

Indusa Customer Case Study

Dynamics 365 for Finance and Operations



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

Customer: Alliance for Audited Media (AAM)

Website: auditedmedia.com

Size: 101-300 employees

Location: Illinois, USA

Industry: Professional Services

Profile:

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

Services:

Dynamics 365 for Finance and Operations

Business Needs

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.

The media verification and information services provider 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 keep up 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 Indusa to successfully migrate from AX 2009 to Dynamics AX 2012 R3, so Indusa had in-depth knowledge of AAM's business model and technology environment.

AAM engaged with Indusa as the preferred Microsoft Dynamics Partner to carry out the upgrade project.

Solution and Approach

Through a series of workshops, Indusa 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

Indusa 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, 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.

The entire upgrade was successfully executed in just 12 weeks and involved a lean team of four experts, two of which traveled onsite to AAM's office.

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.

Dynamics 365 Finance and Operations

Empowering Media Professionals with Trusted Verification and Data

Dashboard

June 2018

Work items assigned to me

- AAM AP Workspace
- AAM AR Workspace
- AAM GL Workspace
- AAM Workspace
- Bank management
- Benefits
- Budget planning
- Business processes for human resources
- Category and product management
- CFO Overview
- Channel deployment
- Compensation management
- Cost accounting ledger administration
- Cost administration
- Cost analysis
- Cost control
- Data validation checklist
- Electronic reporting
- Employee self service
- Expense management
- Financial period close
- Fixed asset management
- General journal processing
- Invoicing
- Outbound work planning
- Payroll management
- Personnel management
- Pricing and discount management
- Product readiness for discrete manufacturing
- Product readiness for process manufacturing
- Product variant model definition
- Production floor management
- Recruitment management
- Released product maintenance
- Reservation management
- Resource lifecycle management
- Retail IT
- Retail store financials
- Retail store management
- Sales order processing and inquiry

Dynamics 365 Finance and Operations Project management and accounting > Projects > All projects

All Projects

NEW MAINTAIN SET UP COST PRICES SALES PRICES JOURNALS Create status trigger file

Show projects: Active Show levels: All Legal entity: aam

Project ID	Project name	Legal entity	Project contract ID	Customer name	Project type	Project stage	Audit Region	Project status
1000010	ALABAMA PRESS ASSOCIATI	aam	1000010	ALABAMA PRESS ASSOCIATI	Fixed-price	In process	NONE	INIT
1000013	ACTIVEREPLY INC - MP	aam	1000013	ACTIVEREPLY INC - MP	Fixed-price	In process	NONE	INIT
1000025	ACTIVEREPLY INC - MP	aam	1000025	ACTIVEREPLY INC - MP	Fixed-price	In process	NONE	INIT
1000051	AGORA - MP	aam	1000051	AGORA - MP	Fixed-price	In process	NONE	INIT
1000052	AGORA - MP	aam	1000052	AGORA - MP	Fixed-price	In process	NONE	INIT
1000053	AGORA - MP	aam	1000053	AGORA - MP	Fixed-price	In process	NONE	INIT
1000070	ALABAMA PRESS ASSOCIATI	aam	1000070	ALABAMA PRESS ASSOCIATI	Fixed-price	In process	NONE	INIT
1000083	SPRINGHOUSE COMPUTING SV.	aam	1000083	SPRINGHOUSE COMPUTING SV.	Fixed-price	In process	NONE	INIT
1000089	REPUBLIC INC - MP	aam	1000089	REPUBLIC INC - MP	Fixed-price	In process	NONE	INIT
1000093	AMERICA'S SYSTEMS - MP	aam	1000093	AMERICA'S SYSTEMS - MP	Fixed-price	In process	NONE	INIT
1000096	AGORA SYSTEMS - MP	aam	1000096	AGORA SYSTEMS - MP	Fixed-price	In process	NONE	INIT
1000097	TransAm Media Corp. - MP	aam	1000097	TransAm Media Corp. - MP	Fixed-price	In process	NONE	INIT
1000100	ALABAMA PRESS ASSOCIATI	aam	1000100	ALABAMA PRESS ASSOCIATI	Fixed-price	In process	NONE	INIT
1000118	THE WASH. POST - MP	aam	1000118	THE WASH. POST - MP	Fixed-price	In process	NONE	INIT
1000125	ALLIED DAILY NEWSPAPERS	aam	1000125	ALLIED DAILY NEWSPAPERS	Fixed-price	In process	NONE	INIT
1000141	THE WASH. POST - MP	aam	1000141	THE WASH. POST - MP	Fixed-price	In process	NONE	INIT
1000148	AGORA - MP	aam	1000148	AGORA - MP	Fixed-price	In process	NONE	INIT
1000150	AMERICAN CONSERVATION	aam	1000150	AMERICAN CONSERVATION	Fixed-price	In process	NONE	INIT
1000160	AMERICAN CONSERVATION	aam	1000160	AMERICAN CONSERVATION	Fixed-price	In process	NONE	INIT
1000270	AMERICAN PREFERRED LEAD	aam	1000270	American Preferred Readers G	Fixed-price	In process	NONE	INIT
1000281	UNIVERSITY OF PENNSYLVAN	aam	1000281	UNIVERSITY OF PENNSYLVAN	Fixed-price	In process	NONE	INIT
1000303	UNIVERSITY OF PENNSYLVAN	aam	1000303	UNIVERSITY OF PENNSYLVAN	Fixed-price	In process	NONE	INIT
1000314	AGORA - MP	aam	1000314	AGORA - MP	Fixed-price	In process	AGTC	INIT