



ciellos
Business Systems Consulting

Upgrade Program

Programs – Upgrade

Each Dynamics version has its own characteristics, complexities, and technology improvements. Our processes map these changes, into repeatable and predictable upgrade programs. In reviewing the state of the systems implementation, and business goals of the customer, we recommend the best approach. Some of the common patterns and characteristics are:

Technical Upgrade

- Concrete Business Processes, Structured/Minimum Investment Customizing / Extending Dynamics AX, Continuous Upgrade Approach.
- Direct Technical Code Upgrade, Standard Data Upgrade, Minimal Process / User Impact

Functional Upgrade

- Changing/Maturing Business Processes, Heavy Core Modifications and Extensive Enhancements, Multiple Version Upgrade.
- Reduced Technical Code Upgrade, Process Re-Mapping, Re-Engineering, Re-Implementation

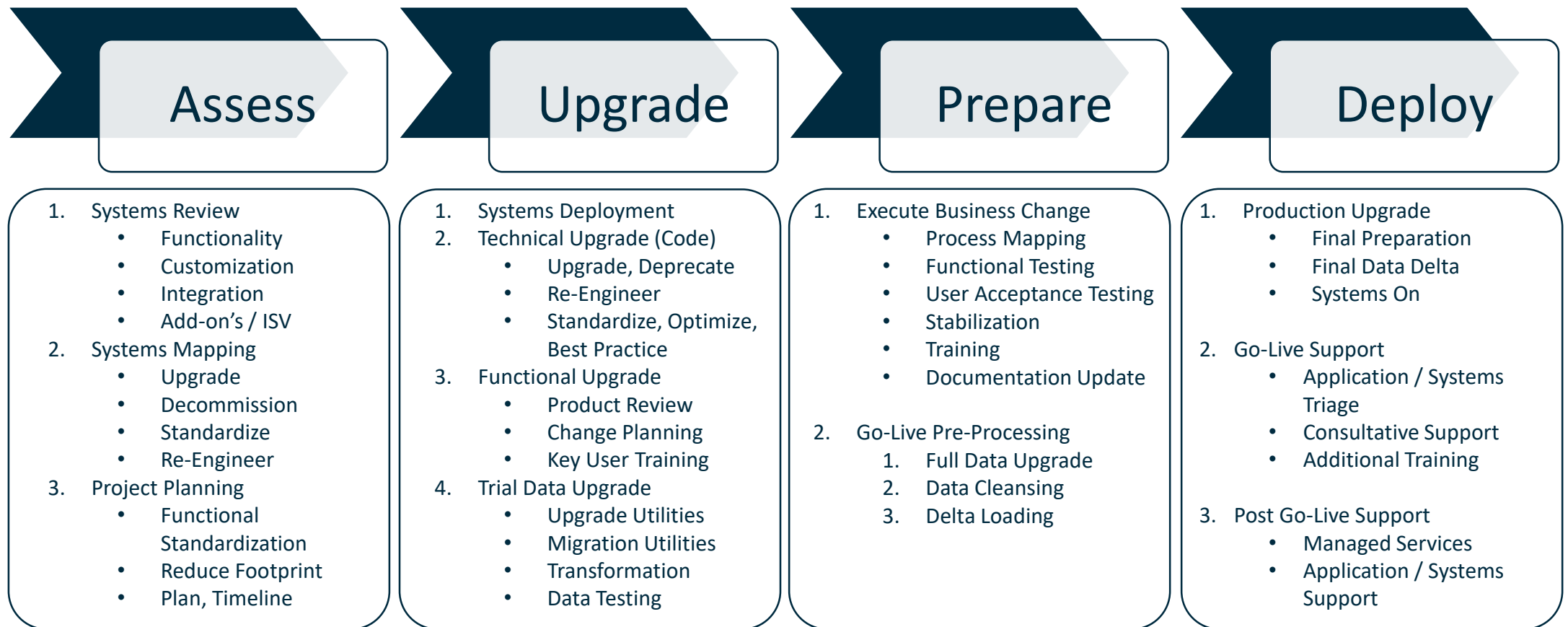
Hybrid Upgrade

- Stable Business Processes, able to adapt to new/changing Feature Functionality.
- Targeted Technical Code Upgrade, Process Mapping to Standard Functionality, Targeted Data Migration



Upgrade Process


Each classification of an upgrade project (Technical, Functional, Hybrid), follows our proven 4 stage methodology to qualify, plan and effectively upgrade your system to the target version, and support your users in the process.



Upgrade Estimation Process

To estimate, two factors are required, (1) a Systems Review (Technical) and (2) Business Assessment (Functional/Process). This provides an understanding as to what feature functionality has been implemented, and what customizations, integrations and third party products are included in the solution.

To complete the Systems Technical Review and estimate, our solution experts require either of the following approaches:

Direct Approach	Indirect Approach
<ul style="list-style-type: none">• Remote Secure Systems Access* to Dynamics and SQL• Temporary Administrator Access  <p>* Note: Non-Production system only</p>	<ul style="list-style-type: none">• Windows, SQL and Dynamics Source Versions and System Kernel Identification• List of Dynamics Models / Customization Projects, Including Documentation• Exported customization layers/objects.• List of Add-on's, Integrations, and Data Dependencies (BI Warehouse, Portals, SQL queries, Connected Systems, etc.)• Exported Dynamics Table Record Count (SQL)

Our solution experts then assess the code base for exceptions using tools and techniques to estimate raw effort, and incorporate feedback from the business assessment to determine the best recommended approach to upgrade.

Upgrade Proposal

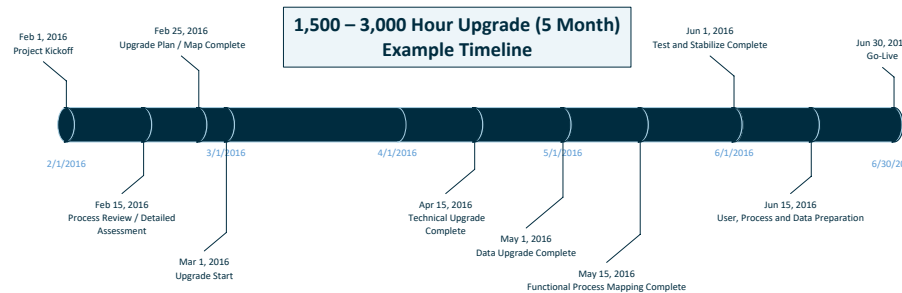
The final estimate is delivered as an Upgrade Proposal, including:

- Recommended Approach.
- Comprehensive Estimate and Rate Structure
- Summary Project Plan, including Teaming Strategy, Timeline and Work breakdown Structure (WBS)
- Raw Code/Object Estimate Summary
- List of Assumptions

Sample Estimate details are provided as example.

UPGRADE SUMMARY*	HOURS / ROLE						TIMELINE (Months)	WEEKS ONSITE	# OF RESOURCES
	SA	PM	FC	STC	TC	TOTAL			
Upgrade Planning and Design	24	44	60	56	-	184	1	1	4
Technical Upgrade	-	107	-	267	805	1,124	2	Remote	8
Functional (Data) Upgrade**	33	69	328	286	120	831	1.5	2	6
Live Upgrade	16	14	72	64	-	166	0.5	1	5
TOTAL ESTIMATE (HOURS)***	73	233	460	673	925	2,304	5	4	8

ROLE Description	ROLE
Solution Architect	SA
Project Manager	PM
Functional Consultant (Remote)	FC
Senior Technical Consultant	STC
Technical Consultant	TC



UPGRADE WBS AND HOURS ESTIMATE	DETAILS	HOURS / ROLE					TOTAL
		SA	PM	FC	STC	TC	
1. Upgrade Planning and Design							
1.1 Technical Review			2		16		18
1.1.1 Add-on / Extension Review			1		8		9
1.1.2 Integration/Batch/Extensions Review			1		8		9
1.2 Business Process Review			2	20			22
1.2.1 Reporting Review			1	12			13
1.2.2 Data Review			2	8	8		18
Version Functionality GAP Alignment			4	20	16		40
Project Plan				32			32
Redesign Plan				-			-
Object Cleanup Plan		8					8
Data Cleanup Plan		4					4
Security Plan		4					4
Deployment Plan		8					8
1. Upgrade Planning and Design Total		24	44	60	56	-	184
Technical Upgrade							
Upgrade Environmental Setup				2	24		26
ISV Add-on Platform	Install and Merge Add-on's			6	64		70
Object Upgrade	Expected 50% Object Cleanup			46	92	367	459
Customization Removal (Clean Up)				23	46	184	230
Redesign	To be determined during Planning and Design			-			
Customization Reengineering	TBD			-			
Integration Redesign and Development	TBD			-			
Functional Process Redesign and Data Mapping	TBD			-			
Reporting Redesign and Development	TBD			-			
GUI Best Practice Conversion			8		20	60	80
Code Optimization	TBD						
Object Testing				13		129	172
Object Stabilization				9	22	65	86
Technical Upgrade Total		-	107	-	267	805	1,124
Functional (Data) Upgrade**							
Data / Script Preparation		4	4		40		48
Test Data Preparation and Migration Pass 1		13	18	32	64	80	206
Custom Data Upgrade Utilities			5		46		46
ISV Add-on Data Upgrade			4	40			44
Functional Testing			8	80			88
Performance Testing	TBD						-
Production Installation					24		24
Training		16	4	40			60
Test Data Migration Pass 2			7	24	48		79
Test Data Migration Pass 3			5	16	32		53
Test Data Migration Pass 4			2	8	16		26
Security Configuration					24		24
User Acceptance Testing				12	40	40	132
Functional (Data) Upgrade** Total		33	69	328	286	120	831
Live Upgrade							
Pre-Go Live Preparation	3 Days, Principle Resources	8	3	16	16		43
Go-Live	24 Hours (Friday through Monday)		3	16	16		35
Post Go-Live Support	1 Week, Principle Resources	8	7	40	32		87
Live Upgrade Total		16	14	72	64	-	166
TOTAL HOURS		73	233	460	673	925	2,304



Business Systems Consulting

MAIN

www.ciellos.com

ciellos@ciellos.com

+1 (770) 799-8565

SUPPORT

www.ciellos.com/support

support@ciellos.com

+1 (770) 790-0570