- As part of this, existing data from the following entities need to be migrated across:
  - Account
  - Contact
- For each entity, it is necessary for us to perform some degree of transformation:
  - **Account**: Modify the Account Name based on the number of employees (e.g. if under 50 employees, append – SMB to the end of the Account name)
  - **Contact**: Append fields for contact preference, blocking all contact except via e-mail.
- In the demo, we will complete the entire data migration.

DEMO: TECHNOLOGY USED





DEMO

THINGS TO KEEP IN MIND....

- Can only import data as part of up to 2 concurrent pipelines; errors likely to occur if this is exceeded.
- No support for deletions / synchronisations
  - Use Data Flows if this is a requirement of yours
- Work will be necessary to define your preferred Table schemas, especially if working with custom fields.
- Potential learning curve for traditional SSIS developers or citizen developers

WRAPPING UP

- Azure Data Factory is a very mature, stable and – arguably – preferable to use state for your data integration needs.
- Provides a far more integrated, seamless DevOps experience versus SSIS.
- Allows you to achieve complex data integration needs that can be orchestrated at will and not break the piggy bank in the process 😉

SAMPLES

Get started with Azure Data Factory using the sample scenario shown today:

- https://github.com/JJGriffin/talk-assets/tree/master/CloudETLWithADF%26D365CE

Any Questions?

Please fill out the survey!
& Win Swags!!

https://bit.ly/GPPBSurvey

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THANK YOU