

AX/ Dynamics 365 Finance&Supply Chain Management BestPath Assessment

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AX Department Manager



Agenda

1. BestPath Assessment
2. Transition to D365
3. Summary and Next Steps



BestPath Assessment for AX/Dynamics 365 Finance&Supply Chain Management



— Are you in the situation?

What discourages you

Every upgrade requires sales and production resources

- Quotes preparation takes time.
- Developers tied up with upgrades instead of new opportunities.

What should encourage you

Risk of losing your customers

- Many customers are on unsupported versions.
- Open for competitors.
- The customer want to know what are the options and costs to upgrade.

Risk of losing revenue

- You could get much more revenue from your existing customers.

What if you could?

- Easily define the price of an upgrade project
- Expand your capacity
- Develop trusted methodology for upgrade projects
- Easily convince the customer to upgrade
- Increase profitability of upgrade projects



1ClickFactory BestPath Assessment for AX

What?



1ClickFactory's BestPath Assessment is a technical solution assessment and analysis to make more informed decisions as to which upgrade tactic is the most beneficial for the customer to move to the new Dynamics AX version.

How?



The BestPath Assessment consists of the initial project assessment, fixed price workshop with a Partner, re-assessment of the solution, recommendations for the most beneficial path and project plan preparation.

Why?



The BestPath Assessment gives a clear plan for the project execution and more visibility into your customer solution complexity to better manage the project's risks and avoid costly mistakes.

1ClickFactory BestPath Assessment for AX Process



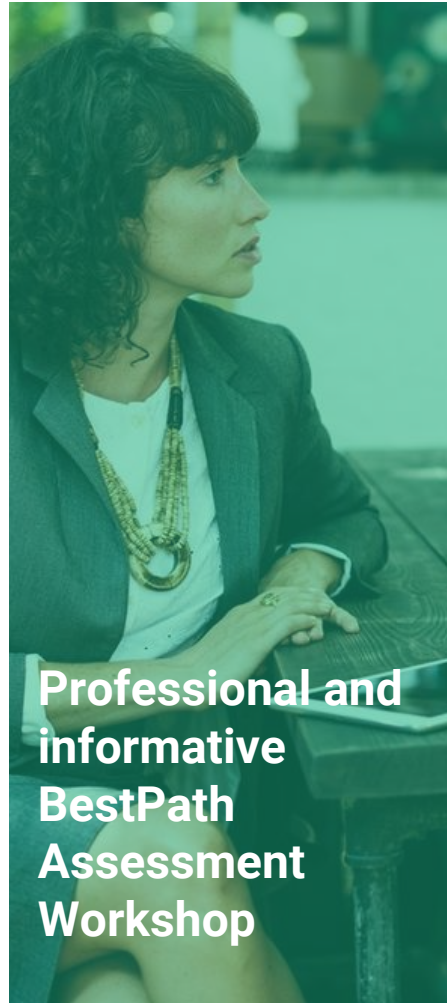
Benefits of 1ClickFactory BestPath Assessment for AX



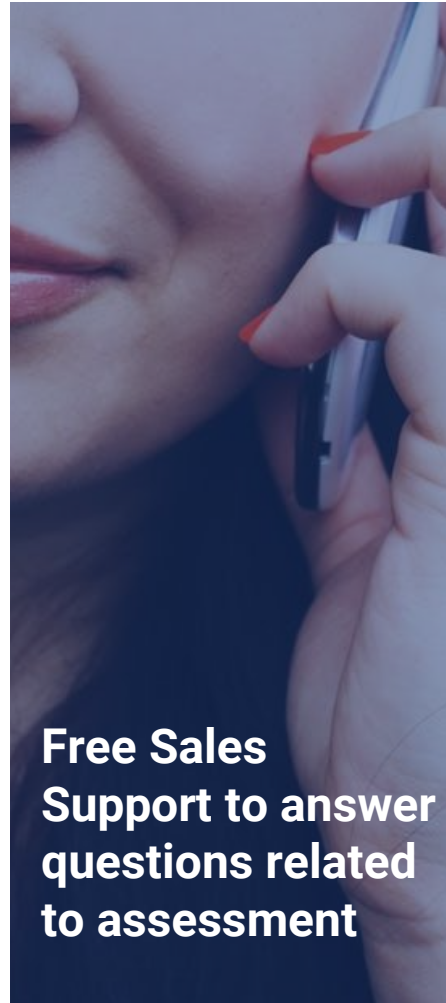
Valuable insights



Upgrade Expertise



**Professional and
informative
BestPath
Assessment
Workshop**



**Free Sales
Support to answer
questions related
to assessment**



**Professional
project planning**

— Partner Evidence

“

We highly recommend 1ClickFactory to other Dynamic Partners. When speaking with customers who are considering upgrades, we always consider your services. For us, it's not possible to conduct successful upgrades without your specialization and experience with AX upgrades. We would not feel confident performing upgrades for our customers without 1ClickFactory's support.

”

Carlos de Lira, Product Sales Manager, XPTA

— Prerequisites for the Best Path Assessment

- Source and Target solution version (build numbers);
- Database size;
- No. of companies to migrate;
- Info about add-ons;
- Modelstore or Application Files of the solution.

Deliverables

- BestPath Assessment Report
- Upgrade Scope Document
- Project Plan
- Fixed Price Upgrade Proposal (Optional)



**Microsoft
Dynamics
AX2012 Solution
Assessment
Workshop Report
for Partner**

Partner:
ABC Name Surname
Email info@abc.com
Document Preparation Date: 20/06/2019

Contact at 1ClickFactory:
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Email agil@1clickfactory.com

The 1ClickFactory Microsoft Dynamics AX Solution Assessment Workshop Report is prepared by 1ClickFactory together with the partner to assess the partner's ability to implement the solution. The report is not intended to be used for distribution or communication to any third party without prior written consent from 1ClickFactory.

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XXXXXX Solution Assessment Report


Executive Summary

XXXX (the "Client") has requested 1000factory perform XXX (the "Customer") solution upgrade analysis from Microsoft Dynamics AX 2012 to Microsoft Dynamics 365 for Finance and Operations. 1000factory performed a modification Assessment of the Customer's solution versus a standard version of Microsoft Dynamics AX 2012 to determine the scope of the planned upgrade to Microsoft Dynamics 365 for Finance and Operations.

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		XXXXXX Solution Assessment Report	
<hr/>			
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	XOXXXXX Solution Assessment Report								
1 Modification Assessment									
The following analysis was made based on the upgrade information and solution objects supplied by the Partner:									
1.1 General Information									
A.	Release identifier	XXXXXX							
B.	Microsoft Dynamics AX version	XXXXXX							
C.	Reference server type and version	XXXXXX							
D.	Reference user ID(s)	XXXXXX							
E.	Existing or new parties	XXXXXX							
1.2 Modification Level									
The Customer's solution Assessment uncovered the following modified objects versus a standard version of Microsoft Dynamics AX 2012:									
Solution Object Type	# of Customized Attributes	# of Customization Levels							
		Class	Method	Form	Total				
				New					
Tables									
Views									
Classes									
Customized Data Types									
Form Layouts									
Integration Objects									
Security Roles									
Reports									
Forms									
Queries									
Jobs									
Menus									
Menu Items (Global)									
Menu Items (Local)									
Menu Item Labels									
Other files									
Total									
Note: X Customer's In-house Modification Assessment									

 XXXXXXXX Solution Assessment Report

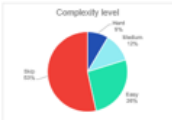


Figure 1 shows the percentage of objects by complexity level: high, medium, easy and almost simple.

1.3 Time investment

The Customer's solution assessment uncovered the following time investment:

Application Object Type	Time Investment estimate, h
Business	
Process	
Form	
Event-driven process	
Complex event-driven process	
Decision	
Integration	
Interface	
System interface	
Other	
Total estimated	
Total new objects	

Note 1: Customer's overall "time investment for objects recognition"

"Time investment for redesign by object type can be found in ANNEX I."

Total investment estimated time for all customized objects: XXXX h.

1.4 New objects

The total of new objects can be found in ANNEX I.

Total investment estimated time for new objects: XXXX h.

1.5 Skipped objects

Skipped objects should be assessed by the partner and approved, that they can be removed from the solution. The set of skipped objects can be found in ANNEX I.

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2. Notes

- There are multiple integrations based on Business Connectors. This technology is obsolete in CIGS F&O and these integrations have to be redesigned. The integration code migration is in scope as it can be re-used in custom scenarios.
- Most inventory management related modifications have been identified as not relevant and are to be dropped.
- Several tables were converted from pre-company to shared. This is not achievable in CIGS F&O and cross-company data sharing functionality has to be considered as requirement.
- 1300+ tables had Create/Transaction and Modified/Transaction properties modified. While it was discussed as done in purpose, these properties are not extensible and modifications were identified as stopgapable.
- OL, posting and number sequence frameworks has been heavily changed and has to be redesigned. This is included in scope.
- Most changes to DTP objects are dropped as either obsolete or identified as not relevant.

3. Annexes

ANNEX 1. C000000 Objects.xlsx

AutoSave [ON] [Icons]

Objects_review_charts.pvz - Excel

File Home Insert Page Layout Formulas Data Review View Help Easy Document Creator Tell me what you want to do

Normal | **Page Break Preview** | **Page Layout Views** | **Custom Views** | **Ruler** | **Formula Bar** | **Zoom** | **100%** | **Zoom to Selection** | **New Window** | **Arrange All** | **Freeze Panes** | **Hide** | **Unhide** | **View Side by Side** | **Synchronous Scrolling** | **Reset Window Position** | **Switch Windows** | **Macros**

Workbook Views | **Show** | **Zoom** | **Window**

A2 : X ✓ fx

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
	Solution analysis results (extensions)													
1														
2														
3	Partner Name:													
4	Customer/Solution Name:													
5	Date:													
6														
7	From version:													
8	Kernel version:													
9	Application version:													
10	To version:													
11	Database Type													
12	Number of Companies:													
13	Database Size (GB):													
14														
15														
16	Object Type Hard Medium Easy Skip New Total objects Tables 201 111 366 678 Forms 41 64 268 373 Classes 206 39 504 749 Base Enums 2 69 211 282 Extended Data Types 122 1 541 664 Views 3 4 24 31 Maps 5 1 7 Queries 7 2 135 144 Menus 8 7 4 19 Menu Items Display 186 1 275 462 Menu Items Output 38 1 66 105 Menu Items Action 69 2 174 245 Macros 4 13 17 Total standard 892 302 2582 1194 Total new objects 54 2811 123 2988 Total 946 3113 123 4182													
17	Object Type Time investment estimated, h + Time investment (preliminary), h = Total, h Tables 142 1 143 Forms 120 120 Classes 136 136 Base Enums 4 4 Extended Data Types 44 44 Views 5 5 Maps 10 10 Queries 9 9 Menus 45 45 Menu Items Display 64 64 Menu Items Output 13 13 Menu Items Action 24 24 Macros 2 2 Total standard 618 1 619 Total new objects 112 112 Total 730 1 731													
18	Object Type Hard Medium Easy Skip New Total objects Tables 201 111 366 678 Maps 5 1 7 Views 3 4 24 31 Extended Data Types 122 1 541 664 Base Enums 2 69 211 282 Feature Keys License Codes													
19	Object Type Time investment estimated, h + Time investment (preliminary) = Total, Tables 142 1 143 Maps 10 10 Views 5 5 Extended Data Types 44 44 Base Enums 4 4 Feature Keys License Codes													

< > Review Charts Total Details Header Calculations (+) : <

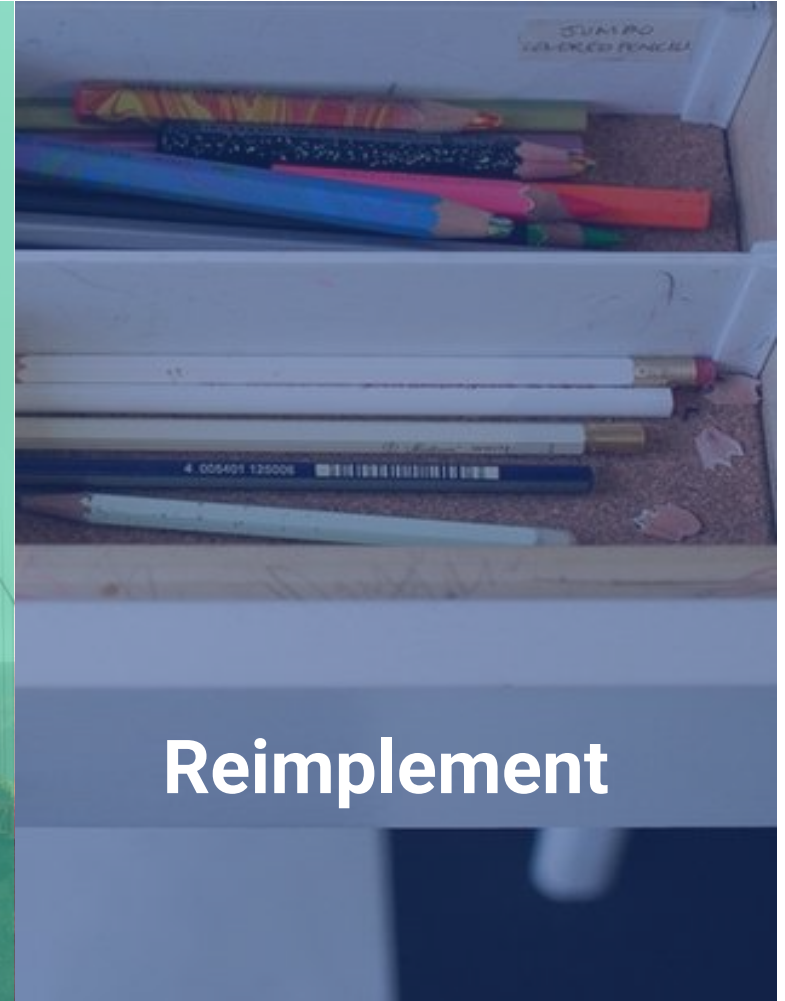
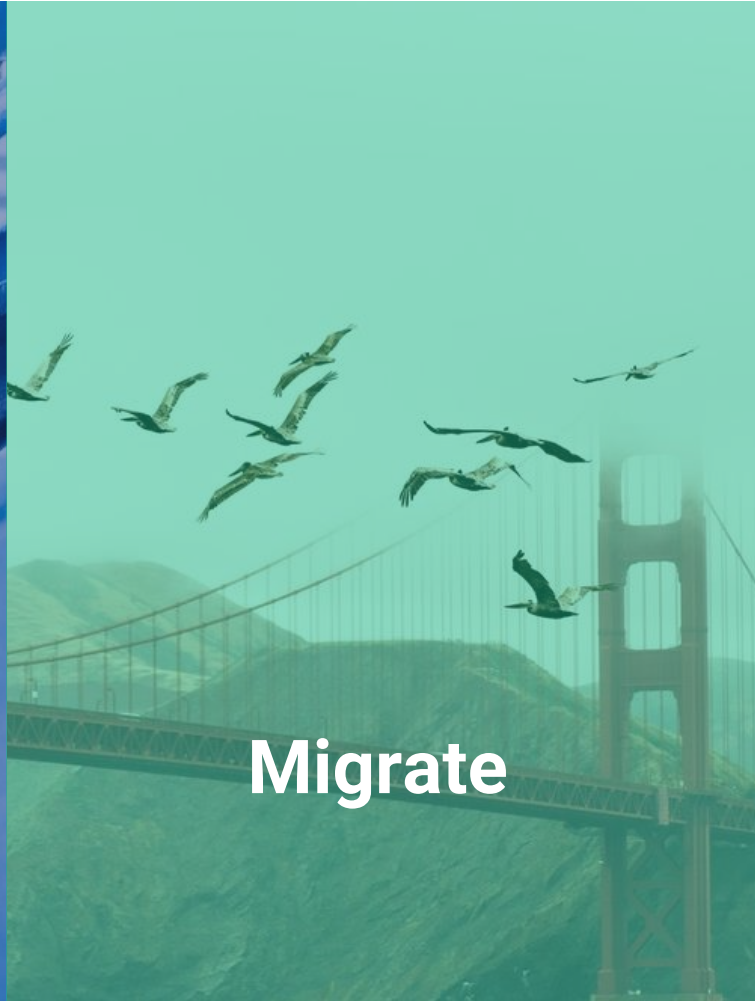
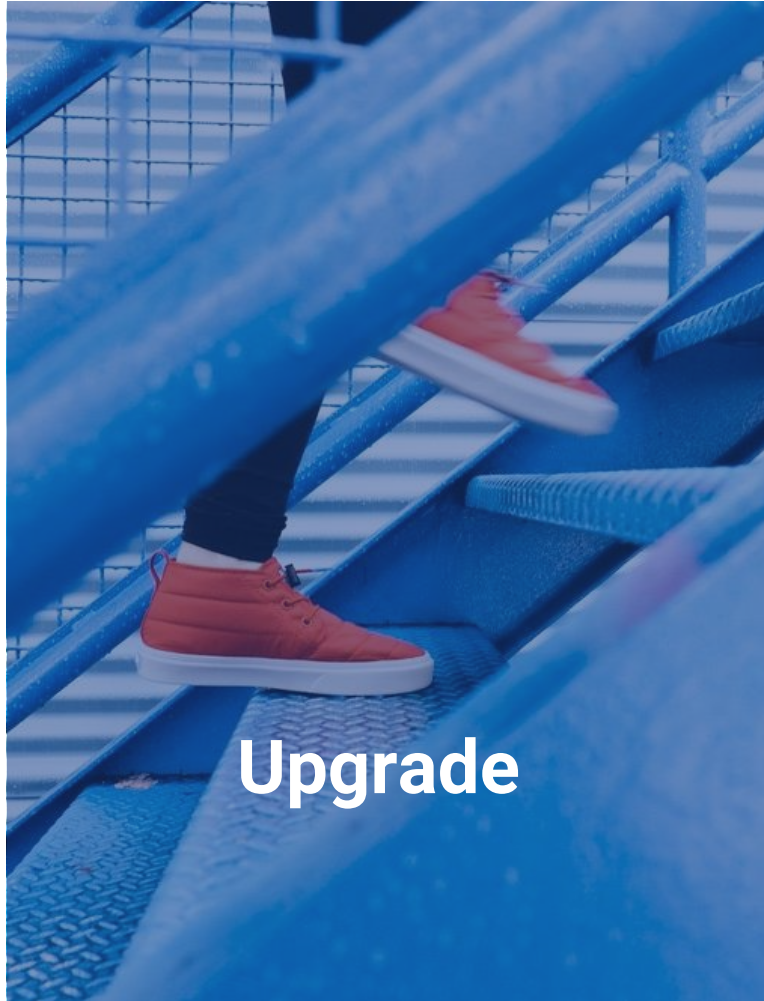
Understanding your path



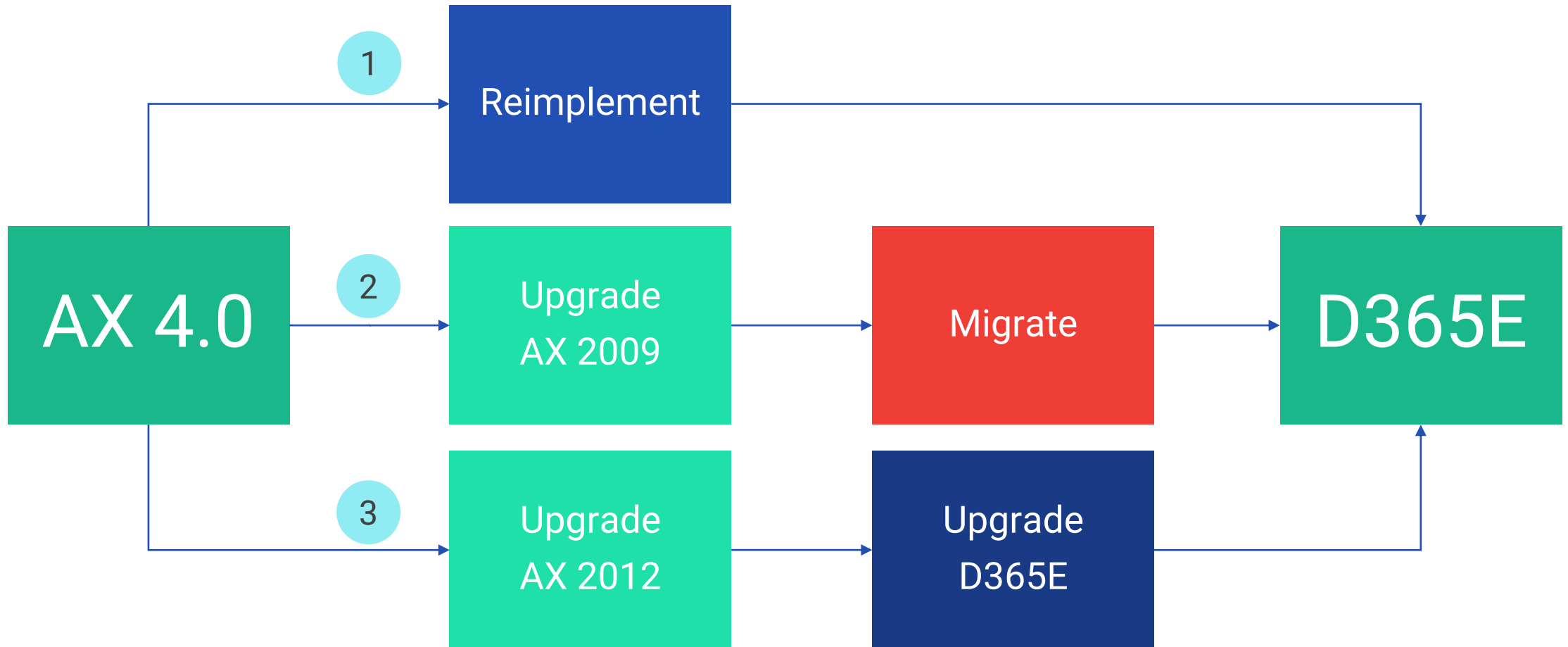
Factors When Selecting the Best Path

Business reorganization or restructure	<ul style="list-style-type: none">• Change in organization structure• Business process change or reengineering. Implementing workflows	
Database size & quality	<ul style="list-style-type: none">• Data quality, consistency, integrity, etc.• Substantial volumes of historical data (purge or archive)	
Customizations & new functionality	<ul style="list-style-type: none">• Need to use new functionality that is available in a new version• Higher integrity, security, and reliability requirements• Change in organization structure• Business process change or reengineering	<ul style="list-style-type: none">• Implementing new business process workflows• Customizations implemented in new standard version• Eliminating obsolete customizations• Risk of moving old customizations to a new version
ISV solutions & integrations with third party applications	<ul style="list-style-type: none">• New functionality replaces existing third party applications• Business critical integrations• Supporting target version	
Other	<ul style="list-style-type: none">• Appropriate budget• Timeline expectations	<ul style="list-style-type: none">• Downtime limitation for a cutover• Internal and external resource availability

Understanding your path Areas of 1ClickFactory's Support



Understanding your path



Transitions

Transition to D365E Path 1 (Reimplement)

- AX 4.0 is a very old system
- Carrying modifications forward old data may be undesirable and difficult
- Modifications might be covered by standard functionality of new version

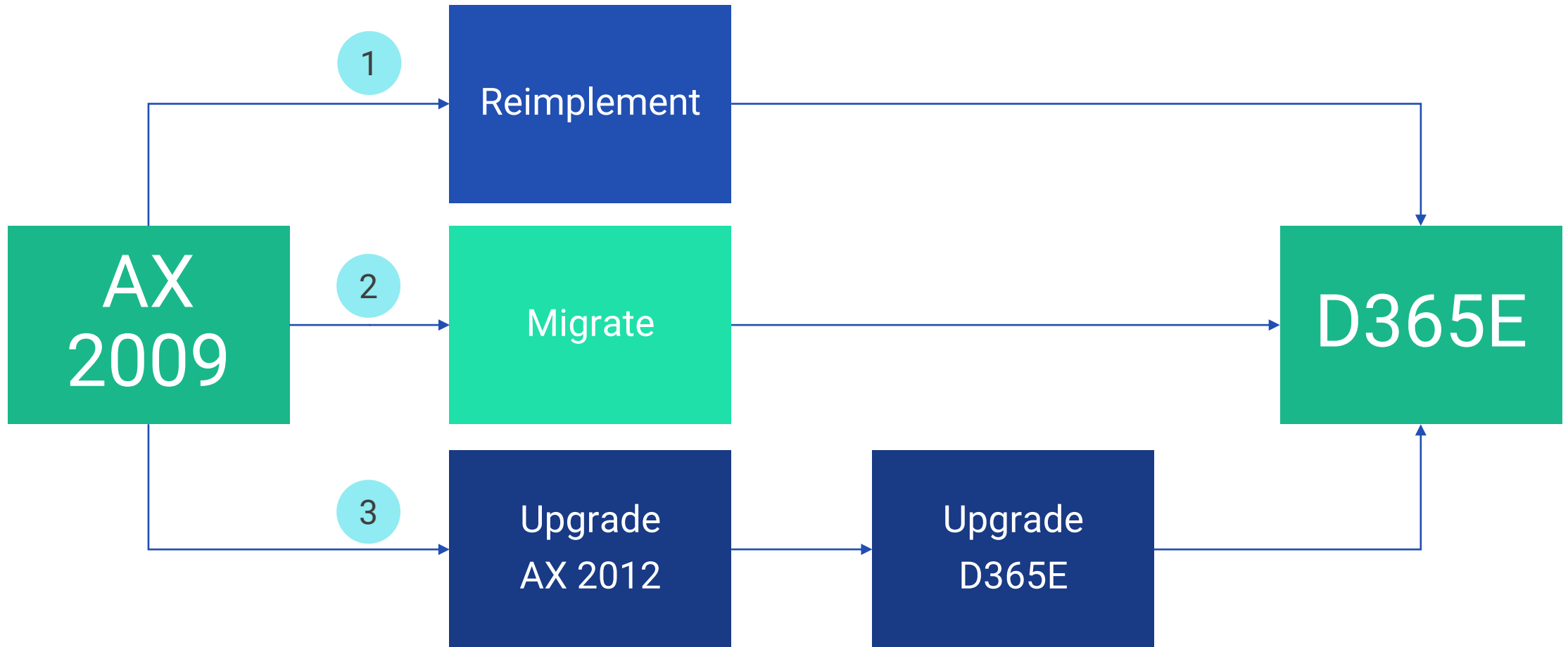
Transition to D365E Path 2 (Upgrade then Migrate)

- The effort needed to go to AX 2009 (vs. AX 2012) is lower
- Ability to use existing AX 2009 data migration tools
- Customer's solution has low/medium complexity level
- Easier move data by upgrading database structure only
- Potentially require additional testing

Transition to D365E Path 3 (Upgrade)

- If customer's solution is lightly customized
- Data migration is more painful than code upgrade
- Potentially requires double testing
- Higher risk

Understanding your path



Transitions

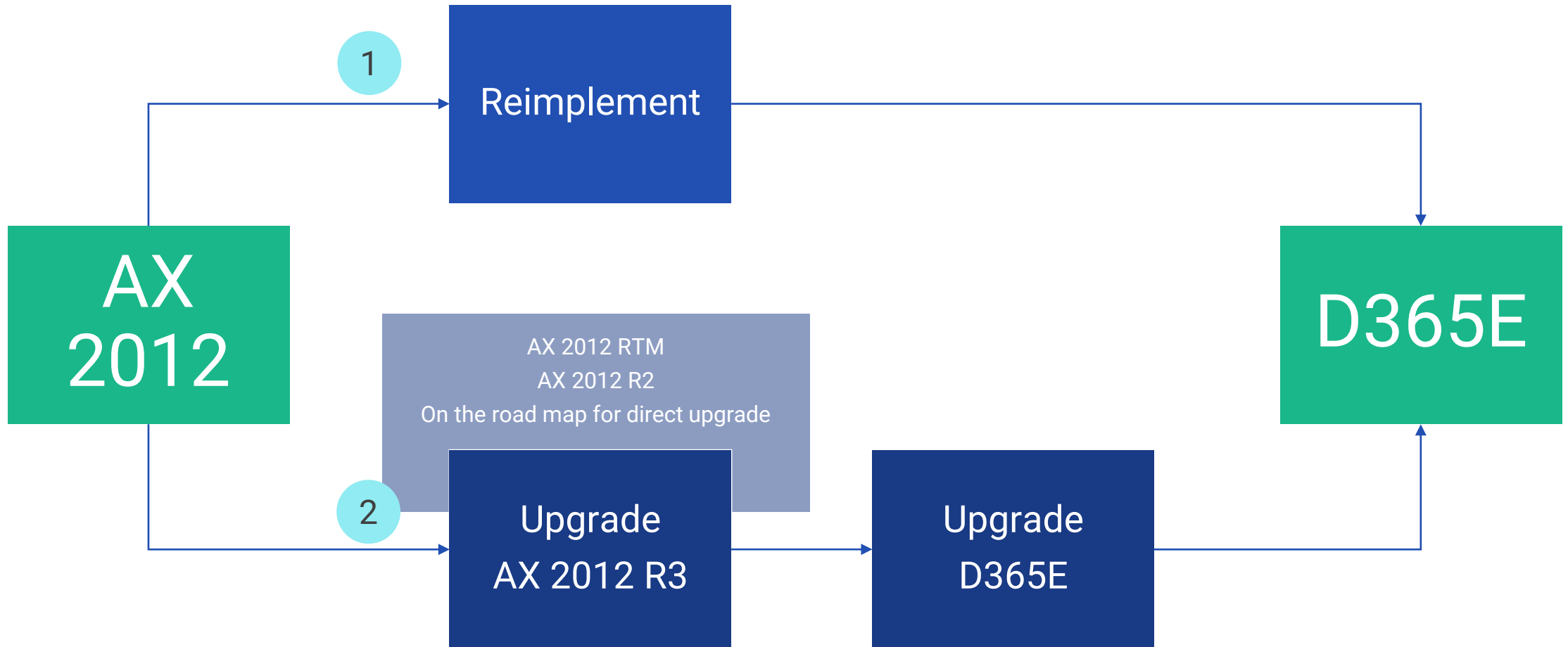
Transition to D365E Path 2 (Migrate)

- If customer's solution is heavily customized and the data is inconsistent
- Brings forward selected data only
 - X++ based framework
 - Simple and useful tool
 - Iterative process
 - Modifications to the utilities can be done to solve specific business problems
 - Delta data migrations possible

Transition to D365E Path 3 (Upgrade)

- If customer's solution is lightly customized
- Data migration is more painful than code upgrade
- Potentially requires double testing
- Higher risk

Understanding your path



Transitions

Transition to D365E Path 1 (Reimplementation)

- Suits well for intrusively customized solutions
- Possibility to chose solution parts to reimplement
- Customizable data migration

Transition to D365E Path 2 (Upgrade)

- Code and data upgrade
- Standard Microsoft upgrade tools are used

Next step

Request BestPath Assessment for AX by providing information about the solution through www.1clickfactory.com

In the comment section specify BestPath workshop for AX

You can always contact your [1ClickFactory local office](#) to request a consultation with our AX specialist.



Request
BestPath
assessment for AX
@1ClickFactory.com

Q&A



Thank you!

