

# Dynamics 365 Upgrade Helps a Cross-Media Verification and Information Services Provider Take Business to the Next-Level

**Customer:** Alliance for Audited Media (AAM)

**Industry:** Professional Services

**Size:** 101-300 employees

**Profile:** AAM is a recognized leader in providing cross-media verification and information services.

**Region:** Illinois, USA

**Services:** Dynamics 365 for Finance and Operations

## Business Need

Empowering media professionals with trusted verification and data, AAM provides data-driven insights, technology certification audits, and information services to more than 4,000 publishers, advertisers, agencies, and technology vendors.

AAM had implemented Microsoft Dynamics AX 2012 R3 (on-premises) solution, along with certain customization and localization services, to connect all the financial, operational, and accounts data in a seamless manner. However, due to rapid growth in business and increased demand for their services, AAM required connectivity and scalability to take full advantage of their business data. They wanted to integrate the cloud footprint across the organization and modify strategies for cost control in order to effectively manage growth.

Furthermore, AAM maintained multiple IT systems, databases, and silos of information – disparate systems (Dynamics CRM and Oracle) that limited visibility into ongoing projects. This resulted in a number of inefficient business processes, and AAM's management lacked a single, comprehensive view into how their projects were performing.

To overcome the above issues and continue with the pace of change, AAM sought to expand the capabilities of its AX system – introduce new end-user experience, accommodate increased demand for real-time access to data from any device, incorporate

demand forecasting and analysis, and integrate the system with productivity tools.

AAM realized that the solution that met all of their requirements was an upgrade of their existing Dynamics AX 2012 R3 system to Dynamics 365 for Finance and Operations.

AAM had already worked with Synoptek to successfully migrate from AX 2009 to Dynamics AX 2012 R3, so Synoptek had in-depth knowledge of AAM's business model and technology environment.

## Solution and Approach

Through a series of workshops, Synoptek performed the upgrade assessment and evaluated AAM's existing Dynamics AX system.

This involved:

- Deep analysis of the current environment to see whether it could support the upgrade.
- Early identification of issues/risks that could occur during an upgrade, and appropriate actions to be taken.
- Determination of the most suitable upgrade approach.

Synoptek used Microsoft Dynamics Lifecycle Services (LCS) code upgrade service and Visual Studio tools to migrate code and metadata from Dynamics AX 2012 R3 to Microsoft Dynamics 365 for Finance and Operations.

The upgrade process involved the following activities:

#### **Code Migration:**

This process involved performing auto-migration using the LCS Code upgrade service. The key tasks included:

- Uploading the AX 2012 R3 model store database to LCS
- Checking the upgraded code with respect to the VSTS workspace
- Importing the VSTS code in the developer environment
- Resolving the code conflicts and build errors

#### **Data Upgrade:**

The database from AX 2012 R3 was upgraded to the Dynamics 365 Azure environment by using the upgrade deployable packages. The upgraded database had all the current and historic transactions with no data loss.

#### **Financial Reporting:**

All the custom reports created in Management reporter of AX 2012 R3 were moved directly to Dynamics 365 for Finance and Operations Financial Reporting using the export-import functionality.

#### **Document Handling:**

All the documents related to various entities in AX 2012 R3 were moved. Furthermore, they were linked using scripts such that users can open documents directly from Dynamics 365 for Finance and Operations.

#### **System Integration:**

The upgraded solution was seamlessly integrated with other productivity platforms:

- CRM - One-way integration was performed between Dynamics 365 for Finance and Operations and Dynamics CRM Online using web services.
- Oracle - Two-way integration was carried out between cloud-based Dynamics 365 for Finance and Operations and the on-premises Oracle database. Azure AAD authentication was used to secure integration calls.

User training was provided throughout the upgrade process to ensure maximum uptake of new functionalities and full onboarding at cutover.

### **Business Results**

With the upgrade of its existing Dynamics AX solution to the new Dynamics 365 Finance and Operations, which took over a period of three months, AAM is now able to analyze data more efficiently and accurately than ever before with real-time access to the required data and reports.

As Dynamics 365 Finance and Operations utilizes a native HTML5 browser-based UI (which can run on any device, any platform, and any browser), it provides AAM users with simplified access to business data from any type of user device.

By moving to the cloud-based Dynamics 365 Finance and Operations, AAM has been able to simplify their IT environment and eliminate on-premises servers and systems that required maintenance. This has helped them reduce their overall cost of ownership and gain a flexible technology platform that can evolve to support future changes to their business environment.

Due to the integration of Dynamics CRM Online and Oracle with Dynamics 365 for Finance and Operations, AAM now has a single business system that is used across their enterprise for all core business processes. This has allowed them to improve communication across their various locations and functional areas, and provided management with better visibility of the organization's clients, projects, and finances.

Dynamics 365 for Finance and Operations has indeed helped AAM speed up business operations, and provided complete flexibility to grow at its own pace. AAM is now free to focus on what it does best: delivering outstanding services to customers while growing organically.

## **About Synoptek**

Synoptek is a Global Systems Integrator and Managed IT Services Provider offering Comprehensive IT Management and Consultancy Services to organizations worldwide. Our focus is to provide maximum "business value" to our clients enabling them to grow their businesses, manage their risk/compliance, and increase their competitive position by delivering improved business results.