Columbus
Once you know how...
Advanced Migration Assessment
Special Offer

Advanced Migration Assessment

Components

Assessment initiation

Kick-off and Business Introduction

- Share assessment goals
- System access, model store export
- Initiate migration approach for earlier version of Dynamics on-premises

Step 1

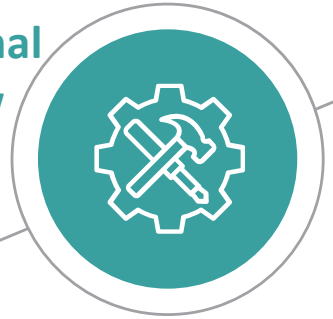
Technical review

Technical Assessment

- Solution customization & modifiation analysis
- Code refactoring
- Data consistency and data integrity check
- ISV implemented solutions review
- Risks identification
- Integrations, BI and reporting strategy
- Technical assessment report

Step 2

Functional review

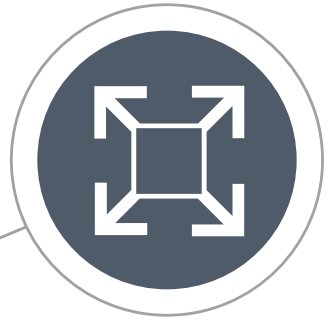


Functional Assessment

- Assessment of the new capabilities and enhancements against existing features
- High-level business process review
- Review of the current solution findings
- Recommendation
- Functional assessment report

Step 3

Assessment Summary



Assessment presentation & next steps discussion

- Review of the state of the current solution
- Proposal on how to start the migration process
- Deployment options analysis
- Recommended best transition approach
- Proposed timeline & resources
- Recommendations & next steps roadmap
- Q&A

Step 4

Timeline & Resources engagement

	Step 1	Step 2	Step 3	Step 4
Focus Area	• Kick-off and Business introduction	• Technical connect • Technical assessment	• Discuss Functional assessment based on findings • Upgrade process / planning / vision / risk	• Finalize and distribute upgrade assessment findings overview presentation • Recommendations and next steps discussion
Customer participants	• CxO, ERP owner / IT manager, business department leads	• ERP owner / IT manager	• ERP owner / IT manager	• CxO, ERP owner / IT manager, business department leads
Levels of Customer engagement	• Participate on the Kick-off call	• Assist the partner to access customer environment/ deliver AX model store • Fill in Microsoft Dynamics 365 upgrade questionnaire form	• Assist the partner to gather information about the business process • Give feedback on questions on why/how	• Participate on the final presentation • Provide feedback and share expectations on next steps

While we perform the assessment over the course of **4-6 weeks**, your total time commitment should fall **between 3-5 workdays.** Can be delivered in on/offsite manner. Expenses are covered by Microsoft & Columbus

Deliverables of Standard AMA:

Functional Assessment
Your business processes may have changed over the lifecycle of Dynamics on-premises deployment, and they might not be the best fit for an online deployment. This analysis drills into the important functional requirements and re-evaluates them with best practices and recommendations for Dynamics 365

Technical Assessment
Assessment includes: Technical analysis of the AX environment, level of customizations and their complexity and pathway for migration. In addition: recommendations towards new available functionalities, complexity of migration, ways to get the same functionalities through work arounds

Integration Options
Existing integrations running on-premises may no longer be needed or run when migrating to the cloud. The goal of the analysis is to assess those existing integrations for cloud compatibility, security, technical feasibility, and performance

Migration Plan
Helps to understand what a future state deployment might look like and produce a high-level system blueprint. This might include items such as conceptual solution architecture, high level gap-fit by business processes, integration strategy, data migration strategy and/or deployment strategy

Reporting
This item makes recommendations on reporting options for Dynamics 365. Examples include detailed reporting and BI assessment broken down by – operation reporting, financial reporting, business document reporting, analytical reporting etc

Recommendation and approach
A summary view of what would be the best course of action to hep you move to cloud and the pathway that would work best for you and you business, depending on complexity, and impact analysis

Additional options upon agreement:

Business Value Analysis (BVA)
Helps to understand the total economic impact of moving to the cloud. Performing a BVA will help to align migration efforts with business outcomes. uncover potential cost-savings and productivity gains establishing a compelling economic reason to migrate to the cloud

Deprecation plan
Deprecation planning assesses those key items that will be affected going to the cloud and offers recommendations, best practices and alternative solutions that a customer should consider

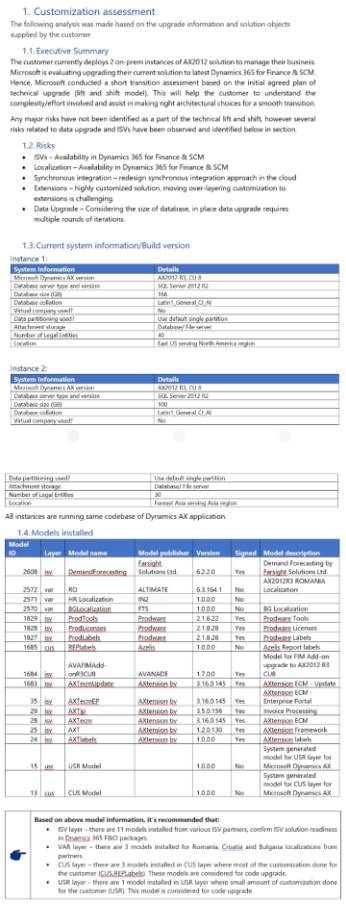
Envisioning
A design thinking workshop can help to generate ideas, ensure all the key stakeholders on the migration project are heard, form a prioritized list of requirements that can be used in the design and help shape future phases of digital transformation

Industry accelerators
Microsoft industry accelerators/3rd party templates can help with time to value on Dynamics 365 cloud migrations. If there is a particular vertical solution that addresses a known functionality gap, then this analysis can help in exploring potential use case scenarios post migration

Industry best practices
Based on the results of the assessment, there may be specific areas which warrant further response, this item is an opportunity to expand on industry best practices, especially as it relates to functional and technical elements of Dynamics 365

Proof of Concept
Joint work to build a limited scope proof of concept (demo) using Dynamics 365. The idea is to enable hands on experience, prove value and see the desired results

Sample of assessment report



1. Customization assessment

The following analysis was made based on the upgrade information and solution objects supplied by the customer

1.1. Executive Summary

The customer currently deploys 2 on-prem instances of AX2012 solution to manage their business. Microsoft is evaluating upgrading their current solution to latest Dynamics 365 for Finance & SCM. Hence, Microsoft conducted a short transition assessment based on the initial agreed plan of technical upgrade (lift and shift model). This will help the customer to understand the complexity/effort involved and assist in making right architectural choices for a smooth transition.

Any major risks have not been identified as a part of the technical lift and shift, however several risks related to data upgrade and ISVs have been observed and identified below in section.

1.2. Risks

- ISVs – Availability in Dynamics 365 for Finance & SCM
- Localization – Availability in Dynamics 365 for Finance & SCM
- Synchronous integration – redesign synchronous integration approach in the cloud
- Extensions – highly customized solution, moving over-layering customization to extensions is challenging.
- Data Upgrade – Considering the size of database, in place data upgrade requires multiple rounds of iterations.

1.3. Current system information/Build version

Instance 1:

System Information	Details
Microsoft Dynamics AX version	AX2012 R3, CU 8
Database server type and version	SQL Server 2012 R2
Database size (GB)	166
Database collation	Latin1_General_CI_AI
Virtual company used?	No
Data partitioning used?	Use default single partition
Attachment storage	Database/ File server
Number of Legal Entities	40
Location	East US serving North America region

Instance 2:

System Information	Details
Microsoft Dynamics AX version	AX2012 R3, CU 8
Database server type and version	SQL Server 2012 R2
Database size (GB)	100
Database collation	Latin1_General_CI_AI
Virtual company used?	No
Data partitioning used?	Use default single partition
Attachment storage	Database/ File server
Number of Legal Entities	20
Location	Fareast Asia serving Asia region

All instances are running same codebase of Dynamics AX application.

1.4. Models installed

Model ID	Layer	Model name	Model publisher	Version	Signed	Model description
2608	isv	DemandForecasting	Farsight Solutions Ltd.	6.2.2.0	Yes	Demand Forecasting by Farsight Solutions Ltd.
2572	var	RO	ALTIMATE	6.3.164.1	No	AX2012R3 ROMANIA Localization
2571	var	HR Localization	IN2	1.0.0.0	No	
2570	var	BGLocalization	FTS	1.0.0.0	No	BG Localization
1829	isv	ProdTools	Prodware	2.1.6.22	Yes	Prodware Tools
1828	isv	ProdLicenses	Prodware	2.1.8.28	Yes	Prodware Licenses
1827	isv	ProdLabels	Prodware	2.1.8.28	Yes	Prodware Labels
1685	cus	REPLabels	Azelis	1.0.0.0	No	Azelis Report labels
1684	isv	AVAFIMAdd-onRTCUB	AVANADE	1.7.0.0	Yes	Model for FIM Add-on upgrade to AX2012 R3 CU8
1683	isv	AXTecmUpdate	AXtension by	3.16.0.145	Yes	AXtension ECM - Update
35	isv	AXTecmEP	AXtension by	3.16.0.145	Yes	AXtension ECM - Enterprise Portal
29	isv	AXTip	AXtension by	3.5.0.156	Yes	Invoice Processing
28	isv	AXTecm	AXtension by	3.16.0.145	Yes	AXtension ECM
25	isv	AXT	AXtension by	1.2.0.130	Yes	AXtension Framework
24	isv	AXTlabels	AXtension by	1.0.0.0	Yes	AXtension labels
15	usr	USR Model		1.0.0.0	No	System generated model for USR layer for Microsoft Dynamics AX
13	cus	CUS Model		1.0.0.0	No	System generated model for CUS layer for Microsoft Dynamics AX

Based on above model information, it's recommended that:

- ISV layer – there are 11 models installed from various ISV partners, confirm ISV solution readiness in Dynamics 365 F&O packages.
- VAR layer – there are 3 models installed for Romania, Croatia and Bulgaria localizations from partners.
- CUS layer – there are 3 models installed in CUS layer where most of the customization done for the customer (CUS,REPLabels). These models are considered for code upgrade.
- USR layer – there are 1 model installed in USR layer where small amount of customization done for the customer (USR). This model is considered for code upgrade.

1.5. Modification level

The Customer's solution Assessment uncovered the following modified objects versus a standard version of Microsoft Dynamics AX 2012:

Application Object Type	Customized Objects	Complexity Level				New Objects
		Small	Medium	Large	Not in scope	
Tables	238	98	34	9	97	1036
Maps	19	4	3		12	11
Views	69	1	61		7	266
Extended Data Types	30	1	27		2	340
Base Enums	19	2	4		13	385
License Codes						6
Configuration Keys						35
Security Keys						57
Perspectives	1				1	8
Macros	8		2		6	47
Classes	456	23	93	29	311	8034
Forms	152	51	24	14	63	657
Info Parts	1				1	97
Form Parts						15
Cues						155
Cue Groups						60
Data Sets	4				4	85
SSRS Reports	30		27		3	51
Queries	12	3	2		7	696
Menus	13	2	2	1	8	12
Menu Items Display	3		3			991
Menu Items Output						81
Menu Items Action	1		1			546
Services	2				2	63
Service Groups						9
Code Permissions	1				1	1
Privileges	21	12	7		2	1263
Duties	11	10			1	349
Roles	6	6				140
Process Cycles	1				1	6
Policies	2		2			4
Resources						58
Label Files						10
References						4
Total	1,100	213	292	53		16,178

Table 1 Customer's Solution Modification Assessment

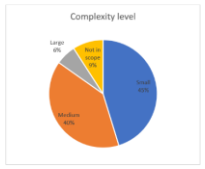
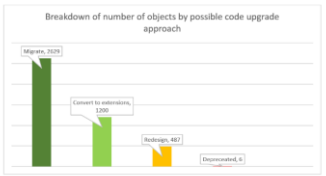


Figure 1 shows the percentage of objects by complexity level; hard, medium, easy and skipped objects.

After analyzing customer's model store using LCS code upgrade service, below is the breakdown of number of objects:



2. Migration assessments

Following section describes high level assessment as compared to Finance and Operations

2.1Solution overview

Customer XYZ produces animal feeds for all different type of animal and all different type of feeds. Feed is low margin business . Pricing is key. Lots of commodity goes in the feed. Pricing is calculated weekly. Commodity pricing > bestmix > formula > production line. Lots of business to distributer and farmers. Feeder finance, feed on credit from distributor.

Process manufacturing - used formulas to create feeds - feeds made of 5 to 25 items. Commodities , vitamins etc. Bestmix as formulation software , Create formula > pass it ax > pass to mill, P&L for individual plan to major plans , Critical to control cost and pricing. Freight charges passed to plants.
Food quality safety , Detailed quality assurance. Most of the outside. Lab testing is external. Lab is custom module.

One instance of AX 2012 R3 – used by 30 production facility in north America. Following modules/business processes used.

1. Production
2. MRP
3. AR
4. AP
5. GL
6. Rebate
7. Pricing
8. Agreement is updated from pricing

They have 30 legal entities, with 10 operational entities and 20 financial legal entities.

2.2ISV Solution Overview

Customer is currently using following ISV solutions.

ISV Name	Purpose	F&O need/availability assessment

2.3Localizations Solution Overview

Customer is currently using following partner localization solutions.

Localization Name	Purpose	F&O need/availability assessment

2.4Customization assessments

Category	Assessments	Comments/Risk
General	Heavy customization in Sales and Marketing, Inventory management and Production module.	Plan for detailed test plan and test cases. Automated testing using RSAT
General	Heavy intrusive customization in Production module	Potential of high number of extension request or redesign
Replace with OOB feature	Customization related to custom mobile device can be replaced with Advance warehouse management capability in F&O.	Evaluate OOB feature in detail and plan for user training
Replace with OOB feature	Customization done in to handle credit management can be replaced with OOB credit management module features	Evaluate OOB feature in detail and plan for user training
Re-Implementation	Custom feature developed for sales order processing needs to be re-designed to consider new Advance warehouse flow.	
Re-Implementation	IntrastatItemCode, SalesOrigin, smmBusRelSegmentGroup, smmBusRelSubSegmentGroup tables were converted not to share per-company. This is has to be re-designed.	
Deprecated features	Enterprise portal is used for purchase requisition entry and approval - All customization can be safely removed.	Evaluate OOB functionality

2.5Forms Refactoring

There are 176 newly created forms in custom model which are migrated from AX2012 to D365 Finance and Operation and the pattern is missing. Form pattern must be applied to each form to remove the conflict.

2.6Integration assessments

There are major differences in integration technologies between AX2012 R3 and MS Dynamics 365 F&O systems. For this reason, existing integrations must be analyzed and possible solutions for existing integrations must be discussed.

Customer has provided a list of existing AX2012 integrations that are used in current system. Possible solutions for existing integration migrations to the new system have been discussed:

Query
General
Will Enterprise Asset Management be used? If so - how many top-level assets will be managed by the system?
Will Advanced Credit Management be used?
Will you require customers or vendors to login to a portal to view orders?
Planning
Will MRP be used? What orders will be planned?
How will the firming process execute after MRP?
Will the Projects module be in use?
Will MRP be planning Project-based orders?
Warehousing
Will you require complex warehousing logic - including picking rules and directed worker guidance via a mobile device?
Will you be integrating with a 3PL or other external logistics partner?

Benefits of Advanced Migration Assessment

Helps to identify best action plan to migrate to cloud & saves time

Diagnoses functional and technical gaps & provides recommendations for the future

Ensures migration readiness & determines how to best handle customizations and data

Eliminates risks at the early stages

Free from upfront financial commitment or obligations

Columbus® Once you know how...