Upgrade Request Form

Microsoft Dynamics GP

As a first step towards your Dynamics GP upgrade, please fill out this form. Once it’s complete, please save it and email it to Allen Finch, our Director of Sales at afinch@inteltech.com.

Section 1: Tell Us About Yourself

|  |  |
| --- | --- |
| Date: *Click or tap to select a date.* | Company Name: *Click or tap here to enter text.* |
| Main Contact Name: *Click or tap here to enter text.* | Main Contact Email: *Click or tap here to enter text.* |
| IT/Project Contact Name: *Click or tap here to enter text.* | IT/ Project Contact Email: *Click or tap here to enter text.* |
| Finance Contact Name (for post upgrade training): *Click or tap here to enter text.* | Finance Contact Email (for post upgrade training): *Click or tap here to enter text.* |

Section 2: Tell Us About Your Current Dynamics GP Setup

1. What version of GP are you using? *Click or tap here to enter text.*

To find this, go to Help 🡪 About Dynamics GP).

1. Version Number: *Click or tap here to enter text.*
2. Build Number: *Click or tap here to enter text.*
3. Number of companies you have in GP (Include Fabrikam, and any other test companies:

 *Click or tap here to enter text.*

1. Do you use Dynamics GP Canadian Payroll? [ ]  Yes [ ]  No
2. If yes, how many companies? *Click or tap here to enter text.*
3. Do you use Integration Manager? [ ]  Yes [ ]  No

If yes, how many users? *Click or tap here to enter text.*

How many integrations? *Click or tap here to enter text.*

Do you have custom integrations? [ ]  Yes [ ]  No

1. Do you use project accounting? [ ]  Yes [ ]  No

If yes, do use PDK? [ ]  Yes [ ]  No

1. Do you actively use Business Portal? [ ]  Yes [ ]  No

If yes, what version? *Click or tap here to enter text.*

|  |  |
| --- | --- |
|  | *Business Portal was discontinued in GP 2015. Any areas currently using in Dynamics GP’s Business Portal will need to be evaluated and a transition plan put in place. Please contact* *afinch@inteltech.com* *to learn about your options.* |

Section 2: Tell Us About Your Platform

1. What version of SQL server do you have? Choose from the dropdown menu below. (To find this, run the command **select @@version** in SQL Management Studio’s SQL Query tool).

*Click to select an option from the dropdown menu.*

1. Do you have SQL Server license keys to download latest version?

[ ]  Yes

[ ]  No

[ ]  Not sure

1. Does your SQL Server participate in Always On Availability Groups or Database Mirroring?

[ ]  Yes

[ ]  No

[ ]  Not sure

1. Is your SQL Server setup in the Cluster Environment? [ ]  Yes [ ]  No
2. Would you like to upgrade SQL?
[ ]  Yes

[ ]  No

[ ]  Not sure

|  |  |
| --- | --- |
|  | *Supported SQL Server Platform 32-bit or x64 for Microsoft Dynamics GP 2016** *Microsoft SQL Server 2016 – Enterprise, Standard, or Express Edition*
* *Microsoft SQL Server 2014 – Enterprise, Standard, or Express Edition*
* *Microsoft SQL Server 2012 – Enterprise, Standard, or Express Edition*

*Enterprise and Standard versions are preferred.* |

1. Are the current SQL Server Collation settings **SQL\_Latin1\_General\_CP1\_CI\_AS**? [ ]  Yes [ ]  No

To find this, in SQL Server Management Studio, right-click the SQL Server Name and click Properties.

1. How many SQL Runtime Client Access Licenses do you have?

 *Click or tap here to enter a number* or [ ]  I have a SQL Processor Volume License

|  |  |
| --- | --- |
|  | * *Details of your Volume License can be found* [here](https://www.microsoft.com/Licensing/servicecenter/default.aspx)*. Windows Live ID and registered business email required.*
* *To find your Runtime Client Access License #* [visit CustomerSource](https://mbs.microsoft.com/customersource/northamerica/GP)*. If you need help accessing CustomerSource click* [here](https://www.inteltech.com/microsoft-dynamics-customer-source-login-instructions/)*, call (336)315-3935 or* email us*.*
 |

Section 3: Tell Us About Your Databases

List all your databases and their sizes below.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| # | Database Name (Logical) | Size (MDF)/MB | Size (LDF)/MB | Total DB Size (MB) |
| 1 | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |
| 2 | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |
| 3 | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |
| 4 | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |
| 5 | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. | Click or tap here to enter text. |

|  |  |
| --- | --- |
|  | * *Should you have more than 5 databases, please attach a document with the above details for the remaining ones.*
* *Verify the logical names of your databases by opening Windows Explorer and locating folders: DATA(mdf) and LOG(ldf). Logical Names are shown in the DATA folder.*
* *Verify the size of your database by opening SQL Server Management Studio. To do this, select databases, right-click on your database and select properties. Then, select File and make note of the Logical Name and Initial size from File Type: Data.*
 |

Section 4: Tell Us About Your Windows Server Configuration

1. Are you planning on installing a new server on premise? [ ]  Yes [ ]  No

If Yes, please check the version below.

## 32-bit or x64

[ ]  Microsoft Windows Server 2008 Standard Edition SP2 or later

## X64 Only

[ ]  Microsoft Windows Server 2016 – Essentials or Standard Edition

[ ]  Microsoft Windows Server 2012 R2 – Essentials or Standard Edition

[ ]  Microsoft Windows Server 2012 – Essentials or Standard Edition

[ ]  Microsoft Windows Server 2008 R2 Standard Edition SP1 or later

[ ]  Microsoft Windows Server 2008 Standard Edition SP2 or later

If No, please enter existing server specifications below:

Click or tap here to enter text.

1. Will you be deploying in the cloud? [ ]  Yes [ ]  No

If yes, which cloud service provider are you planning to use?

[ ]  Azure Would you like Intelligent Technologies, Inc. to deploy this service? [ ]  Yes [ ]  No

[ ]  Rackspace

[ ]  Google

[ ]  Local provider. Who? *Click or tap here to enter text.*

## For on Premise:

## Server Specifications

Want to see Dynamics GP system requirements? Click [here](https://www.inteltech.com/wp-content/uploads/2017/05/Dynamics-GP-2016-System-Requirements.pdf).

1. Core count *Click or tap here to enter text.*
2. Logical processor count *Click or tap here to enter text.*
3. Memory *Click or tap here to enter text.*
4. Do you have additional drives? List their details below.

|  |  |  |
| --- | --- | --- |
|  | Free Space  | Drive Size |
| Drive 2 | *Click or tap here to enter text.* | *Click or tap here to enter text.* |
| Drive 3 | *Click or tap here to enter text.* | *Click or tap here to enter text.* |
| Drive 4 | *Click or tap here to enter text.* | *Click or tap here to enter text.* |
| Drive 5 | *Click or tap here to enter text.* | *Click or tap here to enter text.* |
| Drive 6 | *Click or tap here to enter text.* | *Click or tap here to enter text.* |

1. Is your server running a virtual platform? [ ]  Yes [ ]  No

If yes, what product?

[ ]  Windows Server Hyper-V (2008, 2008 R2, 2012, 2012 R2, 2016)

[ ]  VMWare

[ ]  Other

1. Does this server run anything other than Dynamics GP? [ ]  Yes [ ]  No

If yes, what other applications does it run? List them below.

|  |
| --- |
| Application Name |
| *Click or tap here to enter text.* |
| *Click or tap here to enter text.* |
| *Click or tap here to enter text.* |
| *Click or tap here to enter text.* |
| *Click or tap here to enter text.* |

1. Which server is the domain controller? *Click or tap here to enter text.*
2. Do the server and workstations belong to a domain? [ ]  Yes [ ]  No
3. If yes, what’s the domain name? *Click or tap here to enter text.*

|  |  |
| --- | --- |
|  | * *The domain controller holds the user and computer accounts for network.*
* *To use some of the features in GP 2016 a domain is required.*
* *If you have more than one (1) server, please provide separate documentation outlining the details of each.*
 |

Section 5: Tell Us About Your Workstations

1. How many workstations have Dynamics GP installed? *Click or tap here to enter text.*
2. Do you want Intelligent Technologies, Inc. to update them? [ ]  Yes [ ]  No
3. Would you like to use the Dynamics GP 2016 web client? [ ]  Yes [ ]  No

|  |  |
| --- | --- |
|  | *The web client gives users access to GP from wherever they are via a PC or mobile device.* |

1. Are you using Terminal Server or Citrix? [ ]  Yes [ ]  No [ ]  N/A
2. What Anti-Virus software are you using? *Click or tap here to enter text.*
3. What operating system are you using? Choose from the dropdown menu below.

*Click to select an option from the dropdown menu.*

|  |  |
| --- | --- |
|  | * *All Operating Systems Support 32-bit and x64.*
* *Microsoft Dynamics GP 2016 will ONLY run on the above operating systems.*
 |

1. What version of Office are you using? Choose from the dropdown menu below.

*Click to select an option from the dropdown menu.*

|  |  |
| --- | --- |
|  | * *All Operating Systems Support 32-bit and x64.*
* *Microsoft Dynamics GP 2016 integrations will ONLY work with the above versions.*
* *If you use Internet Explorer and/or Adobe Acrobat, ONLY these versions are supported.*
	+ *IE 11 in Desktop Mode or Edge*
	+ *Adobe Acrobat X*
* *Microsoft Office 2013 and Microsoft Office 2016 are supported. All previous*

*versions are no longer supported.* |

Section 6: Tell Us About Your Reporting Needs

1. Do you use FRx Financial Reporting? [ ]  Yes [ ]  No
2. If yes, how many FRx reports do you have? *Click or tap here to enter text.*
3. If no, are you currently using Management Reporter? [ ]  Yes [ ]  No

If yes, what version? To find this, open Management Reporter, click Help 🡪 About

 *Click or tap here to enter text.*

1. Do you have any Crystal Reports with Dynamics GP data? [ ]  Yes [ ]  No
2. Do you use SQL Server Reporting Services reports with GP data? [ ]  Yes [ ]  No
3. Do you have any modified reports? [ ]  Yes [ ]  No

If yes, please list:

*Click or tap here to enter text.*

If your list is a long one, please export all modified reports and email a package file along with this completed form to afinch@inteltech.com.

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

|  |  |
| --- | --- |
|  | * *FRx is no longer supported in GP 2016. All FRx reports will be migrated to Microsoft’s new reporting tool Management Reporter.*
* *In order to use Management Reporter, server and workstation must belong to the same domain.*
* *SSRS is not supported with SQL Server Express Edition.*
 |

Section 7: Tell Us About Your Integrations

1. What Dynamics GP integrated products are installed on each of your workstations?

*Click or tap here to enter text.*

*Click or tap here to enter text.*

To accurately capture this data, the Dynamics.set file must be reviewed and recorded at each workstation. *To do this, follow these step*s:

1. In Windows Explorer under the Dynamics directory you will need to find the Dynamics.set file (the Dynamics Launch file). C:\Program Files\Microsoft Business Solutions\Dynamics\GP
2. If you can’t see the file extensions, locate the file that has the ‘red books’ icon (See below)



1. Once you have found the file, right-click on it and select edit. This will open a Notepad file that resembles the following image.



In this example, there are 8 products installed: Microsoft Dynamics GP, Bank Reconciliation, FieldService, SmartList, Excel-Based Budgeting, Intelligent Technologies, Inc. Product Maintenance, Canadian Payroll and SmartList Builder.

|  |  |
| --- | --- |
|  | * *To verify all integrated products used in your organization the above must be completed* ***at each*** *active workstation running Dynamics.*
 |

Section 8: Tell Us About Your Upgrade Project Timeline

1. Do you need a test upgrade? [ ]  Yes [ ]  No
2. Is there a specific time you would like to complete the upgrade? Enter desired dates in table below.

|  |  |
| --- | --- |
| Test Upgrade (If applicable) | Live Upgrade |
| *Click or tap to select a date.* | *Click or tap to select a date.* |

1. How would you like your upgrade to be done? [ ]  Remotely [ ]  On-site
2. What is the maximum amount of time you can be without access to GP?

Click or tap here to enter text.

1. Besides the Dynamics GP 2016 enhancement training (approximately 4 hours) is there other training that you would be interested in doing? [ ]  Yes [ ]  No
2. If yes, please list your area(s) of interest? Click or tap here to enter text.

Click or tap here to enter text.

1. Please review the What’s New in GP 2016 Document and list any new functionality you want us to implement.

Click or tap here to enter text.

|  |  |
| --- | --- |
|  | * *Travel and living expenses may be an additional fee if an on-site is done.*
* *During the upgrade process your system will be down with no access to GP.*
* *Premium rates apply for work performed on evenings and weekends. Weekends only available for live upgrades.*
* *New functionality* ***should not*** *be implemented during a test and live upgrade. Any new features and functionality* ***should*** *be implemented upon a successful upgrade. If you would like to discuss further, please contact* *afinch@inteltech.com*.
 |

Please review the following:

Please acknowledge you have read and understand the terms below. Click the check box, and type initials where indicated.

## Assumptions:

1. All users will be logged out of Dynamics GP during the upgrade process.
2. Full administrator access to the system will be provided to the consultant in advance or by staff available during the upgrade.
3. Checklinks will be run prior to the upgrade.
4. **A client contact has been designated to this project, and will be available to the Intelligent Technologies, Inc. Consultant throughout the upgrade process, failure to comply may result in delays of this service.**
5. **Client understands that this project will require the additional install of a new SQL instance which they are responsible for installing / uninstalling.**
6. Client has reviewed the system requirements and confirms that they are in compliance with those requirements.
7. Client will have all software installed and configured, including Microsoft SQL server and/ or Terminal Server prior to beginning the above work.
8. Client is responsible for: Dynamics GP server, Workstations, Microsoft SQL Server, Windows Operating Systems, Terminal Server or Citrix access, Internal network equipment, Wiring, Power and Backup Power, Internet access, Network Security, Backup system, Other infrastructure, Communication between locations, VPN access.
9. No time has been included to troubleshoot, repair, update, and apply service packs on any of these items. If we encounter an issue with the above we will notify you.
10. Client is responsible for all Backups of the data.
11. Client should prepare a backup of ALL SQL Server databases after all work is complete and before the commencement of the upgrade.

## Terms, Conditions & Disclaimer

1. Any issues1 found after the upgrade are not included in the estimated service fee. Diagnostic and solution resolution will be billed on a time and material basis.

2. If the need to roll-back to the original operating version arises due to unforeseen circumstances1 the client and Intelligent Technologies, Inc.’s Practice Lead will discuss the effort and responsibility. These efforts are typically billed on a time and material basis.

3. If any customizations not indicated in this document are identified during the upgrade process the consultant will attempt to transition them to the new version. If upon testing the customization proves to be incompatible with the new version an estimate to upgrade the customization will be provided. If the customization was not originally built by Intelligent Technologies, Inc., the client is responsible for contacting the original developers to complete the customization upgrade, or Intelligent Technologies, Inc. can present an estimate to rebuild the customization at the client’s request.

4. Implementation of new features and functionality are not included in the upgrade unless specified in the upgrade service estimate/Statement of Work. It is not recommended to implement new and extensive features during an upgrade.

5. New feature and functionality training, is defined as an information session led by an Intelligent Technologies, Inc. Consultant on the changes in the new version. The training is limited to new system-wide features and currently used modules. Some new features require extensive implementation time and are not included in the upgrade estimate.

6. Custom documents such as process and/or build documents are not included. If requested, it is at the discretion of the Technical Consultant assigned to the upgrade whether the request can be fulfilled, as upgrades must be completed in a timely manner. Any custom documentation provided will be billed on a time and material basis and are not included in the upgrade estimate.

|  |  |
| --- | --- |
|  | 1Issues and unforeseen circumstances are defined as but not limited to unanticipated system errors, compatibility issues, or undocumented bugs relating to your Microsoft Dynamics solution, add-on products or the supporting technology.  |

[ ]  I have read, understood and agree to the above. Type initials: *Click or tap here to enter text.*