

Human Resources Infrastructure Customer merge

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Agenda

- Introduction
- Scenarios
- Key Challenges and Consideration
- Conclusion
- FAQ
- Q&A

Introduction



What is the customer merge

As part of the infrastructure merge, customers have migrated their Human Resources environments from the standalone infrastructure to Finance and Operations infrastructure. If Customer has an existing Finance and Operations system, they have the option to either keep two separate environments or combine them into one system.

Customer merge is:

- An optional step
- Customer's decision and timeline
- Manual process initiated by the customer
- Data integration with existing finance and operations environment

Why **DO** you think of have to customer merge?

- Simple Application Life Management
- Seamless integration
- Data centralization

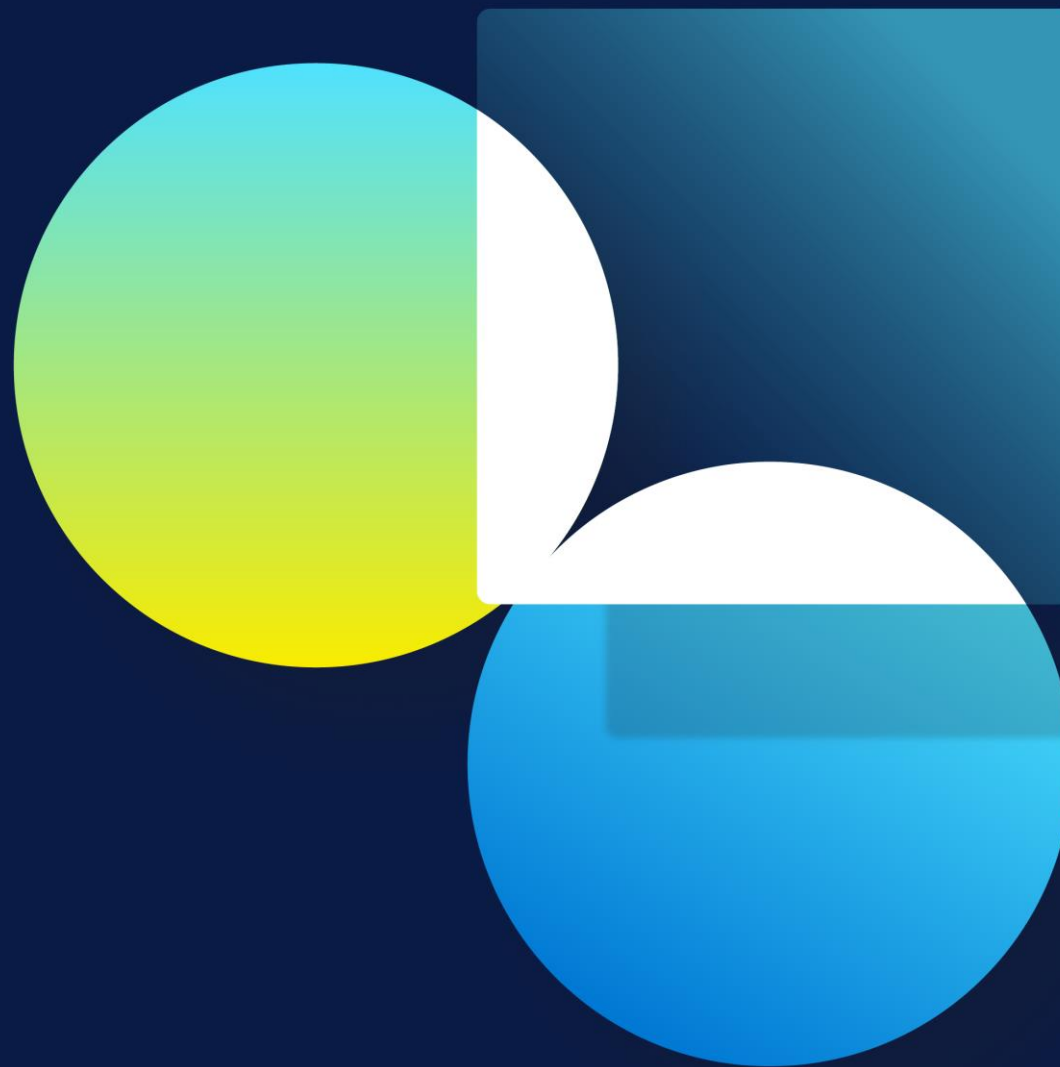


Why **DON'T** you think of have to customer merge?

- Data security
- Dataverse Integration
- System maintenance



Scenarios



Determine which scenario applies to you

Scenarios 1

You have been using Dynamics 365 Finance and completed HR standalone migration, so you have two F&O instances.

Practice suggestion:

- If there are no specific objectives in place, there is no mandatory requirement to merge the applications into one, leaving the option open to maintain the As-is.
- However, if consolidation is chosen, you have the option to merge from HR to Finance and Operations, or finance and operations to HR, each presenting unique challenges that need to be carefully evaluated.

Determine which scenario applies to you

Scenarios 2

You have been using Dynamics 365 Finance and completed HR standalone migration, so you have two F&O instances. There are security requirement in the organization the Employee data can only maintain by HR team.

Practice suggestion :

- Customer merge will consolidate data into a single database, anyone has System Administration rights they can browse all data in the system, if security concern is a key, then you should consider separate HR should be a option.

Determine which scenario applies to you

Scenarios 3

You completed HR migration and the team is implementing Dynamics 365 Finance but not yet launch. So you have 1 F&O instance lived already and Dynamics 365 Finance will be rollout soon. Single environment is the strategy.

Practice suggestion :

You should plan to rollout Dynamics 365 Finance in existing HR production environment, instead of deploy Dynamics 365 Finance in new instance and merge between them.

Determine which scenario applies to you

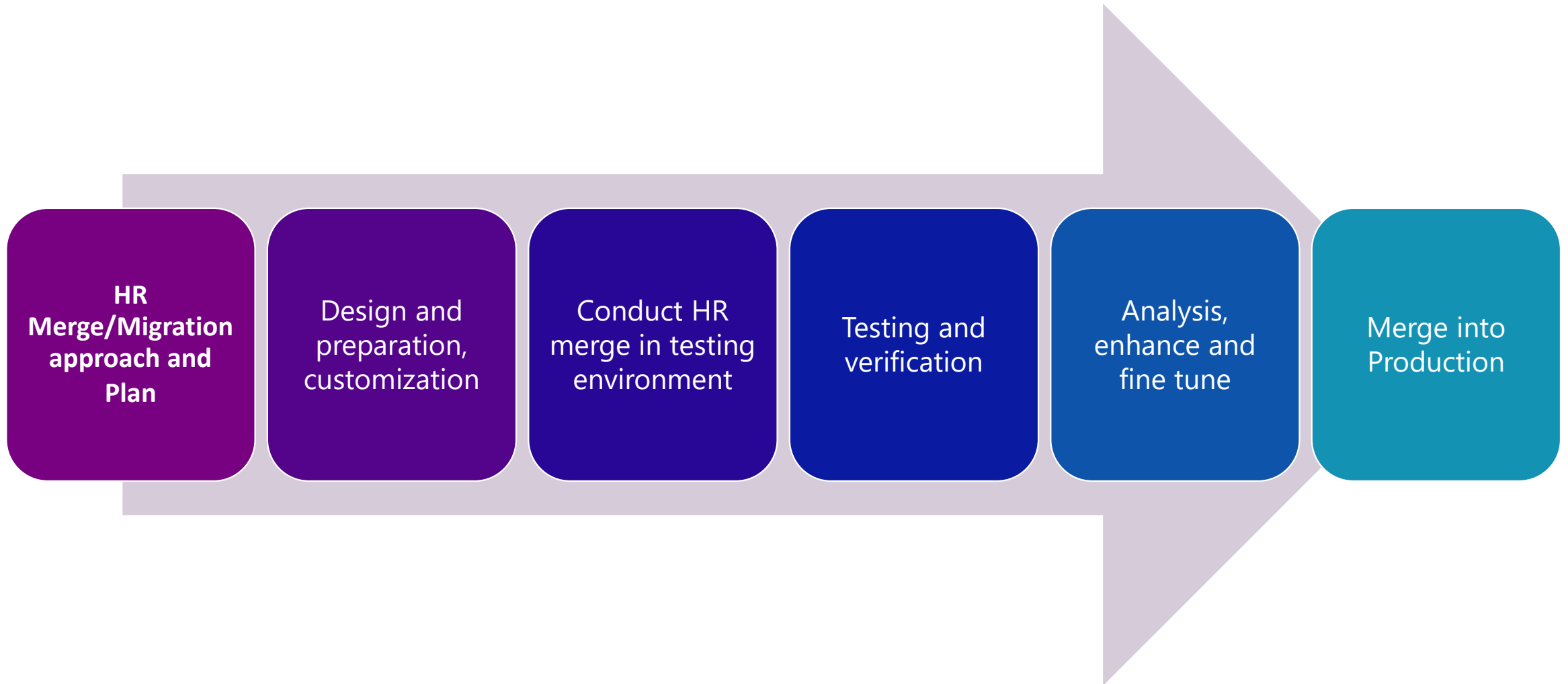
Scenarios 4

No preference of single or separate environment, but Human Resources and Finance an Operations systems are integrated with separate Dataverse environments.

Practice suggestion

Once Human Resources and Finance an Operations systems are merged into one system, it cannot remain linked with 2 Dataverse environments. Therefore, those 2 data Dataverse environments also need to be merged.

Suggest Procedure



Key Challenges and Solutions



Tools for merge

- Microsoft has provided additional Data entities to support the merge.
- The migration process relies on customers to bring data from HR, with **Data Management Framework (DMF)** being the primary standard tool for data migration.
- It's essential to identify and compile a list of data entities that can be utilized for effective data migration.
- Understanding the sequence of data migration is crucial even after defining the appropriate data entities for migration.
- Dynamics 365 Finance and Operations offer **Data templates**, which serve as valuable assets for managing configuration migration between environments.
- Ensuring consistency during the transfer of data from the source environment to other environments can be challenging, but **Data templates** play a pivotal role in simplifying this process.
- If OOB Data entities insufficient meet the required, customized Data entities should be considered.

Tools for merge – Template for Export/Import

Human Resource

Human Resource merge

Draft

Template

AX : Operations

Standard view

Human Resource

Lines

Header

Templates

Template ID

Human Resource

Description

Human Resource merge

Template status

Draft

Last validated date

Entities

+ Add entity

+ Add multiple

Remove entity

Open in Excel

Resequencer

Sort by

Replace from template

Create from data project

Entity

Execution unit

Level in ex...

Sequence

Module

Tags

Entity category

Filter

View m

Compensation job function

1

10

10

Human resources

Jobs

Reference

Export

AX : Operations

Standard view

Export

Group name

HRExp

Description

Data project operation type

Export

Project category

Project

Generate data package

No

Group

{96D

Selected entities

+ Add entity

+ Add multiple

+ Add file

+ Add template

Remove e

Entity

View map

Exec

Add template

Copy from template

Human Resource

SELECT THE OPTIONS

Entity replace or merge

Replace

Merge

Target data format

CSV

Ok

Execution summary :: Export

Data project name

HRExp

Job ID

HRExp-2024-03-14T15:22:11-...

Execution status

Partially succeeded

Refresh

Start time

3/14/2024 03:22:17 PM

End time

3/14/2024 03:27:27 PM

With errors:

1

Entity processing status

View staging data

Download file

Filter

Entity

Status

Exported

Job - certificates

Succeeded

53

Job - education

Succeeded

95

Job - screening

Succeeded

34

Job - skills

Succeeded

269

Job - tests

Succeeded

33

Job - work tasks

Succeeded

52

Job compensation

Succeeded

99

Job detail

Succeeded

641

Job family

Succeeded

0

Job tasks

Succeeded

15

Job template - ADA requirements

Succeeded

0

Job template - areas of responsibility

Succeeded

1

Job template - work tasks

Succeeded

4

Job template test

Succeeded

2

* Data Template will be shared in the FastTrack asset.

Key Challenges and Consideration

Global Address Book (GAB)

- Person identification number.
- Export source and target to compare with v-lookup.

Number Sequence

- Number sequences, which define how numbers are generated for various records, should be migrated when you want to maintain consistency in numbering across environments.

Parameter Configuration

- Parameters often control the behavior of the system.
- Migrate parameter configurations when you want to ensure that the new environment mirrors the settings of the original one.

Custom Field **

- The custom fields feature allows fields to be added directly from the user interface, allowing you to tailor the application to fit your business using your web browser. The current recommendation for moving custom fields between environments is to manually re-create the custom fields in the target environment.

<https://learn.microsoft.com/en-us/dynamics365/fin-ops-core/fin-ops/get-started/user-defined-fields#how-can-i-move-custom-fields-between-environments>

Key Challenges and Consideration

Feature Management:

- Migration of enabled or disabled features from the source environment ensures consistency based on business requirements

Security Configuration

- Migration of roles, duties, and privileges is necessary to uphold consistent access control and permissions across environments.
- Some duties, privileges, and roles may be missing in the target environment.
- System Admin has access to all data.

Workflow Configuration

- Migrating workflow configurations ensures continuity of specific business processes in the new environment.

Batch Jobs/Periodic Tasks

- Any critical batch jobs or periodic tasks should be migrated to maintain scheduled and automated processes in the new environment.
- Batch jobs with "Waiting" and "Executing" statuses should be reviewed for potential migration if required.

Key Challenges and Consideration

Custom Code (X++ or addon)

- Custom code, including extensions, customizations, should be migrated to ensure that any additional functionalities or data structures are consistent across environments.

Personalization/Saved Views

- Migration of personalization ensures users maintain a consistent experience in the new environment.
<https://learn.microsoft.com/en-us/dynamics365/human-resources/hr-customer-merge#personalizations>
- Workspaces and forms may differ between environments due to version mismatches.
- Personalizations can be exported from the source and imported into the target environment, then republished using the same approach as the source.
- In certain scenarios, recreating personalizations may be preferable.

Alerts

- Migration of alert configurations ensures users continue to receive notifications for specific events or conditions in the new environment.

Key Challenges and Consideration

Integrations

- Access to unmanaged Power Platform solutions is crucial for modifying and updating integration endpoints.
- Understanding the impacts of decommissioning integrations is essential during the merge process.


Extended solutions

- Documentation of Power Platform extensions like Power Apps and Power Automate flows is necessary before executing a full merge.
- Analyzing the architecture of the to-be environment and documenting the best approach to merge extensions is a vital part of the analysis process.

Conclusion



Importance

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- Customer merge is a customer decision, you can choose to maintain two environments, or merge them into one.
 - No hard deadline for customer merge as it is not mandatory.
 - No extra tools for customer merging.
 - You should treat it like a application migration, complete cycle of testing
 - No licensing impact for existing customers

Summary

In summary, the merge process should be well-planned, with careful consideration and assessment given to each component to ensure a smooth transition and maintain the integrity of the Dynamics 365 Finance and Operations system in the new environment.

FAQ

Q: Can I extend the merge after completing Migration?

A: The decision to proceed with customer merge post-migration is discretionary and lies with the customer and business stakeholders. There is no strict timeline imposed for this process. Microsoft advises customers to conduct a thorough assessment, considering organizational objectives and weighing the pros and cons before making a decision.

Q: How can Microsoft support in the customer merge process?

A: If you encounter any challenges during the customer merge, initiating a support ticket is the recommended approach to seek assistance from Microsoft.

Q: Is it possible to update the application URL after the merge?

A: No, the existing environment's name and link cannot be updated until you redeploy the instance.

Q: What happens to the HR environment after the merge? Will it be deleted automatically?

A: Following the completion of the customer merge, you are required to deprovision your Sandbox and Production environments yourself, along related Dataverse environment. Subsequently, you can option to the LCS project. [Delete a production finance and operations apps environment - Finance & Operations | Dynamics 365 | Microsoft Learn](#)

Q: We are using the Expense mobile app. Do I need to reinstall it after merging into the new environment?

A: If you are planning to have customer merge, it is necessary to install all required mobile in merged environment, e.g. the Dynamics 365 Expense Management mobile app.

Q: After Merged, can I restrict system administration to different module, e.g. Only HR admin can access to HR data.

A: No, System Admin is a environment administration who can access to whole system without restriction.

Additional resources

[Dynamics 365 Human Resources infrastructure merge overview - Human Resources | Dynamics 365 | Microsoft Learn](#)

[Dynamics 365 Human Resources infrastructure merge FAQ - Human Resources | Dynamics 365 | Microsoft Learn](#)

[Dynamics 365 Human Resources customer merge overview - Human Resources | Dynamics 365 | Microsoft Learn](#)

[Human Resources data entities and templates added in version 10.0.32 and later - Human Resources | Dynamics 365 | Microsoft Learn](#)

[Microsoft Dynamics 365 Human Resources Infrastructure Merge TechTalk](#)

[What's changed in Dynamics 365 Human Resources \(Functional\)](#)

[What's changed in Dynamics 365 Human Resources \(Technical\)](#)



QUESTIONS

Dankie Faleminderit **Shukran** Chnorakaloutioun Hvala Blagodaria
Děkuji **Tak** Dank u Tānan Kiitos **Merci** Danke Ευχαριστώ A dank
Mahalo ἡΤΙΠ. **Dhanyavād** Köszönöm Takk Terima kasih **Grazie** Grazzi

Thank you!

감사합니다 Paldies Choukrane Ačiū **Благодарам** ありがとうございます
谢谢 Баярлалаа **Dziękuję** Obrigado Mulțumesc **Спасибо** Ngiyabonga
Ďakujem Tack Nandri Kop khun Teşekkür ederim Дякую Хвала Diolch