|  |  |  |
| --- | --- | --- |
|  |  |  |
| Go-live checklist **Version 7.0**  Finance and Operations apps |
|  |
| **Customer:** <Contoso International>  **Key customer contact(s) e-mail(s) and role(s):** <contoso.user@contoso.com>, <job title> **Partner:** <Partner Organization>, <MPN ID>  **LCS project URL:** <https://lcs.dynamics.com/V2/ProjectOverview/1234567> **Go-live date (live transactions):**  **Date when Production will be requested:** |

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# **Go-Live checklist review process**

* Finance and Operations apps customers **must** **complete** a Go-live assessment with the Microsoft FastTrack team before requesting their production environment.
  1. If you are not familiar with Microsoft FastTrack, see the [Microsoft FastTrack for Dynamics 365 overview](https://docs.microsoft.com/en-us/dynamics365/unified-operations/fin-and-ops/get-started/fasttrack-dynamics-365-overview).
* This document lists the tasks that the project team must complete before requesting a production environment.
* Note that there are sections in this document need to be completed only if you are using **Retail and Commerce, Dual-Write** and/or if you are **upgrading from AX 2012**.
* When you have completed this checklist, send it to [d365fogl@microsoft.com](mailto:d365fogl@microsoft.com).
  1. Include key customer team members in the e-mail, this will be necessary for completion of the assessment
  2. **Note**: If this project has a designated Microsoft FastTrack Solutions Architect assigned, please copy them on the email.
* After the checklist is submitted, a Microsoft solutions architect will review the project and provide an assessment document that describes the **potential risks**, **best practices,** and **recommendations** for a successful Go-live of the project. In some cases, the solutions architect might highlight risk factors and ask for a mitigation plan.
* When the assessment is completed, the solutions architect will indicate that you’re ready to request the production environment in Microsoft Dynamics Lifecycle Services (LCS).

For a complete overview of the Go-live process, please see the topics, [Preparing for go-live](https://docs.microsoft.com/en-us/dynamics365/unified-operations/fin-and-ops/imp-lifecycle/prepare-go-live) and [Go-live FAQ](https://docs.microsoft.com/en-us/dynamics365/unified-operations/fin-and-ops/imp-lifecycle/go-live-faq), and watch the TechTalk, [Go-live Planning](https://community.dynamics.com/365/b/techtalks/archive/2018/08/09/go-live-planning-8-9-18).

# **Prerequisites for submitting the Go-Live checklist**

Please make sure that the following actions are completed before submitting the checklist:

* **UAT** and **Performance** testing is complete or almost complete on a **Tier-2+** environment ([Tier-1 must not be used for UAT or performance testing](https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/imp-lifecycle/environment-planning#tier-1-vs-tier-2-and-higher)).
* Ensure that the environment **version** you plan to go live with is **compliant with the** [**Software lifecycle policy**](https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/migration-upgrade/versions-update-policy?toc=/dynamics365/commerce/toc.json)**.**
* **Go-live date in** **LCS** **represents the real Go-live date** you are targeting. This is the date when end users will start live operations, not cutover activities.
* **Key customer team members** are **added** to the **LCS** project.
* **Activate** the **final** [**subscription estimator**](https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/lifecycle-services/subscription-estimator) in LCS.
* **Complete** phases including **Test** in LCS **methodology**. It is possible to deploy Production only when all phases including the test phase, are complete.
* Add a **generic service account** to the LCS, which you will use to **deploy** environments.
* All **licenses** needed for the Go-live are in purchased and in the correct tenant.
* It is recommended to run the [**Customization Analysis Report (CAR)**](https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/dev-tools/customization-analysis-report) and address all critical issues.
* You have read the [Preparing for go-live](https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/imp-lifecycle/prepare-go-live?toc=/dynamics365/commerce/toc.json) document.

Throughout this document, we provide tables and fields for you to complete. **Please do not edit or delete any questions in the checklist** and **make sure to fill out the header information above**.

1. **Solution scope** 
   1. Please revise the Solution scope data you provided during Onboarding (Open **LCS project -> Project Onboarding**), if necessary. Please review and update the following sections in case plans changed since then.

**Project overview**

* + - * Partner MPN ID
      * Legacy System
      * Future user licenses

**Project scope**

* + - * Any application/modules added to the solution scope
  1. Use the table below to list the **roll-out** schedule that you have planned. The first two rows are examples of how to fill out the table, please edit or remove them.

|  |  |  |  |
| --- | --- | --- | --- |
| Date | **Users** (in each row list the number of users that will be added at that date) | **Main functional areas** (in each row list the functional modules that will be added at that date | **Countries/Regions** (in each row list the countries/regions and number of legal entities in which you will roll out at that date) |
| <First go live date>  Click or tap to enter a date. | <25> | <AR, AP, Budgeting…> | <1 legal entity in Germany  2 legal entities in France> |
| <Next roll-out date>  Click or tap to enter a date. | <50> | <Retail> | <10 stores in Germany> |
| … |  |  |  |

* 1. Please describe in a few sentences the vision and goals for this project.

Vision and goals

1. **LCS**
   1. Are you using a generic account as the environment’s administrator?

Choose an item.

* 1. Have the customer key stakeholders been added to the LCS project?

Choose an item.

* 1. Are all your Microsoft Online Services running on the same Azure Active Directory tenant? If they are running on multiple tenants, indicate the tenant(s) where the services are running and share the reason why separate tenants are required.

Click or tap here to enter text.

* 1. Is the Go-live milestone date in LCS methodology matching the planned Go-live date?

Please make sure that Go-live date in LCS in reflecting the real Go-live plans when users will start live operations in Production.

Choose an item.

* 1. Are Analysis, Design and Develop, and Test phases in the [LCS methodology completed to request Production Environment](https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/imp-lifecycle/prepare-go-live#completing-the-lcs-methodology)?

Choose an item.

* 1. Are all required licenses available in LCS for the initial Go-live?

Choose an item.

* 1. Is the final version of the [subscription estimator](https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/lifecycle-services/subscription-estimator) uploaded to LCS project and marked as Active?

Choose an item.

Additional comments about LCS

1. **User Acceptance Testing**
   1. Provide the start date and end date of the UAT for the first roll out:

Click or tap to enter the Start date to Click or tap to enter the End date

* 1. On which environment was UAT performed? (Please provide the environment name)

Click or tap here to enter text.

* 1. Have the final security roles been defined?

Choose an item.

* 1. Were the correct security roles assigned to all users during UAT?

Choose an item.

* 1. Do UAT test cases cover the entire scope of requirements planned for the Go-live?

Choose an item.

* 1. What percentage of UAT test cases have been successfully completed and signed-off by the customer?

**<**enter percentage**> %**

* 1. How many users participated in UAT?

Click or tap here to enter text.

* 1. Was migrated data used for UAT?

Choose an item.

* 1. Are there any Go-live blocking issues? If yes, please share your mitigation plan?

Click or tap here to enter text.

* 1. Are you using Task Guides for your end user training?

Choose an item.

* 1. Has user training been completed?

Choose an item.

* 1. Has the entire solution been documented, approved, and signed off by the customer to confirm that it meets their business needs? If no, please share what is pending and what is the timeline for getting sign-off.

Click or tap here to enter text.

Additional comments about solution acceptance

1. **Performance** 
   1. Have you completed [performance testing](https://community.dynamics.com/365/b/techtalks/posts/performance-testing-approach-april-30-2018) of all critical business processes and integrations including peak load volumes?

Choose an item.

* 1. Have defined performance acceptance criteria for go-live been met?

Choose an item.

* 1. What type of activities have you conducted to evaluate the performance of the solution?

Click or tap here to enter text.

* 1. Provide the start date and end date of the performance testing for the first roll out.

Click or tap to enter the start date. Click or tap to enter the end date.

* 1. On which environment did you run (or plan to run) performance testing? Please provide the environment name.

Click or tap here to enter text.

* 1. Have you decided in which data center Production environment will be deployed? Please share which data canter it will be.

Click or tap here to enter text.

* 1. Did you [check latency](https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/get-started/system-requirements#network-requirements) for all end user locations to this data center?

Click or tap here to enter text.

* 1. Have you observed high database utilization in your Sandbox environment?

Choose an item.

* 1. Has the performance testing been signed off by the customer? If no, please share what is pending and what is the timeline for getting sign-off.

Click or tap here to enter text.

Additional comments about Performance

1. **Integrations**
   1. Does the solution have **integrations and interfaces** (including recurring DIXF integrations) in scope for the first Go-live?

Choose an item.

Please reply to **all** further questions in this section if you replied **yes** in first question. If you answered **no,** please move to the next section.

* 1. Have all the integration scenarios been tested at volume to validate service protection limits (throttling, timeouts, payload size)?

Choose an item.

* 1. Have all performance acceptance criteria been met for peak load volume?

Choose an item.

* 1. Have you tested both happy path and edge cases for each integration?

Choose an item.

* 1. What's the hourly peak extended record count (number of calls \* average number of lines) of the OData calls and Custom Service calls combined?

Click or tap here to enter text.

* 1. What's the maximum frequency (in minutes) expected for integrations using the Data management package REST API?

Click or tap here to enter text.

* 1. Is there a plan to use the Recurring Integration Scheduler that is available on GitHub as an out-of-the-box integration solution?

Choose an item.

* 1. What is the maximum number of fields in your custom/customized business event payload?

Click or tap here to enter text.

* 1. Does any of the business event payloads contain a full record or long text fields (descriptions, notes, etc.)

Choose an item.

* 1. Is any business event attached to high volume process which would trigger a huge number of events at the same time?

Choose an item.

* 1. Is error handling logic in place to guarantee there is no data corruption?

Choose an item.

* 1. Are notifications set up to alert users to any integration failures?

Choose an item.

* 1. Do you have integration support in place with named contacts and owners?

Choose an item.

* 1. Have all integrations in scope for the Go-live been signed off by the customer? If no, please share what is pending and what is the timeline for getting sign-off.

Choose an item.

Additional comments about Integrations

**Dual-Write Integration**

* 1. Does the solution contain any **dual-write** integrations (in scope for the first Go-live) to run processes across Dynamics 365 applications?

Choose an item.

Please reply to **all** further questions in this section if you replied **yes** in first question. If you answered **no,** please move to the next section.

* 1. Are you planning to install dataverse (formerly CDS) instance & Finance and Operations apps instance in different AAD tenants?

Choose an item.

* 1. Provide the Azure Region where you are deploying your dataverse instances.

Click or tap here to enter text.

* 1. Are you planning to implement dual-write for multiple legal entities, now or in the future?

Choose an item.

* 1. Are you planning to have multiple dataverse instances or multiple Finance and Operations apps instances?

Choose an item.

* 1. What is the Go-live schedule for each of the Dynamics 365 Applications?

Choose an item.

* 1. Did you identify and document the changes on the business processes that will require integration with Finance and Operations apps and dataverse apps?

Choose an item.

* 1. Are the high-level data flows for each of the dual-write integration scenarios documented? Choose an item.
  2. Have all dual-write flows been tested and has the acceptance criteria been met at expected peak load?

Choose an item.

* 1. Have you tested initial sync at peak migration volumes?

Choose an item.

* 1. What’s the maximum number of records per transaction in your Dual-Write integration scenarios?

Click or tap here to enter text.

* 1. Are you using managed solutions to follow application lifecycle management (ALM) best practices for your dataverse custom entities and extensions?

Choose an item.

* 1. Are notifications set up to alert users about any dual-write failures?

Choose an item.

* 1. Please confirm that you have read and understood the limitations for implementing dual-write in [System requirements for dual-write](https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/data-entities/dual-write/dual-write-system-req) document.

Choose an item.

1. **Code Management** 
   1. Does the solution contain customizations (in scope for the first Go-live)?

Choose an item.

* 1. Please list the ISV solutions that are part of the solution (in scope for the first Go-live)?

Click or tap here to enter text.

Please reply to **all** further questions in this section if you replied **yes** in at least one of the above questions. If you answered **no** to both questions, please move to the next section.

* 1. Are you using version source control (Azure DevOps, formerly VSTS) to manage your customizations?

Choose an item.

* 1. How are you generating your application deployable packages?

Choose an item.

* 1. Does the Azure DevOps Organization connected to LCS project belong to customer or partner?

Click or tap here to enter text.

* 1. Is the code promotion process between environments established and documented, and does the whole team know and understand the process?

Choose an item.

* 1. When will you finalize your Release Candidate?

Click or tap to enter a date.

* 1. Have you generated a [Customization Analysis Report (CAR)](https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/dev-tools/customization-analysis-report) for your models?

Choose an item.

* 1. Are there any open issues from the Customization Analysis Report? If yes, when are you planning to fix them?

Choose an item.

Additional comments on code management

1. **Data Migration Readiness**
   1. Is the configuration data ready and tested? If not, please share with us the expected timeline.

Click or tap here to enter text.

* 1. Is the master data and security data that you will migrate ready? If not, please share with us the expected timeline.

Click or tap here to enter text.

* 1. Are the open transactions/balances data that you will migrate ready? If not, please share with us the expected timeline.

Click or tap here to enter text.

* 1. How are you planning to bring configuration data, master data, and transaction data (e.g. opening balances) into the Production environment? Please describe process you will use for this activity (Data Management Framework/[copy Sandbox DB to Production](https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/database/dbmovement-scenario-goldenconfig#copy-the-sandbox-database-to-production)/etc).

Click or tap here to enter text.

* 1. How have you tested data quality and data migration approach?

Click or tap here to enter text.

* 1. Has the time needed for data migration, during cutover, been estimated and planned?

Choose an item.

Additional comments about data migration

1. **Cutover**
   1. Do you have a cutover plan that contains activity duration, responsibilities, dependencies, and a roll-back plan, signed off by the customer?

Choose an item.

* 1. Are you planning to do a mock cutover?

Choose an item.

* 1. Are you familiar with the process of how to request a Production environment?

Choose an item.

* 1. Are you familiar with the process and SLAs for servicing operations such as deployable package installation to Production, Sandbox DB copy to Production, etc.?

Choose an item.

Additional comments on cutover

1. **Continuous Updates**
   1. Are you familiar with the [Continuous Updates policy](https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/migration-upgrade/versions-update-policy)?

Choose an item.

* 1. On which [version](https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/get-started/public-preview-releases#targeted-release-schedule-dates-subject-to-change) do you plan to request Production environment?

Click or tap here to enter text.

* 1. Have you reviewed the [Continuous Updates settings in your LCS project](https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/lifecycle-services/configure-service-updates) and made adjustments as needed?

Choose an item.

* 1. Briefly describe your organization’s preparedness for Continuous Updates.

Click or tap here to enter text.

* 1. Do you have in place automated regression test plan?

Click or tap here to enter text.

* 1. Are you using any tool for regression testing, like [Regression Suite Automation Tool (RSAT)](https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/lifecycle-services/using-task-guides-and-bpm-to-create-user-acceptance-tests) or a third party tool?

Choose an item.

Additional comments on Continuous Updates

1. **Production Support and Maintenance** 
   1. Does the project team have a plan in place for regular Production environment monitoring and maintenance routine?

Choose an item.

* 1. Is the project team familiar with the [LCS environment monitoring and diagnostics tool](https://docs.microsoft.com/en-us/dynamics365/unified-operations/dev-itpro/lifecycle-services/monitoring-diagnostics)?

Choose an item.

* 1. Has the project team defined post Go-live issue resolution and escalation process?

Choose an item.

* 1. Has the project team verified that team members are able to submit support tickets to Microsoft in LCS under the correct support plan?

Choose an item.

* 1. Is the project team familiar with the process to report [Production outage in LCS](https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/lifecycle-services/report-production-outage)?

Choose an item.

Additional comments on Production Support and Maintenance

1. **Upgrade from AX 2012 to Finance and Operations**
   1. Are you doing an upgrade from AX 2012?

Choose an item.

Please reply to **all** further questions in this section if you replied **yes** in first question. If you answered **no,** please move to the next section.

* 1. Is your AX 2012 instance using the supported collation SQL\_Latin1\_General\_CP1\_CI\_AS?

Choose an item.

* 1. As part of the upgrade activity, have you installed and executed pre-upgrade checklist hotfix in your source system?

Choose an item.

* 1. In AX 2012, do you have any dependency with documents stored in archive directory and if you do, please share the approach you are planning to move documents to Finance and Operations apps?

Choose an item.

* 1. Do you have any dependency on ISV upgrade scripts?

Choose an item.

* 1. Have you finalized the code freeze during upgrade on AX 2012?

Choose an item.

* 1. Have you finalized the Application configuration freeze during upgrade on AX 2012?

Choose an item.

* 1. While performing AX 2012 data upgrade on sandbox, are you using [SQL replication toolkit](https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/database/replication-setup) or performing [data upgrade in self-service environment](https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/migration-upgrade/data-upgrade-self-service)?

Click or tap here to enter text.

Additional comments on Upgrade AX 2012

1. **Retail & Commerce**

**Commerce Solution Scope**

* 1. Please tell us which commerce channel types you will be using in Dynamics 365

Choose an item.

If you will be using two or more channel types, please list them all here.

If you are *not* implementing any commerce channels this concludes the checklist. Otherwise, please reply to **all** remaining questions in this document.

* 1. Will you be using the Modern Point-of-Sale application (MPOS) without offline capability?

Choose an item.

* 1. Will you be using the Modern Point-of-Sale application (MPOS) with offline capability?

Choose an item.

* 1. Will you be using the Cloud Point-of-Sale application (CPOS)?

Choose an item.

* 1. If you will be using POS peripherals, tell us which type of hardware station you will be using.

Choose an item.

* 1. Will you be using a Commerce Scale Unit (CSU)?

Choose an item.

Additional comments on Retail & Commerce implementation

* 1. If you are implementing eCommerce or brick and mortar channels, please confirm you are familiar with the Commerce Scale Unit (CSU) architecture (cloud hosted or self-hosted CSU) including applying updates to the CSU. (Click on the links to review documentation)

Choose an item.

* [Initialize Commerce Scale Unit](https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/deployment/initialize-retail-channels)
* [Update Commerce Scale Unit](https://docs.microsoft.com/en-us/dynamics365/fin-ops-core/dev-itpro/deployment/update-retail-channel)
* [Synchronize self-service installers](https://docs.microsoft.com/en-us/dynamics365/commerce/dev-itpro/synchronize-installers)
  1. If this is an upgrade from AX 2012, will you be utilizing the Commerce N-1 architecture as described in the topic, [Upgrade and N-1 support for Commerce](https://nam06.safelinks.protection.outlook.com/?url=https%3A%2F%2Fdocs.microsoft.com%2Fen-us%2Fdynamics365%2Funified-operations%2Fretail%2Fdev-itpro%2Foverview-upgrade-n-minus1&data=01%7C01%7CClaudia.Betz-Haubold%40microsoft.com%7C4296bde67e9c40d719d308d6ce892de9%7C72f988bf86f141af91ab2d7cd011db47%7C1&sdata=kg88EBkHErn9auBIjTNKvXKLXiBAPb92Rl%2Fiw5sSwr8%3D&reserved=0)?

Choose an item.

**Modern Point-of-Sale**

* 1. During your initial Modern Point-of-Sale rollout (MPOS) will you be using mass deployment techniques, or will you be deploying MPOS manually?

Choose an item.

Additional comments on MPOS deployment plan

**Payments**

* 1. What payment connector and processors will be used?

Choose an item.

Provide the name for ISV payment connector(s) and payment processor

**Customer and ISV extensions**

* 1. Have you extended or added new Real-time Service (RTS) calls?

Choose an item.

* 1. Have you extended the POS UI (add fields, UX changes)?

Choose an item.

* 1. Have you extended the Hardware Station?

Choose an item.

* 1. Have you extended Retail Server (RS) or the Commerce Runtime (CRT)?

Choose an item.

Additional comments for Customer and ISV extensions

**Point-of-Sale Device**

* 1. Have you tested Point-of-Sale with user accounts that do not use administrator access to the POS computer for their normal work?

Choose an item.

* 1. Do you have a plan to monitor Point-of-Sale device health? For example, hard drive space and POS application logs.

Choose an item.

* 1. If using SQL Express for the Modern Point-of-Sale (MPOS) offline database, have you tested that the offline database size does not reach 10 GB after syncing all data needed for normal operations?

Choose an item.

**Peripherals**

* 1. Will you be using peripherals that Microsoft has tested?

Choose an item.

You can review Microsoft tested devices here: [Peripherals - Commerce | Dynamics 365 | Microsoft Docs](https://docs.microsoft.com/en-us/dynamics365/commerce/retail-peripherals-overview#microsoft-tested-peripheral-devices).

Only complete the next section if you plan to use Modern Point-of-Sale (MPOS).

**Business Continuity**

The following questions help you assess your preparedness for failures of services, networks, or devices that could impact the Modern Point-of-Sale application.

* 1. Have you identified the key business scenarios affected by Headquarters (HQ) or Commerce Scale Unit (CSU) outages and tested them in simulated failures?

Choose an item.

* 1. Have you identified and tested key business scenarios in the case of network outages??

Choose an item.

* 1. If you have 3rd party service integrations in Point-of-Sale, have you identified business scenarios affected by outages of the 3rd party service and tested them in simulated failures?

Choose an item.

* 1. Have you planned for business continuity at stores in the case of peripheral or computer device failure?

Choose an item.