

# AIM ASSESSMENT

FOR A MICROSOFT DYNAMICS AX TO DYNAMICS 365  
FINANCE AND SUPPLY CHAIN MANAGEMENT MIGRATION

An AIM (Accelerate, Innovate and Move) assessment is the first step on your cloud journey to help you understand migration benefits, process, and ROI

## OBJECTIVES

An assessment is the first step on your cloud journey, which will help to:

- Understand the Microsoft Dynamics 365 cloud value proposition
- Review business objectives and the Microsoft Dynamics 365 platform benefits
- Define how the upgrade process can be structured with a focus on adopting standards and reducing effort and costs
- Plan for either a more detailed migration analysis or execute your migration project

*Click on video image to the right to watch the AIM Assessment overview.*



## ASSESSMENT WORKSHOP COMPONENTS

A two-day workshop providing a business process overview and assessment of the new capabilities and enhancements against existing features will include:



- **High-level business process review:** Understand your current business processes that are being managed in Microsoft Dynamics AX and obtain a high-level roadmap of the Dynamics 365 solution overview and One-version management strategy



- **Microsoft Dynamics AX configuration review:** Get a high level functional review of your Dynamics AX system



- **Microsoft Dynamics 365 system review:** Get a summary of new Dynamics 365 functionality



- **Customization, ISV and interface assessment:** High level assessment of Microsoft Dynamics AX customizations and ISV implemented solutions in your current environment. The primary goal of this step is to determine the general workload and business dependencies to migrate existing customizations to a Dynamics 365 solution

## HOW IT WORKS

### ASSESSMENT

Partner led assessment and two day workshops delivered virtually and/or onsite

### APPLICATIONS

Finance and Supply Chain Management

### CONTENT/DELIVERABLES

Upgrade assessment report

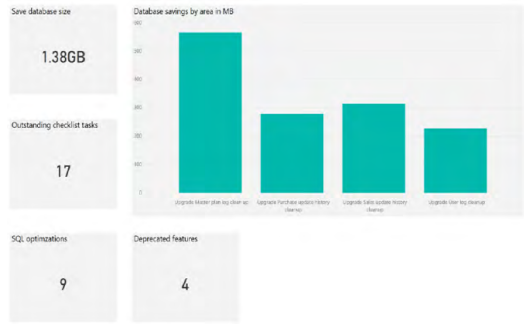
- Review state of current solution
- Preliminary run of code through LCS upgrade tool or migration approach for Microsoft Dynamics AX
- Assessment and joint review of upgrade tool results
- High level estimation ranges for migration project
- Q&A time for your questions around Microsoft Dynamics 365 upgrade methodology

## TECHNICAL ASSESSMENT AND TOOLS

**Requirements definition:** Assist in defining the technical architecture requirements in support of the Finance and Supply Chain Management solution and platform. Get an analysis of existing code and the code that can be migrated to Dynamics 365

### EXAMPLES FROM DYNAMICS AX 2012 TECHNICAL ASSESSMENT REPORTS

#### Upgrade analysis report



#### Upgrade analysis tasks

Name	Observation
Upgrade User log clean up	Delete user logs older than a certain date. This rule has checked for logs over 3 month old. This log is a record of users logging in and out of the system.
Upgrade Master plan log clean up	Master scheduling logic keeps a log table of inventory transactions. This is automatically cleaned up when master scheduling is run. If master scheduling is not run these records continue to grow larger over time and are not cleaned up. A large amount of rows over 3 months old have been found in your database.

#### Migration summary and task list report

Contains code analysis summary, including customization information and task list report. Task represents rough estimates of development effort.

Report		
Name	File type	View
AX7 metadata version 7.1.1541.3036_ExcelReport	ExcelAnalysisReport	
MigrationSummary.xlsx_ExcelReport	ExcelAnalysisReport	
TaskList.xlsx_ExcelReport	ExcelAnalysisReport	
Models upgrade_ExcelReport	ExcelAnalysisReport	

## HIGH LEVEL MIGRATION STRATEGY AND PRESENTATION

The **AIM Assessment** offers you cost-effective options to evaluate the move from any version of Microsoft Dynamics AX to Dynamics 365 F&SCM. The workshop and migration report includes:

- Upgrade approach recommendations and recommendations of existing customizations
- Review of the Functional Assessment Report, Technical Assessment Report, and Go-forward recommendations with your decision makers

### PRE-WORKSHOP

### 2-DAY WORKSHOP

Focus area	Pre-Workshop	2-Day Workshop
Focus area	<ul style="list-style-type: none"> <li>Kick off and Business Introduction</li> </ul>	<ul style="list-style-type: none"> <li>Technical Connect</li> <li>Technical Assessment</li> </ul>
Customer participants	<ul style="list-style-type: none"> <li>ERP Owner / IT Manager</li> </ul>	<ul style="list-style-type: none"> <li>Functional assessment, presentation of the findings</li> <li>Upgrade process/ planning/vision/risk</li> </ul>
Level of Customer engagement	<ul style="list-style-type: none"> <li>Participate on the Kick off call</li> </ul>	<ul style="list-style-type: none"> <li>Finalize and distribute upgrade assessment findings overview presentation</li> <li>Recommendations and next steps discussion</li> </ul>
Prerequisites	<ul style="list-style-type: none"> <li>N/A</li> </ul>	<ul style="list-style-type: none"> <li>Assist the Partner to access customer environment</li> <li>Fill in Microsoft Dynamics 365 upgrade questionnaire form</li> </ul>
	<ul style="list-style-type: none"> <li>Assist the Partner to gather information about the business process</li> </ul>	<ul style="list-style-type: none"> <li>ERP Owner / IT Manager</li> <li>Participate on the final presentation</li> <li>Provide feedback and share expectations on next steps</li> </ul>
	<ul style="list-style-type: none"> <li>Prerequisite files provided by the Partner</li> </ul>	<ul style="list-style-type: none"> <li>Prerequisite files provided by the Partner</li> </ul>

## AIM ASSESSMENT

### ASSESSMENT INITIATION

- Initial meeting with customer on scope
- Share assessment goals
- System access, Model store export
- Initiate migration approach for earlier versions of Dynamics

### FUNCTIONAL REVIEW

- Assessment of the new capabilities and enhancements against existing features
- High-level Business Process review
- Recommendation
- Functional Assessment Report

### TECHNICAL REVIEW

- Customizations
- Standard over layering
- Code refactoring
- Interfaces
- Report modifications
- Data migration
- Technical Assessment Report

### ASSESSMENT SUMMARY

- How to start the migration process
- Customer current deployment analysis
- Recommended best transition approach based on the customers' current solution
- Proposed timeline
- What resources the customer will need
- AIM tools offered
- Benefits of One Version
- Recommendations for a more detailed assessment

## WHY MIGRATE WITH SIKICH

As you embrace your vision for the future, make sure you select a partner that has the experience and expertise to get you where you want to be, and can continue to support you as your objectives evolve. Whether you're on 2012, 2009, or an older version of Microsoft Dynamics AX, reduce your risk with a partner that's performed dozens of successful Microsoft Dynamics AX to Dynamics 365 Finance and Supply Chain migrations, across industries. You'll start seeing real business results right away through several pre-configured solutions to help accelerate the implementation process. With a robust team of full-time consultants focused on Dynamics 365 Finance and Supply Chain, Microsoft Power Platform and Productivity suites, you'll have access to decades of collective experience across our implementation teams. Get the service and expertise needed to make your AX to Dynamics 365 Finance and Supply Chain migration a success, and gain access to continued support for the whole life-cycle of your solution.

To learn more about Sikich, go to [www.sikich.com/technology](http://www.sikich.com/technology) or contact [info@sikich.com](mailto:info@sikich.com).

