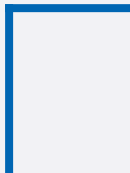




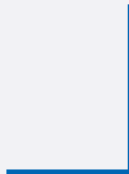
**POWER**  
**OBJECTS**

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**An HCL Technologies Company**



**Dynamics 365 for  
Finance & Operations**



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## Objectives



- Discuss the upgrade options available to you
- Discuss the efforts required to upgrade
- Discuss key considerations leading up to the upgrade

# AGENDA

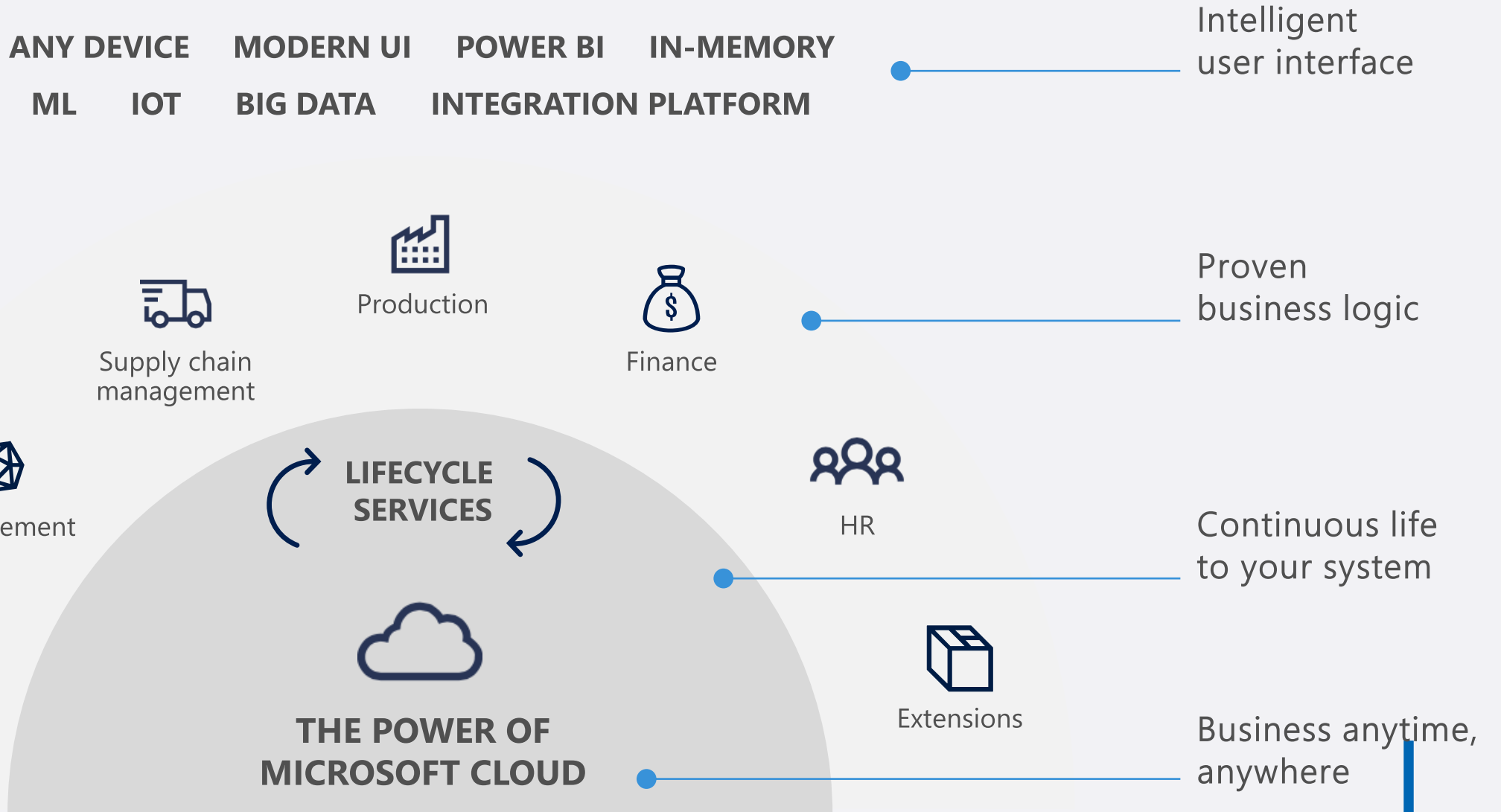
- 1 History and overview
- 2 Getting on the same page
- 3 Features and changes
- 4 Upgrade paths



# Dynamics 365 for Finance and Operations History and Overview

# History and Overview

## Evolution of





# History and Overview

## Current Version

All types convert as is, major exceptions are:

- Enterprise Portal is not supported in current Dynamics AX and needs to be rewritten
- Custom Client controls will not run in current AX
- Document Services are not supported in current AX
- Form parts are replaced by current AX Form parts
- Cue's
- Visual Studio Projects

# History and Overview Roadmap

The screenshot displays the Microsoft Dynamics 365 Roadmap page. The header includes the Microsoft logo, navigation links for Cloud, Mobility, and Productivity, a search bar, and a 'Sign in' button. Below the header, there are links for Dynamics 365, Solutions, Pricing, Partners, Resources, Support, and Blog, along with a 'Contact us' button.

## Microsoft Dynamics 365 Roadmap

The Dynamics 365 Roadmap provides a snapshot of what we're working on. Use this roadmap to find out what is being made generally available and what is in development. All dates and features that are in development are preliminary, are based on current expectations, and are subject to change without notice.

[Availability Guide](#)

The main content area is divided into three tabs: 'What's New', 'In Development' (which is selected), and 'Previously Released'. The 'In Development' tab shows a list of features for the 'Enterprise' edition. The left sidebar allows filtering by Editions (Enterprise, Business), Applications (Sales, Customer Service, Field Service, Project Service Automation, Operations, Financials), and Areas (Financial Management, Globalization & Translation, Human Capital Management).

**What's New** | **In Development** | Previously Released

Editions: Enterprise (selected), Business

Applications:

- Dynamics 365 for Sales
- Dynamics 365 for Customer Service
- Dynamics 365 for Field Service
- Dynamics 365 for Project Service Automation
- Dynamics 365 for Operations
- Dynamics 365 for Financials

Cloud Platform:

Areas:

- Financial Management
- Globalization & Translation
- Human Capital Management

**In Development Features:**

- Ability to rename the project status
  - Dynamics 365 for Operations ships with default project statuses. For some organizations, the status names do not match their process. This feature will enable the ability to rename the status and provide support for language translation.
  - Available For: Dynamics 365 for Operations
  - > Allow a project resource to delegate timesheet entry and submission to any user
  - > Asset management Power BI content
  - > Cash flow analysis
  - > Consignment inventory
  - > Cost Accounting Power BI reports
  - > Credit management Power BI content
  - > Cross docking from production to transfer orders

<http://roadmap.dynamics.com>



# History and Overview

## Data governance

Complete Solutions

### Immersive Experience



Role Dashboards  
Task Workspaces  
Embedded Real-time PowerBI  
Integrated O365 Experiences

### Global Industries



Comprehensive ERP Business Processes, with industry specialization  
Extensive BPM Libraries

### Web Based Client



HTML5 Web Experience  
Any Device, Any Browser  
Embedded Guided Experiences for Learning  
Embedded Analytics

### Azure Cloud Enabled



Azure Native Platform  
Scale up, Scale out on Compute / SQL Azure  
Elastic Capabilities  
Hybrid Possibilities  
Secure and reliable

## Data Governance

### Integration Platform



High Volume Data Import/Export  
1800+ Data Entities & Growing  
Integrated Office 365  
Data Management Services  
Data Quality Services  
Logic Apps/Flow Enabled

### Application Lifecycle Exp.



LCS Based ALM  
Partner Led Guided Trial  
Automated Deployment  
Operate, Support & Upgrade Experience  
Diagnostics Experience

### Developer Experience



VS 2015 Enabled Experience  
Productive tools for Web development  
Integrated Dev ALM with VSTS and LCS

### Continuous update



Platform Components continually updated  
Enhanced Update Experience for Customizations  
Customer Managed ALM

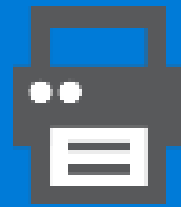
Effective Change Management

# Overview

## Dynamics AX Code Migration



Lifecycle Services  
driven upgrade



Automated,  
Predictable and  
Structured



Accurate  
Estimation



Easy!

Getting on the same page



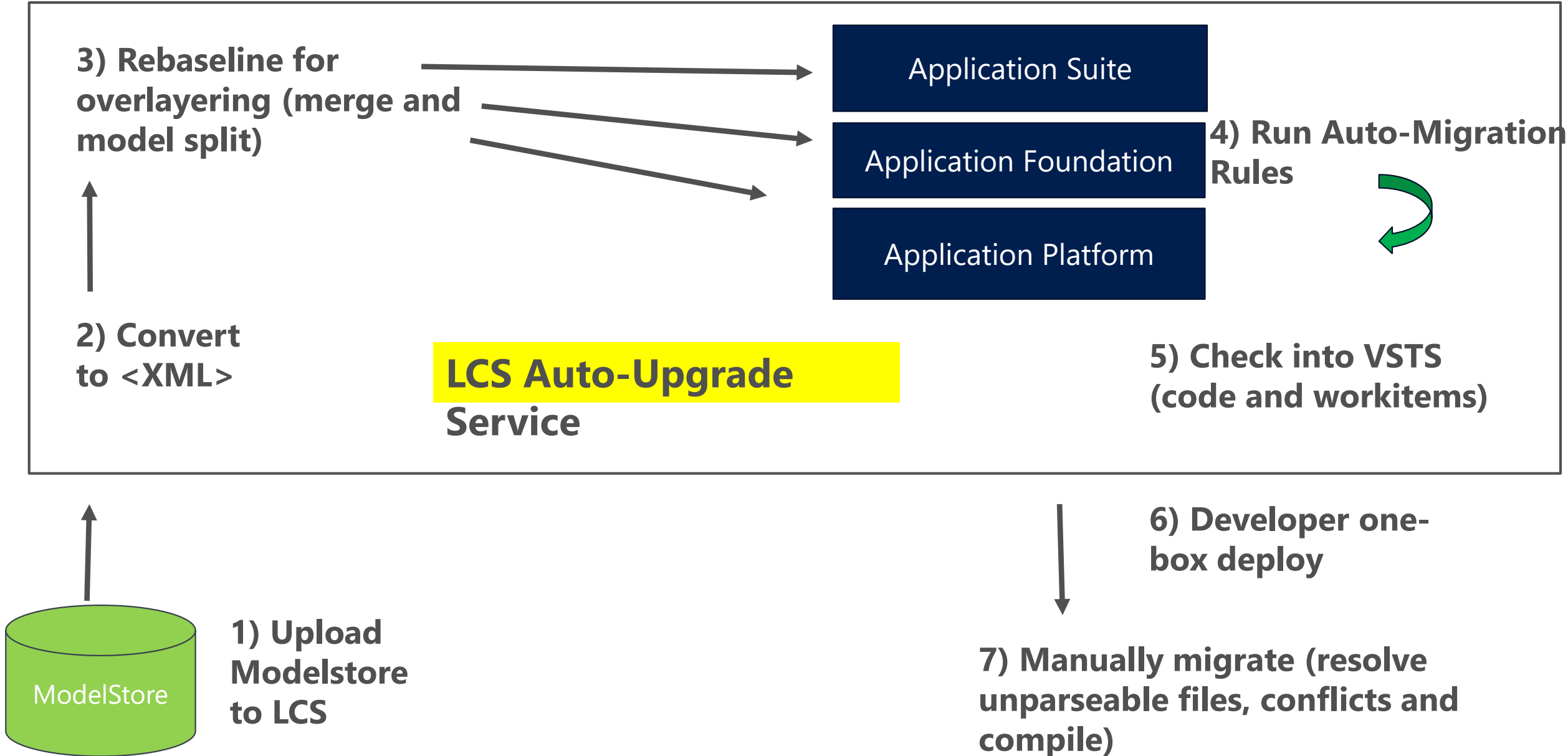
# Database Entity Relationship Diagrams



Available at:

<https://www.microsoft.com/dynamics/ax/erd/ax2012r2/>

# What's really happening?



# Migration Process

**LCS: Auto-migrate code**

**LCS: Check-in upgraded code to VCTS**



**Create AX project in LCS**  
**Create and link VSTS Project**  
**Upload AX2012 model store**  
**Provision DEV (and BUILD) boxes**  
**Map VSTS to DEV Workspace**

**Resolve conflicts**  
**Compile errors**  
**Model split**  
**Form migration**  
**...etc**

# Features and Changes





# Deprecated features





# New Management Tools



# LCS Solution Overview

**What is LCS Solution:** Is a package of pre-built artifacts integrated with Lifecycle services to provide a strong cloud foundation to enable predictable implementations, faster time to realize value, and ensure consistent quality leveraging industry best practices provided by the partners.

## Software

- ✓ Cloud deployed Microsoft Dynamics AX 7 components specific to your industry
- ✓ Application customized to meet standard Industry requirements
- ✓ Choose from a set of predefined topologies or create your own to meet your needs



## Configuration

- ✓ Preconfigured Industry specific data set
- ✓ Preconfigured application configuration settings
- ✓ Granular Industry data sets enabling you to configure and upload your own data or accept the standard Industry data
- ✓ Predefined security roles & privileges specific to your industry



## Business Processes

- ✓ Recorded industry specific business process definitions and how these are executed in the software
- ✓ Documentation & videos included to ensure a rapid start
- ✓ Process configuration status to provide visibility of completion



## Methodology

- ✓ Guided rapid implementation methodology to walk your team through the deployment & configuration steps
- ✓ Scope and documentation templates for gathering requirements
- ✓ Linkage to LCS & TFS tools to drive completeness



## Service

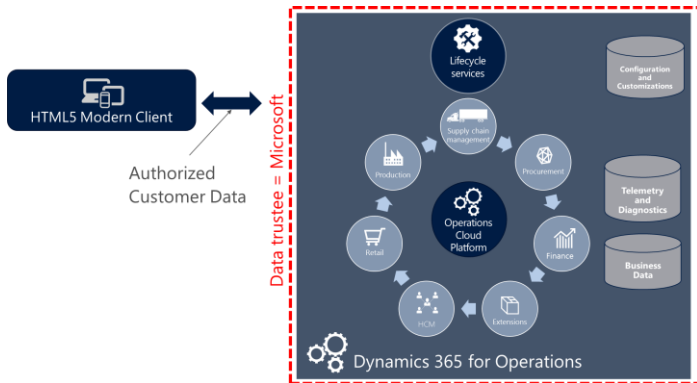
- ✓ Microsoft Dynamics certified partners providing last mile assistance
- ✓ Proven expertise in execution in specific industry verticals
- ✓ Gets you up and running in weeks



<https://azure.microsoft.com/en-us/marketplace/dynamics/>

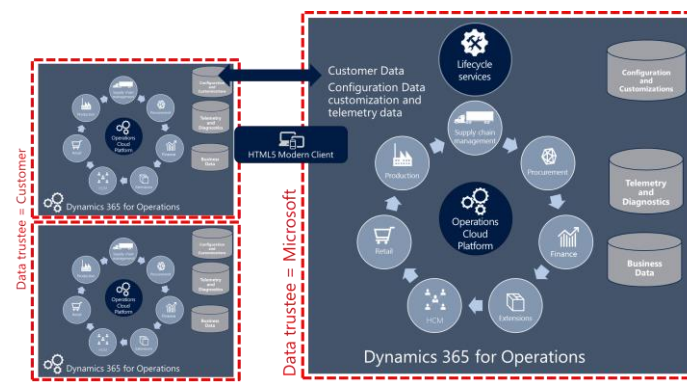
# Dynamics 365 for Operations: Deployment Options

## cloud



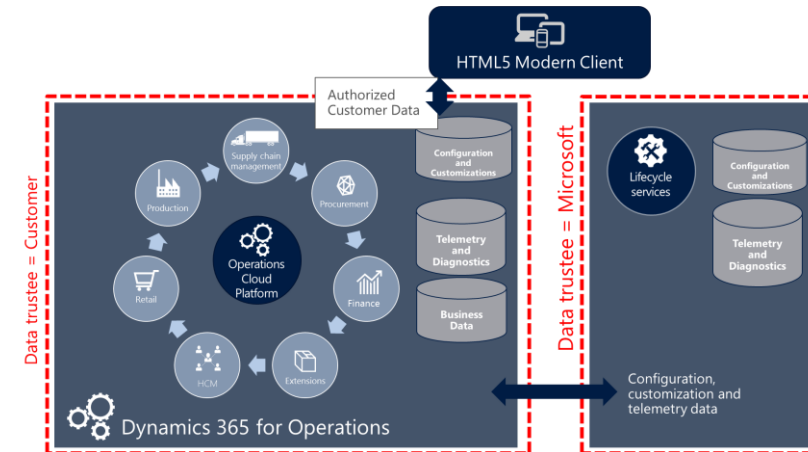
- Fully managed by Microsoft cloud service
  - Systems of Intelligence
- Planned multi Instance federation
  - Elastic scale out

## cloud + edge



- Cloud – MS managed,
  - Edge – customer managed
- Multiple local compute and storage workplaces for retail, shop floor and warehouse while utilizing cloud for scale, master data mgmt., data aggregation
- Local data residency in addition to cloud

## local business data



- Disconnected data center
  - Local data residency
- Capitalize HW investments
  - Single instance only

# Dynamics 365 for Operations Deployment Scenarios

Cloud Scenario	full cloud	cloud and edge	local business data
<b>Use-case scenarios</b>	Fully managed by Microsoft cloud service Systems of Intelligence Planned multi Instance federation Elastic scale out	Cloud – MS managed, Edge – customer managed Multiple local compute and storage workplaces for retail, shop floor and warehouse while utilizing cloud for scale, master data mgmt., data aggregation Local data residency in addition to cloud	Disconnected data center Local data residency Capitalize HW investments  Single instance only
<b>Compute and data residency</b>	Cloud	Cloud + customer or partner infrastructure	Customer or partner infrastructure
<b>Data Trustee</b>	Microsoft	Microsoft and Customer	Customer
<b>Application management</b>	Fully managed by Microsoft Customer access to ALM and telemetry via LCS	Cloud managed by Microsoft, Edge managed by customer or partner with cloud-based ALM and telemetry via LCS	Infrastructure managed by customer or partner with cloud-based ALM and telemetry via LCS
<b>Cloud capabilities</b>	HA and DR included Sandbox environments Cloud-based intelligence	Data Federation and Master Data Management HA and DR included Sandbox environments Cloud-based intelligence	Automated deployment Intelligence as optional cloud-based add-on
<b>Intelligence</b>	Cloud-based	Cloud-based	Optional cloud add-on
<b>Continuous updates and health monitoring</b>	Cloud-based, LCS	Cloud-based, LCS	Cloud-based, LCS
<b>Planned availability</b>	Available	Availability: H2 CY2017	Availability: Q2 CY2017



# Preparing for the upgrade



# Preparing for the upgrade

## AX 2012, Consider

Most current  
AX 2012  
Update (CU11)

Stick to  
patterns

Don't focus on  
deprecated  
concepts

## Dynamics AX, Consider

Partner ready

Estimate your  
upgrade

Azure or On-  
premise

## Familiarize

Lifecycle  
Services

Visual Studio

Azure





## AX2012 to Current





AX2009 to Current





# Legacy to Current



# Upgrade from AX2012 to latest Dynamics 365 Finance and Operations

# Upgrade from AX2009 to latest Dynamics 365 Finance and Operations



# Legacy to Current Using Data Import/Export Framework





# Tips and Tricks





# Tips and Tricks

- Run Visual Studio as Administrator
- Embrace and love extensions and delegates
- Build Packages from AX7 Menu - not Build Solution
- Do not import Microsoft hotfixes to AX2012 as XPOs
- Check full error log if an error does not make sense
- Save \$\$ by using Azure Automation Runbooks to shut down development environment overnight

# Tips and Tricks

- Remember to “Add Solution to Version control” to ensure your new elements are added to VSTS
- Check-in “Descriptor” file for your model to VSTS or else your automated build will fail
- Do not customize Microsoft report designs, copy them instead
- If unsure how to upgrade a pattern, compare Microsoft code of AX2012 and the new Dynamics AX


# Upcoming Webinars

- Nov 7 – 9am CST


Upgrading from Dynamics AX or Other Legacy Systems to Dynamics 365 for Finance and Operations

- Nov 9 – 9am CST

Dynamics 365 for Finance and Operations: Cloud, On-Premises, and Hybrid Deployment Options



Send questions to  
[Arron.Jones@hcl-  
powerobjects.com](mailto:Arron.Jones@hcl-powerobjects.com)





Thank You

