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Wiise and Business Central Upgrade Process

Combined process from Business Central / Wiise / Momentum to outline for you in the management of upgrades and updates (Hot Fixes).

Wiise – Releases and updates sources

https://docs.wiise.com/releases-and-updates

https://www.wiise.com/release-notes

https://learn.microsoft.com/en-us/dynamics365/business-central/dev-itpro/administration/update-rollout-timeline

Microsoft Dynamics 365 Business Central

Monthly releases

Wiise releases new features on a monthly release cadence. These typically occur on the third Thursday of every month to minimise disruption to end of month and other critical activities.

Patches and hotfixes

Wiise has in place a Service Level Agreement to ensure business continuity for our customers. All critical patches and hotfixes are communicated as a priority to implementation partners to ensure business continuity and compatibility for any customisations.

Microsoft Business Central Updates

Wiise is built on the Microsoft Dynamics 365 platform. To ensure that Business Central remains up-to-date, secure, and feature-rich, Microsoft employs a structured release management strategy. This strategy includes both major and minor releases, each serving distinct purposes and following specific schedules.

Major Releases

Major releases are substantial updates that occur twice a year, typically in April and October. These updates introduce new features, significant enhancements, and improvements to existing functionalities.

Key Characteristics

- **New Features:** Major releases include new modules, capabilities, and integrations to extend the functionality of Business Central.
- **Performance Enhancements:** Improvements in system performance, scalability, and reliability.
- **User Experience Improvements:** Updates to the user interface and user experience to make the system more intuitive and efficient.
- **Backward Compatibility:** Efforts are made to ensure compatibility with previous versions, but businesses are encouraged to test customizations and integrations thoroughly.

Rollout Process

1. **Preview Phase:** A few months before the official release, a preview version is made available. This allows partners and customers to test new features and prepare for the update.
2. **General Availability (GA):** The new version is officially released and made available to all users.
3. **Upgrade Window:** Currently, businesses typically have 60 days to schedule and perform the upgrade.

Minor Releases

Minor releases, also known as cumulative updates (CUs), are monthly updates that focus on delivering incremental improvements and critical fixes. These updates ensure the system remains secure, stable, and efficient.

Key Characteristics

- **Bug Fixes:** Resolution of issues and bugs reported by users or identified by Microsoft.
- **Security Updates:** Patches for vulnerabilities to protect against security threats.
- **Minor Enhancements:** Small improvements to existing features based on user feedback and usage data.

Rollout Process

1. **Monthly Cadence:** Minor releases are scheduled and deployed monthly.
2. **Automatic Updates:** These updates can be automatically applied to cloud environments, minimizing disruption to business operations.
3. **Testing and Validation:** Businesses are encouraged to test updates in a sandbox environment before applying them to the production system.

Momentum Best Practices for Managing Microsoft Releases

1. **Stay Informed**: From the Microsoft Dynamics 365 Business Central web page find release plans and update notifications to stay informed about upcoming releases and changes.
2. **Preparation**:
    a. Email sent informing of the scheduled major upgrade.
    b. Prepare Sandbox for the upgrade.
    c. Send Email confirmation to inform of an updated and include a Case for support during the upgrade process including testing of all integrations, forms, reports, and customisation.
    d. Confirm the activities and the scheduled date of the upgrade.
    e. Test plan is provided to assist with process testing by both parties.
3. **Test Thoroughly**:
    a. Use sandbox environments to test major and minor updates against customised code, extensions, and integrations so that they continue to function correctly.

b. Assistance to resolve any issues identified in the upgraded sandbox.

c. Confirm testing complete prior to upgrade of Production Environment.

4. Plan Upgrades:

   a. Schedule upgrades during periods of low activity to minimize disruption.

   b. Ensure all stakeholders are aware of the update timeline and potential impacts.

   c. Day After upgrade

      1. Ensure all customisations are working in the Production Environment

      2. Forms and reports are checked

      3. Integrations are working