Are You Ready to Upgrade from Microsoft Dynamics AX to Dynamics 365?

The transition from Microsoft Dynamics AX to Dynamics 365 (D365) is an important step for your organization, and proper preparation is key to ensuring a smooth and successful upgrade process. This eBook provides insights, considerations and a comprehensive checklist to guide you through the preparation phase.

Understanding the Upgrade Process

To begin, it's essential to understand the differences between Dynamics AX and Dynamics 365. Dynamics 365 offers enhanced features and capabilities, but the upgrade process requires careful planning. Familiarize yourself with the benefits and challenges of upgrading to D365. Identify business requirements and objectives for the upgrade, and assess the impact on existing processes, integrations and customizations.

Pre-Upgrade Planning

The first step in preparing for your upgrade is to form a dedicated project team consisting of key stakeholders, IT specialists and end users. This team will play a crucial role in overseeing and implementing the upgrade process. Review your current system requirements to ensure they align with D365 specifications. Assess existing customizations and prioritize them based on their importance and compatibility with D365.

Data Preparation and Migration

Data preparation is a critical aspect of the upgrade process. Perform data cleansing and validation activities to ensure data quality and integrity. Map data fields from AX to corresponding entities in D365 to facilitate a smooth migration. It's also important to perform full backups of critical data to prevent any loss during the migration process.

Cloud-Readiness, Infrastructure and Environment Setup

Prep organization for transition to a cloud-based business platform. Evaluate your infrastructure and environment needs for the D365 implementation. This will include tasks such as determining the number and type of environments needed for the implementation and appropriate Microsoft licensing to enable the planned solution during implementation activities. Typical examples of solutions requiring a nominal licensing level during an implementation are Azure subscriptions, D365 application licenses and Fabric/Power BI to enable reporting activities.

Application Configuration and Customizations

Once your infrastructure is ready, focus on configuring D365 to align with your business needs. Customize D365 settings based on your requirements and industry best practices. Evaluate existing customizations and determine whether they can be migrated or if new solutions need to be developed within the D365 framework. Provide comprehensive training to users to familiarize them with D365 features and functionalities.

Testing and Validation

Thorough testing is essential to ensure the functionality, performance and reliability of D365. Conduct functional testing of all D365 modules and integrations to identify and address any issues or discrepancies. Engage key users in user acceptance testing (UAT) to validate D365 against real-world business scenarios. Evaluate system performance and scalability under various conditions to ensure optimal performance post-upgrade.

Go-Live Preparation/Mock Go-Live

As you approach the go-live phase, execute the final data migration from AX to D365. Develop a detailed rollout plan outlining deployment timelines, downtime procedures and support mechanisms. Perform a mock go-live and execute the steps in the detailed roll-out plan to confirm all team members can execute their cutover responsibilities. Ensure that all users are adequately prepared and trained for the transition to D365 to minimize disruptions during the go-live process.

Post-Upgrade Support & Optimization

Following the upgrade, monitor the performance of D365 and optimize configurations as needed to address any issues that may arise. Provide ongoing support to users and promptly address any post-upgrade issues to ensure a seamless transition. Gather feedback from users to identify areas for improvement and future enhancements to maximize the benefits of D365 for your organization.

Checklist: Are You Ready for Your Upgrade from AX to D365?

Use this checklist as a guide to assess your readiness for upgrading from Dynamics AX to Dynamics 365. Check off each item as you complete them to ensure a comprehensive and successful upgrade process.

Planning Phase
- ☐ Understand business requirements for the upgrade.
- ☐ Form an upgrade team with key business stakeholders and IT specialists.
- ☐ Assess existing customizations and their impact on the upgrade.

Data Preparation and Migration
- ☐ Cleanse and validate data.
- ☐ Map data fields from AX to D365 entities.
- ☐ Perform full backups of critical data.

Infrastructure and Environment Setup
- ☐ Ensure infrastructure meets D365 requirements.
- ☐ Install necessary software components for D365.
- ☐ Set up a test environment to simulate production.

Application Configuration and Customizations
- ☐ Customize D365 settings based on business needs.
- ☐ Migrate or redesign existing customizations for D365.
- ☐ Provide comprehensive training to users on D365 features.

Testing and Validation
- ☐ Conduct functional testing of D365 modules and integrations.
- ☐ Engage key users in user acceptance testing (UAT).
- ☐ Evaluate system performance and scalability under load.

Go-Live Preparation
- ☐ Execute final data migration from AX to D365.
- ☐ Develop a detailed rollout plan for D365 deployment.
- ☐ Ensure all users are prepared and trained for the transition.

Post-Upgrade Support and Optimization
- ☐ Monitor D365 performance post-upgrade and optimize configurations.
- ☐ Provide ongoing support to users and address post-upgrade issues.
- ☐ Gather feedback from users to identify areas for improvement.

Conclusion

Congratulations on taking the first steps toward upgrading from Dynamics AX to Dynamics 365. By following the guidance in this eBook and using the provided checklist, you can ensure that your organization is well-prepared for a successful transition. Careful planning, thorough testing and continuous support are essential for a smooth upgrade process.

In navigating the complexities of upgrading from Microsoft Dynamics AX to Dynamics 365, enVista stands ready to assist you every step of the way. With our extensive expertise in enterprise software solutions and proven track record in digital transformation, we can provide tailored guidance and support to ensure a seamless transition to Dynamics 365. Contact us today to learn more about how enVista can help you successfully upgrade to Dynamics 365 and unlock the full potential of your business operations. Let's have a conversation.®

About enVista

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Consulting and solutions delivery is in our DNA.
Let's have a conversation.®
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