

# Planning for Your Upgrade to Dynamics GP 2010

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2010

A large, 3D green arrow points diagonally upwards from the bottom left towards the top right. At the base of the arrow, the year '2010' is rendered in large, 3D green numbers. The background is a solid blue color.

# Why Upgrade?



- To take advantage of new functionality and product enhancements
  - What's New In Dynamics GP 2010
- Supportability
  - Microsoft Mainstream support
    - Ends for Dynamics GP 9.0 on 1/11/2011
    - Ends for Dynamics GP 10.0 on 10/9/2012
- Improve efficiency – Do more with less
- Maintain investment in your mission-critical application

# Planning Considerations



- Down time
- Risk of failed upgrade\test upgrade
- Hardware & SQL Server upgrades
- Replacing inefficient or legacy functionality
- 3<sup>rd</sup> Party Modules
- User Security (if updating from GP 9.0)
- Custom Code
- Integrations
- Reporting

# Budget Considerations



- Consulting services for planning, upgrade preparation, test upgrade, production upgrade, post-upgrade training & support
- Hardware upgrades
- Server move
- SQL upgrade
- Customizations
- Post-upgrade projects

# Hardware Planning



- Is now a good time to upgrade my server?
- Do my workstations meet Microsoft's supported configuration?
- Should I upgrade SQL Server?
- Should I upgrade from 32 Bit to 64 Bit?

# What Client Operating Systems are Supported?

Operating system	Editions
Microsoft Windows XP SP 3 or later	Professional
Windows Vista service pack 2 or later (32-bit and 64-bit)	Enterprise Business Ultimate
Windows 7 (32-bit and 64-bit)	Professional Ultimate

# What Database Servers are Supported?

32-bit	x64
Microsoft SQL Server 2008 R2 - Enterprise Edition or Standard Edition	Microsoft SQL Server 2008 R2 - Enterprise Edition or Standard Edition
Microsoft SQL Server 2008 SP 1 or later – Enterprise Edition or Standard Edition	Microsoft SQL Server 2008 SP 1 or later – Enterprise Edition or Standard Edition
Microsoft SQL Server 2005 SP 3 or later – Enterprise Edition or Standard Edition	Microsoft SQL Server 2005 SP 3 or later – Enterprise Edition or Standard Edition

# What Server Operating Systems are Supported?

32-bit	x64
Microsoft Windows Server 2008 Enterprise Edition SP 2 or later	Microsoft Windows Server 2008 R2 Enterprise Edition
Microsoft Windows Server 2003 R2 Enterprise Edition	Microsoft Windows Server 2008 Enterprise Edition SP 2 or later
Microsoft Windows Server 2003 Enterprise Edition SP 2 or later	Microsoft Windows Server 2003 R2 Enterprise Edition
	Microsoft Windows Server 2003 Enterprise Edition SP 2 or later

# What Isn't Supported with Dynamics GP 2010?

- Support ends for:
  - SQL Server 2000
  - Microsoft Office XP and Office 2003
  - Internet Explorer 6.0
  - Adobe Acrobat 6.0 & 7.0

# Pre-Upgrade Steps



- Prepare GP Company data
- Remove unused Companies
- Prepare test environment
- Plan for down time
- Update and test custom code
- Remove unused FRx Rows, Columns, Trees and Catalogs
- Obtain registration keys
- Run pre-upgrade reports

# How Should We Prepare for an Upgrade?

- Are there any companies that need to be removed?
- Before you upgrade, you should post, delete or print all single-use batches. We recommend that you post all transactions that can affect your purchase receipts.
- You should make at least one complete backup of all your databases before upgrading. It's a good idea to make a backup before completing table maintenance procedures, in case you encounter any problems in that process.
- Print comparison reports.

# How Should We Prepare for an Upgrade?

- Run Check Links on all companies.
  - What does the Check Links process do?
    - The Check Links process analyzes the relationships between physical files to find data that exists in one file but is missing from other files. The Check Links process makes sure that the appropriate records or links exist in a logical file group. If they do not exist in a logical file group, the process adds them.
    - A report is printed after the Check Links process is complete, regardless if data is missing. If data is missing and can be replaced, the data is replaced automatically. The report will contain the information about what data was replaced.

# What Does Socius Do When They Come Onsite?

- Backup, Backup, Backup!
  - FRx, Integration Manager, Dynamics GP, etc.
- Follow Microsoft Best Practices for performing upgrades
  - Our goal is to perform your production upgrade with as little interruption to your schedule as possible.
- How do we accomplish that?

# Upgrade Tasks



- Install GP Service pack on current version, if required
- GP Data update
- Install & update 3<sup>rd</sup> party modules
- Install custom code
- Update modified forms & reports
- FRx update (to Management Reporter?)
- If moving to new server, re-map shared files & set up database maintenance & backup plans
- Key user workstation updates

# Key User Acceptance Testing



- Print post-upgrade reports & compare to pre-upgrade reports
- Test custom code
- Test custom reports
- Test integrations

# Roll Out to Users



- Workstation updates
- What's New training for users
- Go Live support

# Post Upgrade Projects




- Opportunity for process improvements
- Opportunity for increased efficiency
- User Security Audit (during test upgrade)
- Implement new features
- Add new modules
- Upgrade FRx to Management Reporter

# Important Links



- Dynamics GP 2010 System Requirements  
<http://go.microsoft.com/fwlink/?LinkId=161197>
- Microsoft Update to GP 2010 Hot Topic page  
[https://mbs.microsoft.com/customersource/support/selfsupport/hottopics/hottopic\\_mdgp2010\\_update.htm](https://mbs.microsoft.com/customersource/support/selfsupport/hottopics/hottopic_mdgp2010_update.htm)

# Successful Upgrade Q & A



- Questions
- Answers
- Let us know when you want to plan for your successful upgrade to Dynamics GP 2010
- Session evaluations

# Planning for Your Upgrade to Dynamics GP 2010

Thank you for attending!

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