Dynamics AX 2009/2012 to Dynamics 365 Finance and Supply Chain Migration Assessment

Summary

New Era will perform an AX to D365 assessment to support efforts to evaluate the modern D365 platform offered by Microsoft.

Objectives

A migration assessment is the first step on the cloud journey. It will help you to:

- Understand the benefits of moving from an older, on-premises solution to the cloud
- Identify business objectives and tie those into the functionality of Dynamics 365
- Learn how to optimize the migration process with a focus on reducing effort and costs
- Determine Customer next steps toward cloud transformation

Content and deliverables

Upgrade assessment report will include:

- A review of the state of the current solution and desired scope
- Upgrade rough order of magnitude
- Q&A time for Customer questions around Dynamics 365 upgrade methodology

Assessment workshop main components

1. Functional and business assessment

Customer estimated time commitment: two to three hours.

This component examines current business processes and assesses how you might be able to benefit from new capabilities and enhancements by moving to the cloud. This assessment includes:

- High-level business process and functional review: Understand Customer current business processes that are being managed in Customer on-premises version and map that to the capabilities of Dynamics 365.
- Customization, ISV, and interface assessment: High-level assessment of customizations and ISV-implemented solutions in Customer current environment and desired environment. The primary goal of this step is to assess the expected effort and identify the business dependencies involved when migrating to Dynamics 365.
- Dynamics 365 system review: Get a summary and high-level roadmap of new Dynamics 365 functionality.

2. Technical assessment and tools

Customer estimated time commitment: about one hour.

To initiate the technical assessment, Customer would need to permit New Era migration assessor(s) on-premises system access to help them identify current technical architecture. This information will then be used to develop an analysis of Customer current code and determine how it can best be leveraged in Dynamics 365. Microsoft will not access—nor should you provide access to—personally identifiable information (PII) that is housed within the current on-premises solution.

Migration summary and task list report
Contains code analysis summary, including customization information and a task list report. The task represents rough estimates of the development effort.

3. High-level migration summary
Customer estimated time commitment: one to two hours.
The standard migration assessment will reveal options based on time, effort, and resources needed to migrate from on-premises to Dynamics 365. The assessment and migration report includes:
- Review of both the functional and technical assessment review.
- How to best handle existing customizations.
- Recommended upgrade approach.
- Next steps in the migration journey.

Timeline and expected resource engagement
Customer total time commitment should fall between four and eight hours. See below for further details of what is expected from start to finish.

Scope
- **Discovery**
    - Map existing environment
    - Review LCS system diagnostic report
    - Architectural review of existing state
- **Identification**
    - Review customizations
    - Identify integrations
    - Map existing data structure
    - Review existing state configurations and identify recommended changes
- **Evaluation**
    - Identify D365 recommended architecture
    - Design upgrade plan
- **Final Report**
    - Upgrade roadmap
    - Issues identified for remediation
    - Estimate custom development required for feature parity
    - Update level of effort and statement of work