



Dynamics 365 Migration Program: Standard Migration Assessment

Start your journey to the cloud

A migration assessment is the first step to help you understand the value of and steps to cloud migration

OBJECTIVES

A migration assessment is the first step on your cloud journey, which will help to:

- Understand the benefits of moving from on-premises to the cloud
- Identify business objectives and tie these into the functionality of Dynamics 365
- Optimize the migration process by reducing effort and costs
- Determine your next steps toward cloud transformation

ASSESSMENT WORKSHOPS MAIN COMPONENTS:



1. Functional / business assessment

Customer estimated time commitment: two to three hours

This component examines your current business processes and assesses how you may be able to benefit from new capabilities and enhancements by moving to the cloud. This assessment includes:

- **High-level business process and functional review:** Understand your current business processes that are being managed in your on-premises version of Dynamics AX and map that to the capabilities of Dynamics 365
- **Customization, ISV and interface assessment:** High level assessment of Dynamics AX customizations and ISV-implemented solutions in your current environment. The primary goal of this step is to assess the expected effort and identify the business dependencies involved when migrating to Dynamics 365
- **Dynamics 365 system review:** Get a summary and high level roadmap of new Dynamics 365 functionality



Assessment

Microsoft-managed assessment delivered virtually, typically requiring 4 to 8 hours of a customer's time



Workload

Dynamics AX



Geography

Globally available



Content/Deliverables

Upgrade assessment report

- Review state of current solution
- Preliminary run of code through LCS upgrade tool or migration approach for Dynamics AX 2009 version
- Assessment and joint review of upgrade tool results
- High level estimation ranges for migration project
- Q&A time for your questions around Dynamics 365 upgrade methodology



2. Technical assessment and tools

Customer estimated time commitment: About one hour

To initiate the technical assessment, you simply permit our migration assessor Dynamics AX system access to help them identify your current technical architecture. This information will then be used to develop an analysis of your current code and determine how it can best be leveraged in Dynamics 365. Microsoft will not access – nor should you provide access – to Personally Identifiable Information (PII) that is housed within your current Dynamics AX on-premises solution.

Examples from Dynamics AX 2012 technical assessment reports



Migration summary and task list report

Contains code analysis summary, including customization information and task list report. Task represents rough estimates of development effort

Name	File type	View
SQL metadata version T:15413236_ExecReport	ExecAnalysisReport	View
AlignmentSummary.xlsx_ExecReport	ExecAnalysisReport	View
TaxCalculation_ExecReport	ExecAnalysisReport	View
Models upgrade_ExecReport	ExecAnalysisReport	View



3. High-level migration summary

Customer estimated time commitment: One to two hours

The Standard Migration Assessment will reveal options based on time, effort, and resources needed to migrate from Dynamics AX to Dynamics 365. The assessment and migration report includes:

- Review of both the functional and technical assessment review
- How to best handle existing customizations
- Recommended upgrade approach
- Next steps in the migration journey

Timeline and expected resource engagement

While the Microsoft-managed assessment will be performed over the course of two days, **your total time commitment should fall between four and eight hours.** See below for further details of what is expected from start to finish.

For more information about the Dynamics 365 Migration Program please visit aka.ms/d365migrate.

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Focus area	<ul style="list-style-type: none"> • Kick-off and business introduction 		<ul style="list-style-type: none"> • Technical connect • Technical assessment 		<ul style="list-style-type: none"> • Functional assessment presentation of the findings • Upgrade process/planning/vision/risk 		<ul style="list-style-type: none"> • Finalize and distribute upgrade assessment findings overview presentation • Recommendations and next steps discussion
Customer participants	<ul style="list-style-type: none"> • ERP owner / IT manager 		<ul style="list-style-type: none"> • ERP owner / IT manager 		<ul style="list-style-type: none"> • CXO, ERP owner / IT manager, business department leads 		<ul style="list-style-type: none"> • ERP owner / IT manager
Level of customer engagement	<ul style="list-style-type: none"> • Participate on the Kick-off call 		<ul style="list-style-type: none"> • Assist the Partner to access customer environment • Fill in Microsoft Dynamics 365 upgrade questionnaire 		<ul style="list-style-type: none"> • Assist the Partner to gather information about the business process 		<ul style="list-style-type: none"> • Participate on the final presentation • Provide feedback and share expectations on next steps
Prerequisites	N/A		<ul style="list-style-type: none"> • Prerequisite files provided by the Partner 		<ul style="list-style-type: none"> • Prerequisite files provided by the Partner 		N/A

MIGRATION ASSESSMENT COMPONENTS

