

THE POWER OF BEING UNDERSTOOD

STAYING ON AX? DON'T OVERLOOK THESE FACTORS



Speakers



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Let's learn about you

AX 2009 users?

AX 2012 users?

D365 users?

Microsoft?

Partners?

Customers?

Currently doing a 365 upgrade?

Worked on any ERP upgrade?

Why Stay Legacy?

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Current
system fits
needs already

Effort to
upgrade too
high

Licensing

Don't trust
cloud

Planning to
move just not
yet

SUPPORT

Microsoft Support

Support dates

- Dynamics AX 2009 SP 1 – Extended 10/12/2021
- Dynamics AX 2012 RTM – Extended 10/12/2021
- Dynamics AX 2012 R2 – Extended 10/12/2021
- 2012 R3 – Mainstream 10/12/2021
- 2012 R3– Extended 1/10/2023

Extended support

- With extended support you can pay for Microsoft support hourly, you receive security updates (this means no regular or requested hotfixes), and you have access to newer versions.
- This is a significant reduction compared to mainstream support which includes no-charge incidents (where there is a bug), ability to request non-security hotfixes, service packs, and extended support.

Supporting Products - SQL

- SQL Server 2005 – out of support
- SQL Server 2008 – out of support
- SQL Server 2008 R2 – out of support
- SQL Server 2012 with SP4 – 7/12/2022
- SQL Server 2014 with SP3 – 7/9/2024
- SQL Server 2016 SP2 – 7/14/2026
- AX 2009
 - SQL 2012 (up to SP3)
 - SQL 2008 R2
 - SQL 2008
 - SQL 2005
- AX 2012
 - SQL 2016 (for R2 or R3)
 - SQL 2014
 - SQL 2012
 - SQL 2008R2
 - SQL 2008

Supporting Products - OS

- Server 2003 – out of support
- Server 2008 SP2– 1/14/2020
- Server 2008 R2 SP2– 1/14/2020
- Server 2012– 10/10/2023
- Server 2016– 1/27/2027
- AX 2009
 - 2012 R2
 - 2008 R2
 - 2008
 - 2003
- AX 2012
 - SQL 2016 (for R2 or R3)
 - 2012 R2 (for R2 or R3)
 - 2008 R2
 - 2008

ISV's and 3rd parties

- Can be hard to find support
- Versions can be limited
- Security?

Now What? - Support

- Upgrade to longest life OS and SQL
- Review Dynamics AX system requirements and support end of life pages carefully
- Discuss risks of no MS support with business leaders
 - No bug fixes
 - No security fixes
 - PCI or other certifications
 - Public trading
 - Value when selling business
 - Finding install media

SECURITY

OS end of life dates coming:

Microsoft will stop releasing security patches, which will create vulnerabilities in your environment.

This is especially critical for environments/industries that are regulated (HIPAA, PCI, GDPR) unless certain management, migration or mitigation is in place

Now What? - Security

If you are going to maintain the aged-out systems and ERP components:

- Penetration testing
- Security review
 - Least privilege operations
 - Segregation of duties
- Hardening of hosts
- Firewalls
- Additional monitoring / tooling
- Lock down and leverage of RDP Remote App

PERSONNEL

Personnel

- When a system reaches a certain age it will become harder to recruit and keep people to maintain the system. In the IT world it is easy for worker's skills to become so far out of date that demand for their services decreases; because of this there is a cultural norm to stay up to speed on current technologies.
- Attracting new talent is hard.
- Find a support partner who can help on your legacy version.

OTHER CONSIDERATIONS

Other considerations

- Disaster Recovery
 - Planning
 - Testing
- Backups
- Hardware
 - Refresh / End of Life
 - Support

NEW FEATURES

New Technology

Platform

Software as a service

Disaster recovery

Microsoft responsible for backups

Continuous upgrade / One version

Modern platform / Logic apps, power BI, flow

Visual Studio development with better source control

Licensing / Customer Engagement Plan (was CRM)

What has changed between versions that affects my company's upgrade?

2012

- Data normalized
- UI rewritten
- Integration technology changed
- SSRS new reporting engine
- Security rewritten
- Financial framework changes
- Licensing

2012 R2

- Process manufacturing

2012 R3

- Advanced warehousing

365

- Move to extensions
- UI rewritten
- Integration technologies changed
- Licensing
- Ecosystem growth (PowerApps, Power BI, Flow, Azure, etc.)

IF YOU PLAN TO
UPGRADE

What is the effort and cost to upgrade?

Code Upgrade

Data Upgrade

User Testing

New Feature Changes

3rd Parties

Training

- SME and End user

Integrations

Work with your partner

Upgrade pre work

Create system test plans

Determine the tests QA performs and when those tests are given

Production data cleanup

Identify the system workflows in use and document the steps associated with them.

Decide what data to keep

Identify steering committee, project sponsor, project manager, and subject matter experts.

Determine disaster recover requirements

Identify unused reports and x++ customizations

Prioritizing projects within the upgrade

Training

QUESTIONS AND ANSWERS

Appendix: Web Links

- D365 F&O What's New: <https://docs.microsoft.com/en-us/dynamics365/unified-operations/fin-and-ops/get-started/whats-new-changed>
- AX 2012 What's New:
 - Microsoft Dynamics AX 2012 what's new
 - <https://technet.microsoft.com/en-us/library/dn527180.aspx>
 - Microsoft Dynamics AX 2012 R2 what's new
 - <https://technet.microsoft.com/EN-US/library/dn529285.aspx>
 - Microsoft Dynamics AX 2012 R3 what's new
 - <https://technet.microsoft.com/en-us/library/dn600262.aspx>

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