Microsoft Dynamics AX Implementation Guide

By Yogesh Kasat, JJ Yadav

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Your all-in-one guide to exploring and implementing Microsoft Dynamics AX
About This Book

- From project kick-off to go live and upgrade, learn what to expect in each phase of the project
- This book guides you through the entire journey of a Dynamics AX implementation project, helping you to avoid the common pitfalls and adapt industry knowledge and best practices for your own project
- This one-stop guide is packed with key tools and techniques to aid your Dynamics AX implementation

Who This Book Is For
This book is for IT project managers, solution architects, consultants, business SMEs (Subject Matter Experts), super users, IT managers and technology leaders who are planning to implement or are in the process of implementing or upgrading Dynamics AX.

You need to have the following knowledge to get the most out of this book:
1. A basic understanding of the ERP implementation process.
2. An understanding of IT project management and Software Development Life Cycle (SDLC).
3. Access to Microsoft Dynamics PartnerSource / CustomerSource and the Lifecycle Services (LCS) portal.
4. Knowledge of Microsoft Dynamics AX and the Microsoft Dynamics Sure Step methodology would be a plus point.

What You Will Learn

- Prepare for a great start with effective project management and planning from the beginning
- Gather details early using effective requirement-gathering tools and techniques
- Gain tools and techniques for effective infrastructure planning and hardware sizing
- Get to grips with integration and data migration through planning and strategy

- Familiarize yourself with the reporting and BI tools
- Master functional and technical design to customize existing features and designs in your own projects
- Manage your configuration and move your configuration from one environment to another
- Learn industry's best practices and recommendations on customization development and performance tuning
- Plan for System testing, training and Go Live
- Learn post go live survival, business transformation and upgrade

In Detail

Microsoft Dynamics AX is Enterprise Resource Planning (ERP) software that supports multi-site operations across various countries, providing international processing within the company. It is an ERP solution with a lot of features and functionality, and it provides support across the fields of financial, distribution, supply chain, project, customer relationship, HR, and field service management.

This book is all about simplifying the overall implementation process of Dynamics AX. The purpose of this book is to help IT managers and solution architects implement Dynamics AX to increase the success rate of Dynamics AX implementation project.

This all-in-one guide will take you through an entire journey of a Dynamics AX implementation, ensuring you avoid commonly-made mistakes during implementation. You'll begin with project kick-off, resource planning, infrastructure design. Then, you'll move onto integration design, data migration, reporting, functional and technical design, configuration, and performance tuning go live and how to get ready for post go live.By the end of the book, you will know how to plan and execute Dynamics AX implementation project right, on your first attempt, using insider industry knowledge and best practices.

Style and approach

This is a progressive, easy-to-follow book that summarizes numerous aspects you need to know to make your Dynamics AX implementations successful using code examples to get you hands-on.

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Editorial Review

About the Author

Yogesh Kasat

Yogesh Kasat is a cofounder of Real Dynamics, which is one of the first Microsoft Dynamics AX IV&Vs (Independent Verification and Validation services provider). The goal of Real Dynamics is to help businesses and their internal IT teams to take their Dynamics AX implementation to the next level with independent and unbiased recommendations. Yogesh has led a number of large Dynamics AX implementations and turned them into success stories. He has a unique blend of knowledge of financial and supply chain modules, technical architecture, and business process optimization, and he has held project management, leadership, and solution architect roles. Yogesh is one of the founding partners of Real Dynamics?an organization focused on providing independent guidance and oversight of Dynamics AX implementations, post-implementation reviews, and help to customers in defining a roadmap for the Dynamics AX platform. He held a leadership role for one of the leading Dynamics AX partners as the vice president of Dynamics AX delivery and oversaw Dynamics AX implementations throughout North America. He was awarded the prestigious Leadership Award twice during his tenure with the company. He has six Dynamics AX certifications, including financials, trade and logistics, and managing Dynamics AX implementation (Sure Step). In addition to more than a decade's experience of working on Dynamics AX, Yogesh has earlier experience with other business applications, including Dynamics NAV/GP and PeopleSoft. He has traveled extensively for global projects and has had the pleasure of visiting different parts of the world.

JJ Yadav

JJ Yadav has worked on Microsoft Dynamics AX for more than a decade as a solutions architect, project manager, technical lead, and developer. He started working on Axapta 3.0 as a developer with Euro Info Systems in India (now Tectura India). He has experience in leading and managing several Dynamics AX Global implementations and upgrade projects. His core technical expertise in Dynamics AX includes infrastructure planning, integration services, data migration, and workflow. He has extensive functional experience in financials, procurement, accounts payable, accounts receivable, inventory and warehouse management, and the service modules of Dynamics AX. Currently, he works as a senior technical project manager with Ignify in the central region of the U.S. on a leading Global AX 2012 R3 implementation project.

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Mildred Duncan:

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