



Top Ten Tips for an AX 4.0 Upgrade

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#1 – Consider the Functional Enhancements

- Inter-company
- Service Management
- CRM – enhanced, data structure changed
- Electronic Banking (national enhancements)
- Alerts – don't use as panacea to workflow requirements
- SNAP (Office and Outlook integration) - requires client licenses
- Many other minor enhancements
- * MOC 8622 “What's new – Application AX 4.0”
- Review any assets your partner can provide
- Review ISV enhancements
- Consider what's coming in AX 5.0

** Available on CustomerSource*

#2 – Consider the Technical Enhancements

- Enterprise Portal now based on SharePoint
- Active Directory for security
- Application Integration Framework (AIF) for EDI, Inter-company, xml interfaces
- Three-tier architecture
- * MOC 8621 “What’s new – Technical AX 4.0”
- * “Upgrade Tools Guide”

* Both available on CustomerSource



#3 – Manage This Like Any Other Project

- Don't leave your upgrade to IT
- Create a project team with functional representatives
- Ensure you have executive sponsorship
- Perform risk assessment and prepare a mitigation plan
- Set milestones, deliverables, sign-offs
- Prepare detailed project plan
- Prepare detailed cutover plan
- Include QA reviews

#4 – Manage Your ISV Solutions Carefully

- Get your ISV partners engaged early
- Get your maintenance contracts in order
- Check version compatibility
- Check ISV resource availability
- Check upgrade experience
- Arrange support

#5 – Change Management

- Communications – need to inform all those affected by potential downtime, Enterprise Portal redeployment, EDI changes etc
 - Site-based employees
 - Remote employees
 - Field staff
 - Customers
 - Suppliers
- End-user training
 - Classroom, Web-based, self-paced e-learning, combination?
 - Consider (re)testing
- Enforce a freeze period for further development

#6 – Housekeeping

- Project rationalization
- Identify and drop unused custom code
- Revert to standard where possible:
 - Review what's new in AX 4.0
 - Review what's new in ISV solutions
 - Review what's new in partner assets
- Revisit localizations and rationalize (multi-site implementations)
- Update your process documents and user guides

#7 – Test Thoroughly

- Get the users involved:
 - They know the application better than IT
 - Gives them a chance to acquaint themselves with the new user interface
 - Need user sign-off before go live
- Upgrade your original User Acceptance Test (UAT) scripts
- Include ISV solutions in testing

#8 – Version and Timing

- Review Microsoft licensing with partner or Microsoft
 - Consider benefits of moving to edition-based licensing
- Current version is AX 4.0 SP2
- AX 5.0 due in 2008 (migration path probably via 4.0)
- Check ISV solution compatibility
- Consider timing of cutover:
 - Consider in overall landscape of other projects (including AX functional scope increases, rollout to other sites, ISV solution deployments)
 - Active Directory implementation required?
 - Enterprise Portal redeployment required?
 - Other non-AX IT and business projects?
 - Period/Quarter/Year-end cutover pros and cons – it's a business decision

#9 – Consider Using Offshore Resources

- Cost-effective for large number of enhancements
- Check credentials of offshore partner
- * Services offered by the following partners:

Company	Contact
Avanade	toml@avanade.com (Tom Lavelle)
Euroinfo Systems	asapra@euroinfosys.com
HCL	ecs_dynamicsmanagement@crm.hcltech.com
Ignify	sales@ignify.com
Infosys	brian_patt@infosys.com or dinesh_mohan@infosys.com
Prosource	info@prosourcedev.com
Sonata	satish.reddy@sonata-software.com
Systems Advisers Group	upgrades@systemsadvisers.com

* please refer to CustomerSource for more information

#10 – Good Luck!

- Please contact Avanade if you would like further information