



Professional Expertise Distilled

Implementing Microsoft Dynamics AX 2012 with Sure Step 2012

Get to grips with AX 2012 and learn a whole host of tips and tricks to ensure project success

Keith Dunkinson
Andrew Birch

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BIRMINGHAM - MUMBAI

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First published: March 2013

Production Reference: 1110313

Published by Packt Publishing Ltd.
Livery Place
35 Livery Street
Birmingham B3 2PB, UK.

ISBN 978-1-84968-704-1

www.packtpub.com

Cover Image by Abhishek Pandey (abhishek.pandey1210@gmail.com)

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I would like to thank everyone who has supported me in this endeavor, including my family and especially my lovely wife Ann, Chandru Shankar, my brother Andrew Dunkinson, Stephen Holden at Fulcrum, Clare Morrissey, and everyone who has helped me along the way in the last couple of decades, not forgetting my professional lifetime mentor Alan Hindley.

Andrew Birch has over fifteen years experience in the technology industry, starting his career as a network infrastructure engineer before moving to an operations management position in a software development company. Andrew began working with AX (Axapta) in 2003, and has since become one of the foremost proponents of Dynamics AX in Europe, speaking at several Microsoft events, and his projects have won a top industry award. He has been heavily involved in the creation and implementation of Microsoft Dynamics AX add-ons, particularly for the feed industry, that focus on real-time integrations between AX and production control systems. Andrew is now the lead consultant at Binary Consultants, a company he owns and runs with some of the most experienced and creative Dynamics AX and Microsoft .NET professionals in the UK.

I would like to thank all the team at Binary Consultants, especially Simon Buxton and Josh Townson for their technical insight, engaging debate, and furious desire to be proved right, which is what drives Binary forward, and has given me the knowledge (along with the things I was right about) to write this book. I'd also like to thank Clare Morrissey for her dedicated proof reading and relentless reminders about deadlines, without which this book would be neither comprehensible nor finished!

About the Reviewers

Simon Buxton started his IT career as database developer, writing bespoke database systems for printing, and later for financial accounting customers. Working for small companies required him to become capable in all aspects of solution design, build and delivery; which was a good grounding for when he became Technical Director (and sole 'technical' employee) of a new Dynamics AX reseller 'Sense Enterprise Solutions'.

He joined Sense Enterprise Solutions (SES) after a year working for Columbus IT Partner as one of their team leaders, where one of the first UK installations of AX (Axapta 1.5) was completed for a local distributor.

The projects won by SES were typically more technically challenging than usual. This experience found him consultancy projects from Bahrain to the USA.

The solutions often included much wider use of technology than normally encountered and involved developing solutions for third party logistics, multichannel retail, and eventually developing an Animal Feed vertical, integrating Dynamics AX into production control systems, government gateways, ecommerce solutions, and myriad others.

Currently working as a Technical Solution Architect at Binary Consultants, he is passionate about solution design and conforming to the best practices of solution design and delivery. He also believes strongly that this comes from the way the delivery partner is run, its ethos and internal efficiency.

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I would like to thank my family and friends who have always been supportive and have shown true unconditional love and patience through my entire career. I would also like to provide a shout out to the Junction Book Club!

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Angela began working with AX in 2001, while completing a Computer Science degree at The University of Waikato in New Zealand. After a successful implementation of version 2.5, and later upgrade to 3, the spouse and bags were packed up and moved over to England to seek out bigger project challenges, and for a taste of world travel.

Since this move, Angela has worked on many AX implementations, specializing in business solutions design, X++ programming, Reporting and Business Intelligence. She is a Microsoft Certified Professional for AX: Development, Installation and Configuration, as well as key modules: Finance, Projects, Production, Trade & Logistics, and is also a Microsoft Certified Trainer for AX.

A big thanks to the authors for all the effort in writing this book, and for inviting me to be one of the reviewers. I've learned many things.

David Probst, with a background in Economics and Computer Science, has been working professionally with Microsoft Dynamics AX since 2001, focusing on specific modules including CRM, Service Management, Shop Floor Control, Environmental Sustainability, Inventory management, and Quality management.

Mohammed Rasheed is a Dynamics AX Solutions Architect, and is responsible for design, delivery, and quality of interfaces and customizations on Dynamics AX. Mohammed's core focus at the moment is Dynamics AX for retail, as he leads one of the largest retail implementations in the UK.

Mohammed lives with his wife Sakeena in Chester, UK.

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Preface

This book provides a comprehensive guide to implementing Microsoft Dynamics AX 2012 with Sure Step 2012, and is the perfect accompaniment for project team members of all levels. With discussions on the Diagnostic, Analysis, Design, Development, Deployment, and Operation phases of an implementation project, details of technical concepts that help you effectively manage a project, and real-world examples and hints, managing and delivering successful projects has never been easier!

What this book covers

Chapter 1, Installing and Setting up Sure Step, examines the installation of Sure Step and the setup of projects, and discusses the project offerings that are available within Sure Step.

Chapter 2, The Diagnostic, introduces you to the Diagnostic phase of a Sure Step implementation project, where we identify the overlap with the sales process, understand and choose Decision Accelerators and initiate project management and governance.

Chapter 3, Planning the Infrastructure to Support Dynamics AX, will help you to discover when and how you should start planning your infrastructure, how to choose the best technologies and roles for your project, and how to get the most out of your project team.

Chapter 4, Installing the Dynamics AX Environments, will help you in understanding the key factors that influence how and when you get started in installing your Dynamics AX environments, which can have a major influence on the overall success of your project. Here we offer tips and advice on how to manage this stage effectively.

Chapter 5, Business Requirements Analysis, will introduce you to the key objectives of the Analysis phase, including help in ensuring that the detailed business requirements have been properly scoped and understood and all contractual documentation is in place. This chapter will guide you through these important steps with helpful hints and examples.

Chapter 6, AX Setup, will help you to find out the basic setup required to make AX useable, and gain insights into the system configuration. This chapter will help you make the right decisions when it comes to setting up AX correctly.

Chapter 7, Integration, will discuss the importance of creating an integration plan for third party software systems, and help you plan and test effectively.

Chapter 8, Harnessing the Power of Standard AX Features, will help you to discover the wealth of highly configurable standard features available to you in AX that allow you to tailor the applications without modification or customization, and find out how to get the best out of AX without development.

Chapter 9, Designing and Developing the Solution, will help you get creative with the design of the AX solution, understand the impact of making changes to AX and know when to develop and when not to. This chapter will guide you through the solution design and assist you with the planning of the development.

Chapter 10, Reports, Document Layouts, and Business Intelligence, will help you learn the differences between Reports, Document Layouts, and Business Intelligence, and discover how to analyze and plan for their implementation.

Chapter 11, Deployment Phase, will increase your confidence in your deployment, after having analyzed, designed, and developed your AX solution. This chapter provides information on End User Training, User Acceptance Testing, Data Migration, and the Cutover to the new system.

Chapter 12, Project Governance and Quality Assurance, will help you with the extensive Project Governance and Quality Assurance that is becoming more and more necessary for larger projects. This chapter will also help you discover more about conducting project lifecycle reviews, auditing, and creating quality review plans.

Chapter 13, Operation Phase, will guide you, following months of planning and design, through the final stages of the project and the most exciting stage—handing the completed system over to a happy customer and transitioning the solution to support. This chapter will also help you learn about the important planning that goes into this stage, and how to have a successful go-live!

What you need for this book

In order to appreciate this book fully, we recommend you have a version of the Sure Step 2012 client, which can be downloaded from PartnerSource or CustomerSource. It is advantageous that you have a copy of AX 2012, or at least a working knowledge of Dynamics AX.

Who this book is for



Implementing Microsoft Dynamics AX 2012 with Sure Step 2012 will help you better understand the principles of Sure Step methodology, and enable you to utilize these in a practical and pragmatic way when implementing Microsoft Dynamics AX 2012. Not only will you increase your knowledge and insights into each of the Sure Step Implementation phases and the AX application itself, you will gain the confidence to deal with the unexpected and problematic. With examples of real-life projects and helpful hints and tips, this book will help you become a skilled project manager able to deliver managed expectations on time, on budget! This book is detailed enough for novices or those new to Microsoft Dynamics implementation projects, and also covers topics that benefit more experienced project team members.



Conventions

In this book, you will find a number of styles of text that distinguish between different kinds of information. Here are some examples of these styles, and an explanation of their meaning.

Code words in text are shown as follows: "The most common file type, for example .doc, .docx, .xls, .xlsx, .pdf, and so on, are preconfigured, but if you plan to upload files generated by specialist applications, you may need to add their file extensions to the list."

New terms and **important words** are shown in bold. Words that you see on the screen, in menus or dialog boxes for example, appear in the text like this: "To create a project, run the Sure Step client and select the **Projects** tab from the opening screen."

 Warnings or important notes appear in a box like this. 

 Tips and tricks appear like this. 

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1

Installing and Setting up Sure Step

In this chapter, we will examine the installation of Sure Step and setting it up for a specific project including some of the key choices we need to make, and activities that should be undertaken at this time. After reading this chapter, we should be able to: download and install the Sure Step client, create an appropriate Sure Step project, and initiate key activities for our Dynamics AX project.

Sure Step is the methodology created by Microsoft for implementing Dynamics projects. Although Sure Step includes content for Dynamics: NAV, AX, GP, SL, and CRM, our book is only focusing on AX. In some cases, one Dynamics project will be split into multiple Sure Step projects. This may be the case for projects covering one or more phases or for global rollouts, with sub-projects covering multiple territories or lines of business.

Sure Step has evolved through several versions, and gains content and maturity through each one. There would be no need to use an earlier version, so we have only considered the current version in this book (Sure Step 2010).

Sure Step is designed to be used by both customers and partners, and although it is currently most often used by partners, it is becoming more and more common for customers to follow Sure Step methodology when implementing ERP systems. In this book, we use "project" to describe an implementation of Microsoft Dynamics AX. In most cases, one Microsoft Dynamics AX project will be the subject of one Microsoft Sure Step project.

For more comprehensive information on Sure Step, you should refer the Microsoft training materials, or the *Packt Publishing* title *Microsoft Dynamics Sure Step 2010* ISBN 978-1-849681-10-0 by Chandru Shankar and Vincent Bellefroid.