



Pre-Upgrade Questionnaire - Dynamics GP

Project Resources:

Please fill out this questionnaire to the best of your ability. Upon its completion, we will schedule a meeting with your Velosio Account manager and Consultant.

Client Name: CMHA	Columbus Metropolitan Housing Authority
Primary Contact: Matt Kudika	Matt Kudika
Primary Contact Phone Number:	6144216216
Technical Contact:	Yuhma Koh
Current Velosio Consultant(s):	614216201

Project Scope:

To be completed by project sponsor and Velosio Project Manager

What is your preferred Go-Live date for this upgrade?	Saturday, May 1, 2021
Are there any new GP features that you'd like to implement or discuss?	Yes
If yes, what features would you like to add?	TBD
Is there any other software-related functionality that would help your business?	Yes
If yes, what software related functionalities are you interested in?	None at this time
What topics would like training on during the upgrade? Examples: New Features, Management Reporter, etc.	In person training
Can this upgrade be completed remotely? If so, please prepare and provide remote access credentials.	Yes
What is acceptable down time during the cut-over production upgrade process?	TBD
Desired start/end time of test upgrade process?	5pm
<i>Please allow for adequate testing between the completion of the test upgrade and the go-live date.</i>	Select a Date

Server & IT Information:

Please list your current server information here.

SQL Server Machine Name	SQL01
SQL Server Operating System	Window Server 2012
SQL Server version (SQL 2008, SQL 2008R2, SQL 2012, SQL 2014, SQL 2016)	2012
Are there other databases or applications running on this server?	Yes
If yes, what are their names?	Multiple
Do users access GP on a local work station or a terminal server? Horizon	Terminal Server/Workstation
What version of Windows do you use on your client workstations? Windows 10	Windows Version
What version of Microsoft Office does your company utilize?	Microsoft Office 2016
How many GP workstations are to be installed?	One bue vdi system
Are you interested in using the GP Web Client?	No

How many companies are you using in Dynamics GP? 2

Double click the following link to run the script in SQL. Then screenshot the result and replace the image below with your results.

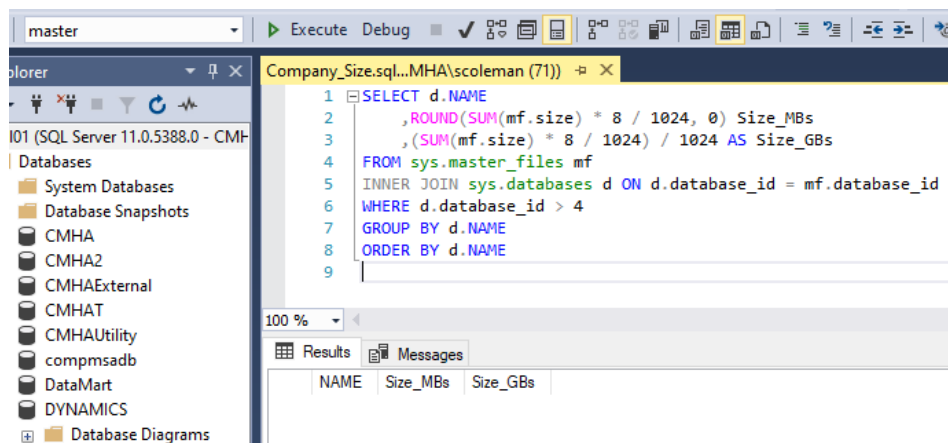


```
1 SELECT
2     [COMPANYID]
3     , [CMPNYNAM]
4     , [LOCATNNM]
5     , [INTERID]
6     , [DEX_ROW_ID]
7 FROM [DYNAMICS].[dbo].[SY01500]
```

CMPANYID	CMPNYNAM	LOCATNNM	INTERID	DEX_ROW_ID
1	Columbus Metropolitan Housing Authority	Columbus Housing Authority	CMHA	1
2	CMHA <TEST>	CMHA	CMHAT	3

What is the total size of all company databases? What is the total size of all company databases?

Double click the following link to run the script in SQL. Then screenshot the result and replace the image below with your results.



```
1 SELECT d.NAME
2     , ROUND(SUM(mf.size) * 8 / 1024, 0) Size_MBs
3     , (SUM(mf.size) * 8 / 1024) / 1024 AS Size_GBs
4 FROM sys.master_files mf
5 INNER JOIN sys.databases d ON d.database_id = mf.database_id
6 WHERE d.database_id > 4
7 GROUP BY d.NAME
8 ORDER BY d.NAME
```

NAME	Size_MBs	Size_GBs
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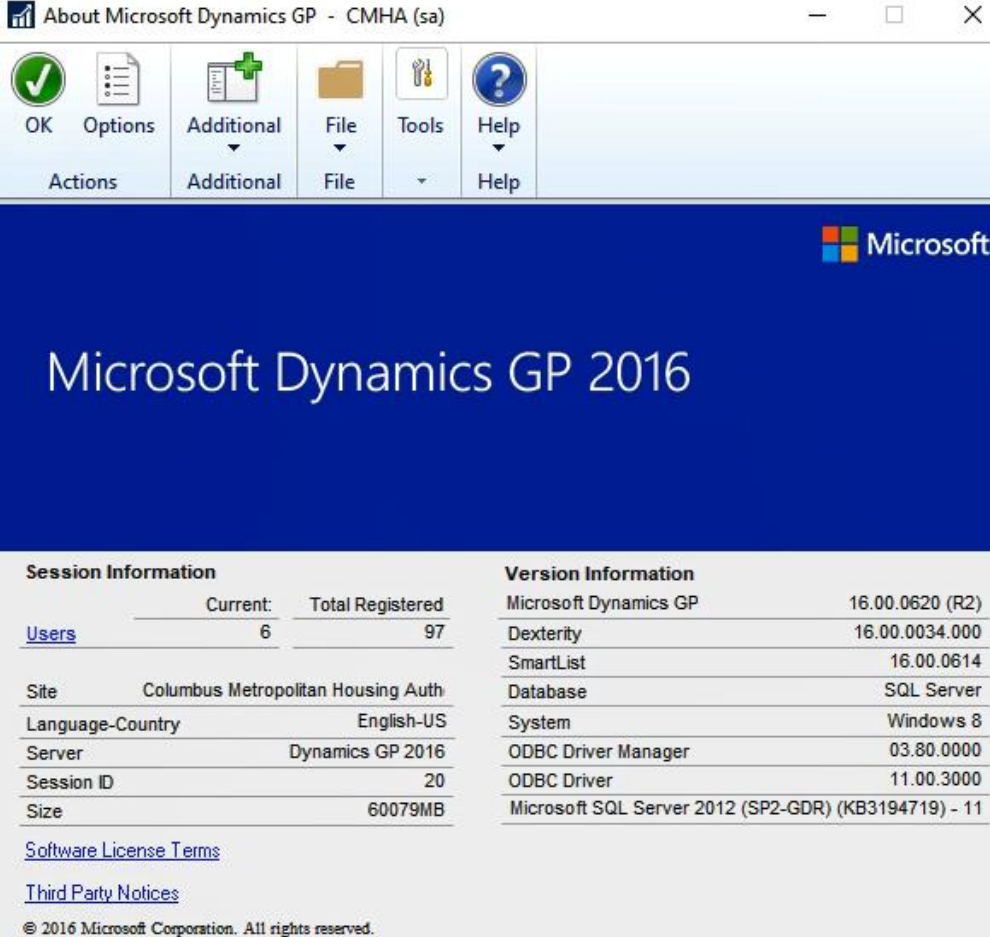
Dynamics GP Information:

Please have your GP administrator and/or IT lead fill out this section

What version of Dynamics GP are you currently running? Microsoft Dynamics GP 2016

1. Navigate to **Help > About Dynamics GP**

Screenshot the result and replace the image below with your results.



Session Information		Version Information		
	Current:	Total Registered	Microsoft Dynamics GP	
Users	6	97	16.00.0620 (R2)	
Site	Columbus Metropolitan Housing Auth		Dexterity	16.00.0034.000
Language-Country	English-US		SmartList	16.00.0614
Server	Dynamics GP 2016		Database	SQL Server
Session ID	20		System	Windows 8
Size	60079MB		ODBC Driver Manager	03.80.0000
			ODBC Driver	11.00.3000
			Microsoft SQL Server 2012 (SP2-GDR) (KB3194719) - 11	

[Software License Terms](#)

[Third Party Notices](#)

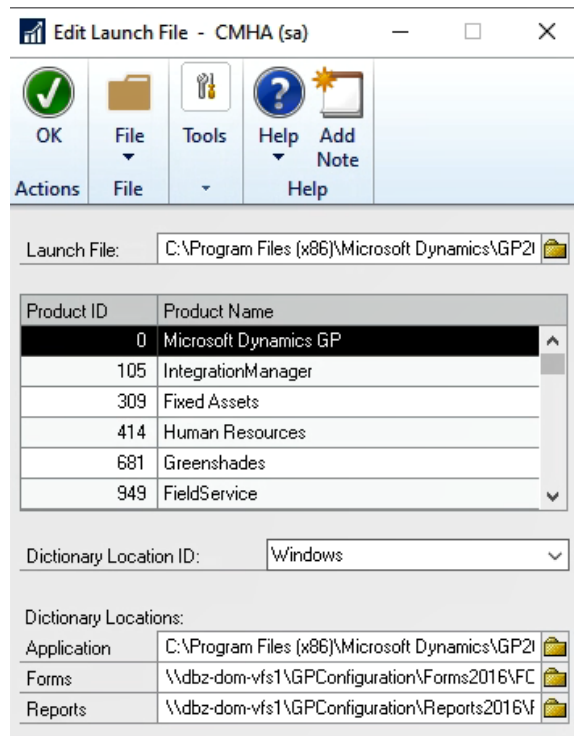
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Where is the primary GP share folder located (UNC pathname)

C:\Program Files (x86)\Microsoft Dynamics\GP2016

1. From a power user's GP workstation where all GP modules are installed, navigate to **Microsoft Dynamics GP > Tools > Setup > System > Edit Launch File**
2. Select **Product 0: Microsoft Dynamics GP**

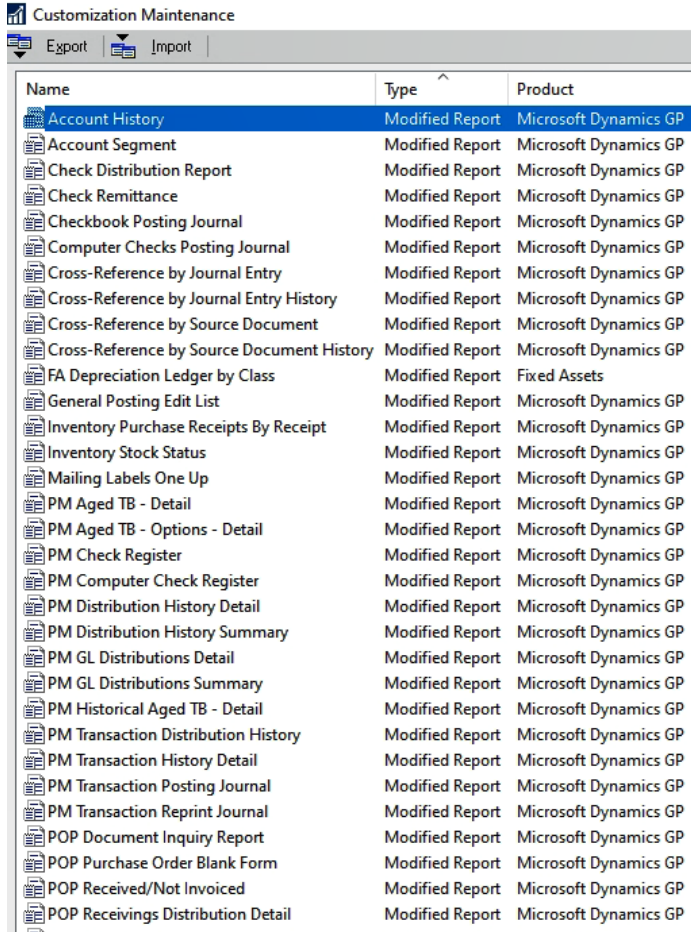
Screenshot the result and replace the image below with your results.



List all modified forms and reports


























1. Navigate to **Microsoft Dynamics GP > Tools > Customization > Customization Maintenance**
2. Click **“Type”** to sort by Customization Type

Screenshot the result and replace the image below with your results.



The screenshot shows the 'Customization Maintenance' window with a table of reports. The table has three columns: 'Name', 'Type', and 'Product'. The 'Type' column is sorted by 'Modified Report'. The 'Product' column lists various products, including 'Microsoft Dynamics GP' and 'Fixed Assets'. The 'Account History' report is highlighted in blue.

Name	Type	Product
Account History	Modified Report	Microsoft Dynamics GP
Account Segment	Modified Report	Microsoft Dynamics GP
Check Distribution Report	Modified Report	Microsoft Dynamics GP
Check Remittance	Modified Report	Microsoft Dynamics GP
Checkbook Posting Journal	Modified Report	Microsoft Dynamics GP
Computer Checks Posting Journal	Modified Report	Microsoft Dynamics GP
Cross-Reference by Journal Entry	Modified Report	Microsoft Dynamics GP
Cross-Reference by Journal Entry History	Modified Report	Microsoft Dynamics GP
Cross-Reference by Source Document	Modified Report	Microsoft Dynamics GP
Cross-Reference by Source Document History	Modified Report	Microsoft Dynamics GP
FA Depreciation Ledger by Class	Modified Report	Fixed Assets
General Posting Edit List	Modified Report	Microsoft Dynamics GP
Inventory Purchase Receipts By Receipt	Modified Report	Microsoft Dynamics GP
Inventory Stock Status	Modified Report	Microsoft Dynamics GP
Mailing Labels One Up	Modified Report	Microsoft Dynamics GP
PM Aged TB - Detail	Modified Report	Microsoft Dynamics GP
PM Aged TB - Options - Detail	Modified Report	Microsoft Dynamics GP
PM Check Register	Modified Report	Microsoft Dynamics GP
PM Computer Check Register	Modified Report	Microsoft Dynamics GP
PM Distribution History Detail	Modified Report	Microsoft Dynamics GP
PM Distribution History Summary	Modified Report	Microsoft Dynamics GP
PM GL Distributions Detail	Modified Report	Microsoft Dynamics GP
PM GL Distributions Summary	Modified Report	Microsoft Dynamics GP
PM Historical Aged TB - Detail	Modified Report	Microsoft Dynamics GP
PM Transaction Distribution History	Modified Report	Microsoft Dynamics GP
PM Transaction History Detail	Modified Report	Microsoft Dynamics GP
PM Transaction Posting Journal	Modified Report	Microsoft Dynamics GP
PM Transaction Reprint Journal	Modified Report	Microsoft Dynamics GP
POP Document Inquiry Report	Modified Report	Microsoft Dynamics GP
POP Purchase Order Blank Form	Modified Report	Microsoft Dynamics GP
POP Received/Not Invoiced	Modified Report	Microsoft Dynamics GP
POP Receivings Distribution Detail	Modified Report	Microsoft Dynamics GP

 POP Receivings Distribution Detail - Reprint	Modified Report	Microsoft Dynamics GP
 Posting Accounts	Modified Report	Microsoft Dynamics GP
 Quick Posting Edit List	Modified Report	Microsoft Dynamics GP
 Quick Posting Journal	Modified Report	Microsoft Dynamics GP
 Quick Posting Journal2	Modified Report	Microsoft Dynamics GP
 RM Detail Aged Trial Balance - Options	Modified Report	Microsoft Dynamics GP
 RM Detail Historical Aged Trial Balance	Modified Report	Microsoft Dynamics GP
 RM GL Breakdown Register Detail	Modified Report	Microsoft Dynamics GP
 RM Statement On Blank Paper	Modified Report	Microsoft Dynamics GP
 SOP Blank History Invoice Form	Modified Report	Microsoft Dynamics GP
 SOP Blank Invoice Form	Modified Report	Microsoft Dynamics GP
 SOP Posting Journal	Modified Report	Microsoft Dynamics GP
 SOP Sales Distribution Detail History Report	Modified Report	Microsoft Dynamics GP
 Trial Balance Detail	Modified Report	Microsoft Dynamics GP
 Trial Balance Detail by Period	Modified Report	Microsoft Dynamics GP
 Trial Balance History	Modified Report	Microsoft Dynamics GP
 Trial Balance History by Period	Modified Report	Microsoft Dynamics GP
 Trial Balance Summary	Modified Report	Microsoft Dynamics GP
 Trial Balance Summary by Period	Modified Report	Microsoft Dynamics GP
 Trial Balance Summary History	Modified Report	Microsoft Dynamics GP
 Trial Balance Summary History by Period	Modified Report	Microsoft Dynamics GP
 Trial Balance Worksheet	Modified Report	Microsoft Dynamics GP
 UnpaidAPbyFundGL	Modified Report	Microsoft Dynamics GP
 Vendor Cash Requirements	Modified Report	Microsoft Dynamics GP
 Voided Payments	Modified Report	Microsoft Dynamics GP

List all 3rd party products (if applicable)

1. Navigate to **Microsoft Dynamics GP > Tools > Customization > Customization Status**

Screenshot the result and replace the image below with your results.

Customization Status	
Product	Status
Microsoft Dynamics GP	Enabled
IntegrationManager	Enabled
Fixed Assets	Enabled
Human Resources	Enabled
Greenshades	Enabled
FieldService	Enabled
Interfund Management	Enabled
Revenue Expense Deferrals	Enabled
Forms Printer	Enabled
Safe Pay	Enabled
Electronic Reconcile	Enabled
SmartList	Enabled
Cash Flow Management	Enabled
Custom Report Integration	Enabled
Technical Service Tools	Enabled
Excel-Based Budgeting	Enabled
Purchase Order Enhancements	Enabled
Mekorma MICR	Enabled
Control Account Management	Enabled
Advanced Bank Reconciliation	Enabled
Enhanced Commitment Management	Enabled
MICR for Canadian Payroll	Enabled
CopierSeries	Enabled
Advanced Security	Enabled
Analytical Accounting	Enabled
Assign By Checkbook	Enabled
Report Scheduler	Enabled
SmartList Builder	Enabled
Analysis Cubes for Excel	Enabled
Housing	Enabled
RM Mass Apply	Enabled
HITB Report	Enabled
Dynamics Online Services	Enabled
Mekorma Multi-Batch Management	Enabled
Mekorma Products Manager	Enabled

How often do you perform GP file maintenance (Checklinks) and how long does this process take for all modules?

Number of Hours

Please attach copies of the DYNAMICS.SET and DEX.INI files from a client machine that has all modules and ISV products installed.



Dynamics Reporting and Integration Information:

Please have your GP administrator and/or IT lead fill out this section

Do you currently use FRx or Management Reporter?

1. Please open Report Designer
2. Navigate to **Help > About FRx (About Management Reporter)**

Screenshot the result and replace the image below with your results.



If you use FRx, do you want the reports to be migrated to Management Reporter <i>(FRx is not compatible with GP 2015 or any later version of GP)</i>	No
Are you interested in BI360 as a replacement for your current financial reporting tool?	No
Are you interested in power bi as a dashboard/analytics tool?	No
Are you linking other products (Excel, Word, Access) to Dynamics GP using ODBC?	Yes
Do you run any integrations on a routine basis? If so, please indicate what tool you are using Ex: Integration Manager, SmartConnect, Scribe	Integration Manager Reporting Services
Do you have any custom SQL Reporting Services Reports or Crystal Reports? Will you require assistance migrating them? Would you like any new reports developed as part of the upgrade? Please describe.	Yes
Are you using any VBA projects?	No
Are you using keystroke macros within the Dynamics GP product?	No
If a SQL Database maintenance plan is not in place should Velosio create one?	Yes
Do you have any SQL Server Agent jobs that need to be migrated to the new server?	No