

Go-live Readiness Review on the Implementation Portal

Dynamics 365 FastTrack
Architecture Insights

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Agenda

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- Go-live Readiness Review (GLR)
 - What is changing
 - Key phases of GLR
 - Process walk-through

What is Go-live Readiness review?

- FastTrack Go-live Readiness review acts as a quality gate to ensure that the project is in good shape before going live. In this review overall readiness of the solution is being validated and if risks are identified, recommendations and mitigations are discussed.
- Successful completion of a Go-live Readiness review is a **prerequisite for production deployment**.
 - Exceptions – live Production tenant move, the process to follow is described [here](#).
- Production can not be used for demo/test/poc/training activities.

What is changing?

- Go-live Readiness Review has transitioned from the Word checklist to the new tool – **FastTrack for Dynamics 365 Implementation Portal**.
- From **June 20th** Go-live Readiness Review can be submitted only on Implementation Portal and Word checklists are not accepted.

What is important to remember

- There are prerequisites for GLR submission, key ones – UAT and Performance testing should be complete or almost complete.
 - [All prerequisites.](#)
- The review might require up to **three business days** for the initial report, plus **additional time** for any risk mitigation that is required.
 - For projects which have designated FastTrack Solutions Architect there is also a mandatory workshop.
- Key stakeholders from the **customer organization** must participate in GLR and must be selected as Review participants in the portal.

Key phases in GLR process

1. Initiating the review
2. Submitting the review
3. What happens after review is submitted

Initiating the Review

1. The customer/partner sends an e-mail to d365fogl@microsoft.com and includes the following information:
 - a) Confirmation that the project is ready to start the Go-live Readiness Review
 - b) Confirmation of the LCS project ID
 - c) Confirmation of the users from the LCS project who will participate in the Go-live Readiness Review and should be granted access to the portal for the Go-live Readiness Review process
2. Microsoft grants **portal access** to the requested LCS project users and confirms that this task has been completed by responding to the email.
3. The customer/partner starts the review in the portal by following the guidance in the [Portal Help article](#). All users who have access to the portal can access this article.

Submitting the Review

- The project team should provide answers to **all** questions in the review. The review process in the portal supports multi-user scenarios. Multiple team members can provide details for the go-live review at the same time.
- When answers have been provided to all the questions in the Go-live Readiness Review, **submit** the review to Microsoft by using Submit button.

After the review is submitted in the portal

- Microsoft FastTrack reviews the project and provides a **report** that describes the potential risks, best practices, and recommendations for a successful go-live of the project.
- Users who have been selected as **Review participants** in the portal receive email communication that provides **updates** about the review.
- For all critical risks and issues customer/partner takes mitigation actions and/or provides necessary clarifications.
- When all critical risks have been addressed, and the review has been completed, Microsoft **enables the production environment slot** in the LCS project. The customer/partner can then trigger the production environment deployment.

1. Help article – How to start GLR

The screenshot displays the Microsoft FastTrack for Dynamics 365 implementation portal. The top navigation bar includes the Microsoft logo, the portal title, and links for 'Contact Us' and the user 'Olga Petrova'. The breadcrumb trail shows 'Home / Help / How to start a Go-live Re...'. A 'Back to search results' button is present. The main heading is 'How to start a Go-live Readiness review'.

Step 1: Open the project page

1. Click on "Projects" in the left navigation.
2. Find the project for which Go-live Readiness review should be started.
3. Click on the project name.

The screenshot below illustrates the 'My Active Projects' table. The 'Projects' link in the left navigation is highlighted with a red box. The table lists a project named 'Dummy project', which is also highlighted with a red box.

Project Name	Customer	Go-live date ↑	Current Project Phase	LCS ID
Dummy project	Test			

A project form will open with key project data and reviews grid, which will be empty if you are accessing Portal for the first time.

Step 2: Start Go-live readiness review

Start Go-live Readiness review by clicking on the "New Go-live Readiness Review" button.

The screenshot below shows the 'Dummy project' page. The 'Projects' link in the left navigation is highlighted with a red box. The 'Summary' tab is selected, displaying the 'Project Summary' section.

Project Name	LCS ID	Go-live date

2. Project page and starting GLR

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Summary

Project Summary

Project Name

LCS ID

Go-live date

Reviews

+ New Go-live Readiness Review

Name	Review	Current Status	Submission Date ▾	Completion Date	Modified By
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3. Instructions step

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Project Review 2022/27/05

InstructionsParticipantsScopeReview Details

Congratulations, you are just a few steps away from the Go-live with your Dynamics 365 implementation project!

Go-live Readiness review is a key milestone for your Finance, Supply Chain, Commerce (Unified Operations) apps implementation. It acts as a quality gate to ensure that the project is in good shape before going live. This review must be successfully completed **before you request your production environment**.

Please carefully review these instructions to understand the process and prerequisites.

If you face any **issues with the Portal**, please report it as described under "**Contact us**" button in the top right corner. Please describe the issue in detail, provide screenshots if applicable and confirm how critical is the issue (it is important for us to know if it is blocking you).

Go-live readiness review process

The visual below describes steps in the Go-live Readiness review process.


```
graph LR; 1[1. Project team validates that go-live readiness prerequisites are met] --> 2[2. Project team starts review by providing answers to review questions]; 2 --> 3[3. FastTrack validates completeness of answers]; 3 --> 4[4. Go-live review is executed by FastTrack]; 4 --> 5[5. Review outcome (report and identified risks/issues) is shared by FastTrack]; 5 --> 6{Are any critical risks or issues identified?}; 6 -- No --> 8[8. Review is complete and project team can deploy Production]; 6 -- Yes --> 6a[6. Project team provides mitigation to all identified key risks and issues]; 6a --> 7[7. FastTrack team confirms that key risks and issues are closed based on provided mitigations]; 7 --> 8;
```

Prerequisites

Please validate that the below prerequisites are fulfilled before the start of the go-live review.

1. **UAT** and **performance testing** is complete or almost complete on a Tier-2 (or higher) environment. Tier-1 environments **must not be used for UAT or performance testing**. Refer to [this guidance](#) to identify the right Sandbox environment tier based on your transaction volumes.

4. Review participants step

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Review Details

Please select participants this Go-live Readiness Review. It is required that **at least one key team member from customer organisation** is taking part in the review. Selected review participants will get **access to this project review on the Implementation Portal** and will be **receiving communications related to this review**.

When you click on "Add review participants" button, all users added to the LCS project are shown and can be added as a review participant. If you would like to add a new review participant who is not on that list, please add this user to the LCS project first , then come back to this step to add the user as a review participant. Note that there is a delay of up to a few hours before new LCS users will appear on the Implementation Portal.

Full Name ↑

E-mail

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Add Participant

5. Review scope step

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Please answer the following questions to confirm the scope of the solution for this Go-live.

Does the solution have integrations and interfaces (including recurring DIXF integrations) in scope for this Go-live?

☐ No

Does the solution contain dual-write integrations in scope for this Go-live to run processes across Dynamics 365 applications?

☐ No

Does the solution contain customizations and/or ISVs in scope for this Go-live?

☐ No

Are you doing an upgrade from AX 2012?

☒ Yes

Please confirm which products are in scope for this Go-live.

Dynamics 365 Finance

☒ Yes

Dynamics 365 Supply Chain Management

☒ Yes

Dynamics 365 Commerce

☐ No

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6. Review details step

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Review Questions

Topic: Solution Scope 2/2 Item: Roll-out schedule 1/1 Responses Captured: 3/51

Questions (1)

Describe the planned rollout schedule. For each rollout provide 1) go-live date, 2) number of users, 3) key functional areas and 4) countries with the number of legal entities.

Response For Selected Question

Normal B I U

Phase 1 Go-live
1) July 1, 2022
2) 500 users
3) AR, AP, Budgeting
4) Germany, Sweden

Phase 2 Go-live
..

Save & Next >

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Submit for Review

Cancel Review

7. Risks and Issues

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Review QuestionsRisks and IssuesMessages 13

Key Risks

Title	Recommendation	Status	Modified On
UAT was not performed on migrated data	It is a significant risk if the solution is tested only on dummy/test data. We strongly recommend performing tests on migrated data before signing of solution readiness and proceeding with the Go-live. Please confirm your plans.	Active	5/27/2022 3:37 PM
Custom deployable packages are not applied to Sandbox	Our records indicate that you have not applied your custom code packages to your Sandbox environment. Please apply the customizations to the Sandbox environment and run a full round of testing (including integration tests). Please confirm when this is complete.	Active	5/27/2022 3:37 PM
UAT test cases cover only part of requirements planned for the Go-live	UAT is a crucial part of validation of the final solution readiness. UAT test cases should cover the entire scope of requirements planned for the Go-live to validate that the solution meets the end user needs. Testing should include not only testing happy path but also validation of edge scenarios. Low testing is considered a risk and we highly recommend running more tests to complete UAT. Please perform more testing and validate the entire scope planned for the Go-live. Please share with us an update.	Active	5/27/2022 3:37 PM
Final subscription estimator is not yet uploaded and activated	Uploading and activating subscription estimator is a mandatory prerequisite for Production environment deployment . It is used to size Production environment. Please finalize the subscription estimator, upload it to LCS and mark it as " active " before requesting Production environment.	Active	5/27/2022 3:37 PM
Key customer stakeholders have not been added to the LCS project	It is expected that customer has ownership of their LCS project. Please add key customer team members as users to the LCS project with their email-enabled organization account and	Active	5/27/2022 3:37 PM

8. Messages feature for risk mitigation discussions

The screenshot displays the Microsoft FastTrack for Dynamics 365 implementation portal. The top navigation bar includes the Microsoft logo, the portal name, and user information (Contact Us, Olga Petrova). The left sidebar contains navigation links: Engagements, Home, Projects (selected), Nomination, Help & Support, Knowledge Articles, Help, Contact Us, and Privacy & Cookies. The main content area shows the 'Messages' tab for a selected project. A table lists messages with columns for title, type, and date. The selected message, 'It is planned to use generic account, but generic account is not added to the LCS project', is highlighted in purple. The message details show a risk level, a FastTrack logo, the message text, a timestamp (2021-11-15 10:16), and a 'Show Files' toggle. Below the message is a rich text editor with a toolbar and a text input field containing 'Hello FastTrack team! ...'.

Microsoft FastTrack for Dynamics 365 implementation portal

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Home / Projects /

Summary Messages

Dummy FT project for P...	09/03
Project	
Implementation is pote...	11/15
Issue	
Project Review 2021/11/08	09/03
Review	
Project Review 2021/10/08	09/03
Review	
Project Review 2021/15/11	01/12
Review	
Project Review 2021/15/11	01/12
Review	
Test on message	04/20
Risk	
It is planned to use g...	11/15
Risk	

It is planned to use generic account, but generic account is not added to the LCS project

Show Files ☐

Risk

FastTrack 2021-11-15 10:16

Great to hear that you are planning to use generic account to deploy Production! However, we do not see a generic service account in your LCS project. Please **confirm** which **generic user account** will be used as Admin for the Production environment.

B I U Normal Sans Serif

Hello FastTrack team! ...

Requesting help

- For access to Portal – reach out to Go-live alias - d365fogl@microsoft.com.
- For issues with Portal, contact the portal Support team by selecting **Contact us** in the upper-right corner of the portal or sending an email to ftd365ip-support@microsoft.com. In the email, specify the ID of your project in LCS, and provide details that describe the issue.

Feedback

Please share your feedback about the new tool directly with me – olpetrov@microsoft.com.

References

Announcement blog post - [FastTrack Go-live Readiness review has transitioned to the FastTrack for Dynamics 365 Implementation Portal](#)

Docs article - [Prepare for go-live - Finance & Operations | Dynamics 365 | Microsoft Docs](#).

Thank you