

Course Outline

80420 - Data Upgrade and Code Upgrade to Microsoft Dynamics AX 2012

General Description

This three-day instructor-led course covers both the data upgrade and the code customization upgrades from Microsoft Dynamics AX 4.0 and Microsoft Dynamics AX 2009 to Microsoft Dynamics AX 2012.

The course will cover the flow of the Microsoft Dynamics AX 2009 SP1 to Microsoft Dynamics AX 2012 RTM upgrade, and point out any differences for Microsoft Dynamics AX 4.0 SP2 during the course. Labs and demos will run on Microsoft Dynamics AX 2009 SP1 and Microsoft Dynamics AX 2012.

The ideal breakdown for this course would be to have the first two days cover the data upgrade. This would be focused in the implementer partner to include the personas of Simon and Tim. The third day of the course would cover the code upgrade and focus on the developer persona of Isaac and would include Tim from a planning perspective and Simon as the customer/partner.

Outcomes

At the end of the course, students will be able to:

- Introduce the Source-to-target framework.
- Discuss key features of Microsoft Dynamics AX 2012 upgrade.
- Describe the system architecture that is needed to perform an upgrade from Microsoft Dynamics AX 4.0 or Microsoft Dynamics AX 2009 to Microsoft Dynamics AX 2012.
- List the available options for cleaning data before an upgrade.
- Describe the best practices to run an upgrade.
- Configure Microsoft Dynamics AX and Microsoft SQL Server for high upgrade performance.
- Understand project planning challenges.
- Explain the steps to upgrade code from Microsoft Dynamics AX 4.0 or Microsoft Dynamics AX 2009 to Microsoft Dynamics AX 2012.
- Discuss ways that Microsoft Dynamics AX 2012 has changed code that might affect a code upgrade.
- Review the different kinds of data upgrade scripts.
- Explain how to write source upgrade scripts.
- Describe specific strategies for writing scripts.
- Discuss some changes in Microsoft Dynamics AX 2012 that affect data upgrades.
- Discuss techniques for debugging scripts.
- Perform a data upgrade.

Course Details

Course code: 80420

Duration: 3 days

Starting time: 9am

Finishing time: 4.30pm

Booking guidelines

Contact our learning consultants on 1300 86 87246 and we will assist you with your booking.



 **1300 86 87246**
1300 TO TRAIN

For more information about any of our training courses, contact our Learning Consultants
on **1300 86 87246** or email us on info@advancedtraining.com.au

Visit us on the web at www.advancedtraining.com.au

Course Outline

➤ Module 1: Overview

This module provides an overview of the Microsoft Dynamics AX 2012 upgrade framework.

Lessons

- Source-To-Target Framework
- Preprocessing Framework
- Upgrade Key Features
- Upgrade References

After completing this module, students will be able to:

- Introduce the Source-to-target framework.
- Describe the Preprocessing framework.
- Discuss key features of Microsoft Dynamics AX 2012 upgrade.
- Introduce available resources for upgrading to Microsoft Dynamics AX 2012.

➤ Module 2: Planning

An upgrade is a large and complex project with many dependencies and complications. Understanding the structure and prerequisites to an upgrade, in addition to careful project planning, can help ensure a successful upgrade.

Lessons

- Requirements for a Successful Upgrade
- Data Preparation
- Upgrade Readiness
- Upgrade Best Practices
- Configuration for Performance
- Project Planning

After completing this module, students will be able to:

- Describe the system architecture that is needed to perform an upgrade from Microsoft Dynamics AX 4.0 or Microsoft Dynamics AX 2009 to Microsoft Dynamics AX 2012.
- List the available options for cleaning data before an upgrade.
- Verify upgrade readiness.
- Describe the best practices to run an upgrade.
- Configure Microsoft Dynamics AX and Microsoft SQL Server for high upgrade performance.
- Present project challenges.

➤ Module 3: Code Upgrade

This module discusses code upgrade to Microsoft Dynamics AX 2012.

Upgrading Microsoft Dynamics AX code is an important part of any upgrade, especially when the earlier system has customized code.

Lessons

- Code Customization
- Code Upgrade Process
- Detect Upgrade Conflicts
- Changes in Microsoft Dynamics AX 2012 that Affect Code

Lab: Code Upgrade Process

- Follow the code upgrade checklist to prepare code for upgrade.

After completing this module, students will be able to:

- Describe the four strategies for upgrading custom code.
- Explain the steps to upgrade code from Microsoft Dynamics AX 4.0 or Microsoft Dynamics AX 2009 to Microsoft Dynamics AX 2012.
- Review the strategies to detect an upgrade conflict.
- Discuss ways that Microsoft Dynamics AX 2012 has changed code that might affect a code upgrade.

➤ Module 4: Data Upgrade

This module covers the data upgrade framework which drives the data upgrade scripts that transform data from an earlier version of Microsoft Dynamics AX to Microsoft Dynamics AX 2012.

Lessons

- Data Upgrade Scripts
- Install Upgrade Framework Files
- Source Upgrade Scripts
- Target Data Upgrade Scripts
- Remove Obsolete Objects with Configuration Keys
- Virtual Company Considerations
- Write Scripts
- Changes in Microsoft Dynamics AX that Affect Data Upgrade
- Adding Checklist Items
- Debugging

Lab: Install the Upgrade Framework Files

- Install the upgrade files required on the source Microsoft Dynamics AX 4.0 or Microsoft Dynamics AX 2009 system.

Lab: Write a Source Upgrade Script

- Create a Shadow Table
- Create the Preprocessing Class
- Create a Live Script
- Create a Delta Script
- Override the `initTransformationJobs` Method

After completing this module, students will be able to:

- Review the different kinds of data upgrade scripts.
- Show how to upgrade the framework files on the source system.
- Explain how to write source upgrade scripts.
- Describe how target update scripts are written.
- Remove obsolete objects by using configuration keys.
- Discuss some of the complications with upgrading data involving virtual companies.
- Describe specific strategies for writing scripts.
- Discuss some changes in Microsoft Dynamics AX 2012 that affect data upgrades.
- Review the required steps for adding to the checklist.
- Discuss techniques for debugging scripts.

➤ Module 5: Perform a Data Upgrade

This module walks through the entire process of performing a data upgrade to Microsoft Dynamics AX 2012, by using hands-on demonstrations instead of labs.

Lessons

- Prepare the Source
- Preprocessing Upgrade State Transfer Tool
- Prepare the Target
- Data Upgrade

After completing this module, students will be able to:

- Define the process to prepare the source system.

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- Explain the preprocessing upgrade state transfer tool.
- Describe the process to prepare the target system.
- Describe the data upgrade process.

➤ **Module 6: End to End**

This module reviews all of the upgrade concepts covered throughout this course.

Lessons

- Overview
- Planning
- Code Upgrade
- Data Upgrade
- Perform a Data Upgrade

After completing this module, students will be able to:

- Review the key concepts learned in the Overview module.
- Review the key concepts learned in the Planning module.
- Review the key concepts learned in the Code Upgrade module.
- Review the key concepts learned in the Data Upgrade module.
- Review the key concepts learned in the Perform a Data Upgrade module.