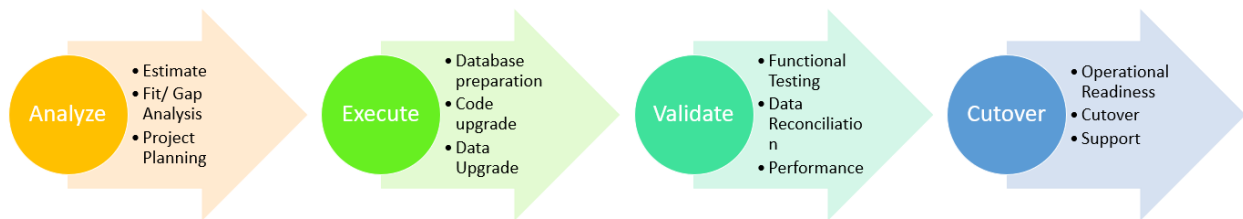# Upgrade Microsoft Dynamics AX to Microsoft Dynamics 365 for Finance and Supply Chain ERP

Unify helps businesses upgrade from Microsoft Dynamics AX 2012 or Microsoft Dynamics AX 2009 to the latest version of Dynamics 365 for Finance and Supply Chain. We also help organizations upgrade from earlier versions of D365 e.g. Version 7.0 and V8.0 to the latest application version

Our methodology follows the Microsoft Dynamics Lifecycle services which includes Analyze, Execute and Validate. Unify provides the environment for the Analyze phase and only requires you to subscribe to Dynamics 365 for Finance and Operations for the Execute and Validate phases of the project.

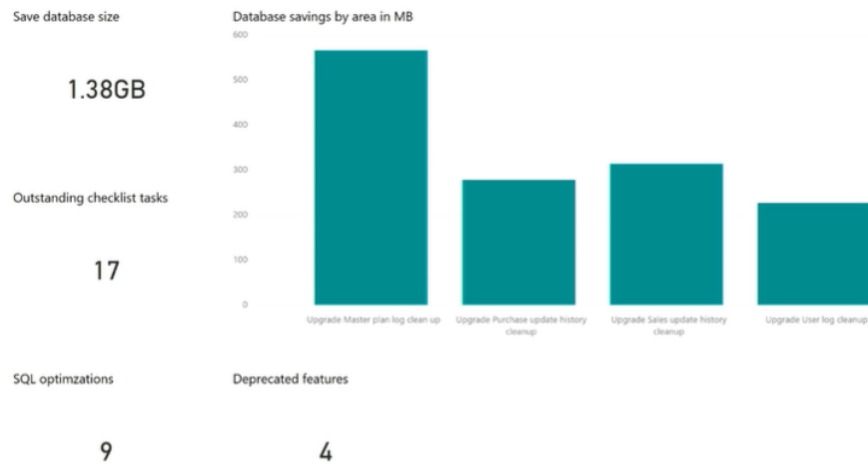| Analyze	Execute	Validate	Cutover
• Estimate • Fit/ Gap Analysis • Project Planning	• Database preparation • Code upgrade • Data Upgrade	• Functional Testing • Data Reconciliation • Performance	• Operational Readiness • Cutover • Support

Analysis Phase of the upgrade to Microsoft Dynamics 365 for Finance and Operations ERP:

In this phase we will use tools that run against a test version of Microsoft Dynamics AX to identify preparation tasks as well as prepare an estimate of time and effort for the upgrade. The types of pre-upgrade tasks identified are

- Data Clean up: This helps optimize the database size and leads to lower cost of ownership of your subscription. We will provide recommendations to reduce the database size
- SQL Optimizations: This helps improve performance of the application.
- Deprecated features: This will identify features that have been deprecated. We also provide work-arounds for these features.

An Upgrade Analysis report as shown below will show you a summary of the performance optimizations, pre-upgrade tasks, deprecated features and outstanding tasks to be completed as part of the upgrade check list.

Analyze – Upgrade analysis report

Save database size

1.38GB

Outstanding checklist tasks

17

SQL optimzations

9

Database savings by area in MB

Deprecated features

4

In addition, we will create a detailed project plan that provides step by step activities required for the upgrade in the Execute and Validate phase. All documents are uploaded to the upgrade portal, so you have full visibility to all the work done by Unify team members.

Execute Phase of the upgrade to Microsoft Dynamics 365 for Finance and Operations ERP:

After you have approved the project plan, and the estimate for the upgrade Unify team members will begin the upgrade process. This broadly includes

Project Management

- Complete the upgrade check list
- Work with any 3rd party software vendor to get the application code required for the ISV application (if in use)
- Update the project plan as we go along the project
- Provide weekly project status reports

Code Upgrade

- Installing any hotfixes required on your Microsoft Dynamics AX application to ensure a successful upgrade
- Upgrade the application
- Compile the application
- Resolve any errors
- Refactor customizations that were done with over-layering and move to extensions where possible.

Data Upgrade

- Complete the data upgrade on a development environment and do the first level validation
- Migrate the database to SQL Azure
- Execute the data upgrade on a test environment and work jointly with you to do the second level validation

Validate Phase of the upgrade to Microsoft Dynamics 365 for Finance and Operations ERP:

In the validation phase, the focus is on testing, resolution of errors, training of the core team and the final cut-over

Key activities in the Validation Phase include

Project Management

- Develop a Training Plan
- Develop a Cutover plan
- Develop a Support Agreement
- Pre go-live checklist

Validation

- Mock Cutover
- Functional Testing
- Data Reconciliation of General Ledger, Trial Balance, Inventory Balances
- Validation of Key Financial and Operational Reports
- Smoke Testing
- Performance Testing
- User Acceptance Testing

Training

- Training Documentation
- Training Videos
- Training to Core Team
- Training by Client Core Team to End Users

Cutover Phase of the upgrade to Microsoft Dynamics 365 for Finance and Operations ERP:

In the cutover phase, the focus is on ensuring a successful cutover and providing support

Key activities in the Validation Phase include

Project Management

- Pre go-live checklist
- Create Operational Readiness Plan
- Put in place a Support Team

-   Go/ No-Go review

Cutover and Support

-   Application Freeze
-   Final Data Cutover
-   Final Code Migration
-   Cut Over
-   Post go-live support

If you are interested in our Microsoft Dynamics upgrade services, please email us at info@unifydots.com.