5 Tips for Dynamics AX 2009 to Dynamics 365 Upgrade Execution

When upgrading from AX 2009 to D365 there are many things to keep in mind while you execute the upgrade. Here are just a few of them:

1. Development environment

Keep an AX 2009 development environment with production data available while going through the upgrade process. Testers and developers will frequently access this machine to reference how functionality and the data behaved in 2009.

2. Replacement processes

Identify replacement processes for deprecated features used in 2009. If deprecated processes are critical to your operations, get comfortable with the replacement processes in D376 before going live. You don't want to get caught in a tough situation.

3. Adopting new options

When possible, consider adopting new modules/ISVs/processes in D365 in a phase following the upgrade. If you add new processes into the mix while upgrading, you interject more change than is necessary at one time. If you run into an issue with the new modules, it is difficult to know whether the issue is with the software or migrated data or if it is due to a lack of understanding in the new process.

4. Migrating data

There is not a data upgrade path from 2009 to D365, the data must be migrated. Microsoft provides a tool/hotfix you install into your AX 2009 environment that extracts data to files. Another part of the tool is a setup form where you tell AX where, in Lifecycle Services (LCS) to push those files with your extracted data. Sort through what data you want to migrate and then get the tool installed in your 2009 environment so are familiar with it.

5. Review customizations

In your AX 2009 production environment navigate to Administration > Reports > System > Element usage log and run the report. The report tells you when each ISV, custom and customized form was last used. If you have customizations not being used, save some time and money and don't recreate them in D365.

If you're interested in learning more about how to set up your organization for a successful upgrade from Dynamics AX 2009 to Dynamics 365, **check out our fixed-price assessment offering**.

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