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DYNAMICS CON LIVE

MAY 2024

How to Easily Migrate Historical Data to Dynamics 365



What is **Easily**?



Easily? That is a
dangerous word



Story of a Migration Gone Bad

- A well know supermarket chain launched in Canada in 2013
- Implementing a new SAP ERP system they were not using in the US
- No data migration strategy (used entry level employees for data entry)
- Only 30% of the data in their ERP system was correct
- Resulted in conglomerates bankruptcy, a billion dollar debt and 17,600 losing their jobs





What would be “Easily?”

Migration



What is Historical Data?

- Master Data
- Transactional Data



Upgrade or Migrate?



Advantages of an Upgrade

Pros

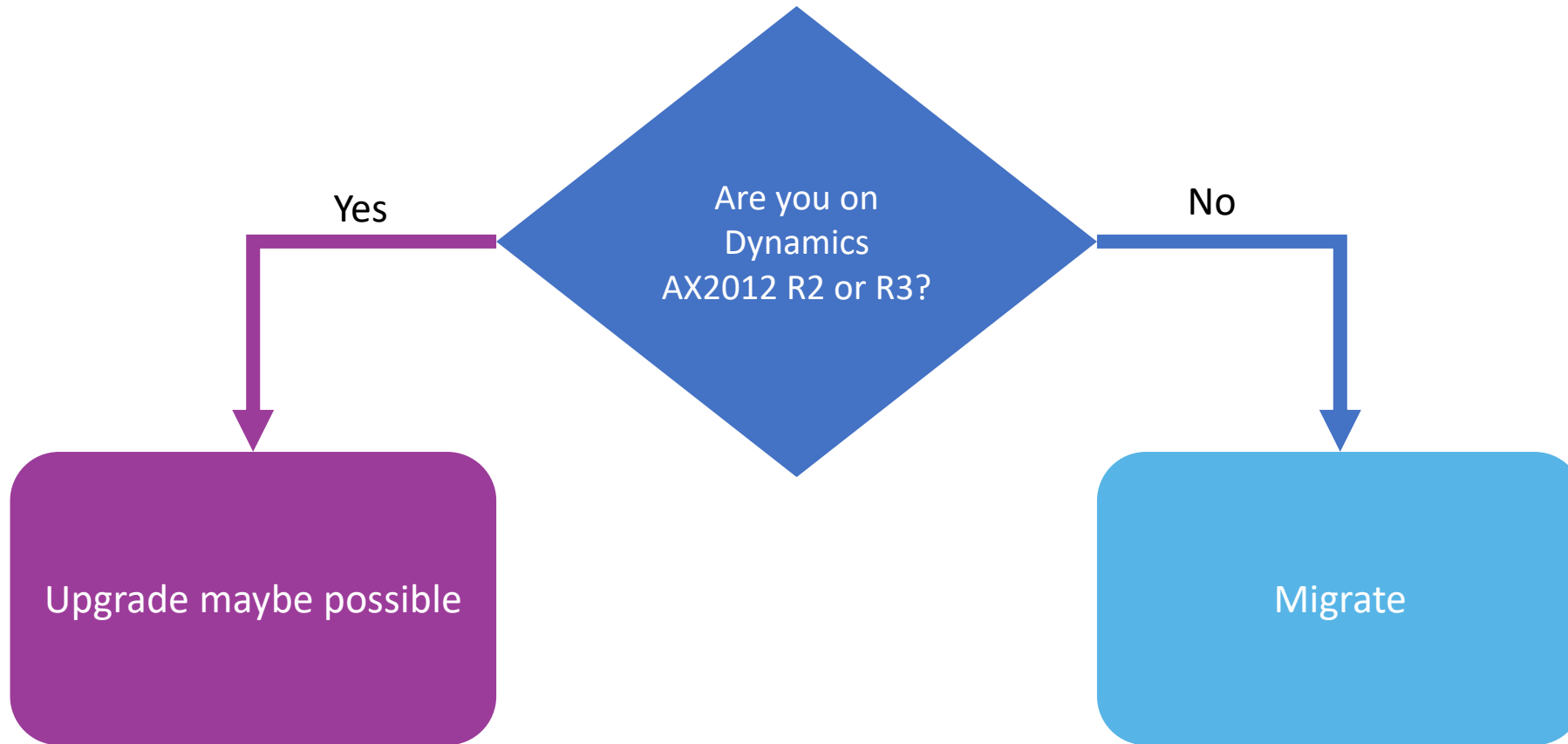
- Easy
- All Master Data
- All Transactional Data
- Same configuration

Cons

- All Old/Dirty Master Data
- All not needed Transactional Data
- New functionality not used
 - To use, requires conversions/development



Can you do an upgrade?



AX2012 R2/R3 -> Upgrade or Migrate?

Upgrade

- Little to no customizations
- No or single ISV only
- Small or medium Database < 1TB
- No Configuration changes

Migrate

- Large amount of customizations
 - Possibly want to reduce those
- Multiple ISV modules
- Large database > 1TB
- Configuration changes:
 - Product dimensions (version, license plate, ...)
 - Chart of accounts
 - Costing methods
- More Legal Entities or name changes
- Cleansing



Upgrade

<https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/migration-upgrade/upgrade-overview-2012>



Migrate



Experiences

- Successful on Budget and Time Data Migrations
- Difficult/Costly/Unsuccessful Data Migrations
 - No priority
 - Unclear responsibility
 - No end users involved
 - Lack of knowledge
 - No strategy/plan
 - Incorrect Solution choice
 - Started too late
 - No Cleansing
 - Not enough testing and validation



The background features a vibrant blue color palette with a pattern of fine, radiating lines emanating from the center. At the bottom, there is a stylized landscape illustration showing rolling hills, a line of evergreen trees, and a few white clouds on the left and right sides.

Technical

Business
Engagement

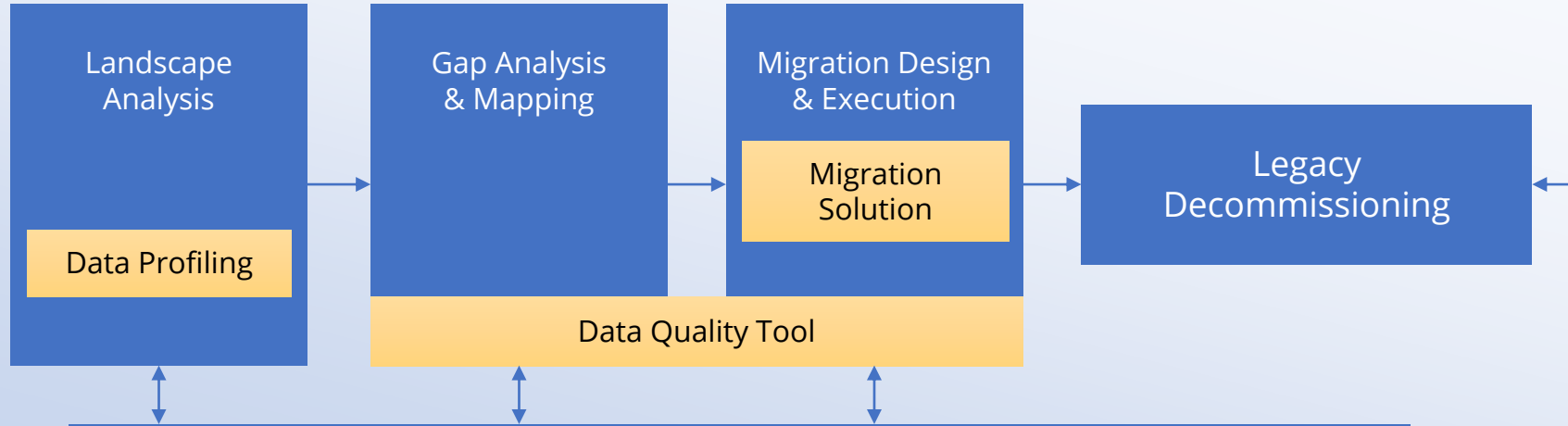


Technical

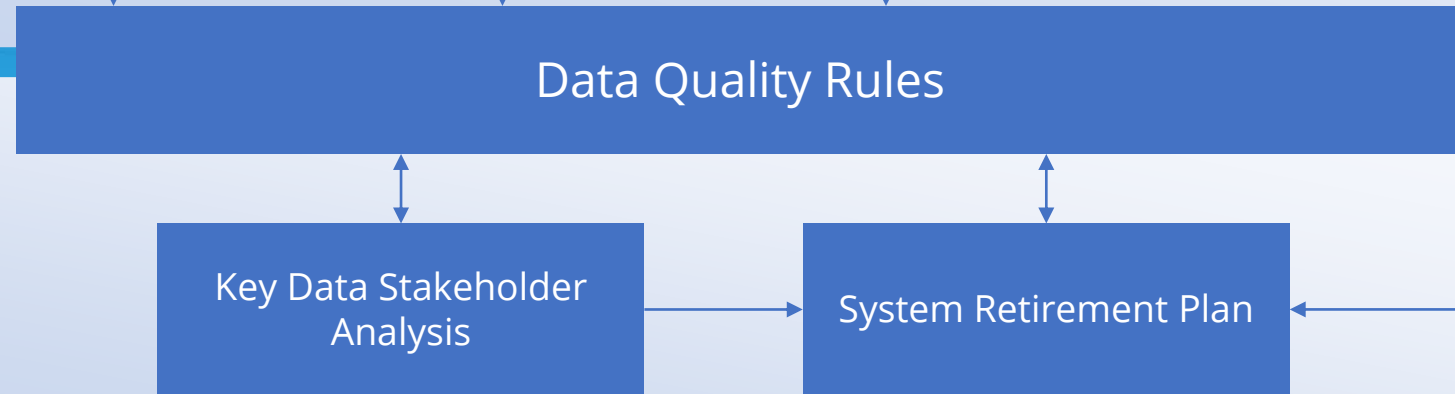
Business
Engagement

Data Migration Strategy & Governance

Technical



Business Engagement



Business

- Data Migration Strategy & Governance
 - Strategy formulation
 - Project Initiation
 - Project Management
- Stakeholder Management
 - Roles and Relationships
 - Responsibilities and Tasks
 - Role Assignments
 - End users
- Business Process Analysis
 - Process Selection
 - Information Analysis
- Validation and Acceptance
 - Validate data migration procedures
 - Validate migrated data
 - Accept the migration
 - Accountants check



Technology

- System Analysis
 - Determine legacy data sources and target data source
- System Preparation
 - Prepare the environment for development, testing, etc..
- System Transition
 - Phase out planning
 - Phase in Target systems



Application and Data

- Data Analysis
 - Legacy Data Source Modeling
 - Target Data Source Modeling
 - Data Source Mapping
- Data Quality
 - Data Quality Definition
 - Data Quality Assurance
- Data Migration
 - Migration Mapping
 - Migration Execution
 - Migration Testing
 - Migration Rework



Data Migration Design & Execution



What type of data is migrated?

- Master Data
- Transactional Data
- Sub-Companies or Legal Entities
- Setup Data



Choosing the right Migration Solution

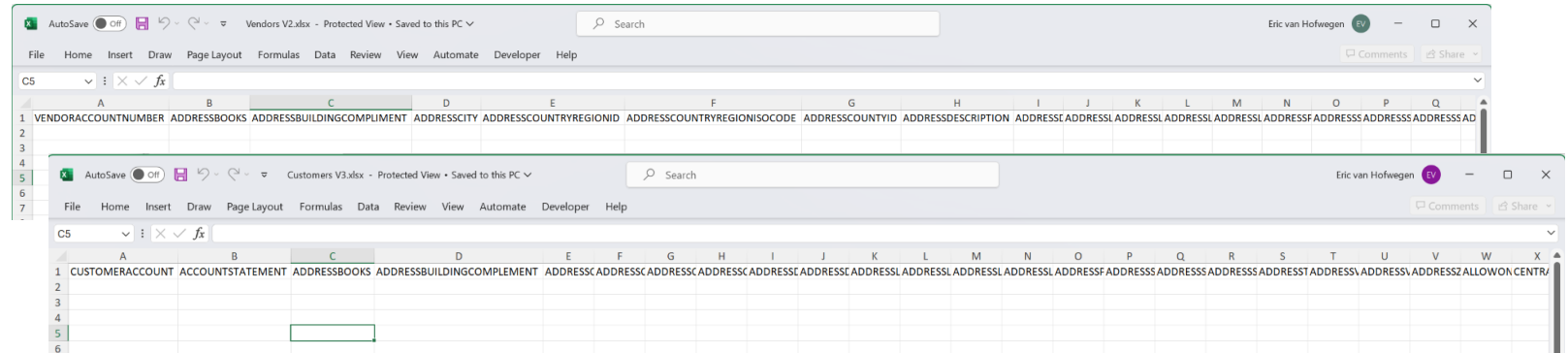
- Data Management (Framework or DMF)
 - + Development
- ISV solution (Configuration)
- Or a combination > Data Management & ISV Solution



Data Management

- Use of templates
 - Fixed structures
- Limited formats
- Staging (optional)
- Execution Sequence

- Limited data manipulation via configuration
- Expect Development



ISV Solution

- Flexible Structure
- Multiple formats
 - Files (XML, JSON, CSV) and ODBC
- Staging (optional)
- Execution Sequence
- Low or No Code (Configuration)
 - Extensive Data manipulation
- Full and Delta Runs
- Test Runs
- Parallel import
- Data Splitting
- History
- Debug options
- Company name changes



Difficulty of Data Migration

- “Easy” Migration
 - AX2012 R2/R3 with
 - No Customizations
 - 1 or 2 Simple ISVs
- Migration tools
 - Data Management
 - Standard DMF Templates
 - ISV Solution



Difficulty of Data Migration

- “Average” Migration
 - AX2012 R2/R3 and AX2009
 - Multiple ISVs
 - Customizations
 - Configuration changes
 - Multiple Legal Entities
- Migration tools
 - Data Management with development
 - Custom Entities
 - Custom DMF Templates
 - ISV Solution



Difficulty of Data Migration

- “Complex” Migration
 - Any ERP
 - Multiple ISVs
 - Customizations
 - Configuration changes
 - Dimensions
 - Multiple Legal Entities
- Migration tools
 - Data Management with massive development
 - Custom Entities
 - Custom DMF Templates
 - ISV Solution



Solution Differences

Short Import Demonstration

- Customers
- Open Sales orders



Solution differences in Tasks times

- Analyzing data
- Migration Mapping
- Migration Execution
- Migration Testing
- Migration Rework



Solution choice based on Strategy

- Master Data
- Transactional Data
- Sub-Companies or Legal Entities
- Setup Data



How to Handle Historical Data?

- Best practice is to
 - Master Data
 - Starting Balances
 - Migrate open transactions only
 - Leave old system running, move transactional data to DW
- All Historical transactional data is possible
 - “Complex” Migration
 - Deep Data and Functional Knowledge is needed
 - Do you need “Old data” (Customers, Unused items)



How to Easily Migrate Historical Data to Dynamics 365

- Prioritize the Data Migration
- Create a Strategy
- Assign Stakeholders
- Determine the in-house knowledge
- Select the correct Solution
- Think about Data Quality & Cleansing
- Define when it is successful
- Test, Test, Test!!!





Thank you