

MICROSOFT DYNAMICS 365 FINANCE AND OPERATIONS

Standard Migration Assessment - start your cloud journey

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



ASSESSMENT

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



WORKLOAD

Finance & Operations



GEOGRAPHY

Globally available through participating partners



CONTENT/DELIVERABLES

Upgrade assessment report

- ✓ Review state of current solution
- ✓ Preliminary run of code through LCS upgrade tool or migration approach for Dynamics AX 2009 version
- ✓ Assessment and joint review of upgrade tool results
- ✓ High level estimation ranges for migration project
- ✓ Q&A time for your questions around Dynamics 365

ASSESSMENT WORKSHOP COMPONENTS

Functional / business assessment

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

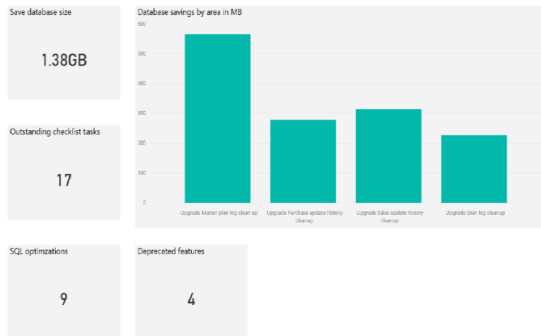
- ✓ **High-level business process review:** Understand your current business processes that are being managed in Dynamics AX and obtain a high-level roadmap of the Dynamics 365 solution overview and One-version management strategy
- ✓ **Dynamics 365 system review:** Get a summary of new Dynamics 365 functionality
- ✓ **Customization, ISV and interface assessment:** High level assessment of 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
- ✓ **Dynamics AX configuration review:** Get a high level functional review of your Dynamics AX system

Technical assessment and tools

REQUIREMENTS DEFINITION: Assist in defining the technical architecture requirements in support of the Finance and Operations 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 cleanup	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

Name	File type	View
AX7 metadata version 7.1.1541.2026_ExcelReport	ExcelAnalysisReport	
MigrationSummary.xlsx_ExcelReport	ExcelAnalysisReport	
TaskList.xlsx_ExcelReport	ExcelAnalysisReport	
Models upgrade_ExcelReport	ExcelAnalysisReport	

High level migration strategy and presentation

The Standard Migration Assessment offers you cost-effective options to evaluate the move from any earlier version of Dynamics AX to Dynamics 365 Finance and Operations, working in conjunction with your existing Partner or independently. 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

TIMELINE AND EXPECTED YOUR RESOURCE ENGAGEMENT

	PRE-WORKSHOP		2-DAY WORKSHOP	
FOCUS AREA	Kick-off and Business Introduction	Technical Connect Technical Assessment	Functional assessment presentation of the findings Upgrade process/planning/ vision/risk	Finalize and distribute upgrade assessment findings overview presentation Recommendations and next steps discussion
CUSTOMER PARTICIPANTS	ERP Owner / IT Manager	ERP Owner / IT Manager	CXO, ERP Owner / IT Manager, Business Department Leads	ERP Owner / IT Manager
LEVEL OF CUSTOMER ENGAGEMENT	Participate on the Kick-off call	Assist the Partner to access customer environment Fill in Microsoft Dynamics 365 upgrade questionnaire form	Assist the Partner to gather information about the business process	Participate on the final presentation Provide feedback and share expectations on next steps
PREREQUISITES	N/A	Prerequisite files provided by the Partner	Prerequisite files provided by the Partner	Prerequisite files provided by the Partner

