

DFC Consultants Upgrade Form

Revised 05/17/16

Information provided below will be used to estimate time and viability of upgrading Dynamics GP. If you would like assistance with the form or would like to have DFC schedule a SQL Server Health Check, please call 701-281-6112. Please fax this form back to DFC at 701-281-4798 attn: Deb Schaffer or email to debs@dfcconsultants.com



CUSTOMER INFORMATION

Customer _____
 Contact Person _____
 Phone Number _____
 Email Address _____

Date Received _____
 Upgrade Scheduled _____
 Consultant _____
 Completed _____

MICROSOFT DYNAMICS GP INFORMATION

Current Dynamics GP version _____
 Number of Databases _____
 Databases and sizes

| Database | Size |
|----------|-------|
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |
| _____ | _____ |

If you have more than 4 databases, please include that information on another sheet. This information is needed for determining approximate times to upgrade.

DATABASE INFORMATION

Current SQL Server version _____
 Do you want DFC to upgrade SQL Server? _____

SUPPORTED SQL VERSIONS FOR GP 2016

- Microsoft SQL 2016 – Enterprise, Standard Edition, or Express
- Microsoft SQL 2014 – Enterprise, Standard Edition, or Express
- Microsoft SQL 2012 – Enterprise, Standard Edition, or Express

SUPPORTED SQL VERSIONS FOR GP2015

- Microsoft SQL 2014 – Enterprise or Standard Edition
- Microsoft SQL 2012 or later - Enterprise or Standard Edition

SERVER INFORMATION

Will you be getting a new server for this upgrade? _____
 Date the server will be available for upgrade? _____
 Enter the server specifications below that Dynamics GP will reside on

SERVER OPERATING SYSTEM

32-bit

 Microsoft Windows Server 2008 Standard Edition SP2 or later

x64 Only

 Microsoft Windows 2016 – Essentials or Standard Edition

 Microsoft Windows 2012 R2 – Essentials or Standard Edition

 Microsoft Windows 2012 – Essentials or Standard Edition

 Microsoft Windows Server 2008 R2 Standard Edition SP1 Edition or Later

 Microsoft Windows 2008 Server Standard Edition SP2 or later

SERVER SPECIFICATIONS:

Processor speed & number of Cores _____
 RAM _____
 Additional drives & disk space _____
 Is this a virtual platform? _____

Supported Virtual Environments:

 Windows Server 2016 Hyper-V

 Windows Server 2012 R2 Hyper-V

 Windows Server 2012 Hyper-V

 Windows Server 2008 R2 Hyper-V

 Windows Server 2008 Hyper-V

Is this server dedicated to Dynamics GP? _____
 If no, what other applications are running? _____
 Which server is the domain controller? _____
 Are the server and workstations on a domain? _____
This is needed for Management Reporter and other GP 2015/GP 2016 features/functionality
 What is the domain name? _____

CLIENT WORKSTATION INFORMATION - Each workstation must have at least 2GB of RAM

How many workstations have Dynamics GP installed? _____ Interested in GP 2016 Web Client? _____
 How many workstations would you like DFC to upgrade? _____
 Are you using Terminal Server? _____ Are you using Citrix? _____
 If YES, how many? _____ If YES, how many? _____

NOTES

- The following are **no longer supported** with Microsoft Dynamics GP 2016:
 a. **Microsoft Office 2010 32bit & x64**
- A 32-bit ODBC DSN is required for Microsoft Dynamics GP 2016 on a 32-bit and x64 machine. Refer to KnowledgeBase Article 870416 for the steps to setup a 32-bit ODBC DSN on an x64 machine.

3. When you deploy a system in a virtual environment, make sure that you have sufficient hard disk space to avoid performance problems. Each computer that you deploy in a virtual environment should meet or exceed the random access memory (RAM) requirements and the hard disk space requirements. For more information, click the following article number to view the article in the Microsoft Knowledge Base: 897615 Support policy for Microsoft software running in non-Microsoft hardware virtualization software.

Microsoft Office

Microsoft Office 2013
Microsoft Office 2016

NOTES:

1. If using Office x64, the server type in System Preferences (Microsoft Dynamics GP | Tools | System | Setup | System Preferences) must be set to Exchange.
2. The Exchange server type only supports XPS and DOCX. PDF is not supported with the Exchange server type.
3. If using Office 32bit, the server type in System Preferences can either be MAPI or Exchange

INTERNET EXPLORER AND OTHER BROWSER INFORMATION

Internet Explorer 11.0 - Desktop Mode Only
Edge

ADOBE ACROBAT VERSION INFORMATION

Version X is supported with Dynamics GP 2016.

INTEGRATIONS TO MICROSOFT DYNAMICS GP

Do you use Integration Manager or eOne SmartConnect?
How many integrations?

SmartConnect

Interation Manager

Please provide a list of integrations currently being used.

How many users?

REPORTING

Do you use FRx Financial Reporting?
How many FRx Reports?

Yes

Using MR

FRx is not supported in GP 2013 and newer. All FRx reports will be migrated to Management Reporter

Do you use SQL Server Reporting Services reports with GP data?
SSRS is not support with SQL Server Express Edition.

Do you use Crystal Reports?

Crystal is not supported and fixes to reports are the responsibility of the customer.

DYNAMICS GP – 3rd PARTY PRODUCTS & OTHER CUSTOMIZATIONS

Please provide us with all the products installed on **each** workstation and ensure that you include **all** additionally installed products.
Examples include: Key2Act (formerly WennSoft), SmartList Builder, Extender, Doc-Link, and Mekorma MICR, GreenShades

MODIFIED REPORTS

Do you have any modified reports?
If YES, please list.

To view these reports, go to Tools/ Customize/Customization Maintenance To export highlight all reports and click the export button.

UPGRADE TIMELINE

Do you have dates in mind to upgrade?

NOTE: During the upgrade process your system will be down with no access to GP. We recommend not choosing payroll weeks to upgrade.

Do you want to do a test upgrade first?

Remote or onsite?

If yes, a Test upgrade estimate will be included in the quote

**Travel and related expenses will be billed at actual if on-site is chosen.*

Please review the What's New documentation for Dynamics GP 2016 and Dynamics GP 2015. Let us know if there is specific new functionality that you would like to implement.

Are there areas of training that you would be interested in after the upgrade is completed?

Please visit DFCconsultants.com website for list of upcoming classes. We also offer customized training either in Fargo or at your site.

Please review the following additional information and exclusions.

ADDITIONAL INFORMATION RELATED TO THE UPGRADE PROCESS

- All users will be logged out of Dynamics GP during the upgrade process.
- During the upgrade process your system will be down with no access to GP
- Full administrator access to the system will be provided to the consultant in advance or by staff available during the upgrade.
- Checklinks will be run prior to the upgrade. Service time during the upgrade can be reduced if this step is completed by the client
- A customer contact will be identified for this project, and will be available to the DFC Upgrade Team throughout the upgrade process
- An overtime rate of 1.5*hourly rate is billed for work performed on evenings and weekends

EXCLUSIONS

No user documentation is provided with the upgrade unless specifically requested prior to the finalized upgrade dates. Production of documentation is billable.