

Smarter Options and Methods for Your Next Upgrade

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Meet Your Presenter



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*We keep moving forward, opening new doors,
and doing new things, because we're curious
and curiosity keeps leading us down new paths.*

Walt Disney



Automated software services:
upgrades, report transformation,
deployment on Azure...
Microsoft Dynamics **NAV, AX, 365,**
.net

Session Objectives

To review technical upgrade methods: components to your Dynamics NAV strategy.

Session Agenda

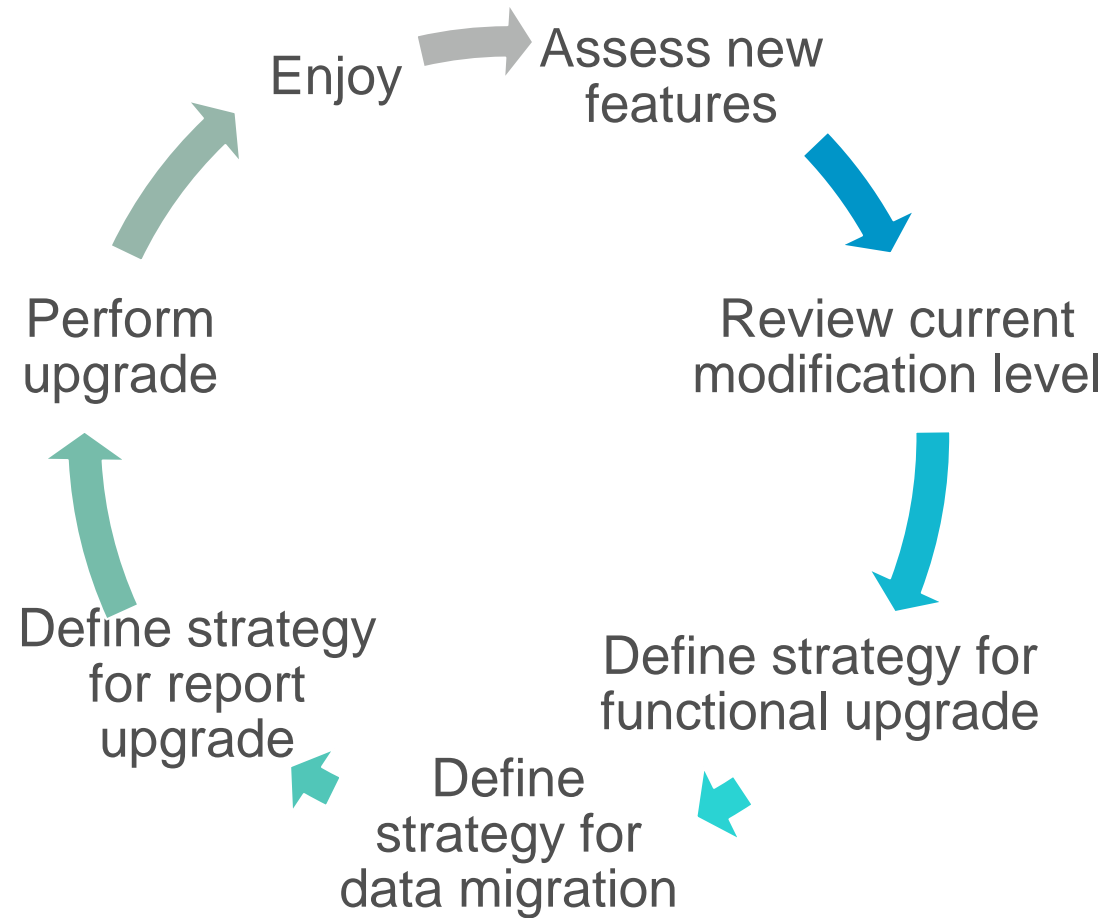
Upgrade methods

Reports, vanishing objects, enhancements

When what method to choose

Upgrade Methods

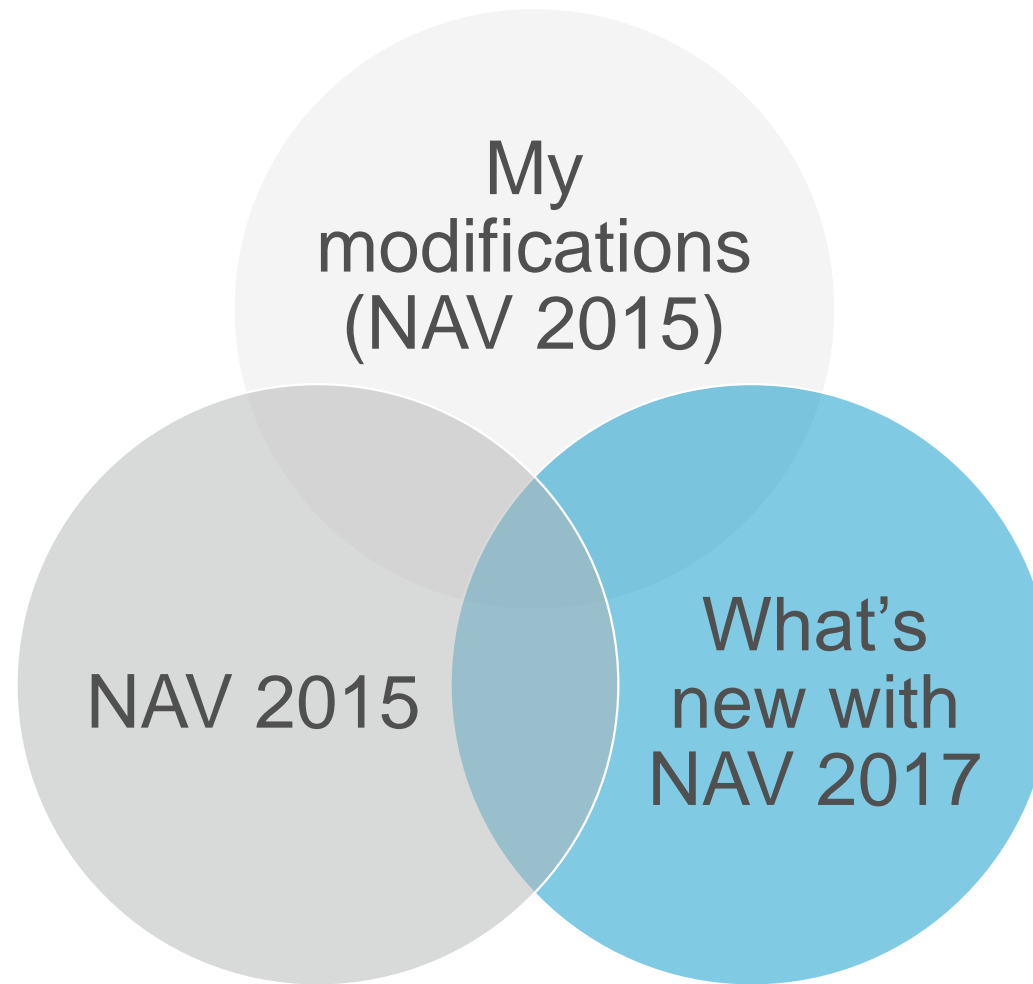
Upgrade Process



New Features

Application	
Performance	Code
Web client	
Mobile client	
Visuals	
...	
	Deferrals
	Work flow
	...

Current Modification Level



Upgrade Method Components

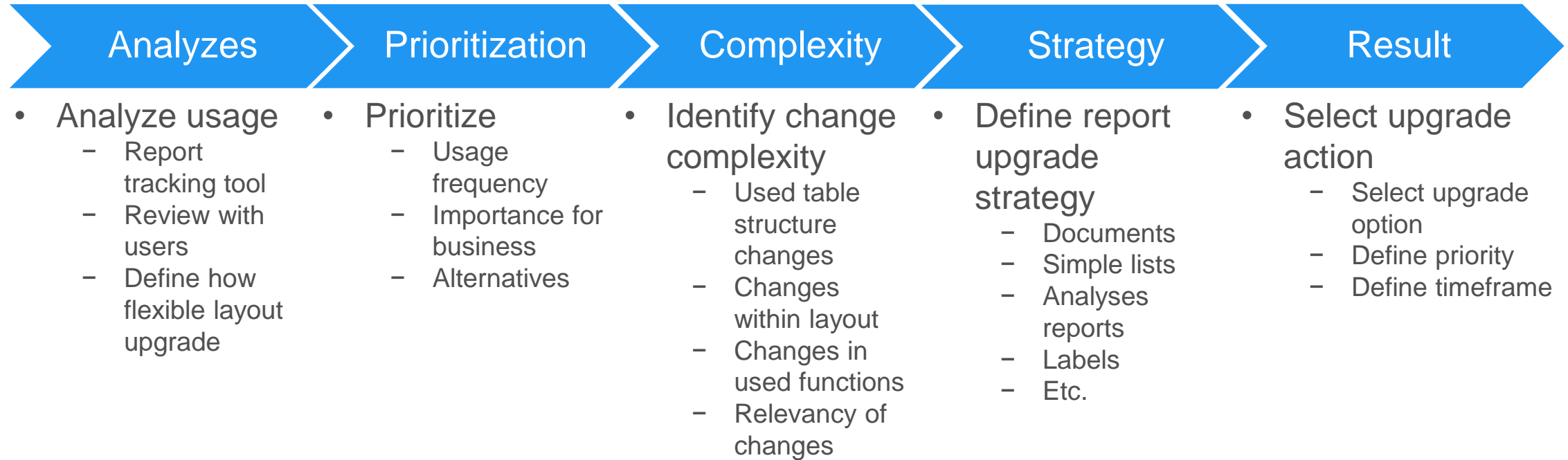
Functionality	Data	Reports	Enhancements
<ul style="list-style-type: none">• Application• Code merge• Code development	<ul style="list-style-type: none">• All data• Master data & balances	<ul style="list-style-type: none">• RDLC layout• Word Layout• Analytical tool• External tools	<ul style="list-style-type: none">• C/AL• Events

Upgrade Methods

Technical Update	Full Upgrade	Clean Start	Re-implementation
<p>What it is?</p> <ul style="list-style-type: none">• Upgrade only platform <p>Advantages</p> <ul style="list-style-type: none">• Can use new technologies• Platform bugs fixed• Usually very fast <p>Disadvantages</p> <ul style="list-style-type: none">• Old functionality• Not applicable for Classic to RTC cases	<p>What it is?</p> <ul style="list-style-type: none">• Merge <p>Advantages</p> <ul style="list-style-type: none">• Usually fastest approach• Microsoft upgrade tools can be used <p>Disadvantages</p> <ul style="list-style-type: none">• Includes outdated customizations (unless cleaned up before upgrading)	<p>What it is?</p> <ul style="list-style-type: none">• Only data migration <p>Advantages</p> <ul style="list-style-type: none">• New implementation with all historic data• No unused customizations• Easier future upgrades• Reuse of new C/AL features <p>Disadvantages</p> <ul style="list-style-type: none">• Require development• Lasts longer• Require more go-live support	<p>What it is?</p> <ul style="list-style-type: none">• New implementation <p>Advantages</p> <ul style="list-style-type: none">• No unused customizations• Easier future upgrades• Reuse of new C/AL features• Less data <p>Disadvantages</p> <ul style="list-style-type: none">• Require development• Last longer• Require more go-live support• No historical data

Reports, Vanishing objects, Enhancements

Preparation for Reports Upgrade



Report Upgrade Options

Most common used

Do Nothing	Merge (manual)	Transform (1ClickFactory)	External Tools	Recreate
<p>When?</p> <ul style="list-style-type: none">• Report not used• Standard feature available• Export to Excel, PDF, Word• Using Word layout• Analyses within Pages• Etc.	<p>When?</p> <ul style="list-style-type: none">• Previous option not valid• Few simple changes (especially within layout)• No requirement to have exactly the same layout after upgrade	<p>When?</p> <ul style="list-style-type: none">• Previous options not valid• Keep in NAV• Not a lot of data to present• One report within object	<p>When?</p> <ul style="list-style-type: none">• Previous options not valid• Have bought external tool• Migration tools exists	<p>When?</p> <ul style="list-style-type: none">• Previous options not valid <p>Actions</p> <ul style="list-style-type: none">• Select platform (maybe different per report type)• Identify experience• Prepare Functional Requirements

Vanishing Classic Client, When to Transform

Form

- Customizations still relevant
- Source table still exists
- Not a copy of standard form
- New or highly customized standard

Dataport

- Integration still in use and with the same structure
- Source table(s) still exists

MenuSuite

- Keep same IDs for most Forms (compared to Pages) and Reports
- Most of changed standard links are still valid

Enhancements

C/AL

C/AL and
Standard
Events

Events



When What Method

Cumulative updates (CU)

Technical Update	Full Upgrade	Clean Start	Re-implementation
Recommended <ul style="list-style-type: none">• “Database version” not changed• Highly customized solution• No major bug fixes within functionality• No time for full upgrade	Recommended <ul style="list-style-type: none">• All cases	Not recommended	Not recommended

Major releases (next version)

(2016 → 2017)

Technical Update	Full Upgrade	Clean Start	Re-implementation
<p>Recommended</p> <ul style="list-style-type: none">• Highly customized solution• No time for full upgrade• Code base on current version	<p>Recommended</p> <ul style="list-style-type: none">• All cases	<p>Recommended:</p> <ul style="list-style-type: none">• Many customizations of which are standard in the newer version	<p>Not recommended</p>

Major Releases (Releases Skipped)

(2015 → 2017)

Technical Update	Full Upgrade	Clean Start	Re-implementation
Not recommended	Recommended <ul style="list-style-type: none">• All cases	Recommended: <ul style="list-style-type: none">• Many customizations of which are standard in the newer version	Recommended: <ul style="list-style-type: none">• Many customizations of which are standard in the newer version• A lot of outdated data• May be mixed together with “Clean Start”

From Classic to Role Tailored

(2009→ 2017)

Technical Update	Full Upgrade	Clean Start	Re-implementation
Not possible	<p>Recommended</p> <ul style="list-style-type: none">• Most cases• Clean-up before/after upgrade <p>Not recommended</p> <ul style="list-style-type: none">• Version 3.7 and older plus highly customized• Many customizations of which are standard in the newer version	<p>Recommended:</p> <ul style="list-style-type: none">• Many customizations of which are standard in the newer version	<p>Recommended:</p> <ul style="list-style-type: none">• Many customizations of which are standard in the newer version• A lot of outdated data• May be mixed together with “Clean Start”

Summary

Upgrade Methods

Technical Update	Full Upgrade	Clean Start	Re-implementation
<ul style="list-style-type: none">• Cumulative updates (no time for full upgrade)• Major releases (max. once, no time for full upgrade)	<ul style="list-style-type: none">• Most cases unless most of customizations are standard in new version	<ul style="list-style-type: none">• Very old versions (3.70 and older)• Many customizations of which are standard in the newer version	<ul style="list-style-type: none">• A lot of irrelevant data• Very old versions (3.70 and older)• Many customizations of which are standard in the newer version

Recommendation: Upgrade in Small Steps

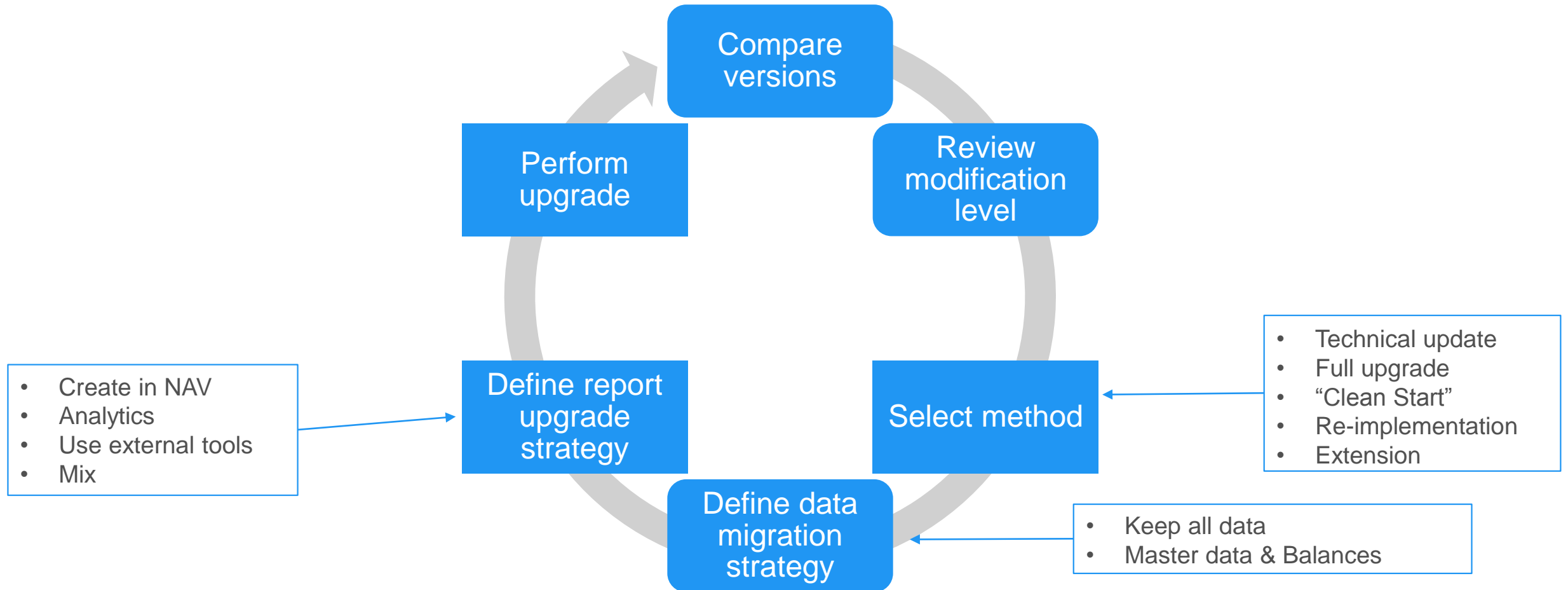
- Update/Upgrade with every CU if possible
- Upgrade at least with every third CU
- Upgrade low customized solutions with every major release
- Upgrade highly customized solutions with every second/third major release



When to Upgrade



Upgrade Process



Thank you for attending this session!

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