

WEBINAR: DE MIGRATION FACTORY – DEEL 2



BROAD HORIZON

EVEN VOORSTELLEN

Broad Horizon Solutions



Tjitse Jousma
Accountmanager
D365 Finance &
SCM



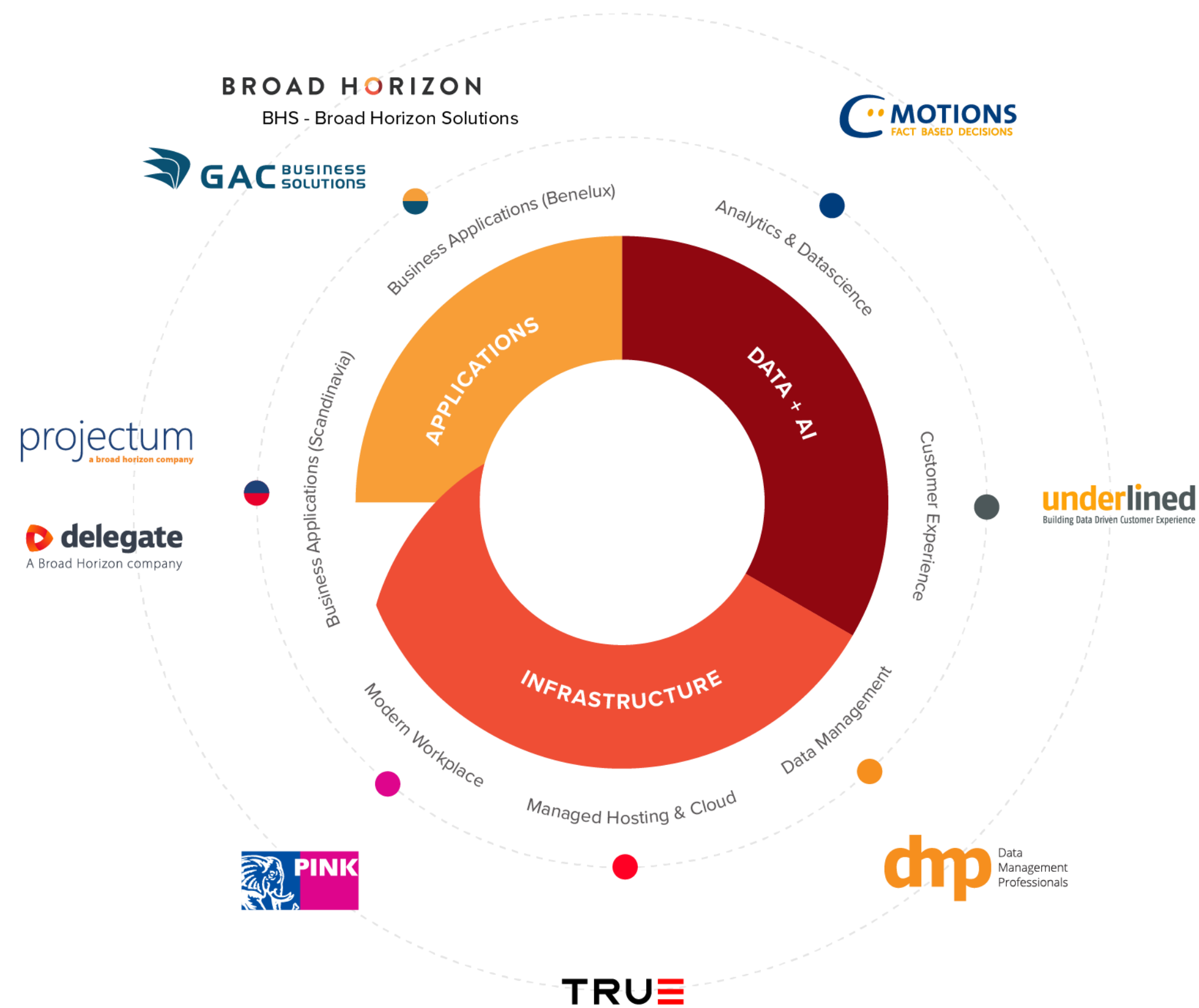
Jeroen Pas
Consultant

Gastspreker:



Martin Abrle
Cloud Solution Architect,
Partner Organization,
Microsoft

BROAD HORIZON SOLUTIONS



OVERZICHT WEBINARS

		
Migration Factory Webinar Deel 1	Migration Factory Webinar Deel 2	Hoe rol je RSAT uit?
Onderwerp: Commeceel, Algemeen	Onderwerp: Functioneel, Technisch	Onderwerp: Regression Suite Automated Testing (RSAT)
Terugkijken via onderstaande link: Webinar: Van AX naar D365 Finance & Supply Chain (broadhorizon.com)	Datum: 7 oktober	Datum: 14 oktober
Aanmelden via: http://broadhorizon.com/events/		

INHOUD

- Waarom dit webinar
- Technische aspecten
- Functionele aspecten
- Product aanbod BHS
- Microsoft Gastspreker
- Vervolgstappen
- Q&A

WAAROM DIT WEBINAR?



WAAROM DIT WEBINAR?

Technische aspecten & Functionele aspecten van de Migration Factory

Klanten informeren:

- Onze klanten begeleiden en adviseren tijdens de Cloud transformatie
- Vooruit lopen op de concurrentie
- Focus hebben op de business
- Overal kunnen samenwerken

TECHNISCHE EN FUNCTIONELE ASPECTEN



TECHNISCHE ASPECTEN

Hoe ziet de technische achtergrond van een migratie eruit?

1. Aanmaken LCS Project
2. Uitvoeren upgrade analyzer
3. Uitvoeren upgrade tool
4. Data upgrade

AANMAKEN LCS PROJECT

Lifecycle Services

Recent projects

All projects

Broad Horizon - One Finance (Implem...

Broad Horizon B.V.
Implementation

Announcements

Legacy Microsoft Edge/Internet Explorer browser end of support August 17, 2021

Support for legacy Microsoft Edge/Internet Explorer browsers will be removed after August 17, 2021. If you are currently using one of these, update to the latest version for better browsing experience in Dynamics Lifecycle Services. Please click here for more information.

Changes coming soon to your LCS environments

Lifecycle Services is simplifying package deployment by mandating an All-in-one Deployable Package (ADP) for production and sandbox environments in the coming months. Development and Test environments are not impacted.

Manage methodologies

Preview feature management

Organization users

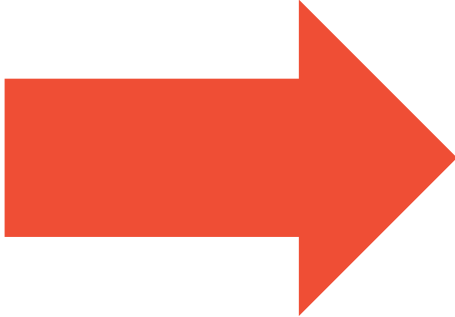
Manage incidents

Globalization portal

Shared asset library

Translation service

Solution management



Lifecycle Services

> Broad Horizon - One Finance (Implementation) (Broad Horizon B.V.)

Broad Horizon - One Finance (Implementation)

Sandbox Develop and Test environments will only be deployable as Cloud-hosted environments after November 2, 2020. [Learn more](#)

METHODOLOGY

1

2/1/2020

2

3/1/2020

3

9/1/2020

4

12/31/2020

5

6

7

AnalysisDesign and developTestDeployOperateLearnConsume

Phase history

Complete phase

Status	ID	Task
✓	1.1	Complete LCS project configuration *
✓	1.2	Invite your project team *
✓	1.3	Configure Azure DevOps *
✓	1.4	Sign up for ProQ project quality monitoring
✓	1.5	Deploy demo environment
✓	1.6	Publish Plan and Milestone Dates *
✓	1.7	Capture Business processes and requirements *
✓	1.8	Perform Fit/Gap analysis *
✓	1.9	Complete subscription estimator *
✓	1.10	Download templates
✓	1.11	Sign off requirements and business processes *
✓	1.12	Upload first iteration of setup and configurati...

Description

Before kicking off, complete the required configuration for LCS to ensure the best experience. This includes to key areas, Sharepoint and Visual Studio Team Services.

Resources for this task

Task history

Action	User	Date
Closed	Niels Appel	1/15/2020 2:35 PM
Created	Stephan van Elteren	1/15/2020 10:18 AM

ENVIRONMENTS

Subscriptions available

Service requests

PRODUCTION

✓ Environment BroadHorizon state: Deployed

Full details

DYNAMICS 365 OPERATIONS SANDBOX: STANDARD ACCEPTANCE TEST

✓ Environment BroadHorizon-PROJUAT state: Deployed

Full details

DYNAMICS 365 OPERATIONS SANDBOX: STANDARD ACCEPTANCE TEST

✓ Environment BroadHorizon-CNV state: Deployed

Full details

SANDBOX: STANDARD ACCEPTANCE TEST

✓ Environment broadhorizon-uat state: Deployed

Full details

UITVOEREN UPGRADE ANALYZER

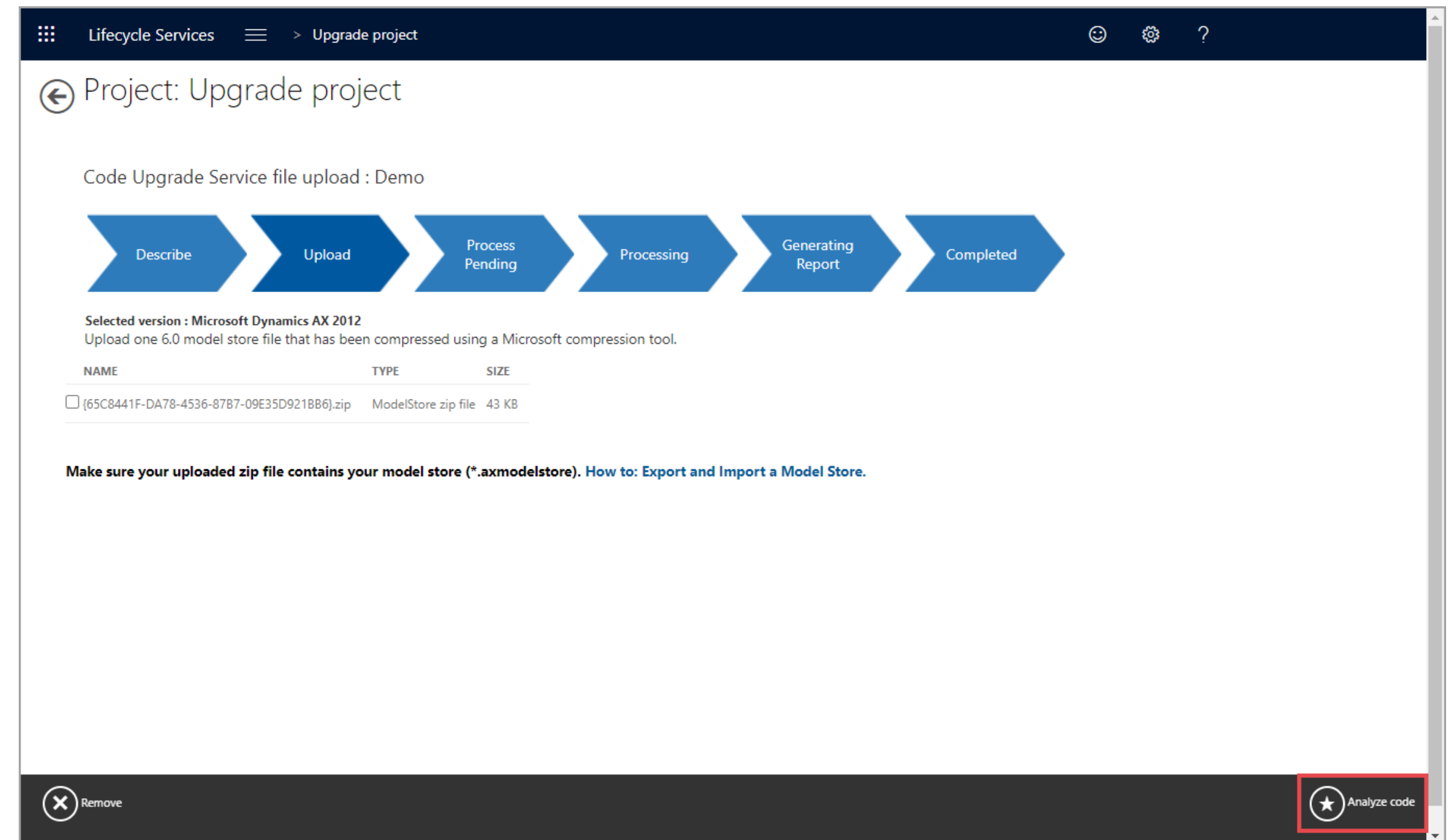
- Uit te voeren in AX2012 R2 of R3 met een hotfix geïnstalleerd.
- De upgrade analyzer geeft advies over:
 - Data clean up
 - Configuratie check
 - Controle of er functionaliteit gebruikt wordt die in D365 UO niet meer aanwezig is



Name	Observation	Recommendation
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.	1. Click System administration > Inquiries > Users > User log. Click Clean up. 2. Enter a value in the History limit (days) field to define a limit for the deletion. Only log information that is older than the given number of days is deleted. 3. Click Select to open the Select log cleanup criteria form, which is a version of the Inquiry form. 4. Select your cleanup criteria. Select a user or a range of users and, optionally, additional user information, such as date and time, for more information, see Inquiry (form). 5. Click OK to return to the User log cleanup form. 6. Click OK to perform the cleanup once, or click the Batch tab to define parameters to clean up the user log regularly.
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.	Execute the following SQL statement to clean up records: DELETE INVENTSUMLOGTTS WHERE ISCOMMITTED =1

UITVOEREN UPGRADE TOOL

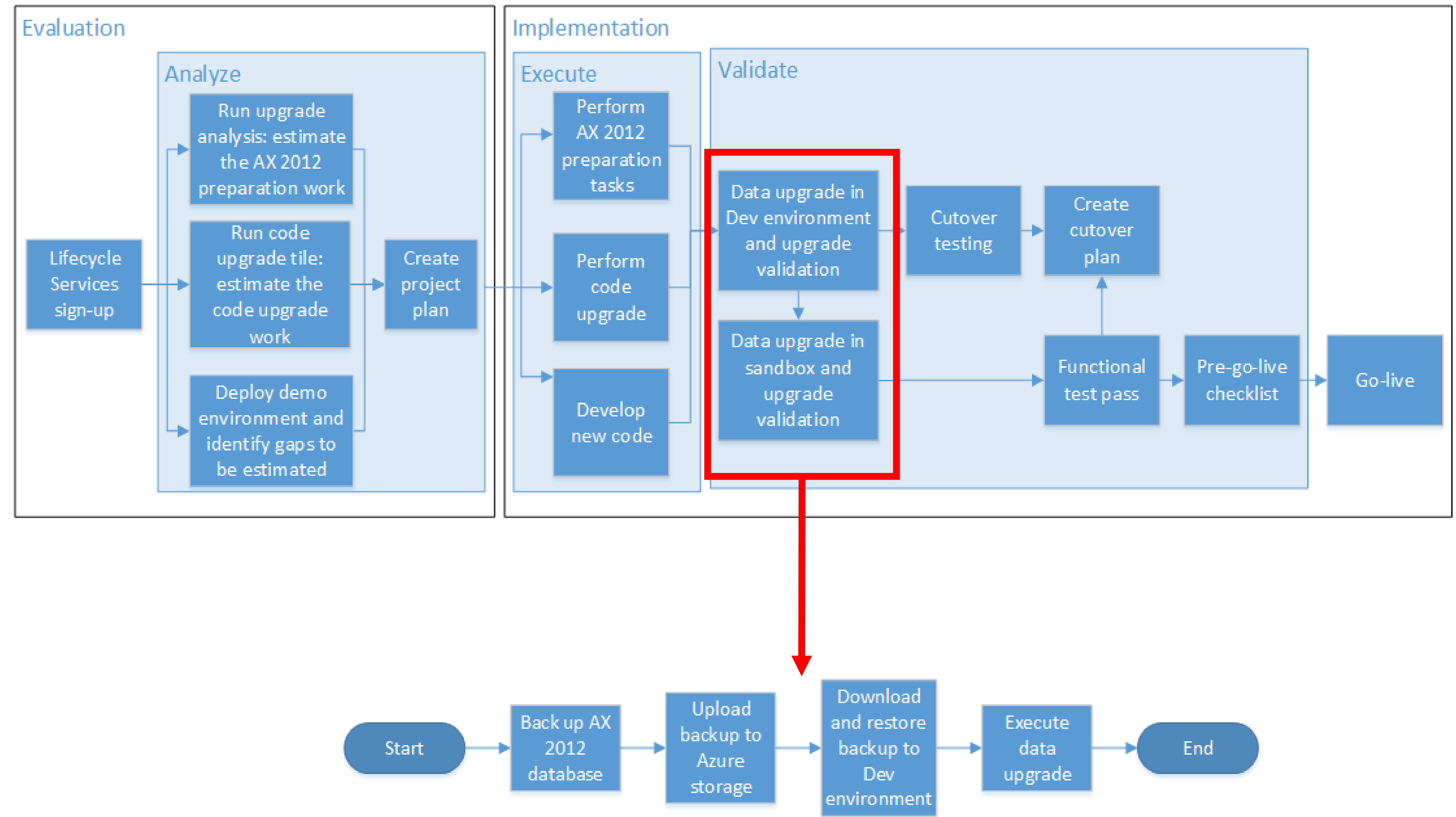
- Op basis van Modelstore AX2012, daar zit alle software dat aanwezig is in.
 - Inclusief maatwerk en ISV oplossing
 - Geen data
- Uitkomst is een Excel document met daarin wat verwerkt is, wat nog moet gebeuren en inschatting vanuit Microsoft
- Developer nodig bij interpretatie van verdere uitkomst



Report		
NAME	FILE TYPE	VIEW
UpgradedMetadata.zip	Model_Zip	
AX7 metadata version 10.0.8.20007_ExcelReport	ExcelAnalysisReport	
MigrationSummary.xlsx_ExcelReport	ExcelAnalysisReport	
TaskList.xlsm_ExcelReport	ExcelAnalysisReport	
Models upgrade_ExcelReport	ExcelAnalysisReport	

UITVOEREN DATA UPGRADE

- In het geheel een van de laatste stappen in het technische proces
- Upgrade tools zijn te downloaden vanuit LCS

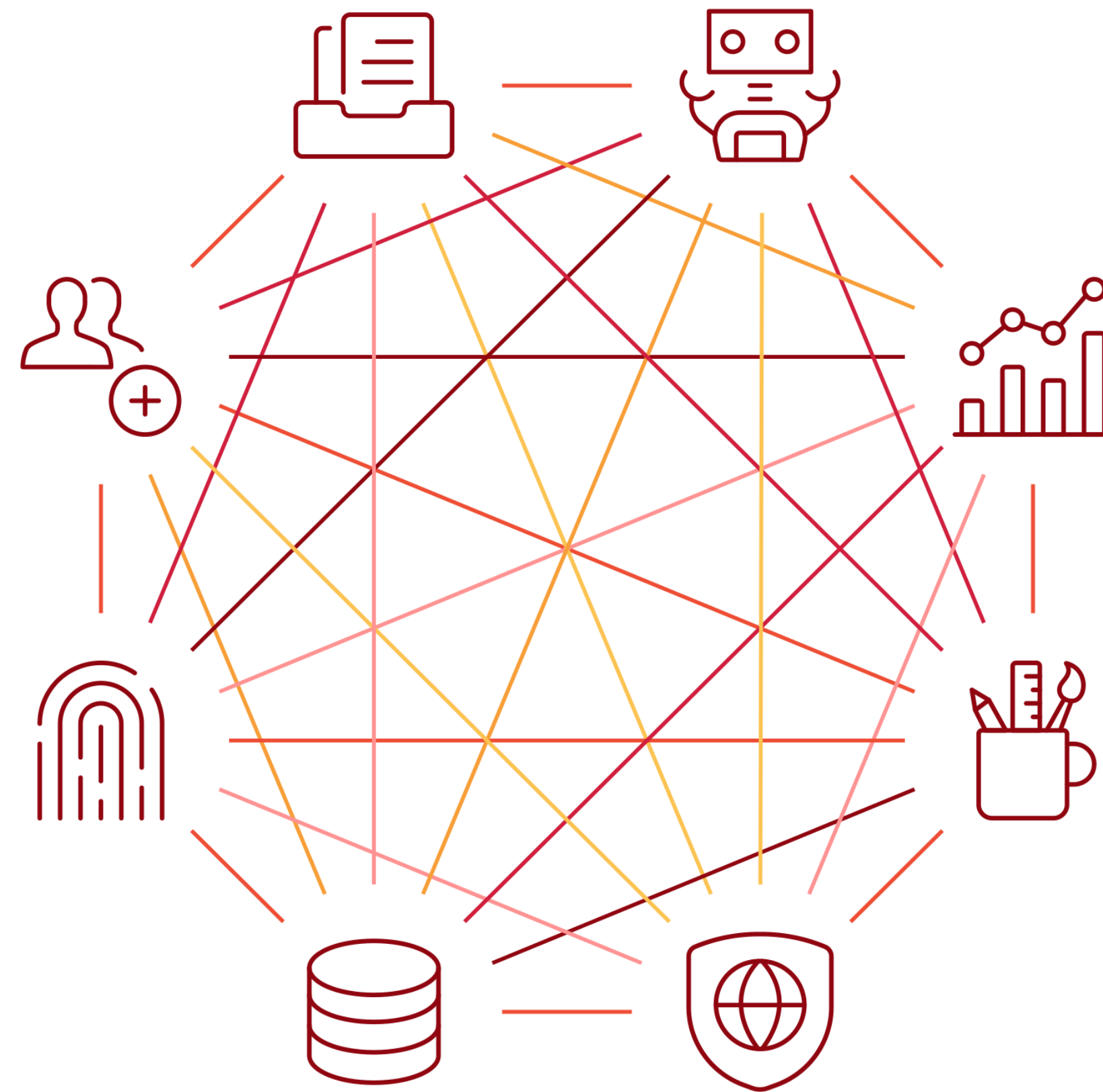


FUNCTIONELE ASPECTEN

Wat zijn de functionele stappen bij een migratie?

1. Applicatielandschap
2. Projectplan
3. Fit / Gap-Analyse
4. Functioneel ontwerpen
5. Trainingen

APPLICATIELANDSCHAP



PROJECTPLAN

- Wat doen we wel en wat doen we niet (Scope)?
- Hoe pakken we bepaalde dingen aan?
- Welke tijdsduur heeft het project?
- Wat voor een projectmethodiek gaan we hanteren
- Hoe ziet de organisatiestructuur van het project er uit?
- Welke risico's zijn er te definiëren in het project?



FIT / GAP ANALYSE

Fit Gap Analysis Table

This slide is 100% editable. Adapt it to your needs and capture your audience's attention.

Competency/Skills	1	2	3	4	5	GAPS
	Poor Fit	Marginal Fit	Acceptable Fit	Good Fit	Excellent Fit	
Analytical Problem Solving						
Innovation						
Text Here						
Commercial Awareness						
Text Here						
Technological Orientation						

Accounting Software Requirements Checklist with GAP-Fit Analysis							Importance/Priority	Process (Category)	GAP Analysis	GAP Source (Location)	Requirement Type	GAP Score
For HELP, place the cursor in desired column Cell on this row:												
(Return to Top)												
MOBILE APPLICATIONS												
BASIC INFORMATION												
Do you need mobile payment app to accept credit card payments?							3	D	GAP	BP	F	3.00
Do you need the ability to apply the payment to an invoice once the transaction in ?							3					
Do you need to create invoices?												
Do you need to automatically send out to mobile users late payments reminders?												
Do you need the ability to create estimates and quotes?												
Do you need the ability to track the following:												
▪ Payments:												
▪ Partial payment:												
▪ Overdue invoices:												

Gap Analysis
Indicates the presence and degree of a requirements GAP:

GAP = Full GAP
PG = Partial GAP
NG = No GAP, in use

FUNCTIONEEL ONTWERP DOCUMENTATIE

- Hoe gaan de processen er uit zien?
- Wat zijn de needs to have, nice to have
- Welke ISV software gaat geïmplementeerd worden?
- Welk maatwerk gaan we toepassen
- Welke modules gaan er gebruikt worden

TRAININGEN



PRODUCTAANBOD BHS



PRODUCTAANBOD BHS

	Product 1 Quick Scan	Product 2 Diagnose	Product 3 Analyse	Product 4 Migratie
Technisch	• Aanmaken LCS project • Upgrade Analyzer • Upgrade Tool	• Technisch plan ontwikkeling	• Verdere analyse Upgrade Tool • Data migratie mogelijkheden	• Uitvoer en verwerkingen Upgrade Analyzer en Upgrade Tool • Codes herschrijven • Nieuwe FO's ontwikkelen • Data migratie • Testen
Functioneel	• In kaart brengen huidig applicatie landschap	• Functioneel advies, tijdsindicatie en projectplan voor uitvoer migratie	• Diepere analyse waarin nieuwe process en / wijzigingen worden doorgesproken	• Uitwerken van Gaps, doortesten, overdracht • Training
BHS standaard			• Fit/Gap - analyse • Functioneel ontwerpen	

MICROSOFT (GASTSPREKER)



Martin Abrle

Cloud Solution Architect,
Partner Organization,
Microsoft

Dynamics 365 Finance and Operations migration strategies

short version

Bring it all with me (code + data)

Bring it all with me: Customizations

What I often hear:

- Code (AX 2012): Upgrading all customizations+modules from AX 2012 RTM/R2/R3 and cleaning it up in Dynamics 365 Finance and Operations
- Code (AX 2009): Bringing all customizations+modules from AX 2009 to AX 2012 R3 and upgrading it to Dynamics 365 Finance and Operations

Questions to ask:

- Is my company now, 10 or more years after the initial ERP implementation, still the same company... with the same processes?
- Can I perhaps utilize some modern, industry standard functionality instead? (PIM, “new” WHS, Lean, Kanban,...)

Bring it all with me: Data

What I often hear:

- Data (AX 2012): Convert the database and upload it into Dynamics Finance & Operations
- Code (AX 2009): Using DMT to push (almost) all the data into Dynamics Finance & Operations

Questions to ask:

- Do I really need to access old transactions daily.... or is it more of a «just in case» scenario?
- Do I understand fin/perf/**quality** implications associated with this, as opposed to, say an «archive VM» or an export into Azure Data Lake?

Leave it all behind (also known as “back to the standard”)

Back to standard

What I often hear:

- Process reengineering, very limited budget for customizations or no customizations expected as we will go back to standard

Questions to ask:

- Am I making this decision because I'm confident that I do not need all the old, customized processes or am I reacting to a previous experience with ERP upgrades (budget overruns, delays, bugs,...)
- Do I have all the key users on-board or can I expect daily feature requests and scope creep?
- What if I need to migrate some code, shall we budget for it now?

Things I have seen working

- ... there is no right or wrong, companies are perhaps similar, but not the same and each project is treated as (at least slightly) unique
- Motivated (ideally also experienced) community of key users on the customer side
- Experienced team on the partner side, ideally with previous migration/upgrade experience
- Project governance, CxO level sponsor,...

....basically the same success factors like in ERP implementation projects

VERVOLGSTAPPEN



VERVOLGSTAPPEN

- Presentatie en opname worden toegestuurd
- Specifieke situatie wordt besproken
- Nadere inventarisatie
- Plan van aanpak wordt opgesteld

Q&A





BEN JE ER 14 OKTOBER OOK WEER BIJ?

Webinar: Hoe rol je RSAT uit?

Automatisch testen was een grote uitdaging voor gebruikers van oudere versies van Microsoft ERP, zoals AX. Er waren eigenlijk weinig partners en tools die deze functionaliteit goed ondersteunden. Daar is nu verandering in gekomen: RSAT sluit volledig aan bij de wensen rondom het geautomatiseerd testen binnen Dynamics 365. Tijdens dit webinar laten we je de mogelijkheden zien van deze tool.

Aanmelden: broadhorizon.com/nl/webinar-rsat/

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