



# STREAMLINING YOUR BUSINESS CENTRAL UPGRADE: A COMPREHENSIVE GUIDE

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# 1. Introduction

## 1.1 Overview of Migration Strategy and Objectives

Our migration strategy is focused to streamline the transition from Dynamics NAV to Dynamics 365 Business Central with minimal disruption to existing workflows. This strategy encompasses a thorough assessment of current systems, meticulous planning of data and application migration, and rigorous testing to ensure seamless migration and integration. Our objective is to not only preserve the integrity and functionality of data and processes but also to leverage the advanced features of Business Central to enhance cost effective, operational efficiency and decision-making capabilities.

## 1.2 Importance of Migration from Dynamics NAV to Business Central

Migrating from Dynamics NAV to Business Central is crucial for organizations seeking to adapt to the evolving business landscape. This transition offers significant advantages, including improved data accessibility across devices, enhanced security measures, superior analytical and reporting tools which promote artificial intelligence. It positions organizations to better handle growth, scale efficiently, and meet the increasing demands of data governance and customer service in a digital-first world.

# 2. Strategy Blueprint

The script program for Business Central online is designed to migrate data to a standard version of Microsoft Dynamics Business Central without any custom modifications. This program uses a script specifically created to move customer data from older versions to the latest Microsoft Dynamics 365 Business Central. If script program is included, the Custom Data Migration to Extension service ensures that data from customized fields is also transferred to the new version, preventing any data loss. Additionally, if there were any third-party solutions (like ISV products) or integration used in the previous system that are supported in the new version, these can be integrated during the migration. Each migration is customized to maintain any specific features that the customer values. After the migration is complete, it is recommended to evaluate for any missing features or additional data needs. Further development and enhancement services are available to add back any missing features in the new setup.

# 3. Detailed Migration Process

## 3.1 Assessment and Planning:

- **Evaluate the current setup:** Review the existing systems, applications, data, and infrastructure to identify what will be migrated.
- **Set clear goals:** Outline specific objectives for the migration, whether it's to enhance performance, cut costs, or boost security.

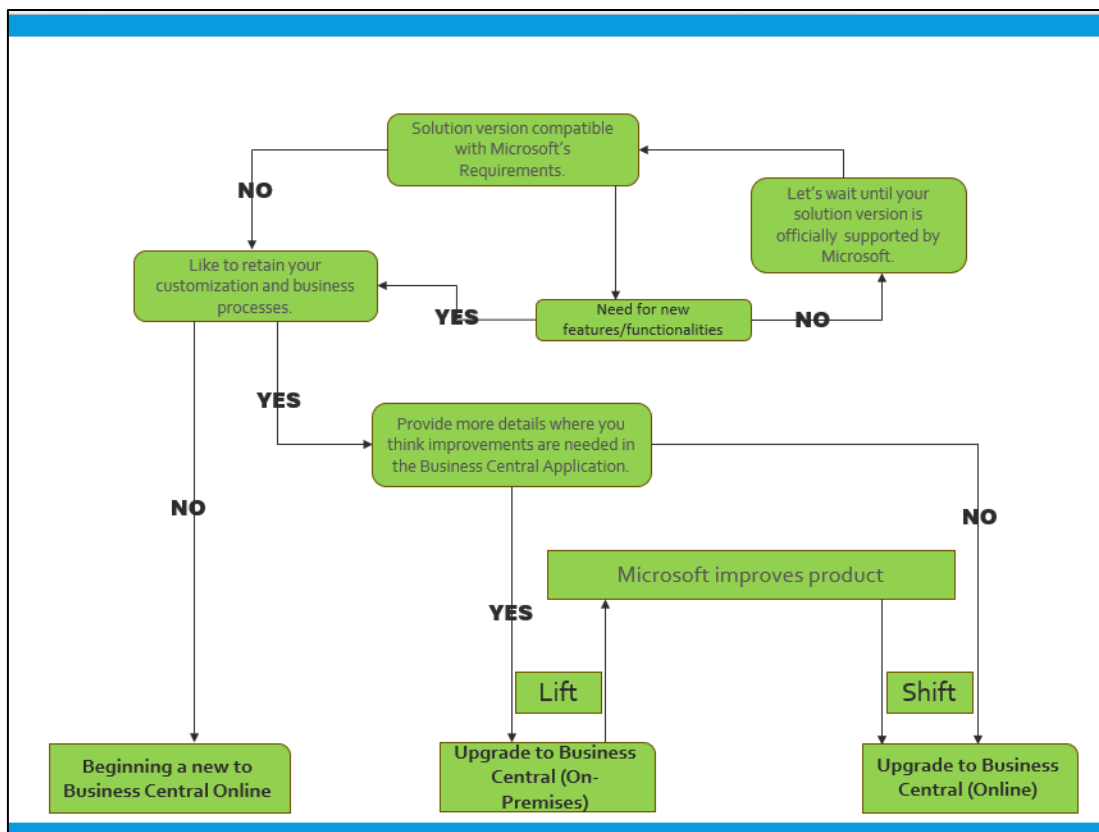
- **Map out dependencies:** Understand how systems and components interact to guarantee a seamless migration.
- **Conduct risk assessment:** Spot potential hurdles and challenges that could crop up during migration and plan ways to address them.

### 3.2 Choosing a Migration Strategy:

- **Lift and Shift:** Transfer existing applications and data directly to the new platform without major changes.
- **Re-platforming:** Make necessary modifications to applications or infrastructure to fit the new environment while keeping their essential functions.
- **Re-architecting:** Completely redesign applications or infrastructure to fully leverage the new environment's features and capabilities.
- **Replacement:** Swap out old systems or applications with newer versions that better align with current business requirements.

### 3.3 Selection of Tools and Technologies:

- **Pick the right tools:** Choose migration tools and technologies that are compatible with your migration strategy and can efficiently support the process.
- **Evaluate key factors:** Look at compatibility, scalability, performance, and user-friendliness when selecting tools and technologies.

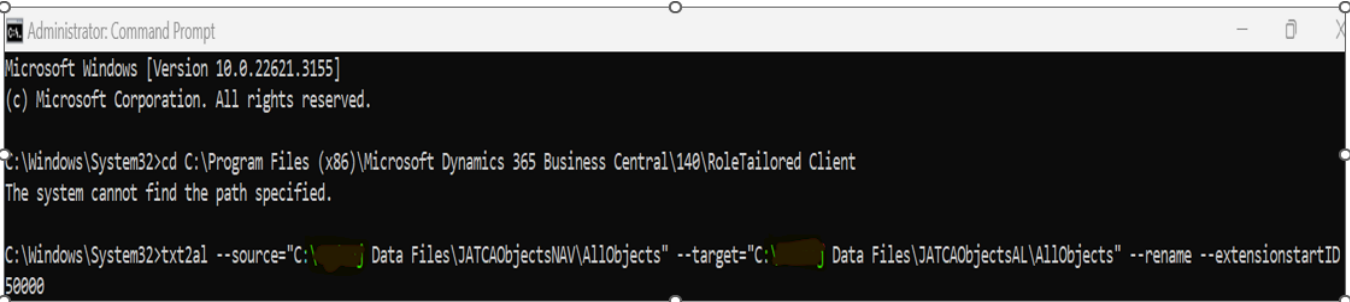


**Business Central Platform decision making for Upgrade.**

### 3.4 Application Migration Process:

- **Evaluate Application Compatibility:** Check if current applications can operate in the new environment as-is or if they need modifications.
- **Manage Customizations:** Shift customizations into custom objects. Necessary customizations should be converted into extensions, which help isolate custom changes from the core application code. Begin by removing custom code from standard objects and establish custom event subscribers that link to standard event publishers. Additionally, modifications in standard tables and other non-code customizations should be transferred to new custom object types such as Table Extension, Page Extension, Report Extension, and Enum Extension.
- **Utilize Conversion Tools:** Commands are available through PowerShell or command prompt to convert CAL (Navision) objects to AL (Business Central) extensions.

**Important Note:** The Txt2Al conversion tool (txt2al.exe) is available only in version 14 (BC14).



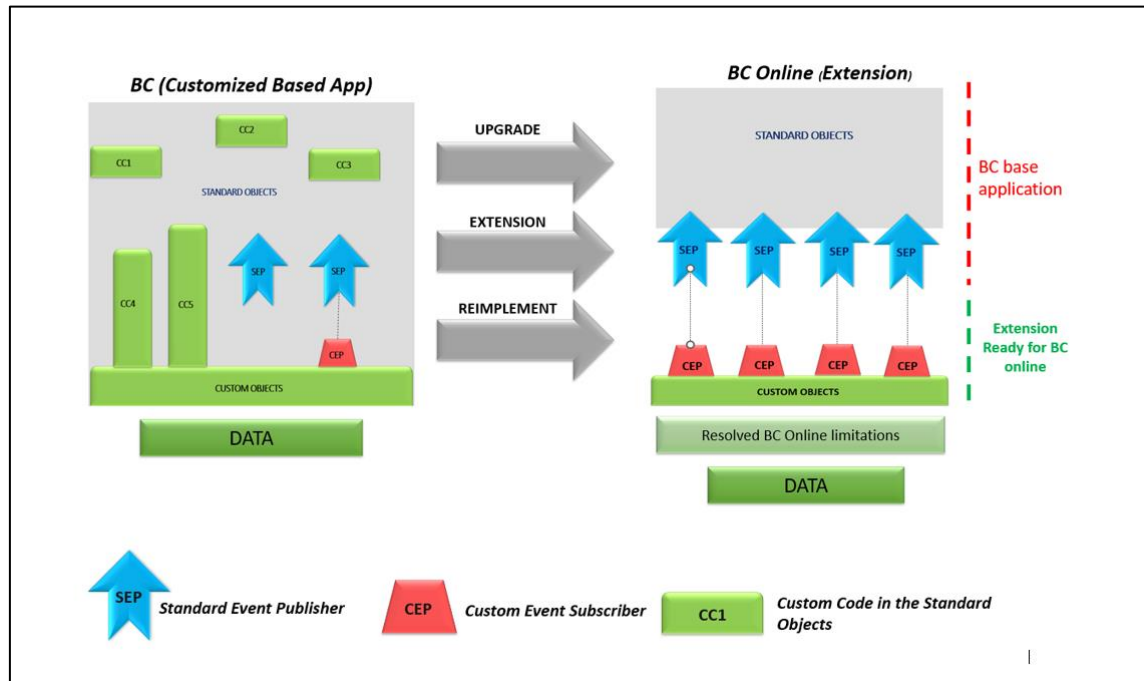
```
Administrator: Command Prompt
Microsoft Windows [Version 10.0.22621.3155]
(c) Microsoft Corporation. All rights reserved.

C:\Windows\System32>cd C:\Program Files (x86)\Microsoft Dynamics 365 Business Central\140\RoleTailored Client
The system cannot find the path specified.

C:\Windows\System32>txt2al --source="C:\[redacted] Data Files\JATCAObjectsNAV\AllObjects" --target="C:\[redacted] Data Files\JATCAObjectsAL\AllObjects" --rename --extensionstartID
50000
```

#### ***Command for converting CAL code to AL Code***

- **Review Remaining Customizations:** Examine any customizations still embedded in the standard code and the technical limits of Business Central online and strategize the best approach to address these discrepancies.
- **Package Custom Objects:** All custom objects should be consolidated into an extension. If any customizations remain in the base application, creating an extension won't be feasible.
- **Solution Cleanup:** To successfully upgrade the solution and migrate most customizations to Business Central online efficiently, it's crucial to identify which customizations should be discarded and which should be preserved.

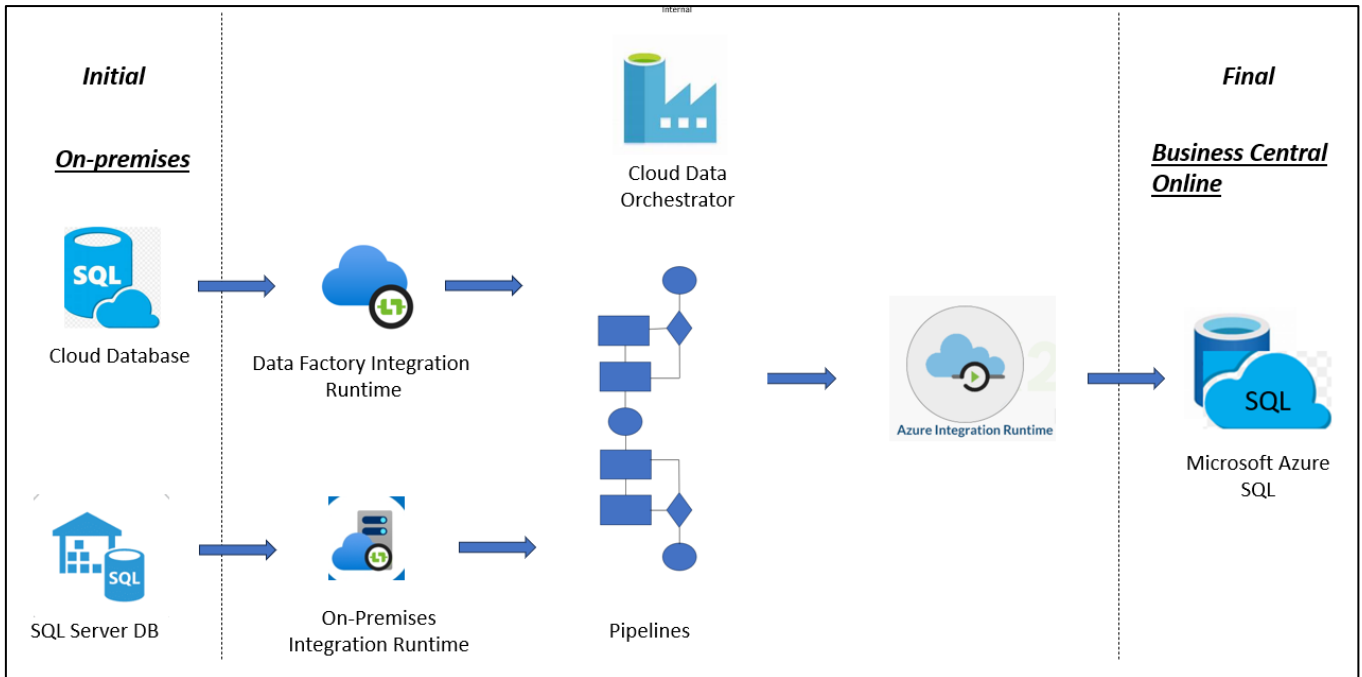


### Extension Design Methodology

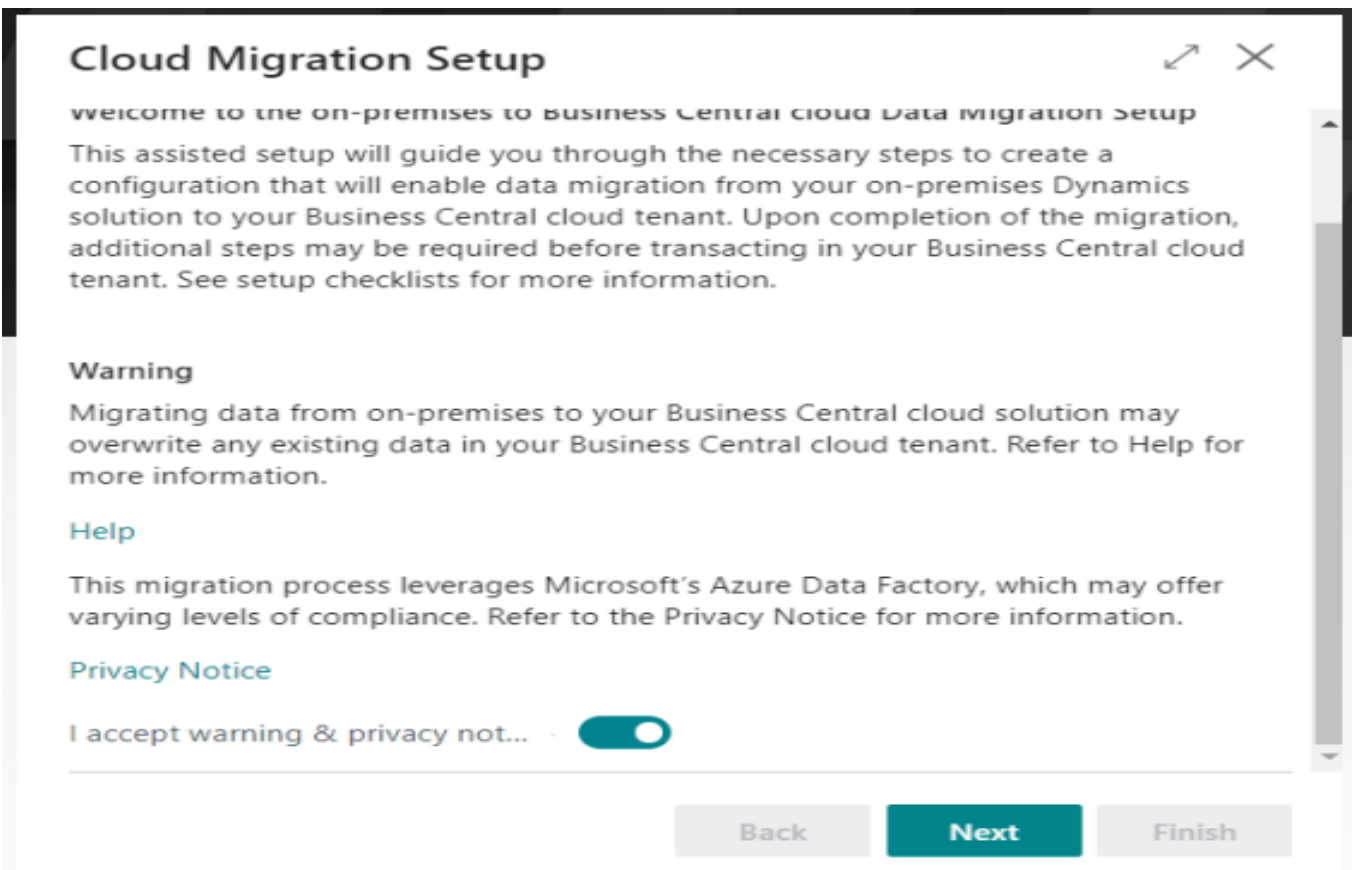
#### 3.5 Data Migration:

- **Manage Migration Phases:** Oversee the cloud migration from Business Central online. It's important to note that during the migration phase, the on-premises solution should remain active until the migration is fully completed. Avoid initiating cloud migration for a production environment in active use as it risks overwriting essential business data. This risk persists even if the migration targets a different company within the same environment due to potential overwrites of shared data.
- **Specify Data Migration Needs:** Identify the data that needs to be transferred, the process for its transformation, and the migration technique to be used, such as ETL (Extract, Transform, Load), batch processing, or real-time replication.
- **Maintain Data Integrity:** Ensure the migrated data maintains its accuracy, completeness, and consistency by conducting thorough validations and testing.
- **Establish a Testing Environment:** Set up a testing environment in Business Central online where the per-tenant extension is installed. Utilize standard Microsoft data migration tools to transfer data from any NAV/Business Central version to the latest on-premises version of Business Central. If the solution includes ISV add-ons, use the data migration tools provided by the ISV partners. Once all data is consolidated in the newest Business Central on-premises version, employ the Cloud Migration Setup to shift data to Business Central online.
- **Integration of SQL Procedures:** With Business Central on-premises, add several stored procedures to the SQL Server instance specified. These procedures are essential for transferring data from your SQL Server database to the Azure SQL server linked with your Business Central tenant.

- **Cloud Migration Capability:** Business Central includes a setup for migrating data from Navision on-premises systems to the Business Central cloud environment.



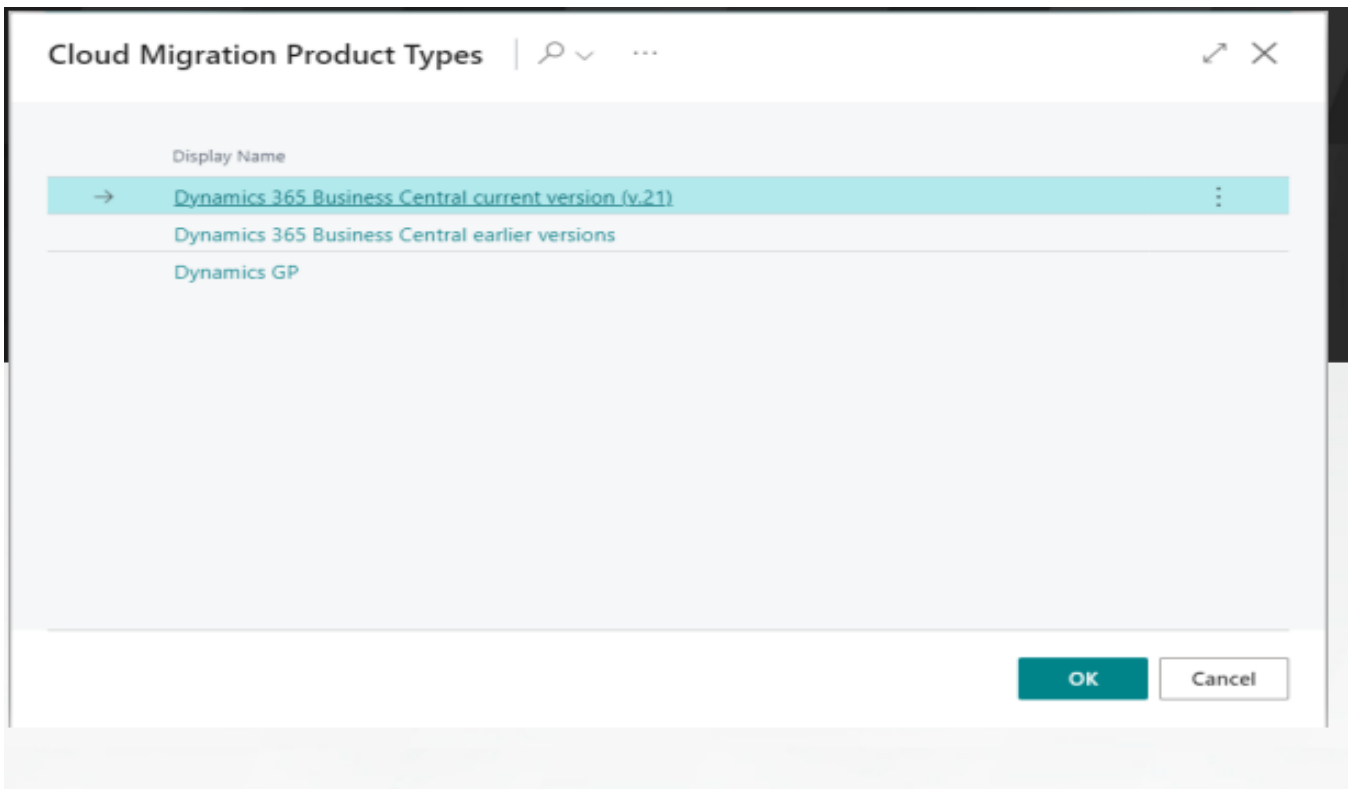
**Data Migration from on-premises environment to cloud environment**



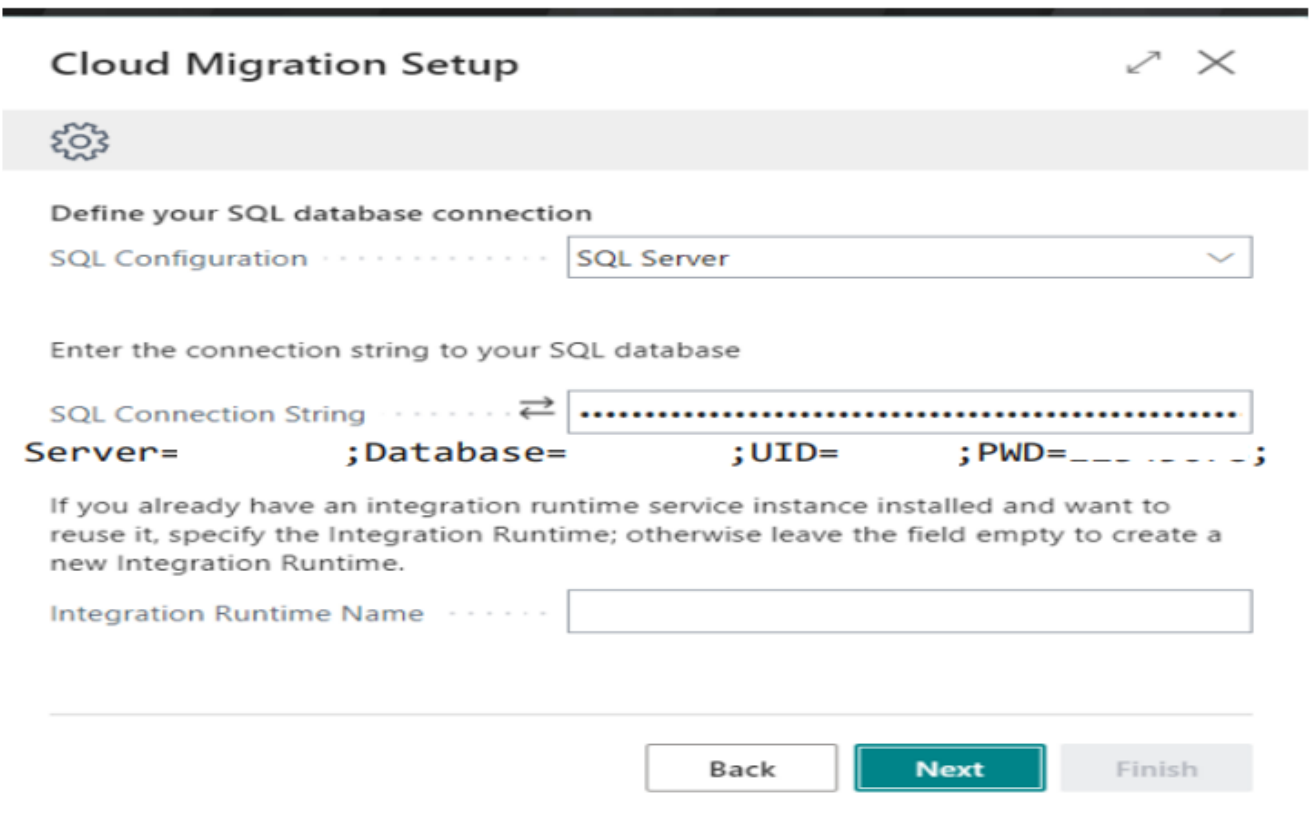
**Cloud Migration Setup Wizard - Step 1**



There is an option to select environment whether cloud or another version.



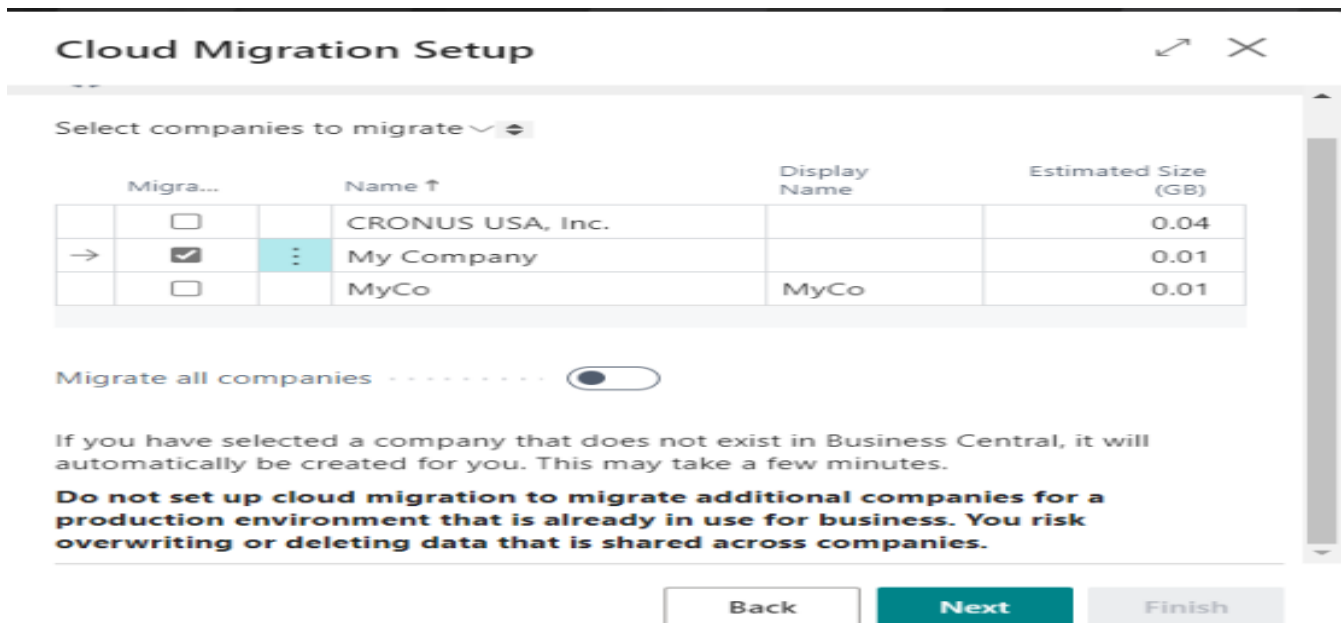
**Cloud Migration Setup Wizard - Step II**



**Cloud Migration Setup Wizard - Step III**



After creating connection system setup will have option whether data transfer for selected company or all company data migration.



Migra...	Name ↑	Display Name	Estimated Size (GB)
<input type="checkbox"/>	CRONUS USA, Inc.		0.04
→ <input checked="" type="checkbox"/>	My Company		0.01
<input type="checkbox"/>	MyCo	MyCo	0.01

Migrate all companies

If you have selected a company that does not exist in Business Central, it will automatically be created for you. This may take a few minutes.

**Do not set up cloud migration to migrate additional companies for a production environment that is already in use for business. You risk overwriting or deleting data that is shared across companies.**

Back Next Finish

### Cloud Migration Setup Wizard - Step IV

### 3.6 Infrastructure Migration:

- **Set Up Infrastructure:** Establish necessary hardware, networking, and software components in the destination environment.
- **Install and Set Up Applications:** Place and adjust applications within the new infrastructure to meet performance, security, and scalability expectations.

### 3.7 Testing and Validation:

- **Execute Tests:** Carry out functional, performance, and compatibility tests to ensure the migrated systems and applications function correctly.
- **User Acceptance Testing (UAT):** This phase involves training and testing to confirm the migration meets system requirements. Users should verify data completeness, check alignment between legacy and cloud fields, and validate that workflows operate correctly. Approval from users on each test case is required before moving to production.
- **Verify Plugins & Third-Party Integrations:** Ensure these components are secure and compatible with the system, continuously validating data throughout the upgrade.

### 3.8 Deployment and Cutover:

- **Plan the Deployment:** Arrange the migration timeline to reduce impact on business operations, considering peak times and potential downtimes.
- **Implement the Cutover:** Follow through with the migration plan, covering data, application, and infrastructure transfers as scheduled.

- **Monitoring and Optimization:** Keep an eye on the new environment for any issues or performance lags and rectify them swiftly. Adjust the Business Central online setup to align with business requirements, potentially including security setups, customization of forms and reports, and integration with existing systems.

### 3.9 Post-Migration Support:

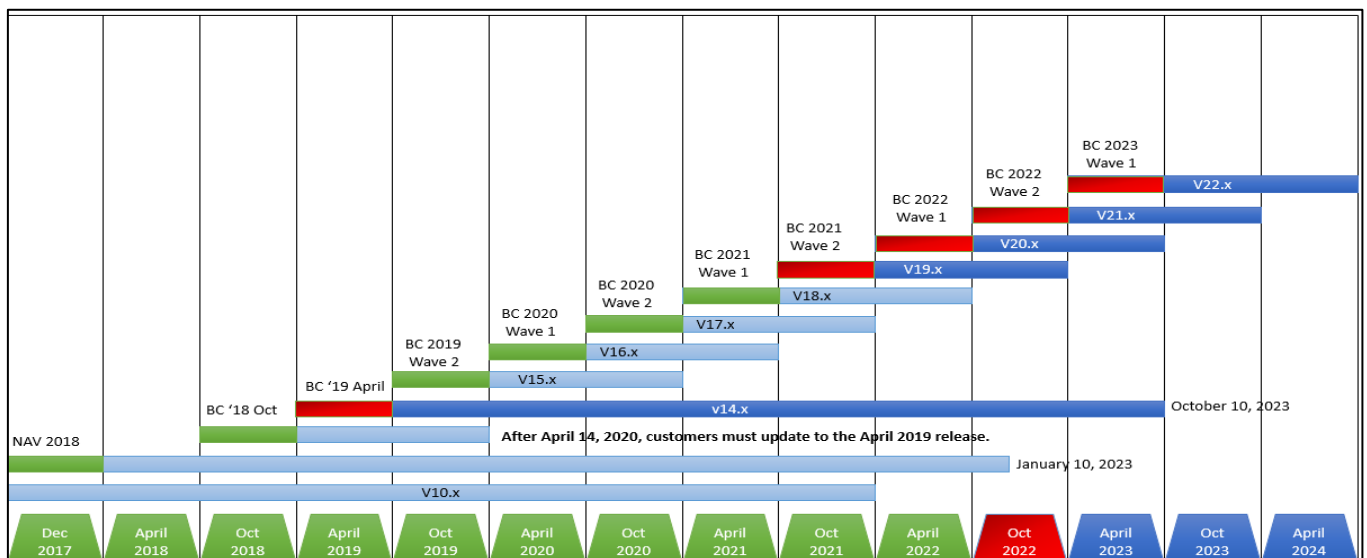
- **Ongoing Support:** Assist users and stakeholders with any post-migration issues or queries.
- **Refinement and Optimization:** Continuously improve the migrated systems based on user feedback and performance monitoring to enhance their functionality and efficiency.

### 3.10 Documentation and Knowledge Transfer:

- **Document Everything:** Record all details of the migration process, including steps taken, configurations, and key takeaways, to aid future migrations or troubleshooting efforts.
- **Knowledge Sharing:** Conduct sessions to transfer essential knowledge to stakeholders so they can effectively manage and support the new environment.

### 3.11 Continuous Improvement and Support Policies:

- **Dynamics NAV/Business Central Support Framework:**
- **Mainstream Support:** Includes incident support, new features, and both security and non-security updates.
- **Extended Support:** Continues to provide security updates after warranty claims end and no longer accepts requests for new features or design changes.



**Continuous Improvement and Support Policies**

By implementing these practices and customizing them to fit your unique needs and limitations, you can create an effective migration strategy that guarantees a smooth transition to the new system while reducing risks and minimizing disruptions.

#### 4. Benefits of Migrating from Dynamics NAV to Business Central:

- **Centralized Data Hub:** Switching from Dynamics NAV to Business Central enhances visibility across your customer's operations and business data, regardless of the number of locations involved. This platform ensures quicker, more informed decision-making. Additionally, it includes various analytical tools that support artificial intelligence, Power BI, and predictive analytics, providing a holistic view of your organization, market conditions, and customer insights and trends.
- **Enhanced Security:** Business Central provides more comprehensive view and robust security compared to Dynamics NAV. As a legacy on-premises solution, Dynamics NAV is outmatched by Dynamics 365 Business Central's array of security capabilities, making it far superior to many traditional ERP systems. Transitioning to this cloud-based solution significantly bolsters your data security measures.
- **Greater Cost Efficiency:** Continuing with an on-premises ERP like Dynamics NAV won't reduce costs for your customers. Conversely, switching to Dynamics 365 Business Central dramatically lowers operational expenses related to equipment, administration, labor, and storage. Adopting cloud technology can substantially decrease the total cost of ownership. Business Central can further cut administrative costs involved in storage management, disaster recovery, software updates, and more.
- **Optimized IT Utilization:** IT leaders should reassess their technology use to maximize their tech investments. Optimal use of technology allows them to discover new opportunities and innovate more effectively. By adopting a cloud-based management solution such as Dynamics 365 Business Central, you enhance business outcomes, boost digital innovation, enhance customer experiences, overhaul business models, reallocate cost savings, and generate new revenue streams. Ultimately, Dynamics 365 Business Central saves management time, which can be strategically used to better understand and meet customer needs.
- **Extensive Accessibility:** Transitioning your ERP system to Dynamics 365 Business Central enables universal access to business data across any device, anytime, anywhere. Business Central equips you with advanced tools that allow you to manage business operations seamlessly from any device, facilitating data access without the constraints of traditional, isolated databases. Moreover, this move is crucial for businesses aiming to support hybrid work environments and develop global partnerships.
- **Enhanced Security:** Dynamics 365 Business Central's security features far exceed those of Dynamics NAV, providing robust protection that challenges even the best on-premises

ERP systems. By moving to a cloud-based solution like Business Central, your business takes significant steps to enhance data security.

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