

BI4Dynamics NAV Upgrade Guide

BI4Dynamics NAV version: 5.3.0

Last update: November 2016

Revision: 1.2

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1 INTRODUCTION

BI4Dynamics NAV upgrade guide is written as a best practice approach scenario when upgrading from older to newer version of BI4Dynamics NAV.

Very likely one of the BI4Dynamics releases in a year is a major release. This usually brings many changes in Data Warehouse and in .NET framework (license, instance, others). In such case a new installation / project has to be started.

When upgrading minor releases, upgrade might be done with less effort.

Please follow the guidelines that are written in this document.

2 PREPARE

2.1 Do a Backup

If doing upgrade on the same server, first do a backup of existing installation folder.

- Create a copy of the entire folder BI4Dynamics NAV and store it somewhere safe.
- If you want to keep running the old versions on the same server, just rename the Installation Folder (for example BI4Dynamics NAV Version xx)

2.2 Check Server ID

ServerID is used for BI4Dynamics license authentication. If you make changes on server hardware configuration (MotherBoard, CPU or HDD), a new ServerID might be needed.

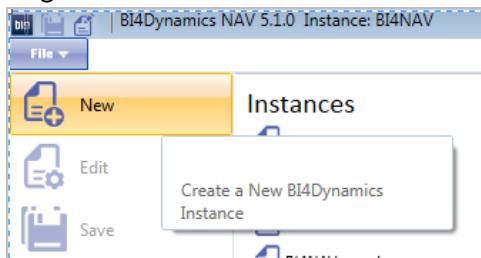
Server ID has to be updated when:

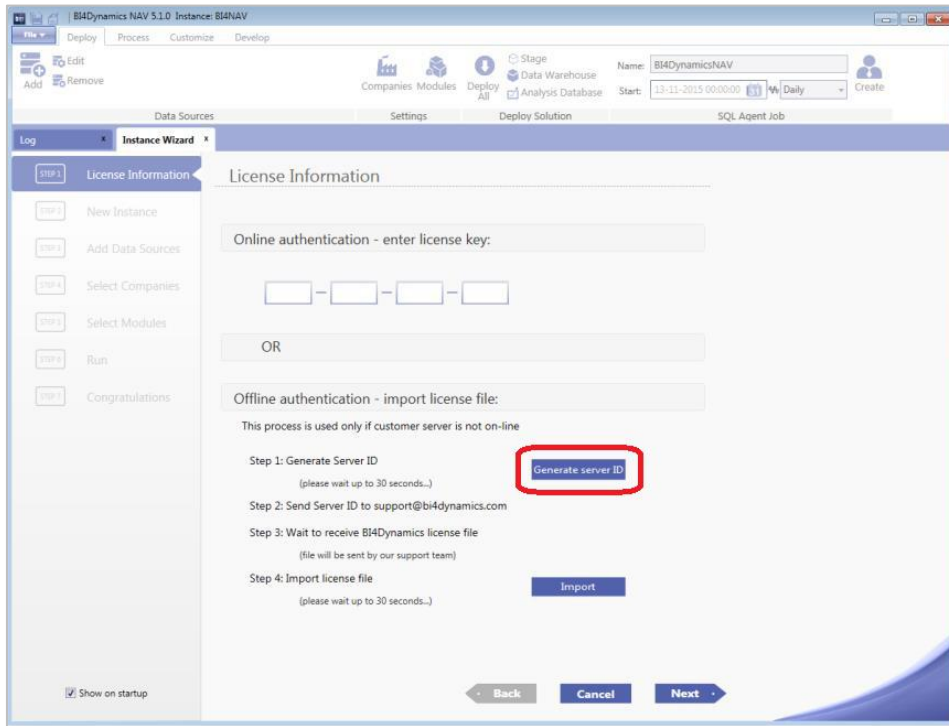
- Moving installation to a new server
- Upgrading hardware on existing server

In case your ServerID does not match the ServerID in your BI4Dynamics license (you will not be able to open an old instance), please send the new ServerID and the BI4Dynamics license key to support:

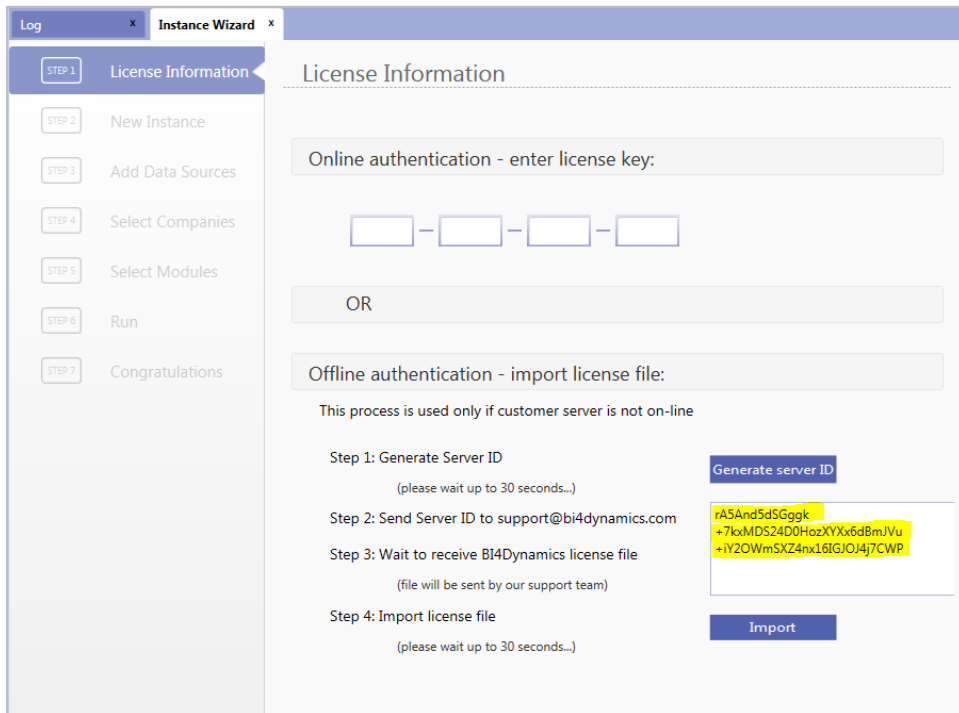
support@bi4dynamics.com

To generate a new server ID Click File -> New





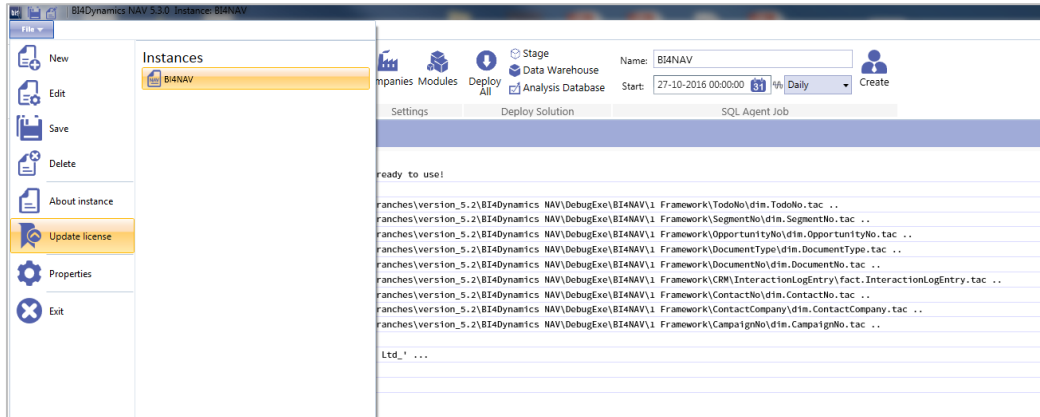
Click Generate server ID



2.3 Update BI4Dynamics license

From BI4Dynamics NAV 5.1+ update license is done automatically during daily processing. If you are using older version or you would like to update license manually go to File → Update License.

In case your license does not support the BI4Dynamics version you are trying to install, please contact support: support@bi4dynamics.com



3 INSTALL

3.1 Do the installation

There are a lot of documents and videos available to support this process.

- Install new version and create a new instance

The latest BI4Dynamics NAV installation package can be downloaded from <http://www.bi4dynamics.com/resources/dl/BI4DynamicsTrial.zip>

- Configure the instance as required.
- Deploy and process of standard solution.

Please see the Installation guide and video for details about the installation process:

<http://www.bi4dynamics.com/dl/nav/Installation-Manual-BI4Dynamics-NAV.pdf>

[Step by Step Installation process video](#)

3.2 Transfer the customizations

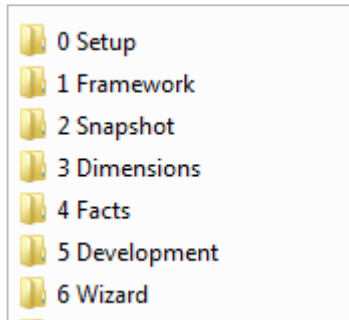
This part of project might require a skilled BI developer.

- Transfer the customizations from old instance to the new one

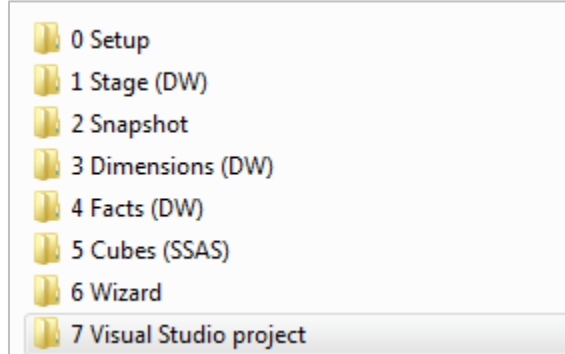
Some of your existing/old customizations might already been included to the standard solution, so you can check the standard content first.

For the customizations still required, please transfer the files from old instance folders to new instance folders.

Previous version



Version 530+



Update the customized scripts according the new version specification.

- Run deploy and process
- Check the data in Excel and Power BI reports

4 TEST

4.1 Download and connect to new Excel and Power BI reports

- Download the latest version of Excel reports
[Prebuilt Excel reports](#)
- Check the video which shows how to change connection in Excel
[Change Excel connection to BI4Dynamics cubes](#)
- Download the latest version of Power BI reports and explore what is new in Power BI support:
<http://www.bi4dynamics.com/power-bi/>

5 FINISH

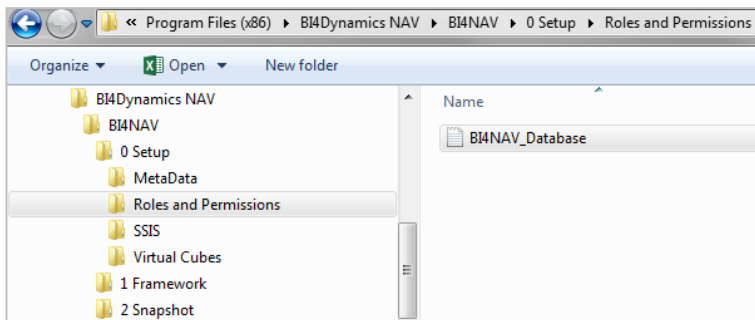
5.1 Schedule the Job agent to run the data update processing

- Create a new SQL Server Job Agent from BI4Dynamics or
- Modify settings of existing Job Agent on SQL Server (SSAS engine)

5.2 Apply roles and permissions

If required, you can define roles and permissions for users to grant the access to the data they are allowed to see. This is done on the SQL Server Analysis services.

- Please see the video for more details:
[Setting up Roles and Permissions video](#)
- Update roles and permission from previous version
In case you have roles and permissions defined already on the existing/old instance then you can transfer the permissions file from existing to new instance folder. Only permissions for those objects (dimensions, facts) that have exactly the same name will be transferred to new instance.



6 VERSION SPECIFICS

6.1 530

- From versions before 520
New instance has to be created for every upgrade project.
- From version 520+
The same instance can be used