

Initial Upgrade Customer Questionnaire

The aim of this document is to gather initial data about the current Microsoft Dynamics AX production environment which is to be assessed for the upgrade project. Information gathered is to be used to evaluate and define the upgrade assessment path.

The current version

System information	Details
Microsoft Dynamics AX version	
Number of users by license type	
License model details	
Areas/Modules used	
Languages used - User Interface	
Languages used - Documents	
Database server type and version	
Database size (GB)	
Database collation	
Virtual company used?	YES/NO
Data partitioning used?	YES/NO
Attachment storage	
Number of Legal Entities	
List of markets (countries) served	
Physical server locations	

Modules installed:

Model ID	Layer	Model name	Model publisher	Version	Signed	Model description

Modules installed:

Interface name	Description	Mode/Direction	Risk

The upgrade process additional requirements

Area	Requirements
Current functions to improve, replace or avoid	
Data migration (all data, opening balances, mixed)	
Model store analysis strategy (full, prepared or partial)	
Reporting, Business Intelligence	
Important business context?	
Any other initial requirements?	