



CASE
STUDY

**World's Largest Bedding
Provider Transforms
Business Operations
& Gains Better Control**

CUSTOMER PROFILE

The company is the world's largest bedding provider. The company develops, manufactures and markets mattresses, adjustable bases, pillows and other sleep and relaxation products which it sells globally in approximately 100 countries.

The company is headquartered in Lexington, Kentucky and its brand portfolio includes many of the most highly recognized brands in the industry.

The Company sells its products through three distribution channels in each operating business segment: Retail, which consists of furniture and bedding retailers, department stores, specialty retailers and warehouse clubs; Direct, which consists of electronic commerce (e-commerce) platform, Company-owned stores and call center, and other, which includes third party distributors, hospitality and healthcare customers.

BUSINESS CHALLENGE

As the company's business expanded and grew, with much greater volumes of transactions and inventory levels, it looked for a solution that would further extend and optimize their processes.

The company's aging enterprise resource planning (ERP) system had limited capabilities and was becoming increasingly difficult to support.

In addition, the challenge was migration of data from tables in the existing system Microsoft Dynamics AX 2009, that contained millions of records.

Also while implementing the solution, the system downtime had to be minimum in order to limit the impact on business operations. This could be only achieved during the long weekend.

The company faced a daunting task: find a new solution – and a technology partner – to help migrate years' worth of historical data and streamline the company's operations.



CASE STUDY

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SOLUTION

After a detailed requirement analysis conducted by NDS Global Microsoft Dynamics AX team, it was recommended that the company upgrade their existing Microsoft Dynamics AX 2009 system to Microsoft Dynamics AX 2012 R3 CU8 mainly on the basis of efficiency gains they would realize quickly in their inventory costing. This was inclusive of all customizations, security, interfaces and reports from AX 2009 to be migrated along with the data (with no exceptions).

Total cost of ownership was a major consideration, while configurability and migration complexity were also taken into account.

The Microsoft Dynamics AX 2012 R3 release features a more sophisticated inventory costing model which is ideal for businesses and situations where there are a very large number of inventory items along with very high number of movements in inventory. This new model proved to be a perfect fit for the company's now complex and growing business and the gains in efficiency that would be realized were enough of a reason to upgrade to Microsoft Dynamics AX 2012 R3.

Microsoft Dynamics AX 2012 R3 represents enterprise-grade scalability and several feature enhancements including native Business Intelligence, Wizard based workflows, Advanced Warehouse Management, Transportation Management, Demand Forecasting.

NDS Global followed a standardised upgrade methodology that ensured control, quality, and repeatability for many of the core upgrade activities. This process was then modified to fit the customer's unique needs based on their internal skill sets and capabilities.

1. Server Readiness :

Analysing and adjusting the space available for the databases can significantly improve performance during data upgrade.

The target and the source systems were prepared and monitored throughout the process for any bottlenecks. A well-designed disaster recovery process was planned along with a backup server kept ready for the purpose.

Dedicated service account was created which would be responsible for all the next steps.

2. Code Upgrade:

Code upgrades are necessary if you've made changes to the core Dynamics AX system. Depending on the amount of customization required the Microsoft Dynamics AX experts needed to determine if the customization is required or if there is a new feature available to replace the scenario.

Once the analysis was completed, it was found that customised objects were less and the business utilized mainly the out of box functionalities.

Due to architectural difference between the two versions, the customized reports cannot be upgraded and hence the X++ reports in Microsoft Dynamics AX 2009 will be re-developed to SSRS reports in Microsoft Dynamics AX 2012.

Below are the steps executed for Code Upgrade:

A. Prepare for pre-processing Upgrade: It included installation of Source system making it the exact copy of production and importing pre-processing XPO's.

B. Pre-processing upgrade checklist: Checklist included all required steps to be executed to make the source system ready for migration. The steps involved preparation of data related to all system tables which are a prerequisite for migration to the new version. The data also needed to be upgraded due to changes in the data dictionary between the versions.

SOLUTION

3. Security Upgrade: The security upgrade advisor tool compares the user group access rights and roles in the current system to privilege mapping in Microsoft Dynamics AX 2012 and generates a list of matching privileges that can be used for a particular role.

4. Reliable Hardware: Data migration is dependent on the success of the previous steps and hence each step in the upgrade process had to be completed. In addition, it was ensured by the business that the hardware setup for the upgrade process enabled the entire process to run faster.

5. Data Migration:

During this process additional caution was taken to avoid data loss.

Below are the steps which were performed:

A. Source dB connection: Checklist connects the target system to source, and ensures that the correct dB is getting backed up.

B. Pre-synchronization: This step loads the Upgrade cockpit. Depending on the stage at which the Upgrade Process started; the Batch Groups and Batch Servers are configured. Once the configuration is set, the PreSync scripts are triggered.

C. Generating Table Mapping: The step is to map the source table to target which helps in case of data loss issues and customised objects mapping. Mapping has to be correctly done, so as to avoid issues with source table id's and destination table id's.

D. Generate Bulk Copy and Script Prioritization: The data is migrated from source system to target. The time required for migration will be dependent on the volume of data in the source system.

Due to changes to the database structure, a thorough testing was executed to determine the validity of data being migrated. This required running reports in both old and new MS Dynamics AX systems and comparing the results. To avoid loss of data, data massaging or script fixing was carried out.

6. Data upgrade process (upgrade scripts): The scripts were divided into 2 major categories: scripts that run in parallel to production operations and scripts that run in single user mode, meaning no one is allowed to access the production environment.

7. Validating AX 2012: For validation, test scripts were developed which validated the standard and customised processes. Due to the licencing methodology, care was taken that was no major impact in the new version while testing. For this a plan was developed to validate the MS Dynamics AX upgrade, and approval was taken of the super users to get their approval. All masters and transactions were validated for the financial impact.

Also the modules were validated for European localisation related functionalities at report and form levels.

BENEFITS

The upgradation to MS Dynamics AX 2012, brought the below benefits to the organization.

- **Upgrades to the financial dimension functionality:** Unlimited number of account dimensions without any additional cost. There was greater dimension flexibility across the chart of accounts and relevant dimension groups created for certain accounts.
- **Product enhancement:** It was now possible to release products with multiple size/color/configurations across all legal entities quickly and easily. Improvements made it easy to manage product master/variants within the organization and streamlined the item management process and improve order entry efficiency.
- **Improvements to manufacturing scheduling:** With the introduction of resource capabilities, resources were assigned at the time of operations scheduling, not hard-coded on the operations and route setup. Additional improvements to the production scheduling Gantt chart functionality made it easy to drag and drop production operations.
- **Ease of user security settings:** Role-based user security allowed for system administrators to create roles based on a selection of around 80 different predefined roles within MS Dynamics AX 2012. This was done quickly and easily and used to set the access rights to forms and reports.

When employees were assigned new roles, the access rights got transferred automatically.

TECHNOLOGY



ABOUT NDS GLOBAL

NDS Global, a trusted Microsoft Gold Partner, offers its customers consulting, implementation, development and support services on Enterprise, Cloud & Mobility for digital solutions.

NDS Global helps customers realize results in a digital world through business technology solutions, cloud and managed services that combine insight, innovation and expertise focused on Microsoft technologies.

Our solutions span across Microsoft Project Online, Microsoft CRM Online, Microsoft SharePoint Online, Office 365, Dynamics 365, Microsoft Dynamics AX, PowerBI & Azure.

Headquartered in the US since 1999, we are preferred partners to customers in USA and India. Our customers span across Consumer Goods, BFSI, Infrastructure, Manufacturing, IT/ITES, and Retail.

A strong team of 180+ Microsoft consultants have provided many a success stories to Enterprise & Small/Medium customers globally.



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