DXC   Dynamics GP Upgrade/System Audit Questionnaire

In order to provide a comprehensive estimate for your Dynamics GP upgrade, please complete all information requested below regarding your current software. If you need help filling out any of these questions, please contact us.

Customer Name: Columbus Metropolitan Housing Authority

Customer Contact Information

Contact Name	Phone Number	Email Address
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Microsoft Dynamics GP Information
Unless noted below, to gather this information, launch Dynamics GP and follow the path provided.
For screenshots, please make sure to expand the screen to fit all information.

Current Version and Licenses
Within GP, choose Help > About Microsoft Dynamics, and paste a screenshot below.

Dynamics.set File from the Dynamics GP Server
On the Dynamics GP server, browse to the installation folder and copy the Dynamics.set file below.

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DYNAMICS.SET

Customization Maintenance

Within GP, choose Dynamics GP > Tools > Customize > Customization Maintenance, and paste a screenshot below.

Customization Maintenance

Export | Import

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

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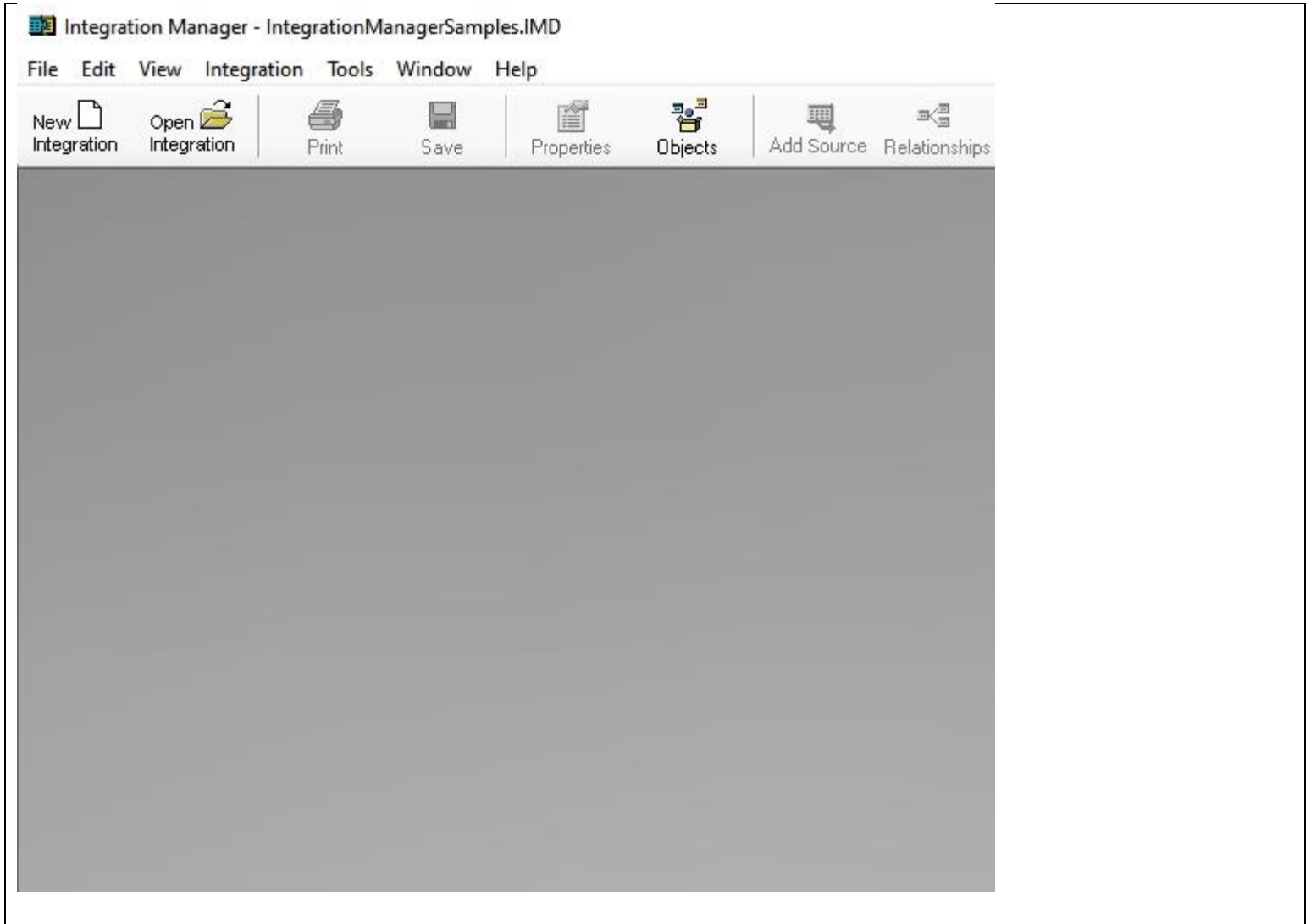
POP Receivings Distribution Detail - Reprint	Modified Report	Microsoft Dynamics GP
Posting Accounts	Modified Report	Microsoft Dynamics GP
Quick Posting Edit List	Modified Report	Microsoft Dynamics GP
Quick Posting Journal	Modified Report	Microsoft Dynamics GP
Quick Posting Journal2	Modified Report	Microsoft 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

Integration Manager Screenshot (if applicable)

Within GP, choose Dynamics GP > Tools > Integrate > Integration Manager, and paste a screenshot of the integrations below.

Microsoft SQL Server Information
To gather the information below, launch SQL Server Management Studio and run the requested script. Open a blank query screen by choosing File > New > Query with Current Connection. Copy and paste the output results in the space below.

SQL Collation
Within SQL, run the following script against the Master database and paste results below: SELECT CONVERT (varchar, SERVERPROPERTY('collation'))

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SQL Version

Within SQL, run the following query against the Master database and paste results below: SELECT @@version

100 %

Results | Messages

	(No column name)
1	Microsoft SQL Server 2012 (SP2-GDR) (KB3194719...

SQL Databases

Within SQL, run the following script against the Master database and paste results below: EXEC sp_helpdb

Results | Messages

	name	db_size	owner	dbid	created	status	compatibility_level
1	CMHA	90705.13 MB	DYNSA	7	May 26 2015	Status=ONLINE,...	100
2	CMHA2	85745.13 MB	CMHA\ykoh	17	Sep 11 2015	Status=ONLINE,...	100
3	CMHAExternal	699.00 MB	CMHA\ykoh	27	Jul 26 2017	Status=ONLINE,...	110
4	CMHAT	89945.13 MB	DYNSA	25	Aug 23 2017	Status=ONLINE,...	100
5	CMHAUtility	3380.00 MB	CMHA\ykoh	13	Jun 16 2015	Status=ONLINE,...	100
6	DYNAMICS	985.38 MB	DYNSA	8	May 26 2015	Status=ONLINE,...	100
7	GPWEBSERVICES	5.83 MB	CMHA\mcraigue	21	Aug 19 2017	Status=ONLINE,...	110
8	master	4433.69 MB	sa	1	Apr 8 2003	Status=ONLINE,...	110
9	msdb	7638.13 MB	sa	4	Feb 10 2012	Status=ONLINE,...	110
10	tempdb	7500.00 MB	sa	2	Mar 6 2020	Status=ONLINE,...	110
11	VendorPortal	26.31 MB	CMHA\ykoh	22	Sep 11 2016	Status=ONLINE,...	110
12	WaitList	2684.00 MB	CMHA\ykoh	15	Jul 22 2015	Status=ONLINE,...	100
13	WaitList_colmetro	2624.00 MB	CMHA\ykoh	30	Jan 4 2018	Status=ONLINE,...	100
14	WaitList_TEMP	2624.00 MB	CMHA\rkosa	19	Oct 7 2015	Status=ONLINE,...	100
15	WaitList_TEST	2624.00 MB	CMHA\ykoh	16	Sep 7 2015	Status=ONLINE,...	100

Dynamics GP Companies

Within SQL, run the following query and paste results below: SELECT CMPNYNAM, INTERID from DYNAMICS..SY01500
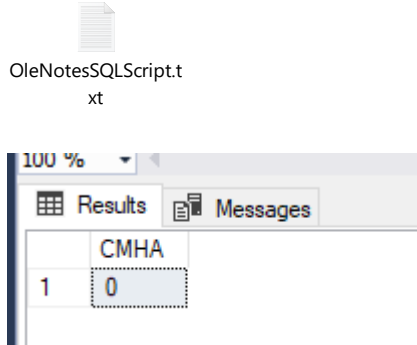
100 %

Results | Messages

	CMPNYNAM	INTERID
1	Columbus Metropolitan Housing Authority	CMHA
2	CMHA <TEST>	CMHAT

OLENotes Script
Run the attached script and paste the results below.

OleNotesSQLScript.txt

100 %
Results | Messages
CMHA
1 | 0

Dynamics GP Add-Ins

Please indicate which Dynamics GP Add-Ins are currently used.

Description	In Use	Details or Other Information
Dynamics GP Web Client	☐	
GP Excel Templates	☒	
GP Word Templates	☒	
GP Email Features	☐	

Custom Add-Ins
On the Dynamics GP server, browse to the addins folder, and paste a screenshot below.

Customizations

Please indicate which customizations listed below are currently used.

Description	In Use	Details or Other Information
Crystal Reports	☐	
SQL Server Reporting Services (SSRS)	☒	
Custom SQL Objects	☐	
eConnect Integrations	☐	
Scribe Integrations	☐	
SmartConnect Integrations	☐	See below for details requested.
Other (please explain)	☐	
Not Applicable	☐	

If you are currently using eOne SmartConnect, please provide the following information.

SmartConnect Version
Please paste a screenshot below with the version information.

SmartConnect Maps
Please paste a screenshot below with the active maps.

Optional Features
Please indicate which optional features are currently in use.

- Are you using NodeBuilder?   <Y/N>

- Have you modified any standard SmartConnect nodes?   <Y/N>
- Do you use the SmartConnect Excel 'Push' integration functionality?   <Y/N>

Dynamics GP Modules

Please indicate which modules are currently in use in production.

Module Name	In Use	Module Name	In Use
FINANCIAL MANAGEMENT		**HUMAN RESOURCE MANAGEMENT**	
General Ledger	☒	Benefit Self Service Suite	☐
Intercompany Processing	☒	HRM Self Service Suite	☐
Analytical Accounting	☐	Advanced Human Resources	☐
Payables Management	☒	Human Resource Management	☐
Safe Pay	☒	Payroll – US	☐
EFT PM	☒	**BUSINESS INTELLIGENCE**	
Receivables Management	☒	Anlaysis Cubes Library	☐
EFT RM	☐	Key Performance Indicators	☐
Revenue/Expense Deferrals	☐	Business Analyzer	☐
Fixed Asset Management	☒	**ADDITIONAL FUNCTIONALITY**	
Bank Reconciliation Management	☐	Field Service	☐
Electronic Bank Reconcile	☐	Manufacturing	☐
Multicurrency Management	☐	Multi Bin	☐
SUPPLY CHAIN MANAGEMENT		Project Accounting	☐
Inventory Control	☐	Refund Checks	☐
Purchase Order Processing	☒	**NOT FOR PROFIT**	
Sales Order Processing	☒	Grant Management	☐
Invoicing	☒	Interfund Processing	☐
Landed Cost	☐	Encumbrance Management	☐
Bill of Materials	☐		
Returns Management	☐		

Reporting / Requisition / Document Management Software Tools

Please indicate which software tools are in use in production.

Software Tools	In Use	Version
Reporting Software		
FRx	☐	
Management Reporter	☒	
Jet Reports	☐	
Solver BI360	☐	
Other (please explain)	☒	Adaptive Insights
Requisition Software		
Paramount WorkPlace	☐	
ReQlogic	☐	
Dynamics GP Workflow	☐	
Business Portal	☐	
Other (please explain)	☐	
Document Management Software		
PaperSave	☐	
KwikTag	☐	
Other (please explain)	☐	

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Workstations and Hardware

Requested Information	Pre-Upgrade (current)	Post-Upgrade
Are your servers on premise or hosted?	Choose an option.	Choose an option.
Do you have a separate test / dev environment?		
Number of Workstations or Terminal Servers		