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MICROSOFT DYNAMICS NAV UPGRADE STRATEGIES

Compare and contrast the options for upgrades available to Dynamics NAV users across different versions.

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Available Upgrade
Options for
Dynamics NAV
Users

Microsoft Dynamics NAV Upgrade Strategies

*Is your database ready for annual upgrades?
Do you know how to prepare?*

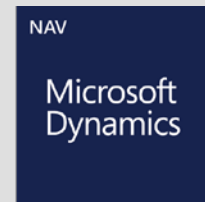
In order to take advantage of Microsoft Dynamics NAV's annual release cycle, your next upgrade needs to include the following considerations:

- MS released technology such as events, extensions, Flow, Cortana and Power BI that extend NAV without customizing the base code
- Rewrite required customizations into event subscriptions
 - You can extend and customize a Microsoft Dynamics NAV deployment without modifying the original application objects
 - Events enable changes of application behavior without code modification
- Eliminate customizations no longer needed due to business processes change or new functionality in NAV
- Evaluate ISVs and impact on upgrade path
- Choose ISV's that offer their solution as an extension
- Use a reporting tool to simplify your reporting strategy rather than modifying reports within NAV

*Do you know your Dynamics NAV
upgrade options?*

Over the years, Dynamics NAV has evolved from a DOS system to Windows (the classic client) to now a modern application with Windows clients, web clients, and mobile apps.

Many companies are still utilizing the legacy Navision/NAV classic client – 2009 or older; in some cases, they have customized it to support their business processes. In other situations, they have just waited to invest in the newer versions of NAV. Western Computer offers several options for customers that want to upgrade from their current version.



*Considering an
upgrade?*



Our Customer Account Managers are here to help you through this process. They can work with you to evaluate your current NAV instance, bring in subject matter experts to advise on different areas, and help you choose one of our upgrade offerings.

In addition to reviewing your current NAV database, Western Computer can help you determine your infrastructure requirements for NAV. Today you have the choice of on premise, partner hosted, or using the Microsoft Azure cloud services. Your customer account manager will explain all three options to you and help you determine a complete cost of ownership.

What are my Dynamics NAV upgrade options?
www.WesternComputer.com

Complete (As-Is) Upgrade

The **Complete Upgrade** approach involves a thorough upgrade of all Dynamics NAV objects including Reports. The main highlights of this approach are:

- All supported custom objects are brought forward into NAV
- Forms are converted to Pages (for the RTC, web client, and universal app).
- Reports are converted to the new RDL reports for Windows

The **Complete Upgrade** results in the least amount of work for the NAV users but requires the most amount of effort from NAV developers to convert everything to the new version. This option also brings forward all data (both good and bad). For example, it is nice to have complete detailed transactional history, but your lookups might be slow. All of this history may also limit your future decisions in NAV, such as changing costing methods, posting groups, locations or other key configurations.

WC Fresh Start Upgrade

The **WC Fresh Start Upgrade** simply upgrades your data and tables but no other objects (code, reports, forms, data ports). This approach is well suited for a company that wants to keep all of their detailed transactional history in NAV but feel like most of their customizations may no longer be required – due to new functionality in NAV or changing business processes. Here is a typical approach to a **WC Fresh Start Upgrade**:

- Database is upgraded and delivered to client's test environment
- The client can review NAV 2016 functionality with all of their data. We have found that reviewing with your data is a more efficient way to determine which customizations may no longer be required than with the Cronus database.
- Client works with a Western Computer consultant to determine which customizations are required based upon current business processes
- Required customizations are identified and redeveloped in NAV using the event subscription methods in NAV 2016 and later.

This upgrade requires significantly less effort from a NAV developer than a Complete (As-Is) Upgrade. However, there is more time to be taken by the NAV user to review customizations and determine which ones should be moved into the latest version of NAV.

New Start Upgrade

In this approach, we start with a blank NAV database and import selected data. Limited history is migrated, eliminating existing custom data and custom code. In a **New Start Upgrade**, the following data can be migrated from your older NAV system:

- All master records (customers, vendors, items, GL Accounts)
- Open transactions (purchase orders, sales orders, open AP and open AR) Historical Sales and Purchase Invoices – Posted sales and purchase invoices can be migrated as Posted Invoices – both header and line items can be included. For example, a user could look up customer purchase history while on the phone with a customer.
- Common configuration tables in NAV (posting groups, dimensions, unit of measure, number series)



In a **New Start Upgrade**, some history is tough to migrate. This includes detailed history that links together the sub-ledgers in NAV. For example, it is relatively easy to migrate a posted sales invoice (with header and line items) but harder to bring over the corresponding customer payment(s) related to that invoice and link them to that invoice. You would also be able to see the inventory item on the posted sales invoice, however migrating item ledger entries and value entries and linking them together in the new system is more difficult.

If detailed history is required, then a data warehouse can be utilized to store this data. Western Computer offers a data warehouse that can be quickly populated with detailed data from older versions of NAV.

There are many advantages to this approach; they include:

- Any old corrupt data is left behind. This is especially useful for companies with inventory costing issues.
- Old customizations can be eliminated or rewritten based upon newer business requirements.
- You can redesign your NAV system with a new chart of accounts, dimensions, posting groups.

While this approach utilizes the least amount of programming time (primarily data migration and creation of document reports), it does require more time for the NAV users to define business requirements, assist in configuration, test transactions and implement the new system. However, customers that choose this approach often enjoy a lower cost of ownership due to their advanced knowledge of their new system.

Conclusion

In conclusion, there are several different options for a NAV customer on an older version to upgrade to the latest version of NAV. This table provides a summary of the various options available to Western Computer clients.

Offering	As-Is	WC Fresh Start	New Start
Description	Traditional Upgrade	Upgrade of all data	No upgrade of database
Data Migration	Includes all history	Includes all history	Limited history, master data and setups
Development Effort	High for classic client users, less for later versions	Upgrade effort is less, customizations are developed as needed using events	No upgrade effort, customizations are developed as needed using events
Customer Effort	Little effort, simply learning new version	Medium effort for customer	Most effort for customer
Consulting Effort	Very little	Medium effort	Most effort

[Contact us today](#) to speak to a Dynamics NAV expert and evaluate which approach would work the best for your instance.