Lifecycle Services (LCS)

How it works with Microsoft Dynamics

Overview

Lifecycle Services is a platform that allows you to manage software implementations, keep track of methodologies for these implementations, hold a full business process library of task recorded processes for training and control, provides an area to link to SharePoint and Visual studio for easy access, and provides an arsenal of tools for you to work with. We will also deal with how to structure the Business Process library and how Lifecycle Services assets library is useful in promoting assets to Organizational level. In this whitepaper, we will dive into all these features around Lifecycle Services to show how beneficial it is for both Partners and Customers.

LCS can be summarised by these four roles:

- Project manager
- Business analyst (Define)
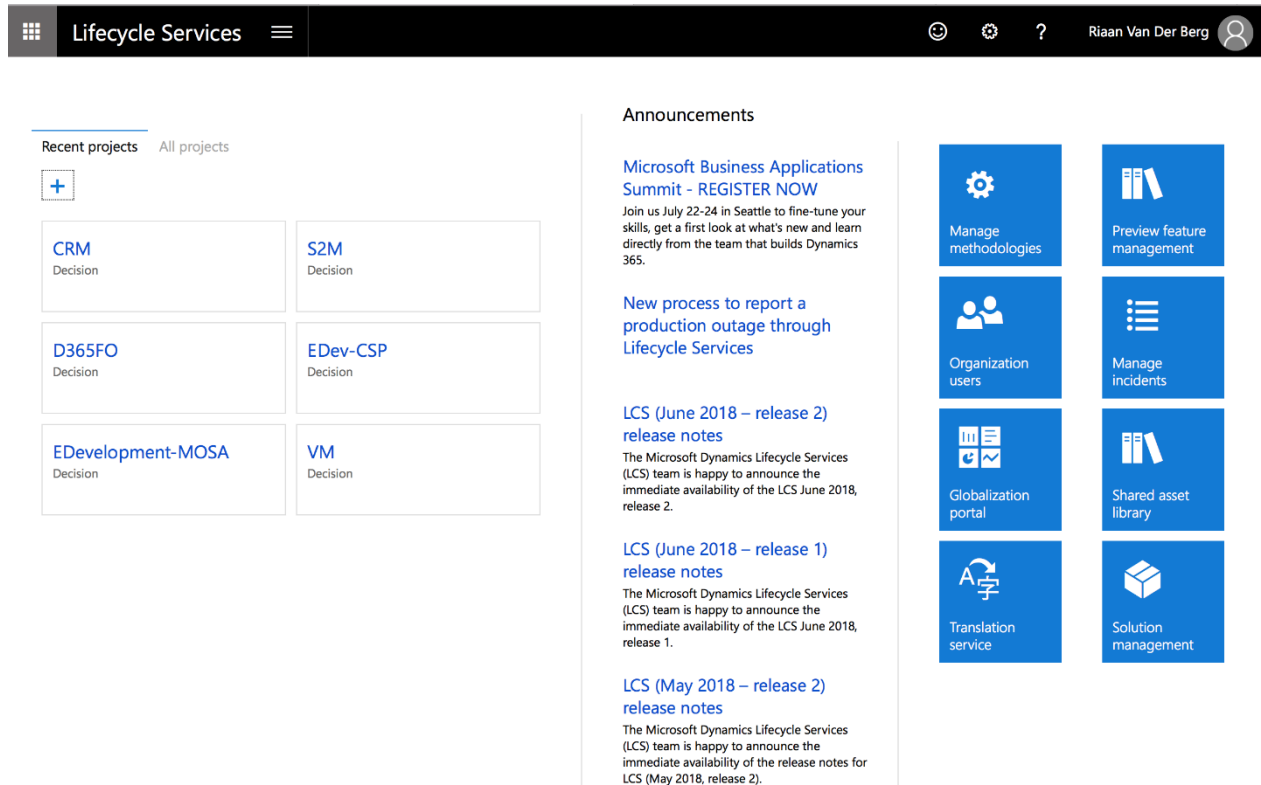
- Developer (Develop)
- Administrator (Operate)

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Lifecycle Services

Lifecycle Services is accessed through a web browser. You will need to use a Microsoft account in order to gain access into Lifecycle Services. Once you have signed in, it will take you to the homepage where you will find Projects, Announcements, and the first set of tools all laid out on the page. Warning – Microsoft is updating Lifecycle Services once a month, so this will likely change as time goes on.
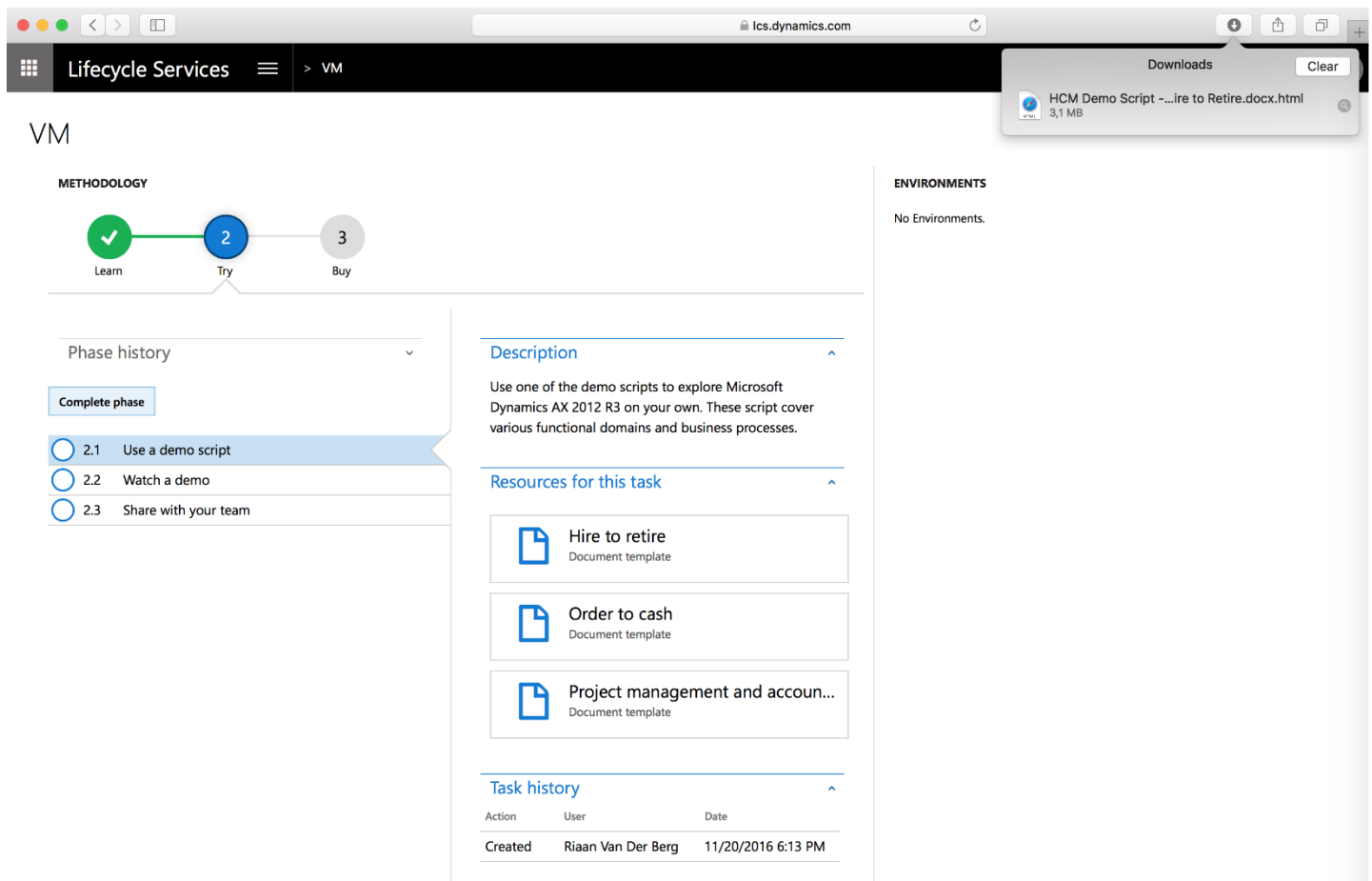

The Project sections shows all the Projects that you are associated with and the announcements section contains articles released from Microsoft related to Lifecycle Services. The Tools section on this page is related to all projects or the creation of a new project. The Organization users section allows you to create new users and give them specific rights. Preview feature management is an area page which allows you to make certain areas public or private for users. Manage incidents helps you keep track of an issue that has a ticket opened with Microsoft. Solution management is used to show which solution will be used to help speed up the development of test environments. Shared asset library is used as a resource area for assets (explained in a later section). Manage methodologies is where we keep specific methodologies of implementations (we will dive more into this subject in the next section).

To create a new project, you will select the + button under the projects and a window will open allowing you to select the purpose of the project, name, product type and version, industry and more importantly what methodology will be used for this implementation.

Managing Methodologies

What is the importance of Methodologies? Methodologies are used to help guide an implementation from start to finish. Methodologies are step by step requirements that are used at each phase of an implementation. For a better understanding, implementations are generally broken down into four phases, namely, 1. Analysis, 2. Design and develop, 3. Test, 4. Deploy and operate. In each one of those phases there are specific tasks which need to be accomplished in order to move forward. With the use of Methodologies in Lifecycle Services, not only can we document each task for reference, but we can go back and tweak the task that caused issues. This will help document and find solutions in order to provide the best path when implementing Dynamics 365 for future customers.

This is also a great tool to show future clients what path you will take for their implementation and how it worked for you in the past. The methodology tool allows you to keep multiple methodologies, so you can keep a library of industry specific implementations and reference them at a click of a button. A great tool to keep everyone in your company on the same page not only for the best path but also for best practice when implementing.

Diving into the Project

If we select an existing project from the above "homepage" it will take us into that project area where we can manage our project. In this area we could link into SharePoint and Visual Studio, managing our methodology for this project, and other tools that are essential for an implementation, including the functionality of task recordings.

In the middle of the screen, we have a clear visual of the methodology being used for this project. We can easily jump from phase to phase to view or complete tasks. This gives users a clear understand of the task completed and what phase of the implementation they are at. When a phase has been completed, you will select "Complete Phase" to close it out, allowing you to start completing tasks on the next phase.

The Complete LCS Project Configuration is an area which provides you with things you still need to configure in Lifecycle Services. The Environments area is where you will set up your environments related to this project, giving users a quick reference point. You will need a subscription to Azure in order to link environments to Lifecycle Services, which is extremely beneficial when it comes to task recordings.

Moving on, we will now look into some of the tools that are provided for us in the Project section. The Business Process modeller is related to the task recordings which we will be the main discussion in our next section. The Issue search tool is where we can search the Microsoft database for any issues we might run into during the implementation. We will type the issue into the search bar and it will pull up articles, hotfixes, or anything associated with that issue and provide you with information on how to go about fixing or addressing the issue. The Project Users' tool is used to set up all the users who will be associated with the project. The Work items tool is to document specific work items and attach users to it. This is very helpful in allowing users to see progression on a specific task which could be holding up a section of the project.

There are two different types of Asset tools, one is the Shared Asset Library and the second is the Asset library. One is on the homepage (Shared Asset Library) and the other is in a specific Project (Asset Library). The difference between the two is one is shared, which means it is an area for you to access digital releases sent from Asset Creators, which could include hot fixes, configurations, software packages, etc. The other is in your specific Asset library which is used to store configurations, task recordings, and any other specials documentation you would like to reference later.

Business Process Modeller

This is a great new feature that is completely integrated with Microsoft Dynamics 365. Here we can create and manage our library of task recordings for training and business processes. In order to set up a new business process model, you will need to select the business process modeller and select upload in My libraries section. You also have the option of creating a corporate library, which can be used as a base for future projects, or select an existing Global Library which is modelled out for you already (if you don't have an existing structure, see how to "Create a New Hierarchy Structure" section below). Once your structure is in place and you have connected your environment to Lifecycle Services, using Azure, we are ready to start using Task Recorder.

The new Task Recorder for Microsoft Dynamics is truly an amazing upgrade. To compare, the previous Task Recorder in AX2012 would only allow you to start and stop the recording without making any adjustments during the recording, so if you were to make a mistake you would have to start over. The new Task Recorder allows you to edit and delete steps along the way, if you happen to miss a step you could go back and correct it. Going back to our main topic of Lifecycle Services, Task Recorder is fully integrated with it. Meaning you could create a recording and upload it straight to Lifecycle Services. After you hit stop on the recording an option to upload to Lifecycle Services appears and when you select it, it will show you your Business Process library where you can upload your recording. You can then view your steps in Lifecycle Services. Another great LCS feature with Task Recorder, is that you can pull that recording back into Microsoft Dynamics 365 for editing, updating, or for using as a task guide.

Task guide is a brand new feature that is used for training purposes in the new Dynamics 365. To use this task guide, open task recording in Microsoft Dynamics 365, one of the options is to "Play recording as a guide." If you select this option, D365 will ask if you would like to pull a recording from Lifecycle Services, upload from your computer, or open from recents. Since we are using Lifecycle Services you would select that and all the steps related to that recording will populate. Now, as you progress, the guide will guide you through each step one by one (shown below), which is very beneficial for someone who has never been in Microsoft Dynamics 365 before.

Create a New Hierarchy Structure

Let's say when we wanted to create a new hierarchy structure in the business process modeller and you only had the Global libraries available. You would right click on one of the Global Structures and select copy. A new structure with the same name will be copied to My Libraries. Right click the new structure and select edit to rename the library. After you have completed that, you can go into the structure and select the "Author and edit" tab on the core views area. This will now allow you to edit your structure, just highlight the specific area and on the right side (Process details) you can delete or edit the text and you can then save it from there.

View Business Process

You can associate an activity diagram with a business process. Activity diagrams are used to describe how a business process or task is completed in a proposed software solution.

- Task recordings – Business processes that are associated with task recordings for Microsoft Dynamics 365 for Finance Operations, include activity diagrams and process steps that are automatically generated.
- Microsoft Visio – You can associate a business process with a Visio diagram by manually uploading a Visio file.
- User-defined – You can manually create or edit a Business process modeler (BPM) activity diagram.

In addition to activity diagrams, you can describe a business process by using detailed process steps.

BPM automatically generates an activity diagram and detailed process steps for all task recordings that are created in Finance and Operations. The following illustration shows an example.
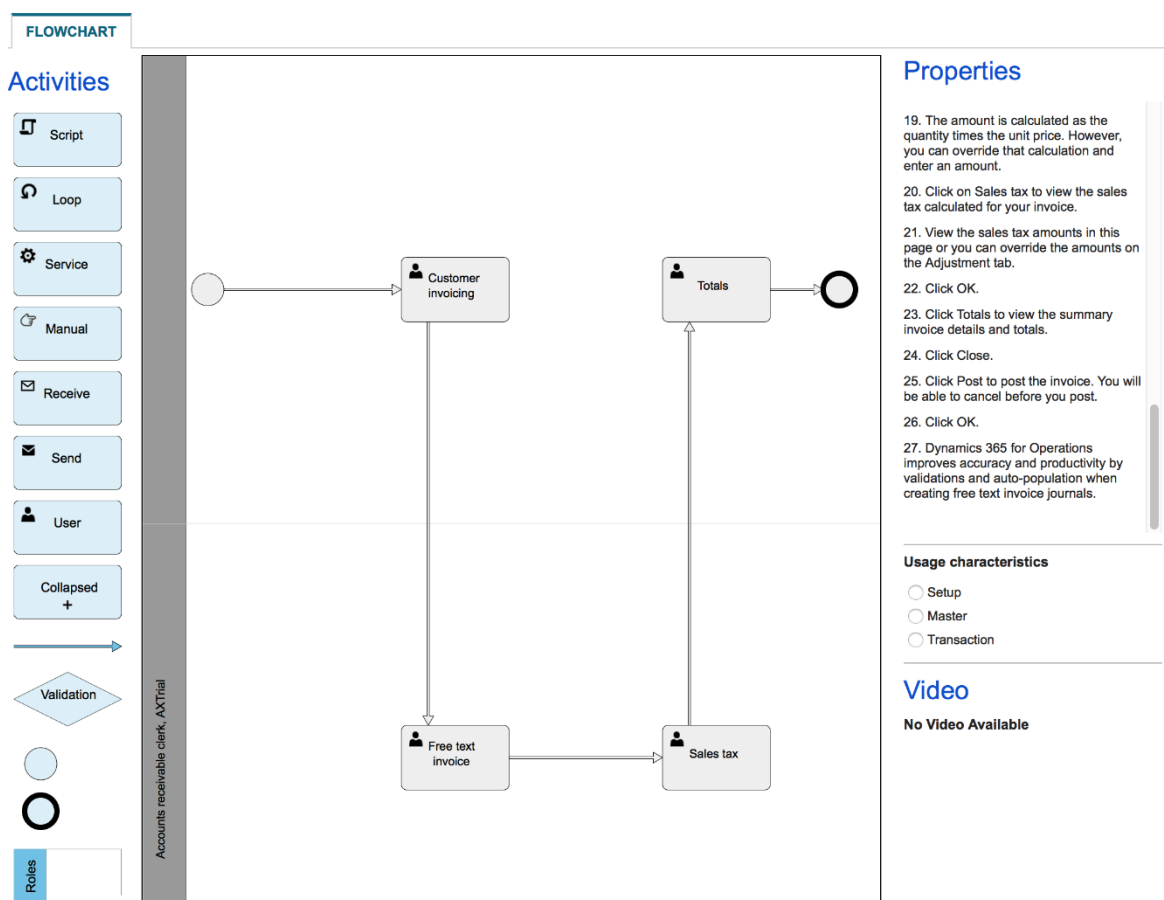
Monitoring dashboard

In the Monitoring and diagnostics portal, click the Environment tab to view the Monitoring dashboard. On the dashboard, a green check marks indicate that the environment is available to perform business operations. Health metrics are collected for every machine and component. These health metrics include CPU usage, errors logged per second, and batch heartbeat. For some metrics, Microsoft has set up threshold values. If a metric crosses the threshold, an alert is triggered. For example, an alert is triggered if CPU usage exceeds 70 percent. You can view the health monitors for a specific area to see what is occurring.
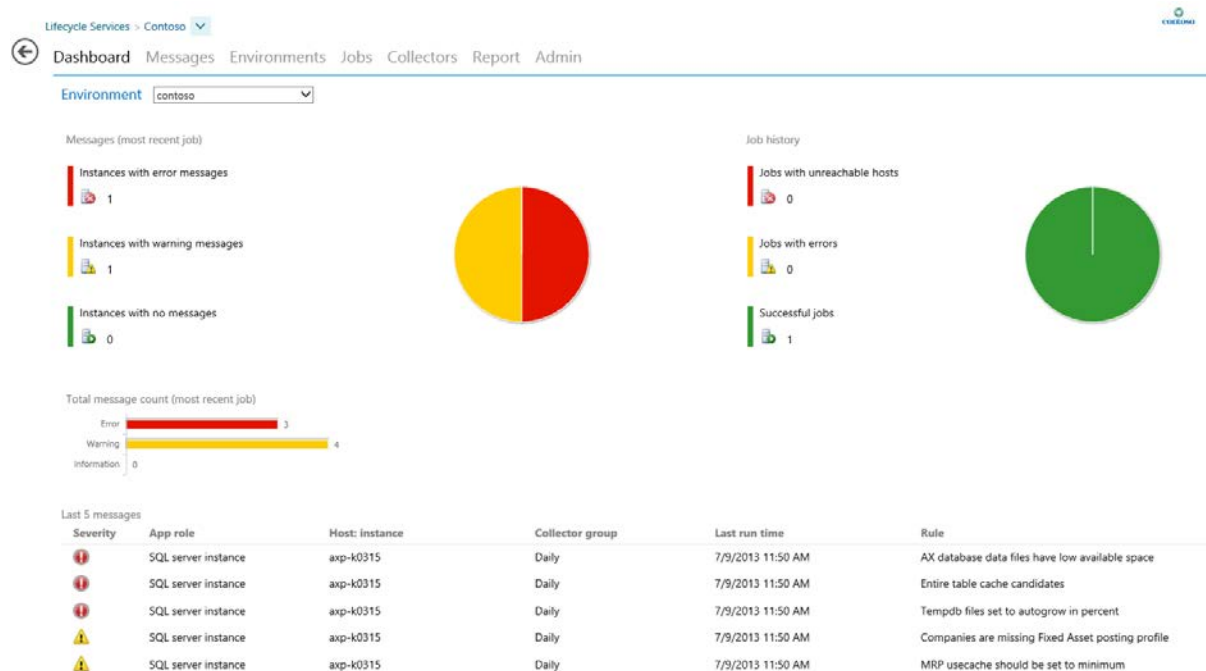
Conclusion

Overall, Lifecycle Service is a great resource to use during implementations. It will provide your team with the proper tools to communicate and be more efficient throughout the project. Clients will love the easy to use features and be more at ease with how the project is progressing if they can visually reference tasks and steps. It will also help to better organize and access task recordings for training end users, especially if they haven't touched Microsoft Dynamics 365 before. The user-friendly task guides will give them the confidence in using Microsoft Dynamics when the time comes to officially hand over to them. The ability to document and keep track of tasks throughout phases will allow for adjustments in methodologies to find the best way to go about an implementation. All the information needed for a project is right in front of you.