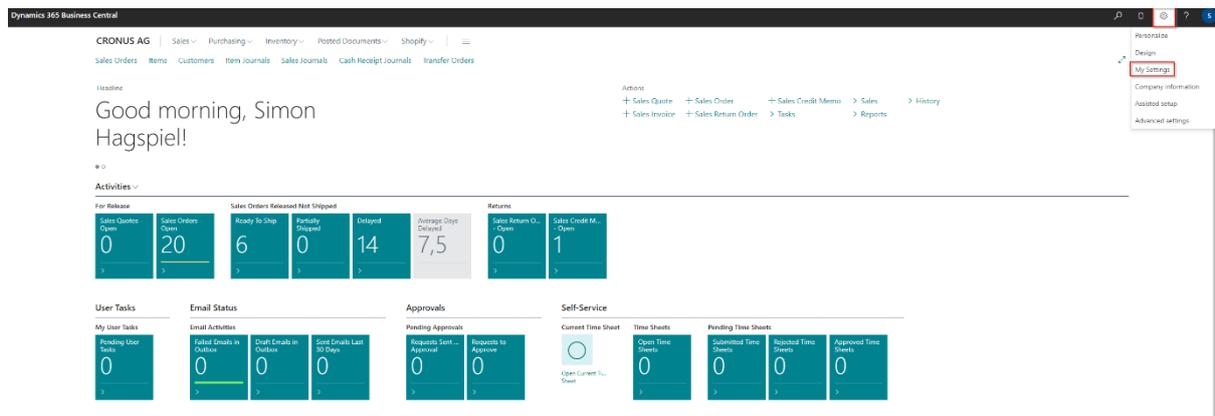


## Online help for PI Suite Data Provider

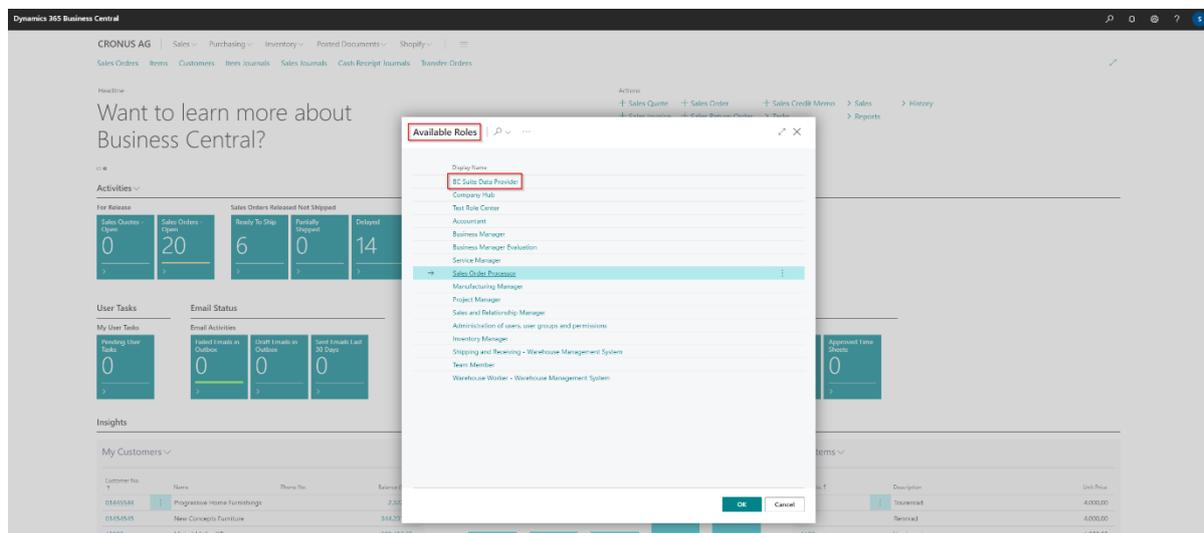
The following is documentation and help for setting up prisma informatik's own product **PI Suite Data Provider**.

The PI Suite Data Provider provides a user-friendly procedure for exporting Business Central tables to Azure Blob Storage (AZBS). In addition to the export of standard fields, it is also possible to export calculated fields.

To use the extension, navigate to **My Settings**.



The **PI Suite Data Provider** is now listed under the **Roles** tab, which is also selected.



Selecting this role opens a new dashboard on the home page.

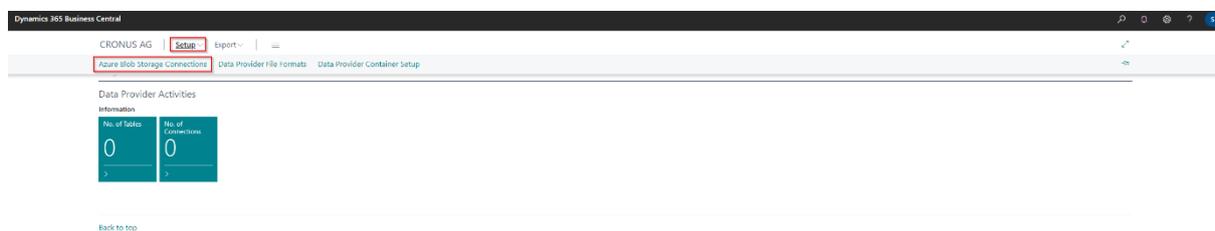


This is followed by the configuration of the PI Suite Data Provider.

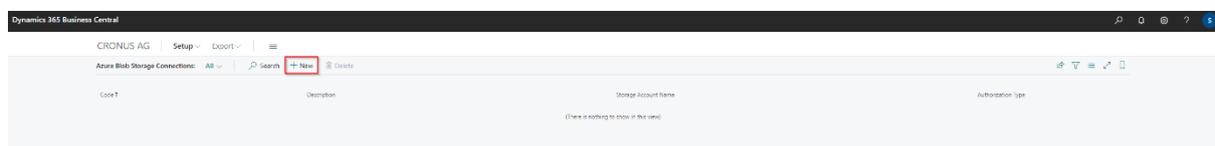
## I. Azure Blob Storage Connections Setup

At the beginning you can see the start page of the Data Provider.

Under **Setup**, select **Azure Blob Storage Connections** to connect the data provider to the AZBS.

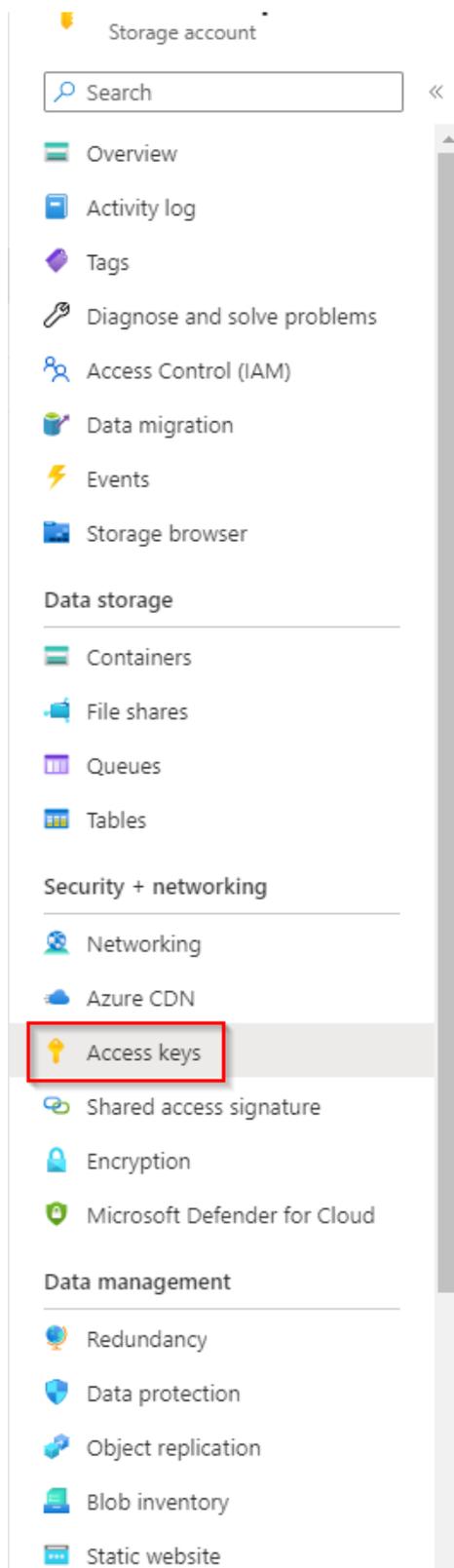


On the page that opens, select "New".



To be able to fill in the opened fields, you have to navigate to the company's own AZBS (**portal.azure.com**). Here, open the **Storage accounts** option and then the storage **account** to which the data should be exported.

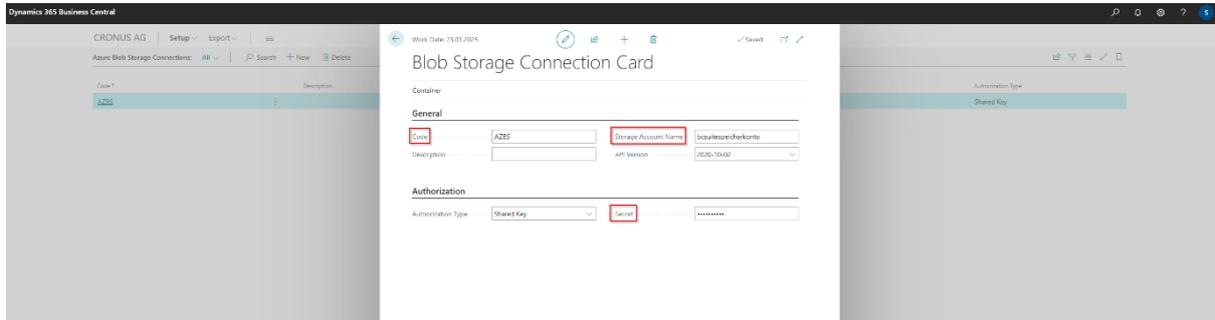
To get the required data for the configuration of the AZBS connection, navigate to the **Access Keys** tab.



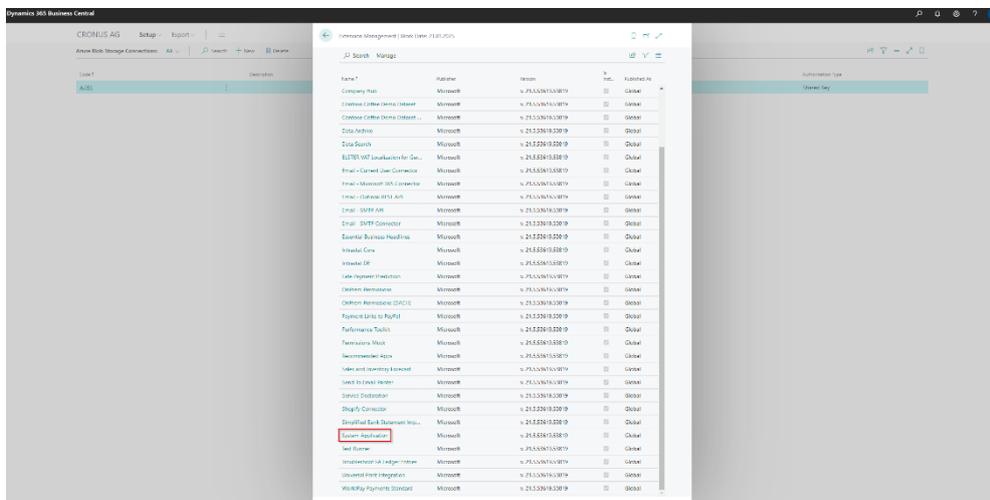
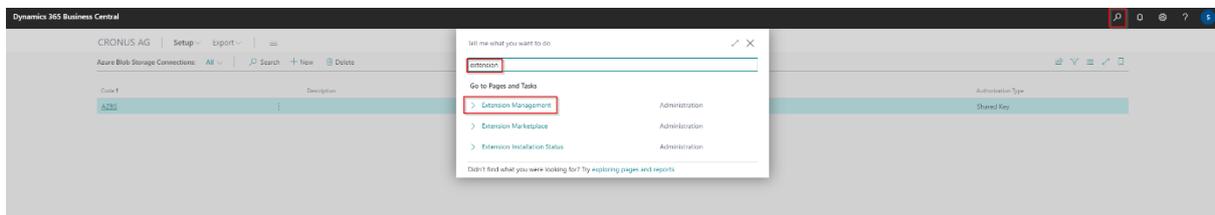
Storage account name

key1

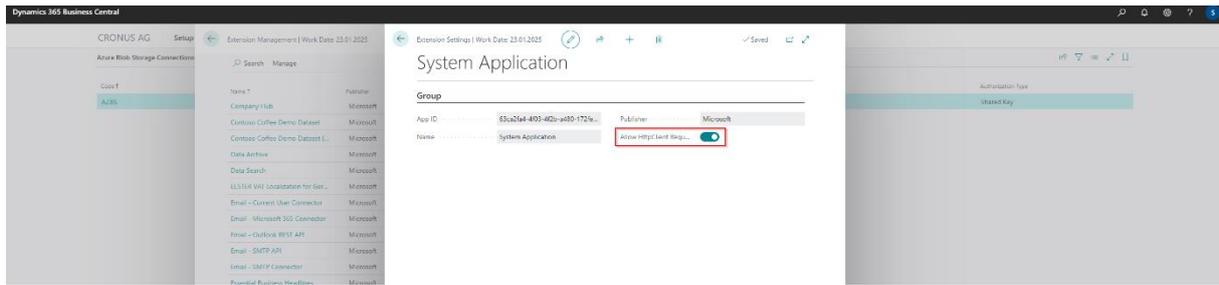
Both the **Storage account name** and the **key** are consequently copied into the fields of the PI Suite Data Provider. The code as well as the description can be defined individually, but meaningful names are recommended.



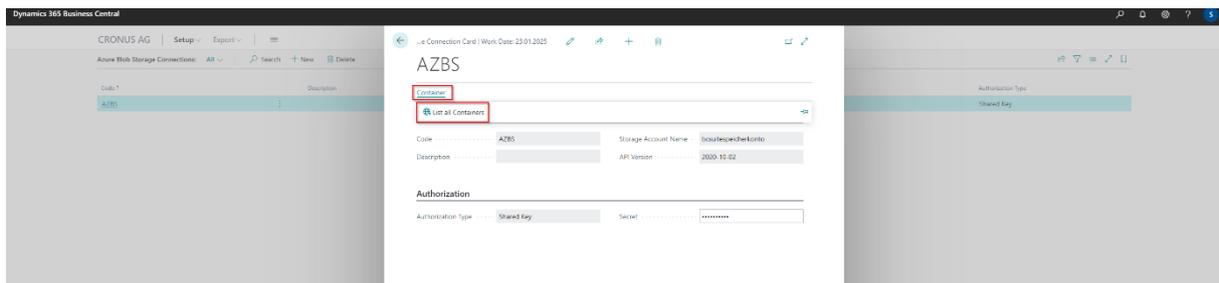
To finally complete the configuration of the connection, it is necessary to navigate to the **Extension Management** and call the **System Application** extension.



This must be opened and the **HttpClient Requests** allowed so that the PI Suite Data Provider can communicate externally.



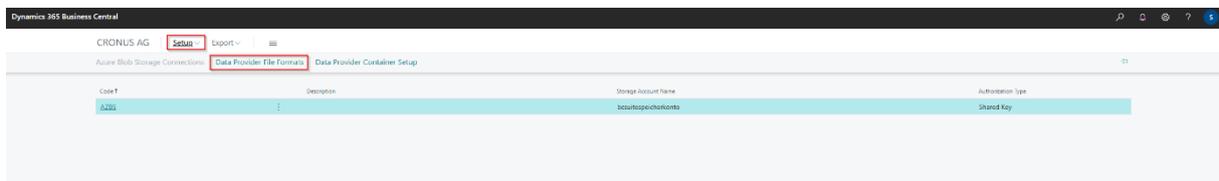
If this step was done properly, it is possible to navigate back to the AZBS connection setup and select **List all Containers**.



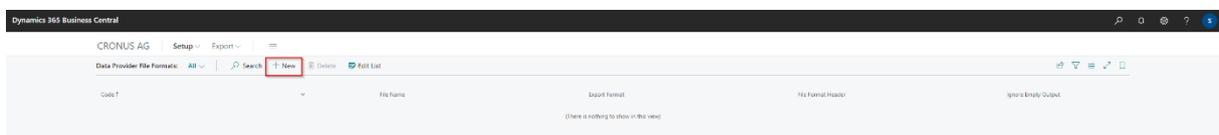
Now the connected containers should appear and the connection setup between AZBS and the Data Provider is considered complete.

## 2. Setup File Formats

Now the file formats must be configured.



By default, no file formats are stored and new ones must be created.



In the following a list opens, in which different fields with various options are given. These influence the structure of a file.

In the first field the **Code** is stored, i.e. in which format with which values the table should be exported. The following types of code are possible at the moment:

Code	Explanation
JSON_CAPTION	German translation of the names
JSON_FIELDNAME	English original names of the database
JSON_FIELDNO	Table field numbers
XML	Playout as XML file
CSV	Playout as CSV file

In the **File Name** field there are options which structure the naming of the exported file in the AZBS should follow.

File name	Explanation
Table Id	The file name consists of the Id of the selected table
Table Id + Company Name	The file name follows the structure: Id of the selected table + name of the company (client).
Company Name + Table Id	The file name follows the structure: Name of the company (client) + Id of the selected table
Table Name	The file name consists of the original English name of the selected table
Table Caption	The file name consists of the German translation name of the selected table
Company Name + Table Name	The file name follows the structure: name of the company (client) + original English name of the selected table.
Company Name + Table Caption	The file name follows the structure: name of the company (client) + German translation name of the selected table.
Table Name + Company Name	The file name follows the structure: original English name of the selected table + name of the company (client)
Table Caption + Company Name	The file name follows the structure: German translation name of the selected table + name of the company (client).

In the next field the basic **Export format** can be defined. This is directly related to the **Code** field!

Export format	Explanation
JSON	The table is exported in JSON format
XML	The table is exported in XML format
CSV	The table is exported in CSV format

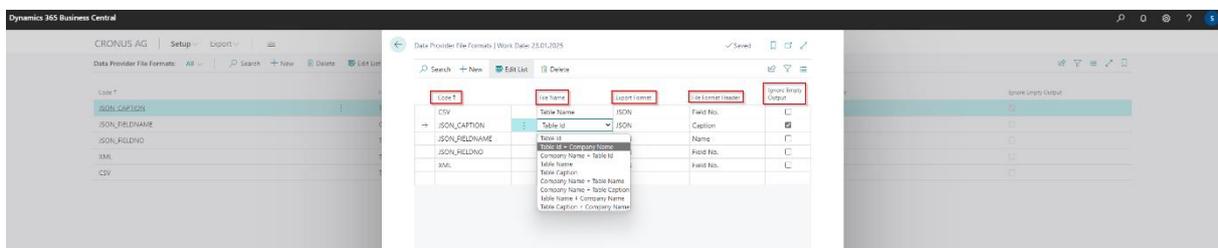
In the last field **File Format Header** there are options for the data structure of the table.

## The types of File Format Header:

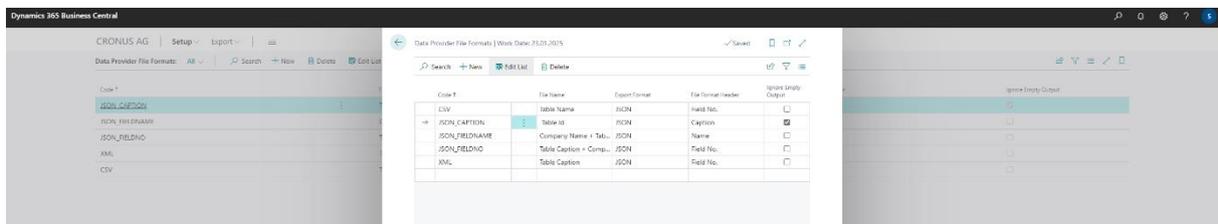
Identifier format	Explanation
Caption	Caption is used as field description
Name	The name is used as the field description
Field no.	The field number is used as the field description

In addition, there is the **Ignore Empty Output** option, i.e. outputs that are not filled are ignored and accordingly not exported.

**NOTE:** This option is only available for JSON format, because this problem does not exist for CSV / XML.



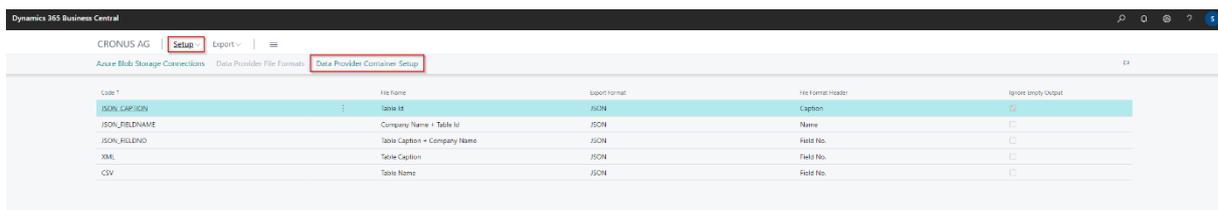
The final configuration may look like the following:



After setting up the file formats, the combination between AZBS and the file formats takes place.

## 3. Data Provider Container Setup

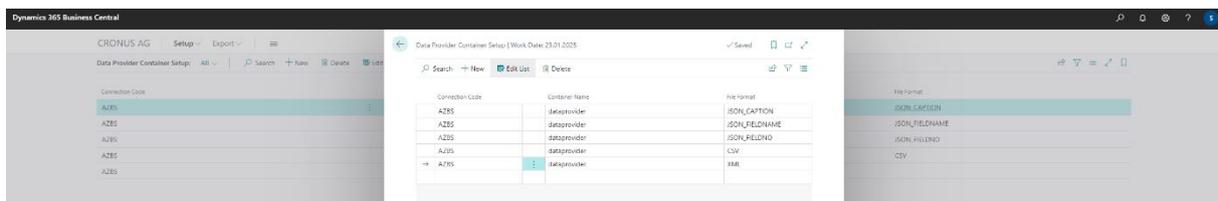
To do this, navigate to the **Data Provider Container Setup** level.



This layer is empty by default. **+New** must be selected.



In the following, the individual fields are configured so that the result looks like the following figure.



The previously configured AZBS connection is selected in the **Connection code** field. The container name specifies in which container of the storage account in AZBS the files are to be stored. Finally, the file format of the exported files is defined.

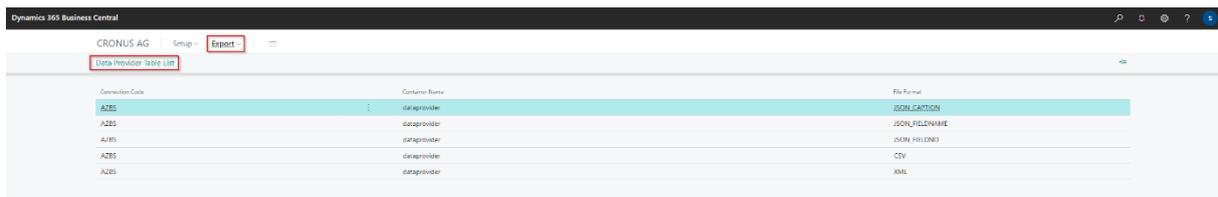
This definition of the fields ensures a connection between all individually configured subsections.

## 4. Export

To get the desired files into the CES, they must be exported.

There are basically two possibilities for the export, which are explained below.

To do this, click on the **Export** tab and select the **Data Provider Table List** layer.



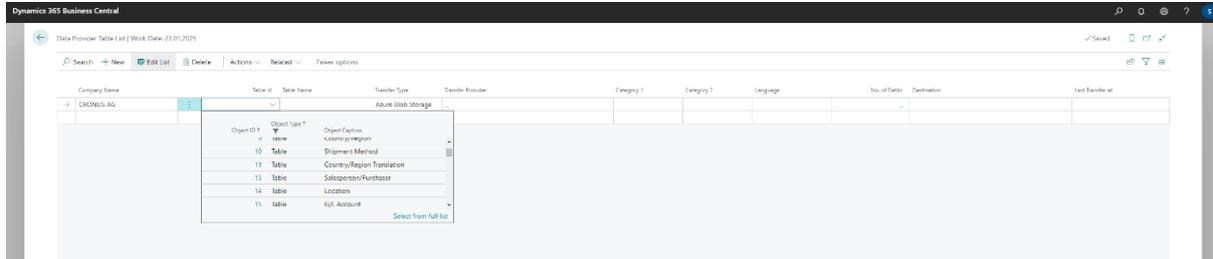
This layer is also empty by default. To fill it, **Edit List** must be selected.



A list of fields opens, all of which offer various options.

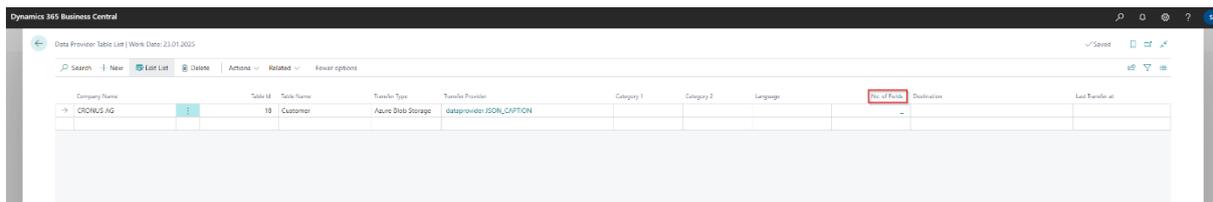
In the **Company Name** field, the company that owns the data is selected.

In the field **Table ID** an assignment of the table takes place, which one would like to export (e.g. debtor table). You select the corresponding table in the drop-down menu, but only the ID is displayed.

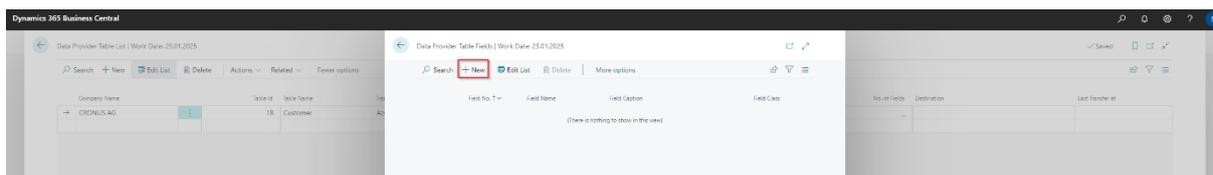


In addition to this framework data of the table structure, the **Transfer Provider** is subsequently selected, i.e. in which format the table is to be exported.

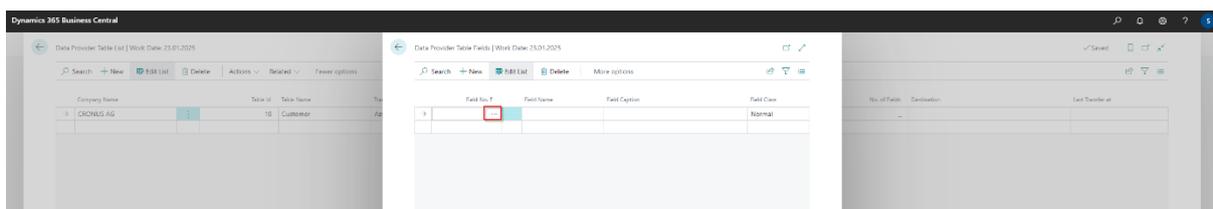
In addition, a configuration can be stored that describes exactly which fields the exported table should contain. For **No. of Fields**, the hyphen must be selected if there is no configuration yet, or the number if it has already been configured.



In the new window the layer **+New** must be selected.

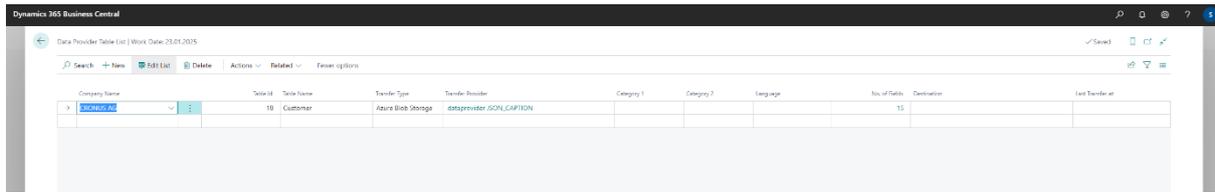


Then, under **Field No.**, the three dots must be clicked.



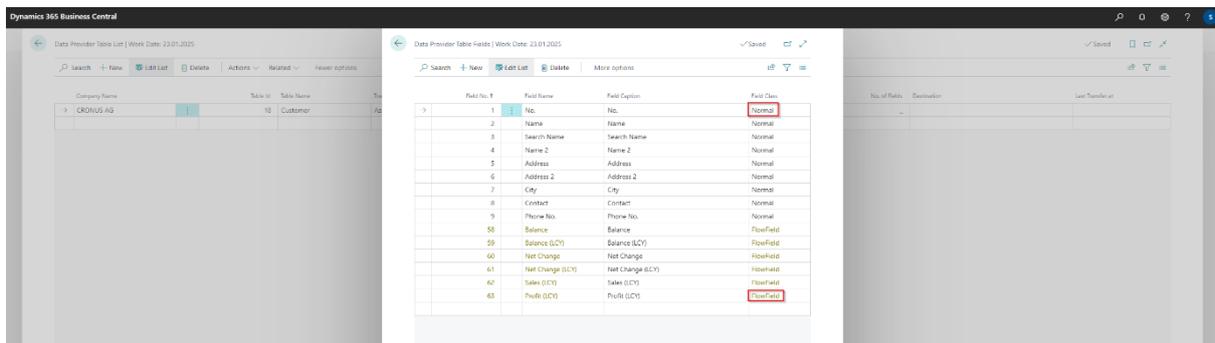
Thereupon a selection of all possible fields opens. In this example, the fields 1-9 and the fields 58 - 63 are selected for the customer table. These fields will be loaded into the file that will be exported.

The following figure shows the overview of how the configuration should or can look before navigating back to the general export overview.



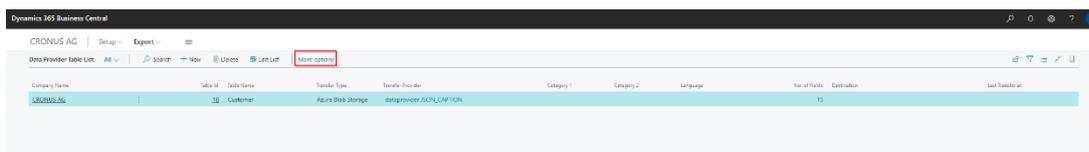
**NOTE:** Business Central distinguishes between different types of fields. These are explained below.

Field class	Field properties	Export requirement
Normal	Default field in Business Central	If nothing is defined, all fields of the Normal class are automatically exported with the table
FlowField	Calculated field in Business Central (based on a calculation from fields of the Normal class)	Must be explicitly selected during export so that they are included in the export of the table



For the actual export, it is necessary to navigate beyond to the layer.

Selecting **More options** opens various tabs, all of which are available for selection. There are basically two options for the export, which are explained below.



## Manual export

The first possibility for an export is the manual transfer of the tables into the AZBS.

For a manual transfer, the **Actions** option is selected, followed by **Transfer**.



To transfer all tables, each one and the transfer action must be selected.

To check if the export was successful, navigate to the AZBS.

Here the **storage account** is selected and then the **containers** are navigated to.

Here you can see all existing containers. If you now open the corresponding container in which the tables are to be stored, the individual files should be visible.

If the files are visible in the corresponding container, the manual export was successful.

## Automatic regular export

The second option represents the automatic regular transfer of the tables to the CES.

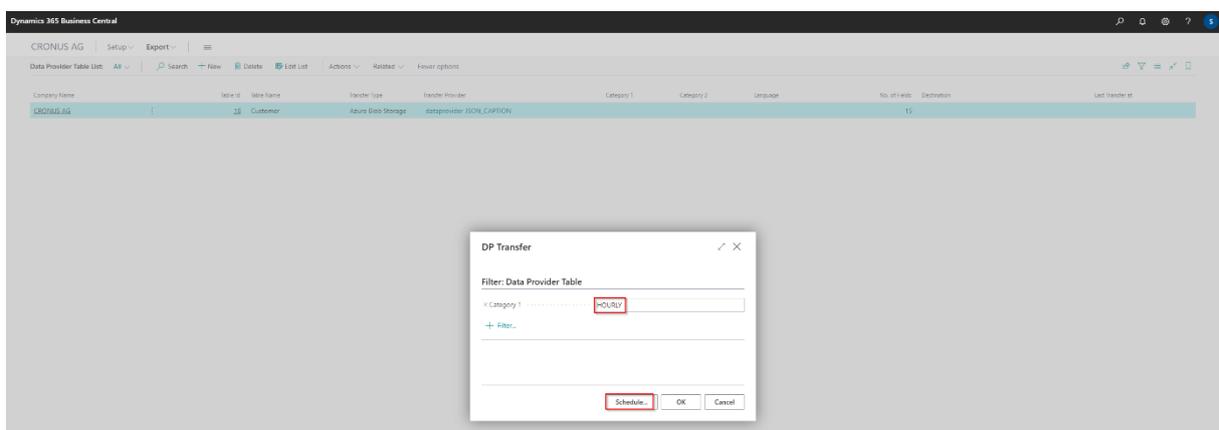
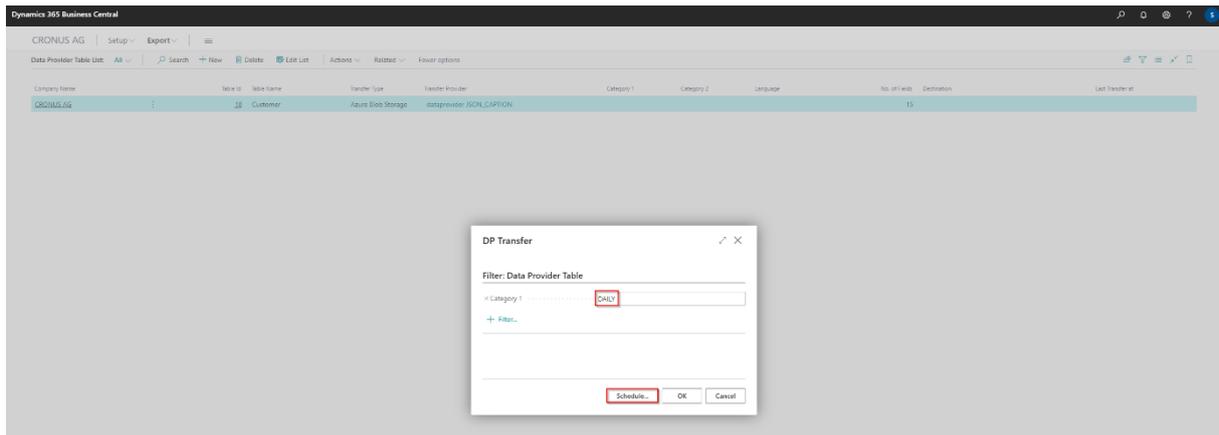
Instead of manual transfers, an automated regular transfer can also be configured. This makes a lot of sense in practice, because on the one hand the security is increased by regular backup of changes and on the other hand the workload can be reduced.

To configure this, the **Plan or Transfer multiple** option must be selected.



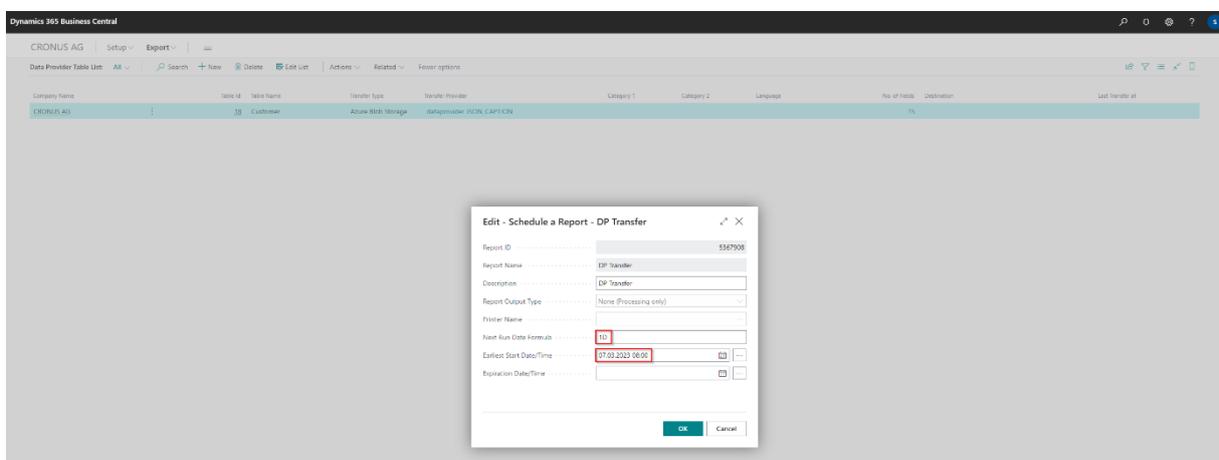
A new window will open where a category such as HOURLY or DAILY can be filled in to uniquely define (or tag) the different configurations.

Then navigate on **Schedule**.



Now follows the actual configuration of the transfer rule. It is important that a **date formula** for the next execution must be stored.

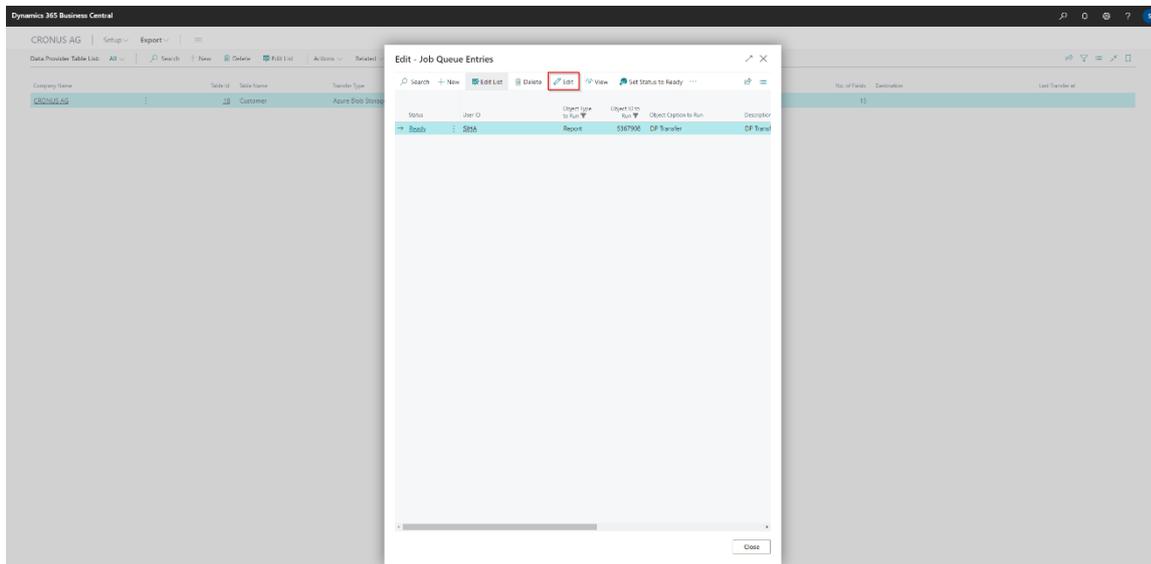
**NOTE:** If the date formula is not filled in, a later configuration is not possible and only a one-time transfer will occur!!!



Then navigate back. Now the **Related** tab and then the **Job Queue Entries** option must be selected.

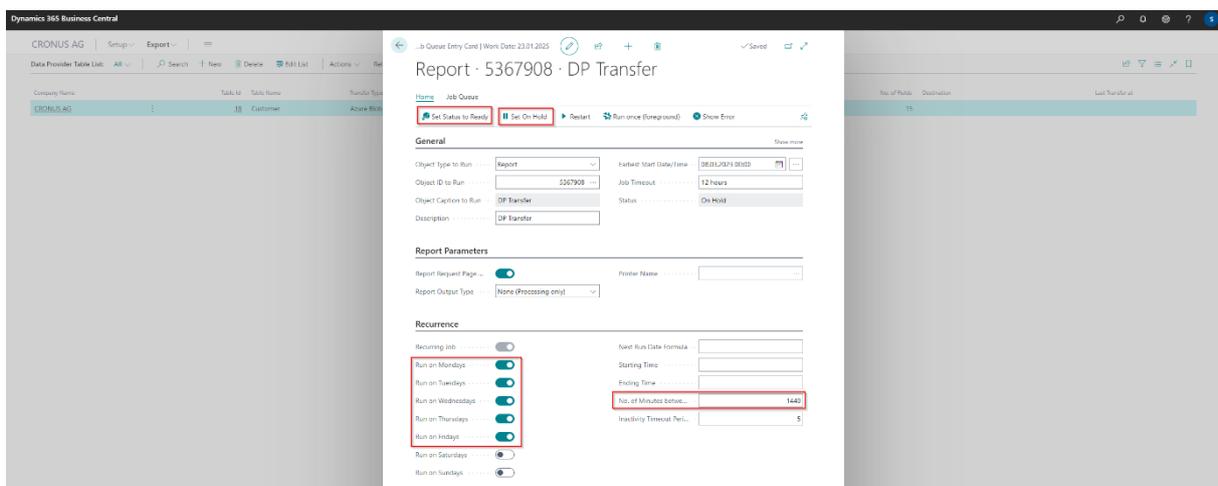


In the new window you can see the plan you just created. Here you must select the **Edit** option.

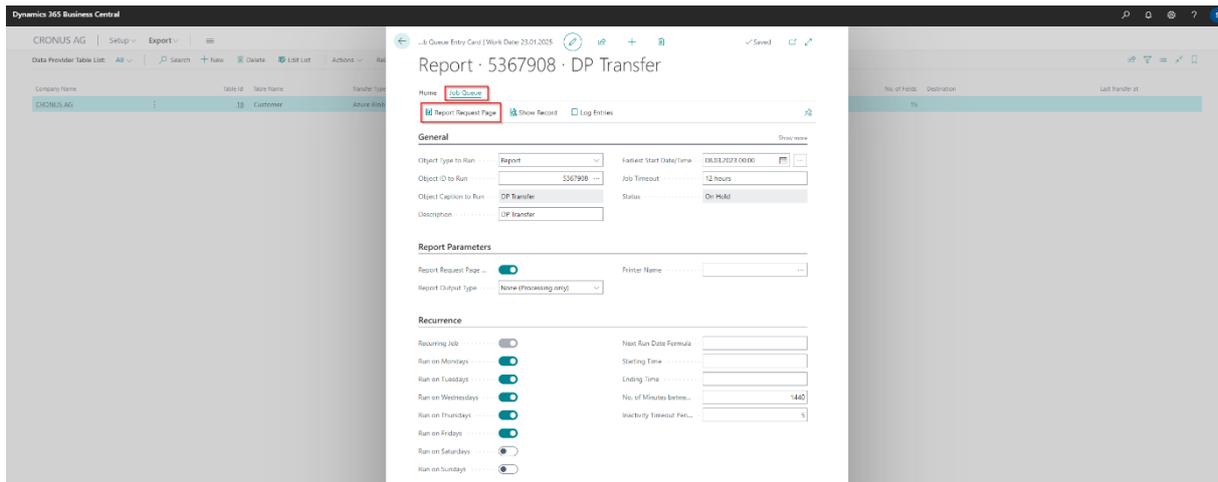


To be able to process the task queue item, the status must be set to **Set On Hold**.

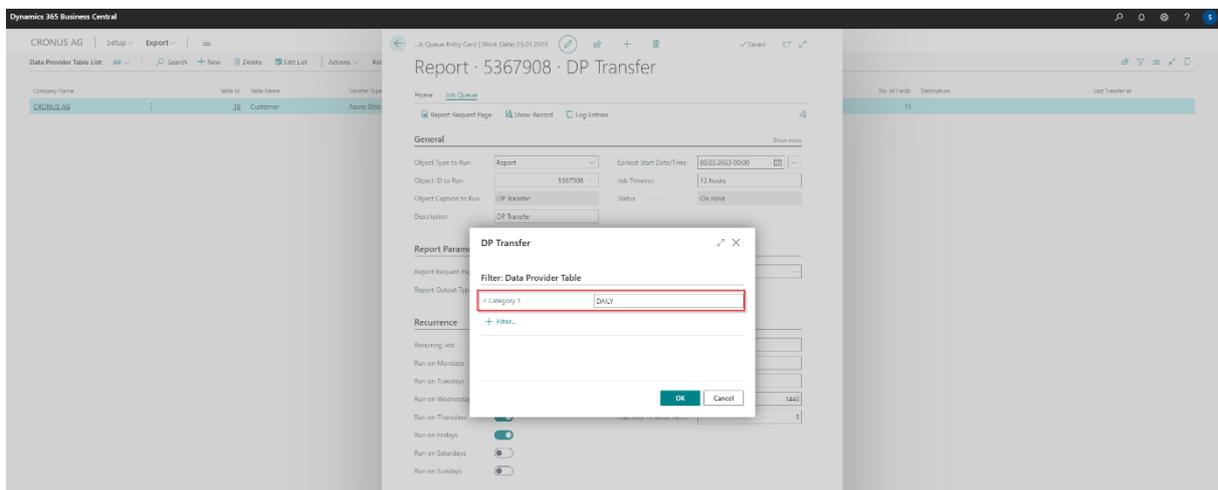
If you navigate to the bottom of this window, you will see the **Recurrence** section. Here you can set on which days the transfer should take place. Usually the data or the change of the data should be transferred every day anew. Also the number of minutes between the individual transmissions can be defined here again without date formula (e.g. 1440 minutes with a frequency of one day or 60 minutes with a frequency of one hour). The status is then set to **Set Status to Ready**, which also corresponds to the saving of the changes and the activation of the task queue.



Alternatively, the category for the export cycle can be edited again in this step. To do this, navigate to the **Job Queue** action and then to **Report Request Page**.



This opens the category view, which can be configured, revised or merely checked here for the first time. So the deposited filter parameter on the category 1 can be viewed.



Subsequently, it is also possible to navigate to the container for checking, analogously to option 1. Here, too, if the transfer was successful, the individual tables are now in wanted format in the associated container.

This means that the desired data has been successfully exported from Business Central using the data provider and can be used subsequently. There are many use cases for reuse, such as using the exported data for **BI solutions** using **Qlik®** or **Microsoft Power BI®**. The files can be imported Azure Blob Storage Data and consequently lead to meaningful conclusions and insights.

## General notes

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