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# Data Import Scheduler for Dynamics 365

v1.0



## Data Import Scheduler for Dynamics 365



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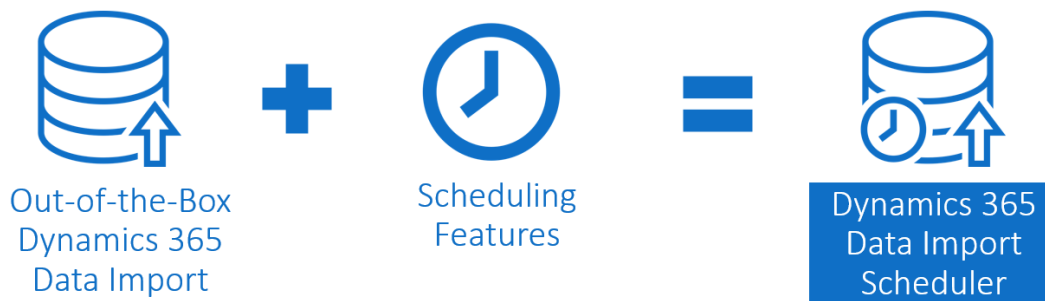
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## Overview

Data Import Scheduler adds the scheduling capability to Dynamics 365's out-of-the-box Data Import feature. While there are numerous data ETL (Extract, Transform, and Load) tools in the market, most require technical expertise to import data. Dynamics 365 has a well-tested and tried data import feature that has run since its earliest version. It is particularly handy for non-technical system users, e.g., Department Coordinators, Data Entry Operators. The tool is equally useful in case the technical stakeholders want to benefit from a scheduled-based data import into a Dynamics 365 table.



## Data Maps

Data Import Scheduler also supports the Data Maps available in the out-of-the-box Dynamics 365 Data Import functionality. Business Administrators need to create the data maps in advance for the end-users to use in the Scheduled Data Import process.

Data Map is an optional field. If left blank, the process will still attempt the data import using the default data mapping. Solution Park recommends always providing a valid data map, as the default process may not serve the ideal data map and may result in a failed data import.

## Imported Records Ownership

Solution Park recommends including the Owner column in the data template and defining the Owner of each record.

## User Roles:

Data Import Scheduler comes prepacked with the following security role (user persona):

- Data Import Scheduler - Base Role

The system administrators must assign this security role to each user requiring access to the Data Import Scheduler.

## Important Considerations

1. The logged-in person must have the following security roles to work with Data Import Scheduler:



- a. Data Import Scheduler - Base Role
  - b. Other security roles having data creation permission on the target tables, e.g., Account, Contact, ...
2. Dynamics 365 does not support data creation in certain tables, e.g., Virtual Tables, or system tables. Data Import Scheduler uses Dynamics 365's data import functionality on its core and hence will fail the attempt to import data in such restricted tables.
  3. Users can import data into both, the out-of-the-box Tables or the custom tables.
  4. A Data Import Scheduler requires at least 1 hour in advance to schedule the data import job. If you require scheduling an import job in less than 1 hour from the current time, we recommend manually using the out-of-the-box data import functionality.

## Licensing & Pricing

### Power App License:

Data Import Scheduler is a model-driven app built using Power Platform and runs under your existing Dynamics 365 license. Assuming the users will already have a valid Power Platform or Dynamics 365 license, Data Import Scheduler does not require any additional Microsoft license.

### Solution Park License (Free):

Data Import Scheduler is a free app. We also provide a free 2-hour setup/training service. Solution Park will charge any additional work on a Time & Material basis.

Get in touch with us to inquire about the Data Import Scheduler rollout: [info@solutionpark.au](mailto:info@solutionpark.au).

## New Features (Work In Progress)

Solution Park is in the process of adding the feature of Approvals in the Data Import Scheduler. This feature will allow the data uploaders to seek a Reviewer's Approval before submitting a file for data import. Get in touch with us to inquire about the availability timeline of this feature:

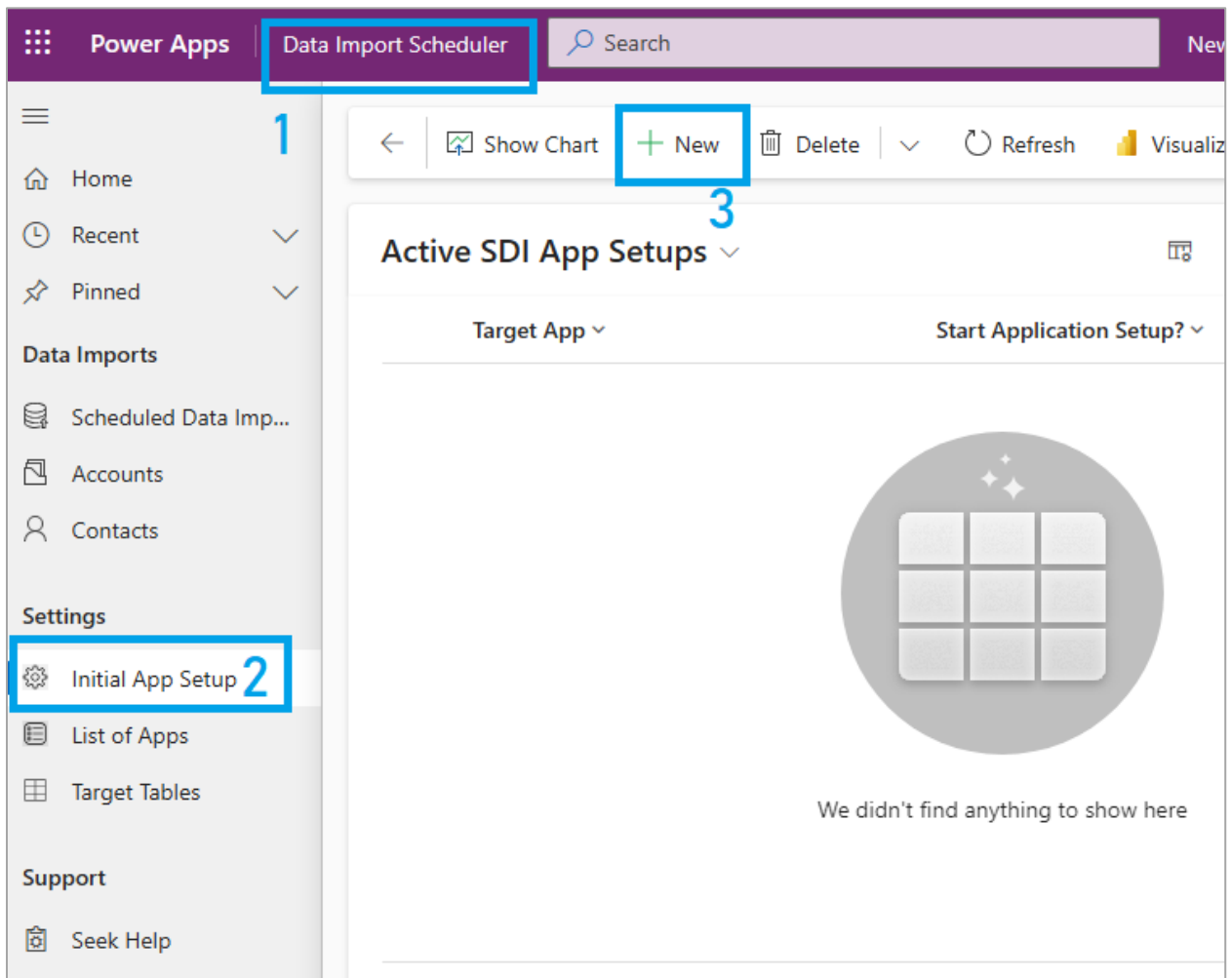
[info@solutionpark.au](mailto:info@solutionpark.au).



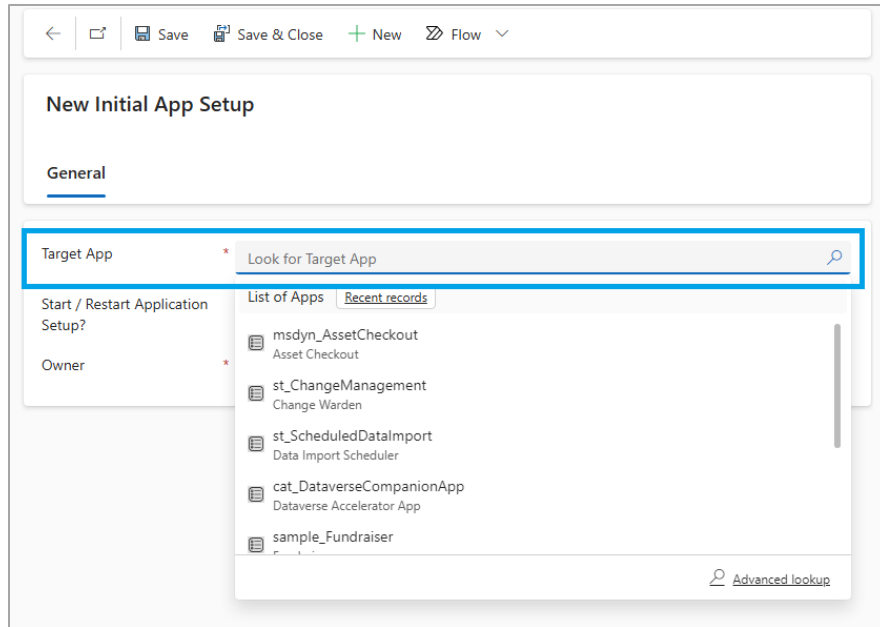
## App Setup

### Option1: Add Data Import Scheduler to an Existing App:

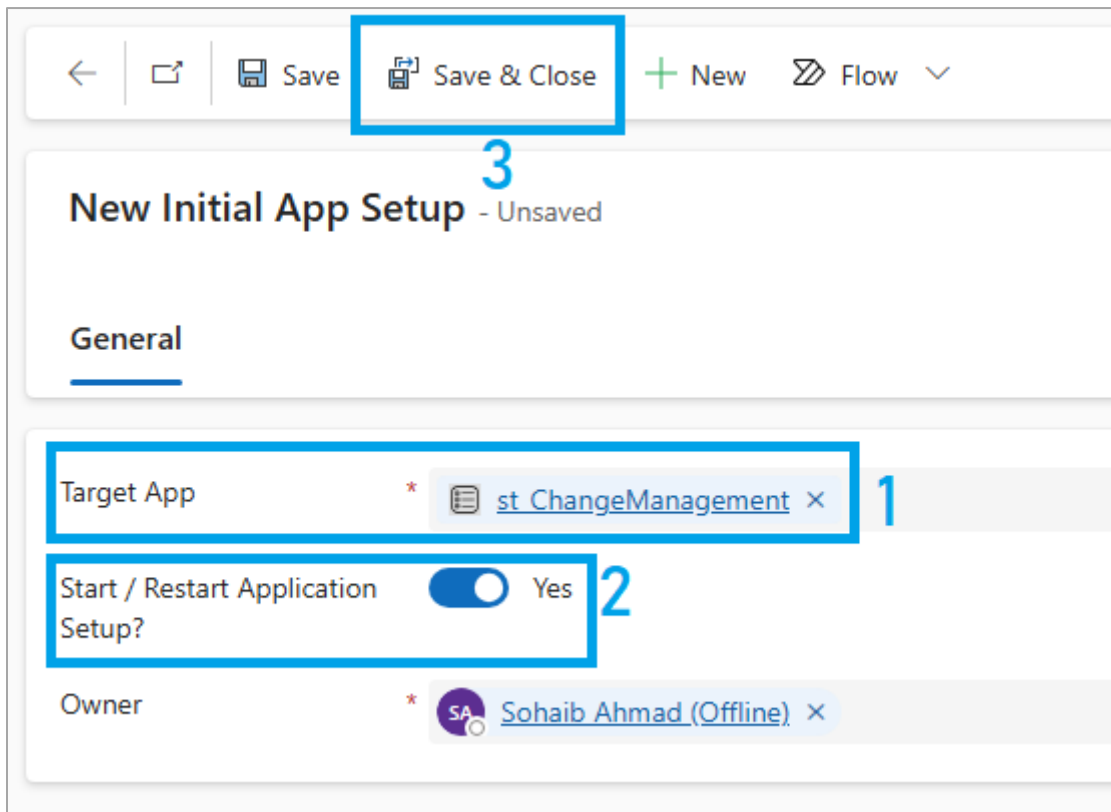
1. Make sure that you have downloaded and installed the “Scheduled Data Import Base” solution in your instance.
2. Assign “Data Import Scheduler - Base Role” to your target users.
3. Please follow this [Microsoft Article](#) and add the “Scheduled Data Import” table in your existing app’s sitemap.
4. Go to the “Data Import Scheduler” app → Initial App Setup → + New:



5. Select the target app where you want to introduce the Data Import Scheduler functionality:



6. Once the target app selection is completed → set the “Start/Restart Application Setup” to Yes → Click Save & Close.

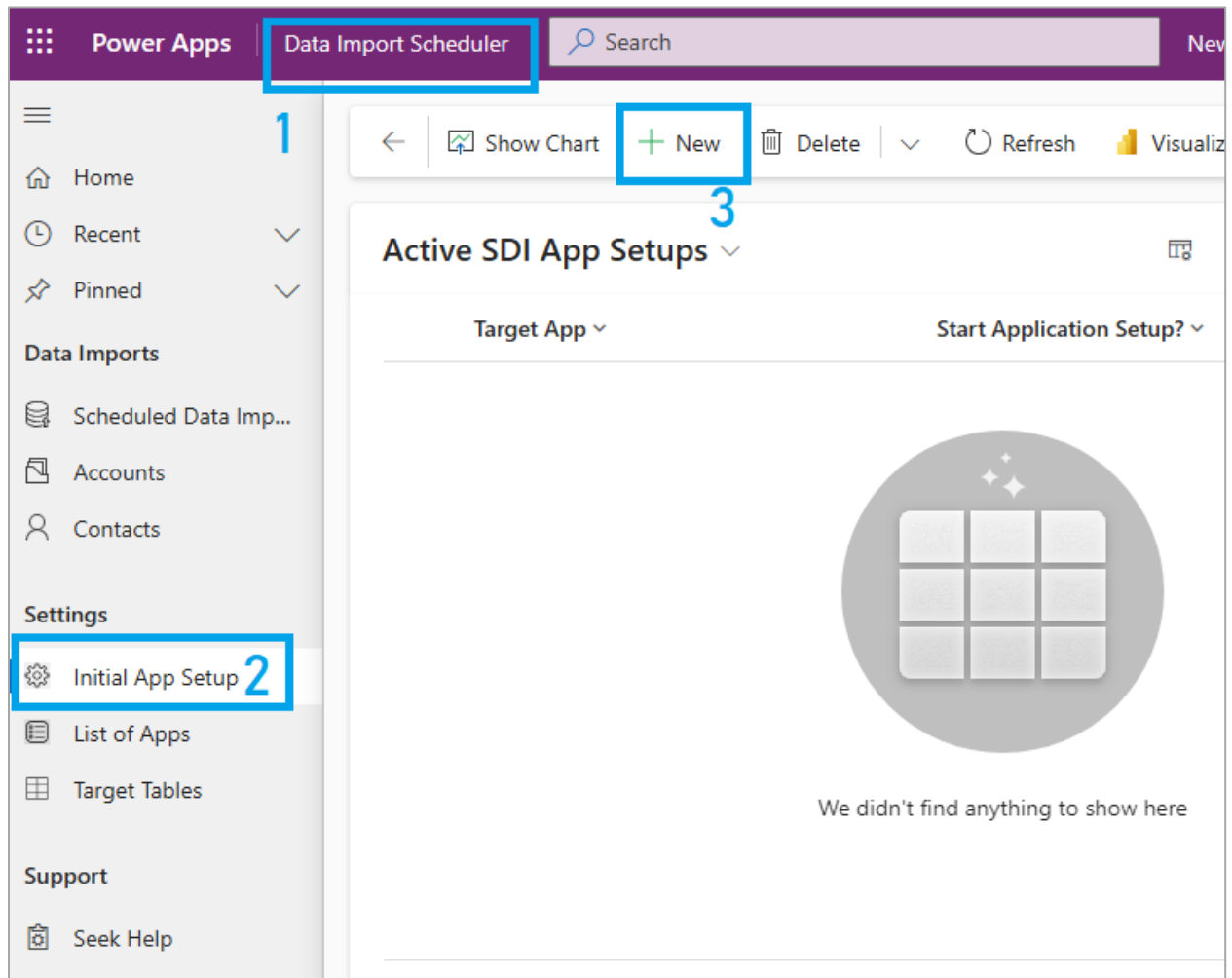


7. Allow up to 10 mins for the system to complete the setup in the background.
8. Refresh your application (Ctrl + F5) and use the Data Import Scheduler functionality.



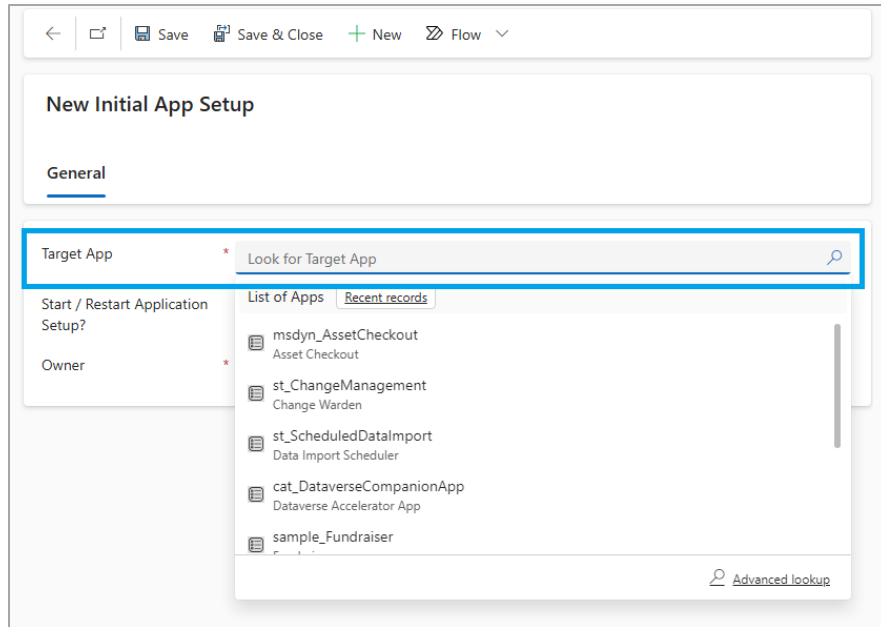
### Option2: Add the Target Tables to the Data Import Scheduler App:

1. Make sure that you have downloaded and installed the “Scheduled Data Import Base” solution in your instance.
2. Assign “Data Import Scheduler - Base Role” to your target users.
3. Please follow this [Microsoft Article](#) and add your target tables in “Data Import Scheduler” app’s sitemap, e.g., Leads, Opportunities, Custom Table(s) etc.
4. Go to the “Data Import Scheduler” app → Initial App Setup → + New:

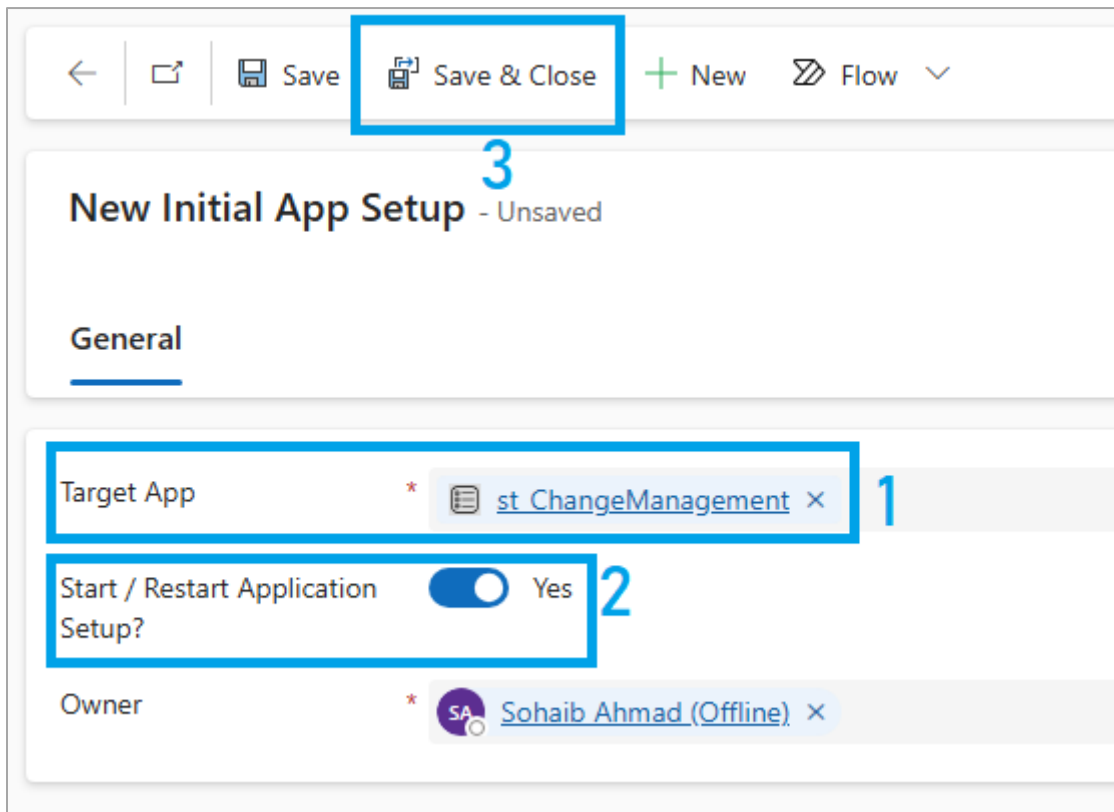


5. Select the target app where you want to introduce the Data Import Scheduler functionality:





6. Once the target app selection is completed → set the “Start/Restart Application Setup” to Yes → Click Save & Close.



7. Allow up to 10 mins for the system to complete the setup in the background.



8. Refresh the “Data Import Scheduler” app (Ctrl + F5) and use the Data Import Scheduler functionality.



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## Contact Us

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