

How to Plan a
MICROSOFT DYNAMICS
GP UPGRADE



Encore
Business Solutions

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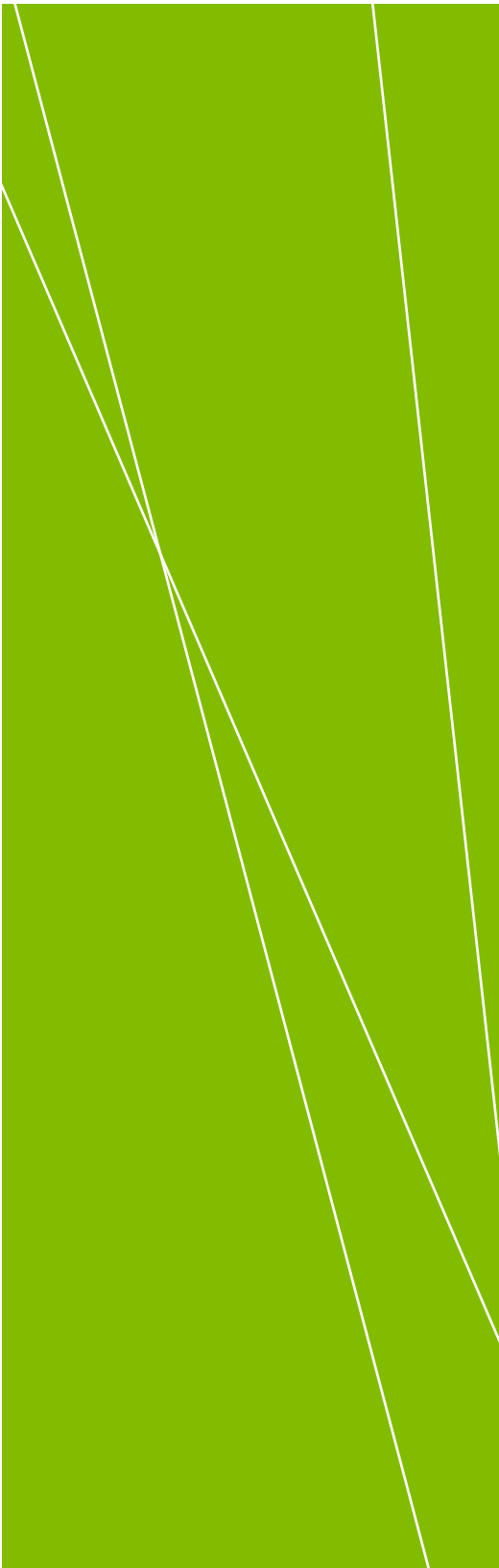
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With rapid changes in technology, upgrading has become another important part of a long list in operating a successful business.

Keeping up with the changes can be challenging. How to make it as painless as possible can sometimes feel overwhelming.

We've gathered some key points to help build a perpetual plan to assist in not just building a long term, recurring upgrade plan, but also one that is successfully executed.



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6 Key Steps to Planning an Upgrade

1. **Determine when and how often your business should upgrade.**

It's best to set a rolling timeline to ensure upgrades happen regularly. Whether your upgrade happens biennial or less often, try to keep it consistent. If you don't currently have a recurring plan, read about the [Common Upgrade Paths](#) on the next page to help determine which upgrade path works best for you. By determining upgrade frequency and optimal time of year, you can budget accordingly and coordinate the timing for introducing the new version to your users.

Tip:

Make planning of an upgrade part of your annual strategic planning and/or budgeting process to help ensure it's never forgotten.

Once you've determined which upgrade path suits your business best, the next question is, when during the year is best. We suggest never doing it close to month end or payroll week, so keep in mind important functions in the week, month, quarter or year. We hope you are always busy, but if possible pick the slowest time of the year. This will ensure your availability, and users can make themselves readily available to complete testing, attend training, and hopefully put what they learned to good use by incorporating the new features.

2. **Do we require a test upgrade?**

A test upgrade is fairly standard for most customers, but not always necessary. If you have multiple ISV (third party) add on products, customizations, integrations or other highly sensitive operations that need to be considered when upgrading, a test upgrade is definitely recommended. Likewise, if you are considering deploying new functionality in Dynamics GP, the test environment provides a place to try it with your own data before putting it into your production environment.

3. **Should we evaluate moving to [Azure](#) (aka the cloud)?**

Evaluating Cloud computing is certainly warranted and something to be considered when planning your upgrade. As part of the upgrade process a new server is usually needed, so it's a good idea to review cloud options, like Microsoft Windows Azure. No matter which option is selected, the upgrade process itself mostly stays the same. If you need some guidance on the topic, we have the experts and resources to walk you and your team through this evaluation.

6 Key Steps to Planning an Upgrade (cont'd)

4. **Who is responsible for managing the project internally?**
Assign a technical resource and power user from your team. These resources should work directly with your [Encore Representative](#), covering both the technical parts of upgrading, and application improvements offered when upgrading.
5. **Know why you're upgrading?**
Each version offers advancements, improved efficiencies, and new functions and features. Through What's New Training, users can take advantage of these upon completion of the upgrade which will continue to improve on their productivity. Also, are there features, functions, or modules that have been available for a while that have been on your business wish list to use with the changes to [Perpetual Licensing](#)? If so, this is a great time to add that to your training list too!
6. **Should we attempt upgrading on our own?**
Some customers do have the talent and expertise to properly execute an upgrade, but many don't. Though the process isn't complicated, you must adhere to hundreds of steps. Forget one, do one before the other, and it very well could be a disaster. Though attempting an upgrade even in test can help you master the process by adjusting and correcting along the way, documenting the process and corrections can become tedious, challenging, and likely very time consuming. By engaging Encore, experts that live and breathe the entire process, understand the nuances, complications and best practices to execute an update successfully will in the end save you time and money.

You're not alone. If at any time, you need an expert to help walk through all the options to build out the optimal plan, Encore has the resources to help you, just reach out to clientservices@encorebusiness.com.

Common Upgrade Paths

There are 3 Common Upgrade Paths. The following recommendations are listed by preference:

1. The most common upgrades Encore works on are known as single version-to-version upgrades. These upgrades are strictly moving from one version to the next consecutive version of Dynamics. For Example: v2010 to v2013, or v2013 to v2015
2. Another fairly common upgrade path, is (what we call) a multiple-version upgrade, where customers can – by Microsoft design – skip a single version. Essentially, the upgrade process would upgrade through the skipped version directly to the next consecutive version, such as: v10.0 to v2013, v2010 to v2015.
3. A less common upgrade path, but doable, is a double upgrade, where the upgrade needs to happen in two parts. For example, if you are using v10.0 and would like to upgrade to v2015, the process would be to upgrade from v10.0 to v2013 to v2015.

Encore's 5-Point Process for a Successful GP Upgrade

Your process with Encore

Once you've answered the questions, reach out to your [Encore Representative](#) and inform them of your Upgrade Strategy so we can keep the upgrade planning momentum going.

- 1. Share and Build the Plan**
Understanding your expectations is important to us. By fully understanding your upgrade plan and what the key reasons are for upgrading, we can assist in refining the plan by providing some of our best practices and suggested improvements.
- 2. Evaluating and Completing an Upgrade Checklist**
No one likes surprises when upgrading. Encore's [upgrade checklist](#) reaffirms all details that need to be accounted for when planning an upgrade. If through the upgrade checklist process there are indications that more details should be collected, Encore may recommend an Upgrade Analysis; a 90-point system inspection that gathers the finite details to ensure accuracy and completeness. The documentation provided is useful not just to confirm a successful upgrade, but can help with moving forward and maintaining your environment.
- 3. Estimate**
Budgeting for an upgrade is important. By completing the checklist, Encore can provide you an upgrade estimate which will cover everything from a test upgrade, live upgrade, training, and more based on your upgrade strategy.
- 4. Scheduling and Assignment**
Once everything is in order and you're ready to proceed, your upgrade is sent to our delivery team to be scheduled and assigned to our team of solution specialists.
- 5. Execute**
Lastly comes the most exciting part, complete the upgrade.

Prefer extra assistance with planning and/or completing the upgrade checklist?

Request an Upgrade Analysis

Encore technicians can either come onsite or access your environment remotely to walk through the complete upgrade planning exercise with you.

The Upgrade Process and What you Need to Know

It comes with experience...understanding the nuances of planning and executing an upgrade. We've done a few thousand in our time, and we've learned lots along the way... and so have our [long standing customers](#). If it's your first time going through this process, or just want a reminder, there are a few items you will want to keep in mind throughout the upgrade process to ensure a successful upgrade.

- 1. Give yourself and Encore Ample Time**
If you have a rigid timeframe to execute this upgrade, give yourself and Encore ample time. Encore completes 80-90 upgrades perpetually, and availability can be limited. Contact Encore 3-4 months in advance (or more if you can) to ensure you're guaranteed the dates you want. Flexible? We always have open weeks, if you're flexible, we would be happy to fit you in!
- 2. Know the Timeline**
Upgrade timelines vary depending on your Dynamics GP solution. The estimate presented to you will give you a good idea of how long the process will take. Knowing the timeline will allow you to plan how best to use you and your user's time while the live upgrade is in progress.
- 3. Prepare for Hiccups**
We have accounted for everything we can; you've accounted for everything you can; but even a successful upgrade can have a few hiccups. We will collectively run preliminary testing, validating the success, and over the first few days, any hiccup found can be reported to us and we'll certainly review and address!
- 4. Reap the Benefits**
Upgrading is important. Firstly, you are entitled to it through your annual [Enhancement Fees](#). The 2 most current versions are on [mainstream support](#) with Microsoft, and who doesn't want to be on the latest and greatest. However, we believe the most important reason is that you and your users get to take advantage of the improvements that were built with [you in mind](#), to help further automate and improve processes, build collaboration among users, and improve the work experience. So be sure your business and your users reap all the benefits of the upgrade; it's the best part of upgrading!

What's our success rate you ask?

Test upgrades are a great way to ensure a successful upgrade. Our Live Upgrade success rate is 99.9%. What about the 0.1%? We do prepare for the worst and yes, we have a plan. It's called a Roll Back. Essentially, we have the ability to roll you back to your original version, which in the immediate moment will ensure your business won't miss a heartbeat. From there, we evaluate the problem, find, test and validate the solution and work through the next best time to complete.

We know upgrades, we've learned by [years of experience](#), by Microsoft, by customers and yes, sometimes by mistake. You got questions? We got answers. So, if you don't know where to start then [Contact Encore](#).