

RG Connect 2015

Smarter. Faster. Together.



What You Need to Know for a Successful GP Upgrade

Presented by: Kayla Schilling, Sandi James and
Michael Krasivsky

Upgrade Steps

- **Upgrade Checklist**
 - **Quote**
 - **Technical Planning Call**
 - **Project Schedule**
 - **Test Upgrade**
 - **“What’s New in GP”**
 - **User Testing**
 - **Issue Tracking**
 - **Production Upgrade**
 - **Go Live Support**
- Preparation and Planning**
- Testing and Training**
- Go-Live and Closing**
-
- ```
graph LR; subgraph Prep [Preparation and Planning]; A[Upgrade Checklist]; B[Quote]; C[Technical Planning Call]; D[Project Schedule]; end; subgraph Test [Testing and Training]; E[Test Upgrade]; F["What's New in GP"]; G[User Testing]; H[Issue Tracking]; end; subgraph GoLive [Go-Live and Closing]; I[Production Upgrade]; J[Go Live Support]; end;
```

# Preparation and Planning

- **Pre-Upgrade Checklist**

## Overview

The information in this document allows The Resource Group to provide a ballpa Microsoft Dynamics GP upgrade. Technical details will be discussed later with a Application Consultant as appropriate.

## Microsoft Dynamics GP Information

Please fill out the following information about the current Microsoft Dynamics GP

## Upgrade Questions

What is your version of Microsoft Dynamics GP?

What version of Microsoft Dynamics GP would you like to upgrade to?

- **Quote**

| Product                                                                                 | Quantity | Price    | Extended |
|-----------------------------------------------------------------------------------------|----------|----------|----------|
| <b>TRG Professional Services</b>                                                        |          |          |          |
| Technical Planning Call with System Engineer                                            | 2.00     | \$xxx.xx | \$xxx.xx |
| Update of Dynamics GP in Test Environment - 16 Companies                                | 12.00    | \$xxx.xx | \$xxx.xx |
| Test Plans - scripted exercises to confirm existing functionality performs as expected. | 3.00     | \$xxx.xx | \$xxx.xx |

- **Project Planning**

## GP Upgrade Project Planning Call

Client: \_\_\_\_\_ Customer \_\_\_\_\_

Project Planning Meeting: 7/8/15

Technical Planning Meeting: 7/10/15

Test Upgrade: **Yes** No

TRG Hosted TestDb: Yes No

# Preparation and Planning

- Project Schedule

| Customer                                                        |           |                            |                      |          |                     |
|-----------------------------------------------------------------|-----------|----------------------------|----------------------|----------|---------------------|
| Project Plan: Microsoft Dynamics® GP 2010 to GP 2015 R2 Upgrade |           |                            |                      |          |                     |
| Task/Activity                                                   | Status    | Time                       | Date                 | Location | Resource            |
| Project Planning & Scheduling Call                              | Complete  |                            | 04/23/15             | Remote   | Project Coordinator |
| Microsoft Dynamics® GP Test Upgrade to GP 2015 R2               |           |                            |                      |          |                     |
| Test Upgrade                                                    | Complete  | 1:00 - 5:00<br>1:00 - 3:00 | 07/08/15<br>07/10/15 | Remote   | System Engineer     |
| Microsoft Dynamics® GP Training                                 |           |                            |                      |          |                     |
| Training: Management Reporter Training                          | Scheduled | 9:00 - 12:00               | 08/10/15             | Remote   | MR Consultant       |
| Training: "What's New in GP 2015 R2? - Navigation and Payroll"  | Scheduled | 10:00 - 12:00              | 07/24/15             | Remote   | Master Consultant   |

- Technical Planning



## Microsoft Dynamics GP System Checklist

Client: **Company Name**

Customer Account Manager: **TRG Employee Name**  
 Project Manager: **TRG Employee Name**  
 Master Consultant: **TRG Employee Name**  
 Developer: **TRG Employee Name**

### Overview

This document provides the System Engineer with all of the information necessary to complete an upgrade for a customer.

### Customer Upgrade Questions

The following questions are geared towards the accounting department or other decision making body.

| GP Environment                                                         |                       |
|------------------------------------------------------------------------|-----------------------|
| What is the current GP version?                                        | GP 2013 R2 12.00.1745 |
| What version of GP are you upgrading to?                               | GP 2015 R2            |
| Will the service pack needed to upgrade GP be installed in production? | No                    |
| What version is Management Reporter at?                                | MR 2012 CU9           |

# *Preparation and Planning*

- **Technical Planning Call Preparation**
  - Resources from IT should be available for technical planning call
    - We will discuss environment recommendations
    - Unanswered questions are sent in a follow-up email
- **Test Upgrade Preparation**
  - Servers should be purchased with Windows installed
  - We need access to the current and new servers
    - Customers will create service accounts
    - Customers will provide Windows credentials
    - Customers will provide sa credentials
    - Customers will assist with getting us connected

# *Testing and Training*

- **Test Upgrade Preparation**

- Provide a computer to install the new version of GP
  - Laptop
  - Terminal Server
  - Virtual Machines
- Compile a list of users that will be testing
- Assign the test plans to the users that will be completing them
  - Make sure the users report issues to the appropriate resource at The Resource Group
- Inform users how they will connect to the computer for testing
- Once the test upgrade has started, customer resources need to be available to resolve issues or answer questions
  - GP user
  - MR user
  - IT Contact

# *Testing and Training*

- **Test Upgrade**

- The following items are upgraded in a test environment:
  - GP application and databases
  - Third Party products
  - Microsoft Products:
    - Management Reporter
    - eConnect
    - Integration Manger
    - Web Client / Web Services
- The test environment provides the opportunity:
  - To test business critical processes
  - To test existing functionality
  - To identify issues prior to the live upgrade
- The less testing that occurs, the greater the risk for downtime after the live upgrade.

# *Testing and Training*


- **User Testing**
  - The Resource Group will provide comprehensive test plans for modules currently in use
- **“What’s New in GP”**
  - A demonstration of new features you will gain access to will be provided during the upgrade project.
- **Status Meetings**
  - Will begin upon completion of the test upgrade
  - Will continue through resolution of post go-live issues.



# Testing and Training

- **Reporting Issues: Test/Production**
  - Contact System Engineer and Project Coordinator
  - Include the following information:
    - What is the issue
    - What steps are taken to reproduce
    - Error messages
    - Who gets the error
    - One user or all users
    - One client or all clients
    - Issue consistent or intermittent
  - Resource will be assigned
  - Issue logged in issues list
  - Status meetings

Customer GP 2015 Production upgrade Issues list



| Issue # | Date Opened | Issue Description                                              | Reported by |
|---------|-------------|----------------------------------------------------------------|-------------|
| 1       | 8/22/2015   | Trial Balance Summary Starting account number is wrong in SSRS | Kayla       |
| 2       | 8/23/2015   | User's PC couldn't access the file share                       | Kayla       |
| 3       | 8/24/2015   | PC cannot install sql 11                                       | Kayla       |
| 4       | 8/24/2015   | PC cannot access the fileshare                                 | Kayla       |
| 5       | 8/24/2015   | MICR check printing not working                                | Randy       |
| 6       | 8/24/2015   | MICR check stubs- line spacing                                 | Randy       |

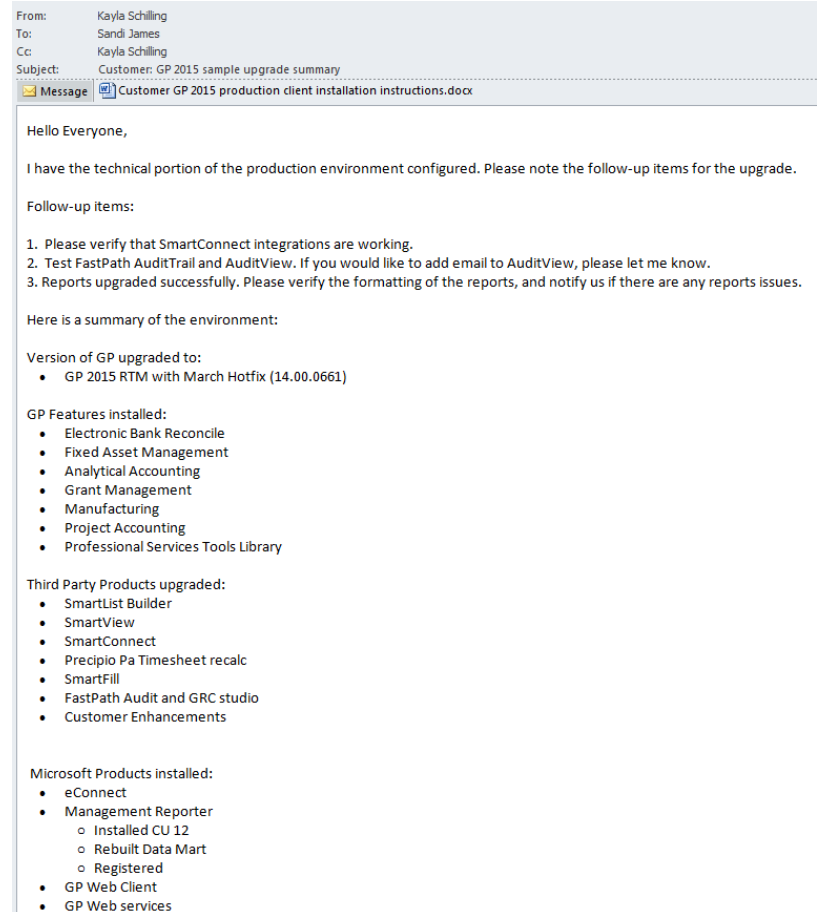
# Go-Live and Closing

- **Production Upgrade Preparation**
  - Technical resource assignment
  - Upgrade schedule
  - Print key financial reports
  - User's out of the system

| The Resource Group                                                                                                                                  |                   | Customer                                     |                 |          |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|----------------------------------------------|-----------------|----------|
| Delivering Business Insight for 25 Years                                                                                                            |                   | Microsoft Dynamics GP2015 Production Upgrade |                 |          |
|                                                                                                                                                     |                   | DEPLOYMENT PLAN                              |                 |          |
| Updated as of: 10/6/2015                                                                                                                            |                   |                                              |                 |          |
|                                                                                                                                                     | Target Start Date | TIME                                         | Resource        | Comments |
| <b>Pre-Deployment planning</b>                                                                                                                      |                   |                                              |                 |          |
| Go/No Go Decision Meeting                                                                                                                           | 10/6/15           | 3:30 p.m.                                    | TRG, Customer   |          |
| Users Print Validation Reports                                                                                                                      | 10/8/15           | 4:00 p.m.                                    | Customer        |          |
| Users out of the system                                                                                                                             | 10/8/15           | 5:00 p.m.                                    | System Engineer |          |
| <b>Production Upgrade</b>                                                                                                                           |                   |                                              |                 |          |
| Perform database backups, copy GP share, upgrade the databases                                                                                      | 10/8/15           | 5 p.m.                                       | System Engineer |          |
| Configure companies, Organize share, upgrade modified forms and reports, install eConnect, and integration manager, Install and upgrade 3rd parties | 10/9/15           | 8 a.m.                                       | System Engineer |          |

# Go-Live and Closing

- **Production Upgrade**
  - The test upgrade steps are repeated
  - Issues found during the test upgrade are resolved
- **Upgrade Summary**
  - The Systems Engineer will email a summary of what was configured
- **Data Validation**
  - Users will login and verify the GP reports and data
- **Go Live Support**
  - The Systems Engineer and the Application Consultant will be available for issue resolution





# Questions?



*Thank you!*