



Implementing Microsoft Dynamics AX for a global roll out: lessons learned

What are the challenges?

As clients expand their presence around the world, a single Enterprise Resource Planning (ERP) solution that supports their global operations is a great benefit. It gives a consistent the confusion often found when employing local ERP systems that require consolidated and aggregated reporting.

Indeed, a truly global ERP system maximizes business benefits in all areas, from a central point of administration and a single system/version of the truth, through to easier and more cost-effective support and maintenance.

However, whilst the benefits of a global ERP solution are compelling, there are initial implementation challenges not found in a single-geography implementation. For example, when doing business in a particular country the organization must comply with country-specific laws and regulations to meet legal and other obligations for activities conducted in that country.

In this paper we present the lessons learned from numerous global implementations – lessons that will help your business to mitigate the challenges of such a project.

5 lessons to lighten the implementation challenges

1 Template approach

Utilizing a template approach brings many benefits and determines the evolution of the project scope and deployment.

Using a template design ensures that global standard processes remain consistent throughout the whole organization, which in itself brings vitally important training, user and cost reduction benefits.

A template design as the core of the system leaves only local legal and fiscal additions to add prior to a local country deployment.

The governance required when using a template approach includes the need to determine a gold master template owner; one who can determine what functions, processes and features are a global standard and can be added to the template, and which features need to be locally driven.

The template owner can control the template and how the ownership evolves through the deployment.

Consider a sequenced deployment, as follows:

Build the template > Test centrally > Hand off to local owner > Add the localization > Retest > Deploy in each geography.

Smaller sites may not warrant a full solution or even an implementation at all. In such cases, a company can design and develop a “light” version of the solution.

2 Delivery team

Choosing the delivery team carefully in a global implementation is key. It is important to use a trained onshore team that have offshore experience, to confirm the delivery team's willingness and availability to travel, and team members' ability to secure the relevant visas.

All of this must be done early in the resource assignment phase.

Obviously, key team members' command of a second and relevant language is also a useful benefit.

Using local channel partners will help with local legal and fiscal understanding and can reduce potential complexities and confusion that can occur with local laws. AXpact partners can bring local expertise and valuable experience.

3 Governance

The large and complex nature of a global ERP implementation requires a similarly expansive and robust governance model.

Document the handoff to the local ownership framework. It is important to know:

- Who is controlling the build?
- When does the build move from the template owner to local governance?
- When does the freezing of the template take place?
- When is the final date to add core features into the build?

Ensure all parties know the above and the key dates.

Document the project language. Will all engagements be in English?

The project can progress quickly once the template is completed and handed off to a local owner to control the addition of the localization, testing and the go-live process.

Don't over-define tasks centrally. Instead, allow a degree of freedom with the local system owners as they are the local specialists.

Provide a central project control tool, where tasks and progress can be holistically viewed by all project team members.

Management of local team morale is important. It is key to ensure that all parties understand they are a part of a well-defined and wider project and that their input is valued. This reduces attrition increases project knowledge transfer and ultimately aids project success and user adoption.

4 Available localization packs

Microsoft Dynamics AX "out-of-the-box" is localized and translated to address specific laws and regulations for particular countries, but not all countries.

It is imperative to understand which countries are required for the implementation and to confirm if the Microsoft localization pack is available as standard for that geography, or if a local specialized AXpact channel partner will be needed to deliver the local needs.

It is also important to understand the details of the scope of the implementation and the local requirements in relation to national or international functionality to address specific tax, accounting or financial reporting needs. These requirements then need to be matched to what is available out-of-the-box from Microsoft Dynamics AX. This will allow you to confirm that the requirements match the standard solution, or if any further customization is required.

Don't assume that the requirements have already been added to the localization pack – review the country-specific report to clarify.

Microsoft has a detailed portal to guide partners, delivery teams and customers in this area. Reviewing this portal should be a first step when considering deployment challenges for global roll outs.

You can find the Localization Portal at:

<https://mbs.microsoft.com/customersource/northamerica/ax/support/support-news/GFMLocalizationPortalMC>

Alternatively, search: Microsoft Dynamics Localization Portal - Microsoft Dynamics AX

From this portal, you can view reports for designated countries. These reports contain the following information:

- Currently planned to be released localization features list for any designated country by version
- View and access links related to released country-specific localized features for any designated country by version
- View and access links to documentation related to specific countries or specific localization features
- View information related to country certification, registration and reports.

Links to the available reports are included on the next page.

Country Specific Reports

The following reports are available at the time of writing.

Australia	View Report	Download Report
Austria	View Report	Download Report
Belgium	View Report	Download Report
Brazil	View Report	Download Report
Canada	View Report	Download Report
China	View Report	Download Report
Czech Republic	View Report	Download Report
Denmark	View Report	Download Report
Estonia	View Report	Download Report
Finland	View Report	Download Report
France	View Report	Download Report
Germany	View Report	Download Report
Hungary	View Report	Download Report
Iceland	View Report	Download Report
Ireland	View Report	Download Report
India	View Report	Download Report
Italy	View Report	Download Report
Japan	View Report	Download Report
Latvia	View Report	Download Report
Lithuania	View Report	Download Report
Malaysia	View Report	Download Report
Mexico	View Report	Download Report
Netherlands	View Report	Download Report
New Zealand	View Report	Download Report
Norway	View Report	Download Report
Poland	View Report	Download Report
Russia	View Report	Download Report
Saudi Arabia	View Report	Download Report
Singapore	View Report	Download Report
Spain	View Report	Download Report
Sweden	View Report	Download Report
Switzerland	View Report	Download Report
Thailand	View Report	Download Report
United Kingdom	View Report	Download Report
United States	View Report	Download Report

5 Defining which languages

Language packs delivered by Microsoft or AXpact channel partners will ensure the standard menus are translated to the desired user's operation language, but language packs will not translate master data or any customizations.

For data translations or customizations, these will need to be gathered and translated manually by the client during the implementation and added to the Dynamics AX label file. Although this is possible, a cost-benefit analysis is needed before it is undertaken and local language team members should test the translations once the task is completed.

Other little things to consider

It is vital to maintain regular cross-team communications and to schedule structured update meetings. However, it's not cost effective to have the global project team meet face to face, so a regular call or video call should be scheduled at convenient times for all parties considering local time zones and local public holidays.

It's useful to have access to conference call facilities that have local dial-in numbers, local language instructions and sensible costs.

Further considerations related to time zones include an understanding of team availability and outage windows and when it's convenient to take down the system for maintenance or upgrades. Many countries don't work a Monday to Friday week, so team and system availability need to be considered when scheduling any meeting, call or system-related event.

For example:

- Afghanistan generally works Saturday to Wednesday
- Maldives generally works Sunday to Thursday
- Russia generally works Monday to Friday

Try to ensure there is an overlapping of work hours.

It's also important to ensure the delivery teams and client subject matter experts have the ability to travel and have the relevant passports and visas. It's wise to set up a central PMO database that should keep track of visa expiry dates and renewal details and time frames.

Summary of the lessons learned

- Check the availability of standard localization/language packs from the Microsoft localization portal.
- Consider language translations for any customizations undertaken.
- Don't assume that the requirements have already been added to the localization pack, review the country-specific report to clarify
- Consider the cost-benefit of the inclusion (or not) of smaller satellite sites.
- Be mindful of local public holidays and time zones.
- Ensure there is overlapping of work hours.
- Have conference call facilities that have local dial in numbers and local language instructions.
- Keep track of visa status and expiry dates.
- Have regular structured project update meetings.
- Template the core design.
- Assign Template ownership.
- Assign Localization owners.
- Document the Template design cut-off window.
- Understand the normal working hours of a country to ensure the delivery team is available and the system outage windows are scheduled in actual organizational down time.
- Don't over-define tasks centrally.
- Provide a central project control tool.
- Document the handoff to local ownership framework.
- Document the project language.
- Management of local team morale is important.
- Consider using local AXpact partners.

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