



Is Now the Right Time for an Upgrade?

Presented by: Kayla Schilling
Holly Miller Jones
Craig Mosier

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Agenda

- **The benefits of Perpetual licensing**
- **What's available now with GP2013**
- **What's coming with GP2015**
- **The Upgrade process**
- **Questions**

Reasons to upgrade -

- **Version no longer supported – GP 10 and older**
- **Version nearing end of active support - GP 2010***
 - *active support thru end of 2015, extended support thru 2020)
 - *GP 2010 will not receive any further YE or Tax updates after Oct 2015
- **You are updating your OS (Windows XP no longer supported by Microsoft)**
- **Features/Functionality gained via the Perpetual licensing model**
 - What does the new model look like?
 - “Light” users convert to “Limited” users
 - Example of gained functionality: Unlimited counts for HR/P and MR. Fixed Assets – \$6K for module for GP 2010. Included in GP 2013.

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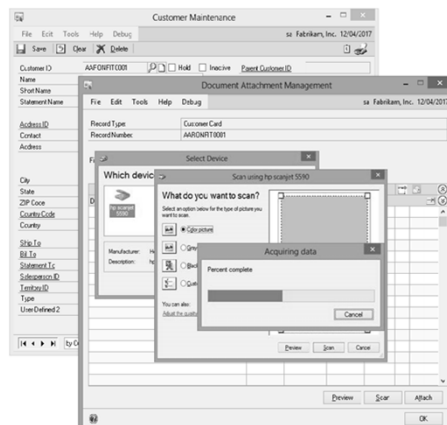
CM1

New Cool Features in GP 2013 R2 – Document Attach

Scan Documents Directly to Doc Attach from Scanner

Add Doc Attach to Payables

Convert OLE Notes to Doc Attach



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Slide 4

CM1

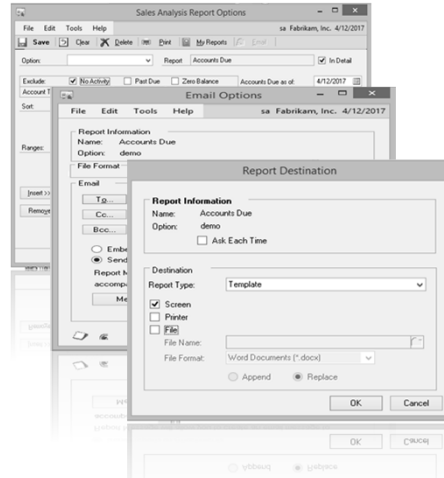
Craig Mosier, 10/22/2014

**GP 2013 R2 –
Email or Print any report in Word**

Ability to send reports in Word format

Ability to print reports as Word templates

Use Word tools to modify the reports



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GP 2013 R2 – Reverse Fiscal Year

Ability to reverse the GL Year End Close process

Will open the previously closed fiscal year

Will warn users to create backups and verify all users out of GP prior to process

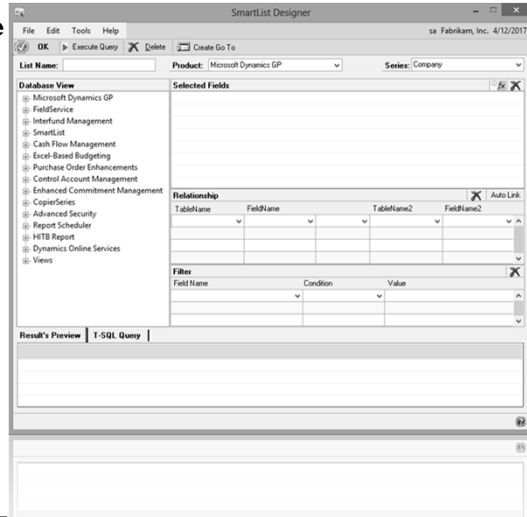


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GP2013 R2 – SmartList Designer

- Create new or integrate with existing Go To Options
- Select and Join Data from Tables or Views
- Easy to Use Interface
- Open Form, Navigation List, SmartList, or Web Page



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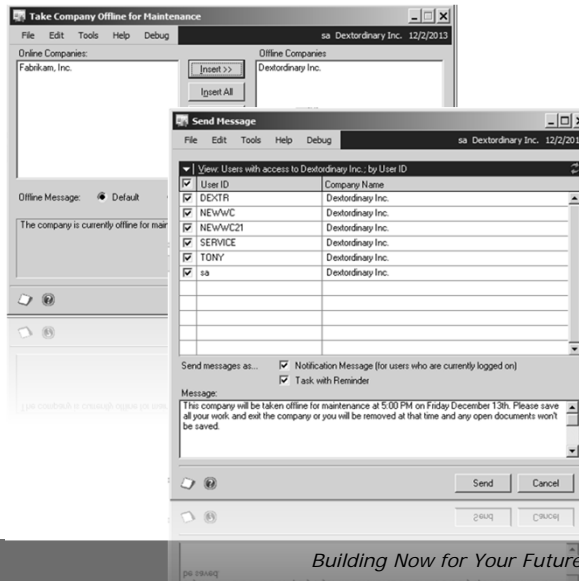
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GP2013 R2 -Take Company Offline

Limit company access for Maintenance

Assign user with access

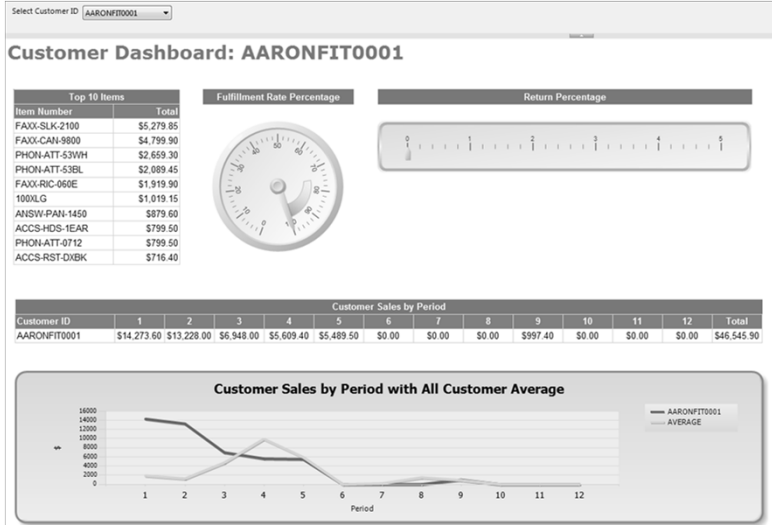
Message users



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GP 2013 R2 - Dashboarding

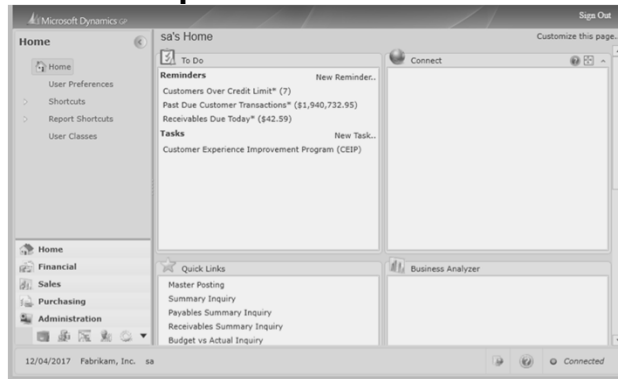


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Features for GP 2013 R2- Web Client

- GP 2013 has added web client functionality
- Browser based access to GP
- Does not require a client installation

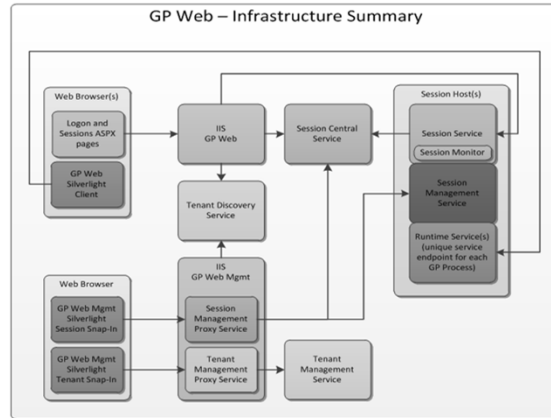


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Features for GP 2013 R2- Web Client

- **Back-end infrastructure for the Web Client:**



Features for GP 2013 R2- Web Client

- **Back-end infrastructure for the Web Client:**

- Dynamics GP Web Client site
- Web Management Console site
- Session Hosts
- Session Service
- Session Central Service

Features for GP 2013 R2- Web Client

- **Web Client Requirements:**
 - 2 Windows security groups
 - Web client users
 - Web Management Console user
 - Service account(s) for the following services:
 - GP Web client site application pool
 - Web Management Console application pool
 - Session central service
 - Session service
 - Operating System needs to be server 2008 R2 or Server 2012
 - IIS Website
 - Certificates

Features for GP 2013 R2- Web Client

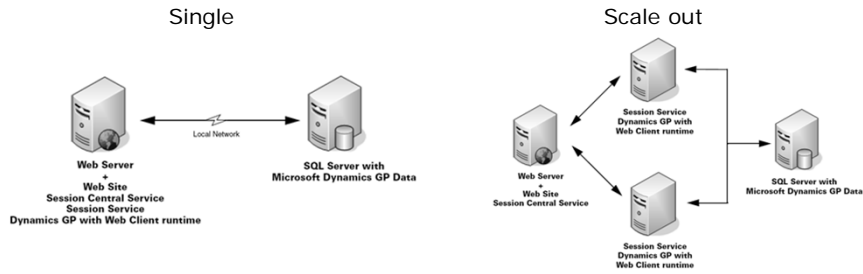
Web Client Server(Minimum requirements)

Operating System	Server 2012 Datacenter or Standard Server 2008 R2 SP1 or later - Enterprise or Standard
Processor	1 Quad Core or 2 Dual Core Processors
RAM	4 GB – Up to 25 concurrent web client users 8 GB – Up to 60 concurrent web client users 16 GB – Up to 120 concurrent web client users
Network Card	1GB Ethernet or Fiber
Dedicated SQL server	GP databases/Web client databases with no other SQL instances on the server

Features for GP 2013 R2- Web Client

- You have three deployment configurations for GP web client:

- Single Machine
- Scale out
- Multitenant



Features for GP 2013 R2- Web Client

- Features released!

Microsoft Dynamics GP Web Client Phased Release Cycles

Phase 1	Phase 2	Phase 3	Phase 4	Phase 5
Financials	Financials	Financials	Financials	Financials
Distribution	Distribution	Distribution	Distribution	Distribution
	HR	HR	HR	HR
	Payroll	Payroll	Payroll	Payroll
		Project Series	Project Series	Project Series
			Field Service	Field Service
				Manufacturing

Features for GP 2013 R2- Web Client

- Phase 1 was released December 2012
- Phase 2 was released with Service Pack 1 in April 2013
- Phase 3-5 released with GP SP2 in August 2013
- Microsoft Dynamics GP SP2 Released the following new Web Client Modules:
- **Field Service**
 - Service Call Management
 - Depot Management
 - Preventative Maintenance
- **Project Accounting**
- **Manufacturing**
 - Bill of Materials
 - Manufacturing Order Processing
 - Master Production Scheduling
 - MRP and Manufacturing Suite
- **Fixed Assets Enhancements**
- **Business Activity Statement (BAS) for Australian GST**
- **Payment Document Management (PDM)**

- GP 2013 R2 released the Identity management V1 functionality for Web Client.

Features for GP 2013 R2-Workflow 2.0

- **Four Workflows deployed in GP 2013 R2:**
 1. Requisition Entry
 2. Payroll Time card Entry
 3. Project Time & Expense Entry
 4. Purchase Order Entry

These workflows do NOT require SharePoint!

Features for GP 2015- Web apps/Workflow

- **Business Portal will not be released with GP 2015!**
 - The following features WILL be available in the core code base:
 - Business Portal
 - Business Portal Employee Users
 - Business Portal Customer Users
 - Time and Expense for Business Portal
 - Time and Attendance
 - Employee Pay
 - Employee Profile
 - Recruitment
 - Skills and Training
 - Requisition Management
 - SOX Accelerator for Business Portal

Features for GP 2015- Web apps/Workflow

- **Features not available in 2015 from Business Portal:**
 - Order Management
 - PDK
 - eService
 - eReturns
- These features are not planned to have any replacements at this time.

Features for GP 2015- Web apps/Workflow

- **Workflows to be released in GP 2015*:**
 - General Ledger Batch Approval
 - Payables Batch Approval
 - Receivables Batch Approval
 - Vendor Approval
 - Project Expense Approval
 - Direct Deposit Approval
 - Employee Skills and Training Approval
 - Employee Profile Approval
 - W4 Approval

- **SharePoint is no longer needed for these workflows!**

*Product is not released so this list can change

Features for GP 2015- Service Based Architecture

- **Service Based Architecture(SBA) will be released with 2015.**
- **It enables GP and ISV products to expose and consume services.**
- **Supports cloud based interactions**

Feature: Service Based Architecture

The graphic contains the following text elements:

- HTML5**: Build apps on many different platforms.
- REST**: REST style API lets you build apps on many different platforms.
- Secure Access**: Use Windows or O365 Identity to authenticate.
- Enhanced Interoperability**: Gives developers additional capability to leverage the Microsoft Platform.
- Operation Security**: Managed within the GP application just like forms and reports.
- Integrate**: Integrate to other applications or services.
- Discovery**: Discovery operations inform you of available operations and their syntax.
- Deployable on** Windows Azure

Features for GP 2015- Service Based Architecture

- **What does this mean for you?**
 - This will allow The Resource group the ability to build more robust integrations, and create companion apps using our platform of choice.
 - Gives 3rd party software the ability to integrate their products with GP across multiple platforms.

 - GP will have the ability to interact with cloud applications.
 - You will be able to authenticate with Windows or Office 365 authentication.

 - .NET Framework Interoperability.
 - GP 2015 can be deployed on Azure

Prepare for your upgrade - System Requirements

- **GP 2013 Requirements:**

Client	
Operating System	Windows 7 or Windows 8
Processor	1 dual core or 1 Single Core Processor 2.6 GHz or higher
Disk Space	2GB or more on System Root
RAM	2GB or more
NIC	1 GB Ethernet
Office	X86 or x64 office 2010 or 2013

Server	
Operating System	Microsoft Windows Server 2012 Essentials or Standard SBS 2011 Standard with Premium Add-on SBS 2008 Premium SP2+ Microsoft Windows Server 2008 R2 Standard SP1+ Microsoft Windows Server 2008 Standard SP2+
SQL	Microsoft SQL Server 2014- Standard or Express Editions (Prerequisite is Microsoft Dynamics GP 2013 R2) Microsoft SQL Server 2012- Standard or Express Editions Microsoft SQL Server 2008 R2 SP1 or later - Standard, Workgroup or Express Editions Microsoft SQL Server 2008 SP3 or later - Standard, Workgroup or Express Editions
Processor	1 Dual Core or 2 Single Core Processors
Available RAM	2GB
Network Card	1 GB Ethernet

Prepare for your upgrade - System Requirements

- **Web Client:**

Single Machine Recommendations	
Item	Requirements
Operating System	Microsoft Windows Server 2012 - Datacenter Edition or Standard Edition Microsoft Windows Server 2008 R2 SP1 or later - Enterprise Edition or Standard Edition
Processor	1 Quad Core or 2 Dual Core Processors or higher (see note 7)
Minimum Available RAM	4 GB – Up to 25 concurrent web client users 8 GB – Up to 60 concurrent web client users 16 GB – Up to 120 concurrent web client users
Network Card	1GB Ethernet or Fiber
Bandwidth Consideration	Planning Average: 25,000 Kilo Bytes(KB)/sec per active Web Client user with spikes up to .25 MG/sec (see note 4)
Internet Information Services (IIS)	IIS 8.0 IIS 7.5
Other Applications	.Net Framework 4.0+ ASP.Net 4.0+ SQL Native Client Adobe Reader (Required to read or print manuals)
Back Office Server	All deployments require a dedicated Microsoft SQL Server. Refer to the Microsoft Dynamics GP 2013 System Requirements

Prepare for your upgrade - System Requirements

- **Management Reporter 2012**

Management Reporter 2012	
Process Server	
Processor	2.4 GHz dual core processor or higher
Hard Disk Space	1 GB
RAM	4 GB RAM
Operating System	Server 2003 Standard or later
Application server	
Processor	2.4 GHz dual core processor or higher
Hard Disk Space	1 GB
RAM	4 GB RAM
Operating System	Server 2003 Standard or later
Data Mart	
RAM	8 GB RAM Minimum for Process Server

Prepare for your upgrade- Upgrade Steps

- **Contact CAM to initiate upgrade process**
- **Upgrade checklist**
- **Quote**
- **Technical planning call**
- **Test upgrade**
- **What's new training**
- **Test scripts**
- **Production upgrade**
- **Go Live Support**

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References

- **Great source for upcoming features in GP 2015!**
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- **Business Portal for GP 2015**
https://mbs.microsoft.com/partnersource/northamerica/pricing-ordering/pricing-ordering-news/MSDYG2015_FunctionalityDiscontinue
- **Workflow 2.0**
<http://community.dynamics.com/gp/b/dynamicsgp/archive/2014/08/07/workflow-2-0-for-microsoft-dynamics-gp-2013-r2-an-overview.aspx>
<http://community.dynamics.com/gp/b/dynamicsgp/archive/2014/06/05/new-workflow-in-microsoft-dynamics-gp-2013-r2.aspx>
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<http://community.dynamics.com/gp/b/dynamicsgp/archive/2014/06/03/identity-management-for-the-web-client.aspx>
- **Workflow for GP 2015**
<http://www.erpssoftwareblog.com/2014/09/new-workflow-engine-microsoft-dynamics-gp/>

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The Resource Group

The Resource Group Leaders
Marty Schillaci, CEO
Denise Schillaci, COO

Questions?

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