## **DETERMINE YOUR BEST PATH**

to Upgrade from Dynamics AX to Dynamics 365 Finance and Supply Chain Management



## ANALYZE DATA

- Evaluate data integrity within current system
- Determine importance of historical information
- Plan data cleanup process of de-duplication, purging, and archiving
- Determine strategy for master data management

### **EXAMINE CODE**

- Analyze current code changes or customizations and rate success of each
- Compile list of all customizations and rate effort required to update each one
- Clean up projections and review code alterations for best practices



# EVALUATE BUSINESS PROCESSES

- Identify and evaluate current business processes
- List all unmet business needs
- Compare required functionality between current system and Dynamics 365
- Identify current ISV solutions

## **BASECAMP**

- Determine business drivers and overall vision for the future
- Establish success criteria
- Build project team
  - IT
  - Project Managers
  - Business Process Owners
- Assemble any pre-existing process documentation



## **PATH 1 (MIGRATION)**

Allows you to migrate your current system customizations and all your current data to the cloud

### PATH 2 (HYBRID)

Allows you to keep your custom code and choose which data to bring to the cloud

#### **PATH 3 (FRESH START)**

- Only choice for those on Dynamics AX 2009 or Dynamics AX 2012 R1
- Allows you to determine which data to bring to the cloud while eliminating unnecessary code and customizations from your prior system
- Gives you the opportunity to start fresh with systems and processes







