



Dynamics 365 and Power Platform Community Conference

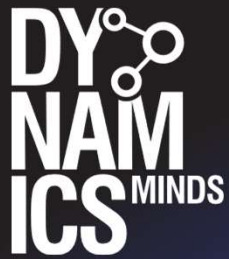
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Lessons learned from 20+ template rollouts



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Podcasts:

- Dynamics Update
- En Liten Podd om IT
- The Nerd Herd

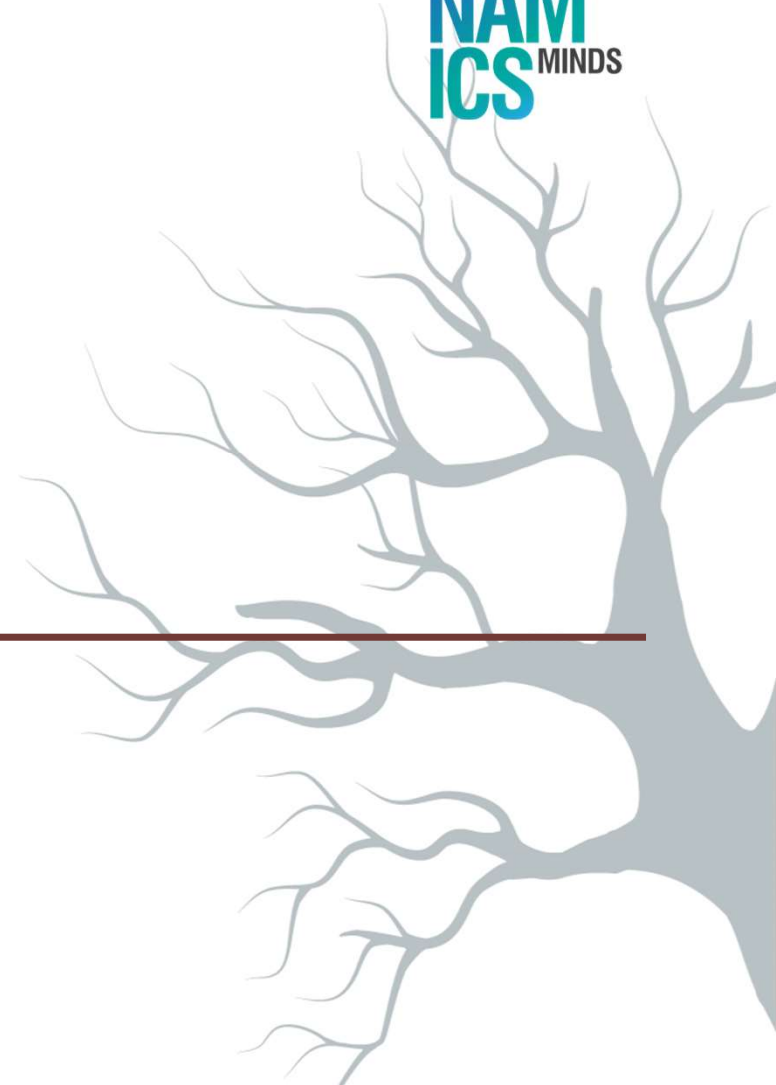


Agenda



- ❖ **What is a Template Rollout?**
- ❖ **What is Golden Config?**
- ❖ **Why do we automate?**
- ❖ **The Process**
- ❖ **Too Good to be True? (This can't possibly work)**
- ❖ **QnA**

What is a Template Rollout?



Template – Definition

A template is a form, mold or pattern used as a guide to make something.

<https://www.techtarget.com/whatis/definition/template>

Two types of templates addressed in this session



Legal Entity
Template



Data Management
Framework Template



Legal Entity Template

Do we need a template?

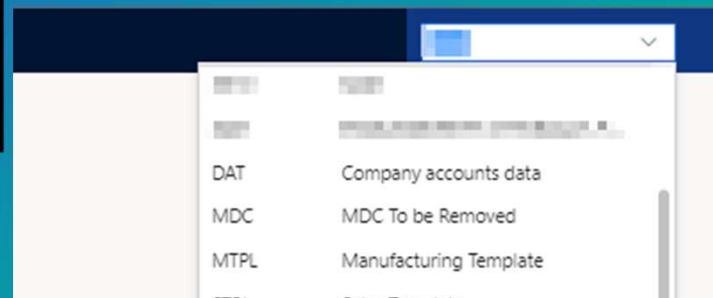
How do we create it?

How many templates?

(How) Do we maintain it?

How generic should it be?

What is it?



Data management framework template

STANDARD TEMPLATES

- ❖ Created by Microsoft
- ❖ One template per module
- ❖ Predefined sequencing

Data Packages

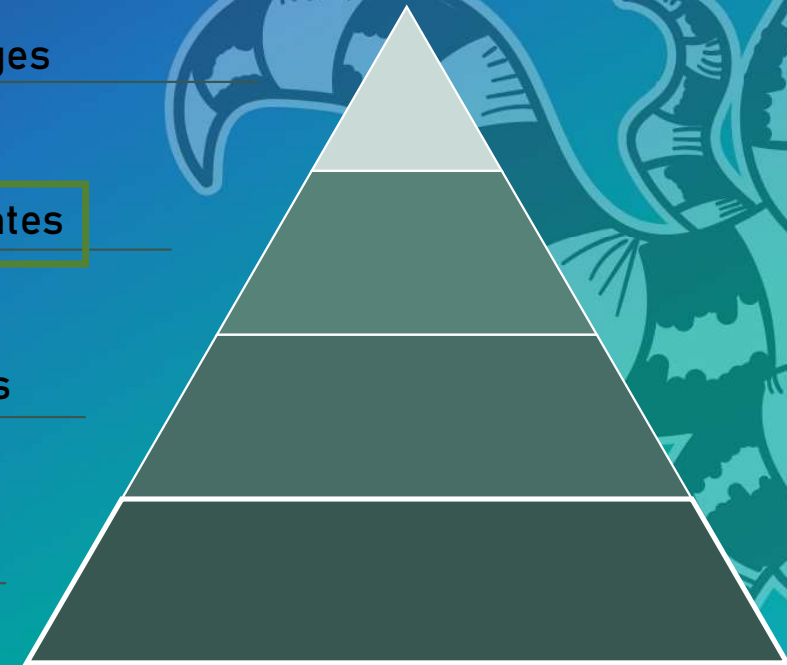
Data Templates

Data Entities

Tables

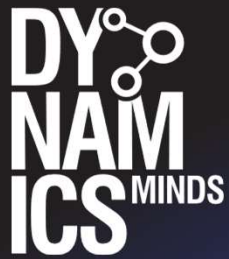
CUSTOM TEMPLATES

- ❖ Custom entities
- ❖ ISV
- ❖ Master template for all?
Maintenance?



What is Golden Config?





What is Golden Config?

- Copied to PROD as part of GoLive

- Complete – Environment with all legal entities

- Clean environment – No transactions

- Shared tables – Mirror PROD

- Restricted – Limited user access

- Closely controlled – It's the single point of truth

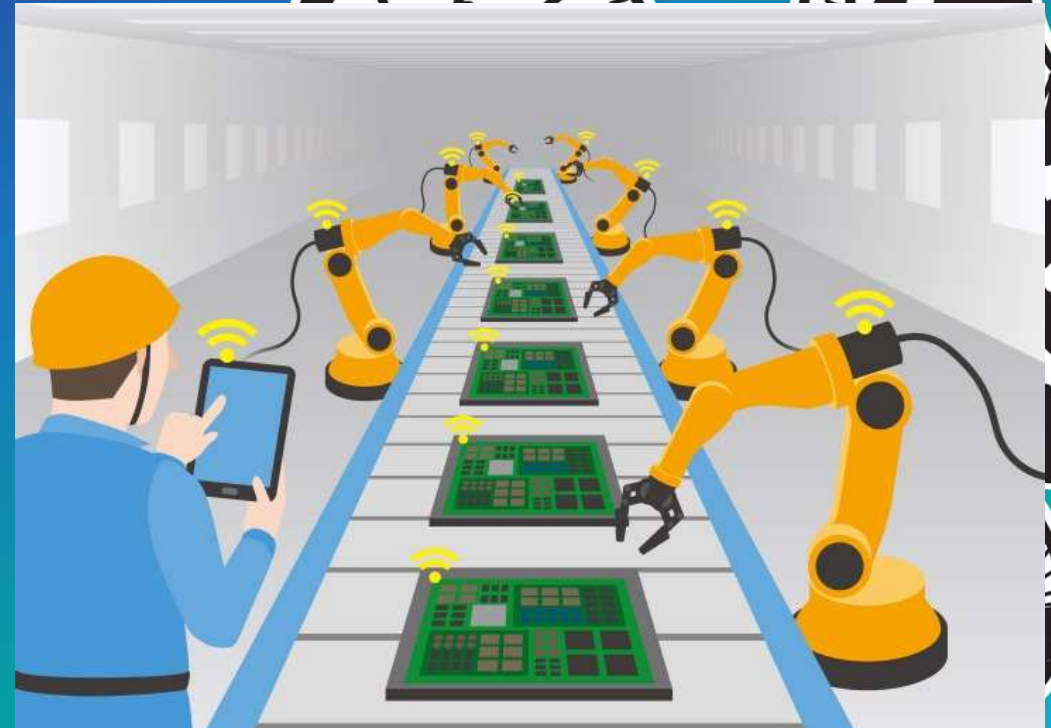


Why do we automate?



Why automate?

- ❖ Save time
- ❖ Reproducibility
- ❖ Supportability
- ❖ Eliminate human factor



The Process



The process

Create a legal entity

- Configure name & country



Copy config into Legal Entity

- Copy into legal entity
- Add number series



Export the export template

- Use copy into legal entity
- Download the empty package



Import package to legal entity



Create legal entity (UAT)

- Create the new legal entity
- Configure name & country



Export legal entity

- Use package for export job
- Export to file



Verify

- Use copy into legal entity
- Download the empty package



Adjust Golden Config

- Ensure all changes are updated in GC



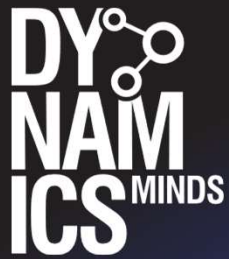
Import new package into prod

- Ensure import to CORRECT legal entity



Seems too good to be true?





- ❖ Number Sequences
- ❖ Shared Tables
- ❖ Calendars (To and From)
- ❖ Sequence
- ❖ Route Cost Categories
- ❖ Entity Lists and Entity Mappings
- ❖ Timeouts



Questions?



Thank you for your attention!

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