



# Upgrade or Reimplementation

Moving to Microsoft Dynamics 365 Finance and Supply Chain Management...

Should you upgrade or re-implement?

**If you are currently using Dynamics AX 2012, or an earlier version, then extended support with Microsoft will be ending soon.**

This means that you have a decision to make about your next move.

When you start to consider your next option, the following question will likely come up: should you upgrade or re-implement?

**Knowing that this is a question that many organisations must face, we have detailed seven key points that you should consider when making this decision.**

## 1. Your current AX version

Does your current AX version have the ability to be upgraded?

Upgrading is currently only supported from either Dynamics AX 2012 R2 or Dynamics AX 2012 R3. However, to take advantage of all the tools available, and to be able to move all your data across, you would need to be on Dynamics AX 2012 R3 CU8 or later.

If you are not on a version that supports an upgrade, this is what you will need to remedy first. This means going from your current Dynamics AX version to Dynamics AX 2012 R3 first, and then from here to Dynamics 365.

Therefore, you need to consider if it is worth going through the effort of two different upgrades.



## 2. The number of customisations and integrations that you have

If you have minimal customisations in your current system and they are simple changes, like new forms and fields only, then a code upgrade should be an easy task.

If you have more complex customisations, these will most likely need to be rewritten to take advantage of new frameworks and extensions within Dynamics 365. If it is not possible to translate the existing customisation into an extension, then it may need to be redesigned.

You also need to consider if you have integrations with external systems.

The framework for integrations in Dynamics 365 is now based on ODATA or Data Management and is a web-based solution rather than an application running on a server. This means that a re-design would be needed.



## 3. The quality of the existing data and processes

When you make the decision to upgrade, all your data will move to the upgraded system as it is; you will not have the chance to review it and decide specifically what data you want to bring over. The same applies for the current processes designed in the system; changing them will not be an easy task. Therefore, if you are considering an upgrade, an important pre-requisite is that your data and processes are all still valid for the business.

However, if the data is no longer of quality, if there are new processes now in place, or if how the system was previously structured no longer meets the current business requirements, a new implementation will give you the opportunity to change the structure and existing processes, and allow you to work on data cleansing. By re-implementing, you get a fresh start with the benefit of coming from a known solution, making activities such as data migration a lot easier.



## 4. Cloud versus On-premise

The general recommendation from Microsoft is to use the cloud. After all, there are some functionalities that only work on cloud, for example, embedded Power BI, some ISV's, and AI machine intelligence. There is also the benefit of not requiring local hardware, and having easy scalability. If you are in Australia, your data will be housed in an Australian data centre.

However, if you have an unreliable internet connection or legal conditions that require data to be stored locally for example, on-premise should be your choice

## 5. Third party solutions

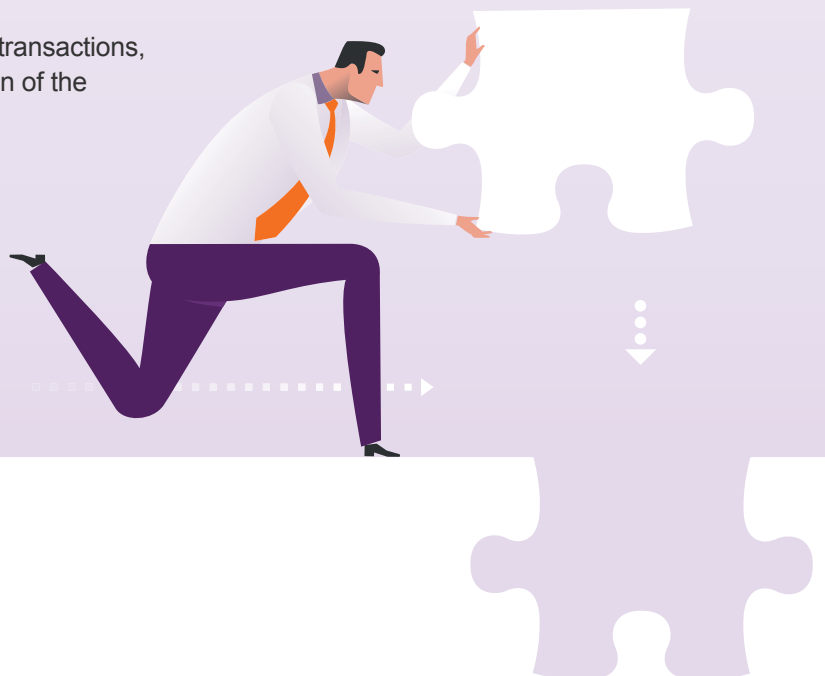
In reviewing the functionalities the external solution offers, you may find that they are now part of the standard offering of Dynamics 365.

If you find they are not part of the standard offering, you will need to consider if they are available for the current version, and if they still meet the company's requirements.

## 6. Transactional data

If you need to carry forward historical transaction information, e.g. invoice history or GL entries, then you will need an upgrade. It is not practical, and almost impossible, to import transactional data in a new implementation. Only opening balances and open transactions are brought across to the new system, which is not a very complex activity as you are coming from a Microsoft system that shares a similar structure.

There are workarounds to check your historical transactions, which include read-only access to the old version of the system, and reports that can be created to combine the data.



## 7. The functionalities being used

It is important to consider the new functionalities versus the deprecated functionalities. For example, the solution for warehousing within Dynamics 365 is very different to warehousing in AX 2009. With the introduction of advanced warehousing came a multitude of new functionalities, meaning you would need to re-design your processes and customisations. This could influence your decision towards a fresh Dynamics 365 implementation.

Unfortunately, a number of things have been deprecated in the new version, which is also something to consider when upgrading. For example, the Enterprise Portal is no longer available within Dynamics 365.

Whilst there are several factors to consider when making the decision about whether to upgrade or re-implement, there are some key areas to summarise.

If you need to retain transactional history, you have a low level of customisation on your system, or you are using a relatively new version, then an upgrade is likely the better option.

However, if you want to re-design your current processes, review the quality of your data, if you are still using an old version, or you have customisations and ISV's that are no longer needed, then a new implementation is likely to be the way forward.

### Why choose Professional Advantage?

Professional Advantage is a highly experienced provider and implementer of leading business systems and can guide you through the process of implementing Dynamics 365 Finance and Supply Chain Management within your organisation.

As a preferred Microsoft partner, Professional Advantage supports Microsoft Dynamics AX and assists clients in the transition process to Dynamics 365 Finance and Supply Chain Management.

We bring more than 30 years of industry and technical expertise to our IT projects backed by our growing team of certified and experienced developers, architects, project managers, and change managers. Our growing list of verifiable projects and client references speak of our track record and the quality of our engagement and project delivery.

We have a demonstrable track record of professional excellence helping our clients achieve their business objectives and our clients report strong benefits from the projects we have executed.

Our philosophy is one of continued specialisation in business management solutions, client service excellence, and to be a trusted business partner.



# Let's Talk.

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## About Professional Advantage

Professional Advantage is an international IT consulting and solutions company with 30 years of experience in helping organisations achieve more by improving their business systems through industry leading software solutions. Originating in Australia, it is one of the country's most awarded solutions providers. Their 250-strong team covers seven offices across three continents and has successfully worked with over 1,000 organisations.