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The Five Star GP Administration Presentation

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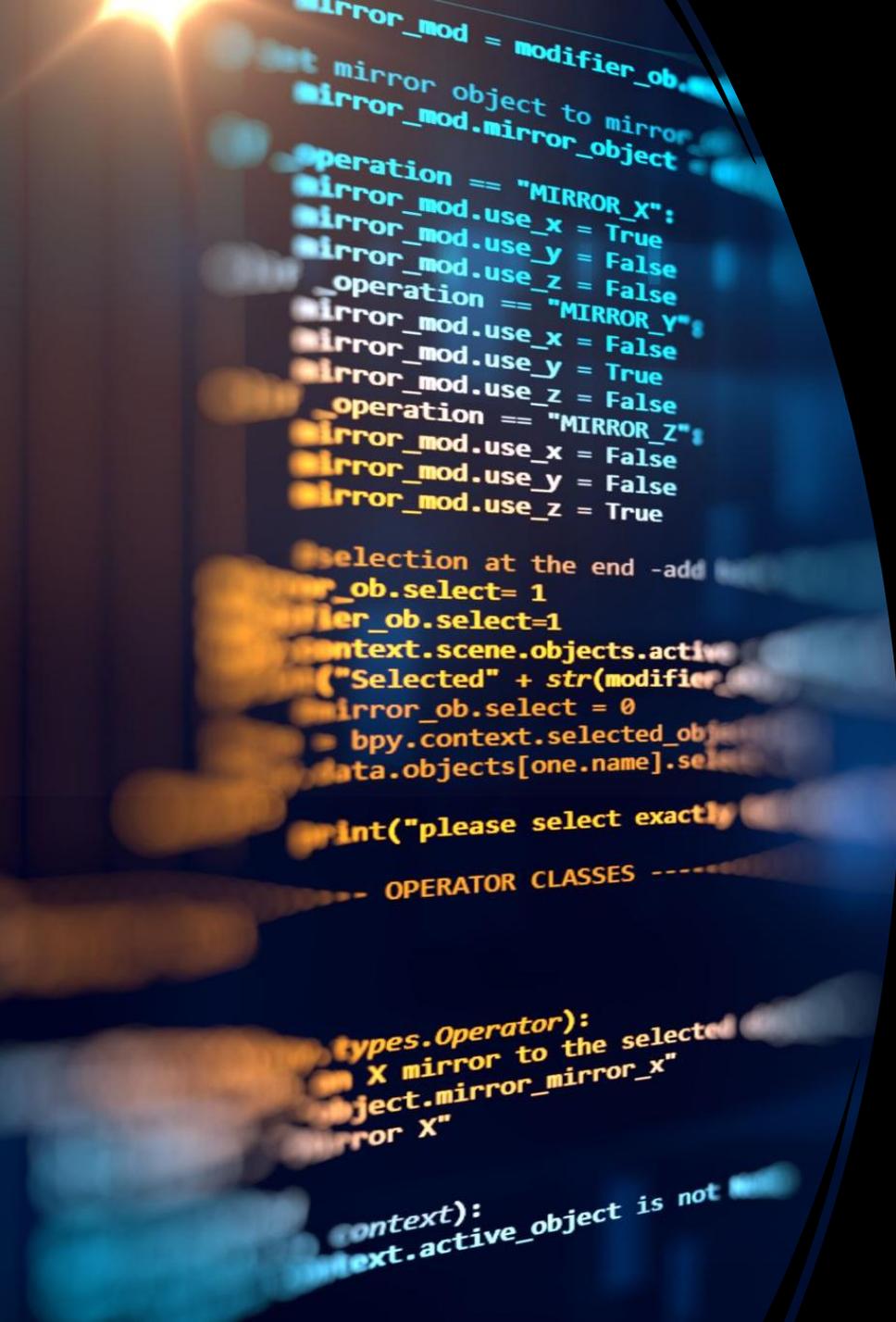
About Jo deRuiter (Me)

- **24 Years working with GP**
 - 10 as an end user in positions from Senior Accountant to CFO
 - 14 as a consultant having worked with a number of Gold Partners and now I own my own Microsoft Partnership
- **All in all, 30-some-odd Years in Accounting Systems, including Oracle, SAP and others**
- **MS Dyn GP Instructor teaching courses such as:**
 - Tables and Dataflow
 - How to setup and use multiple aspects of GP
 - Project Accounting
 - Fixed Assets
 - Field Service, etc
- **Co-Chair Dynamic Communities Credentialing Council -GP**
- **Member GPUG Exam Committee**



Compatibility With OS, SQL, SQL Settings, Virtual Environments to GP is Of Utmost Importance

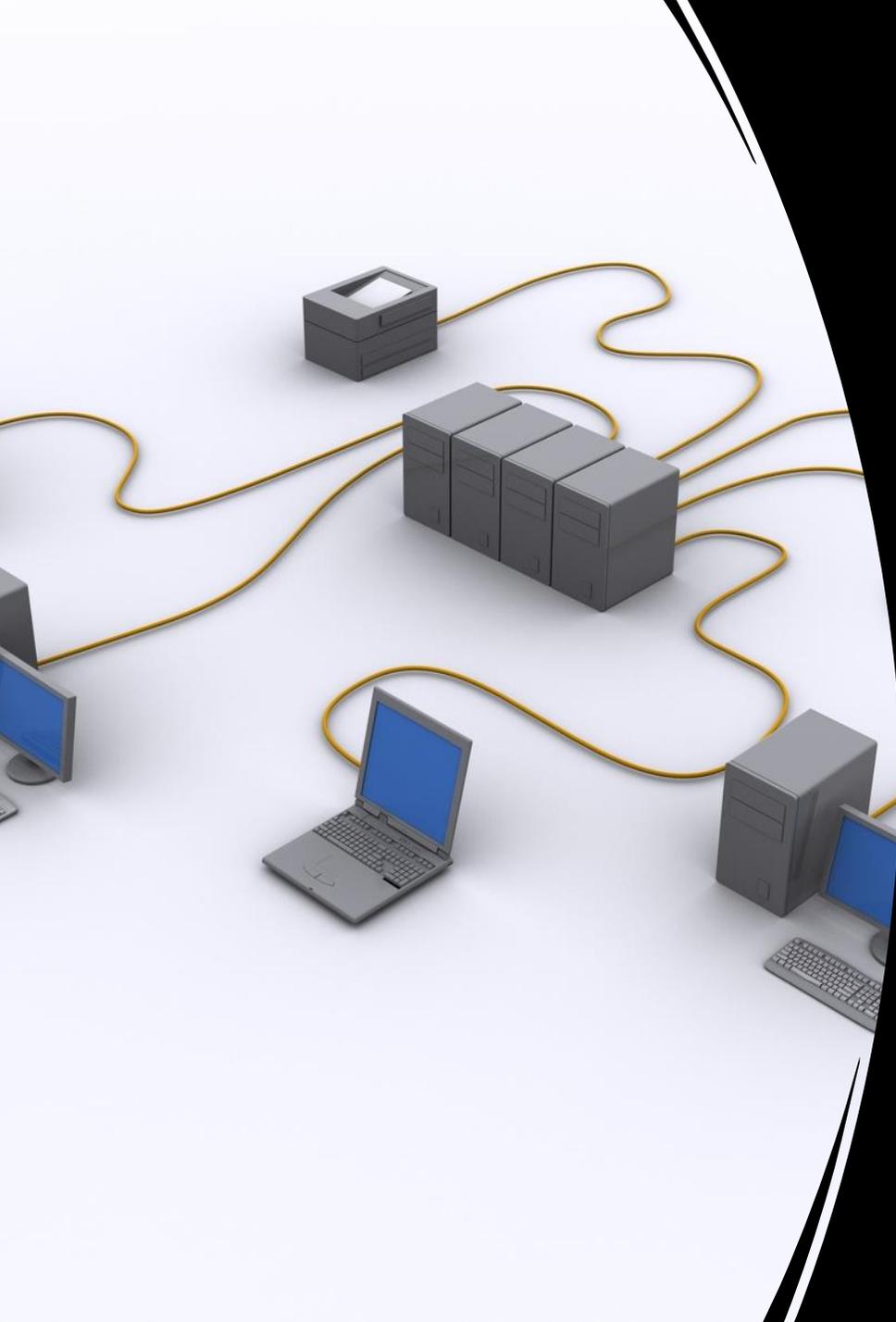
- For GP 2018 go Here:
- https://docs.microsoft.com/en-us/dynamics/s-e/gp/mdgp2018_system_requirements
- Things to watch out for:
 - Choose your Profile CAREFULLY, too much or too little can be configured.
 - Server and workstation have different requirements, be careful.



A person is seated at a desk in a server room, working on a computer. The room is filled with rows of server racks and multiple computer monitors. The lighting is dim, with a strong blue glow from the screens and server equipment. The person's hands are on a keyboard, and they are looking at the monitor. The background shows other people working at similar workstations.

What is a GP Systems Administrators Role?

- The GP Network Infrastructure
- The GP SQL Server Install, configuration and performance
 - Maintenance on databases
- GP Users, including Active Directory Users
- GP Security
- GP Setups (occasionally)
- GP Maintenance in the user interface
- Troubleshooting and resolving GP Issues
- Liaising with Accounting and IT
- Knowing when to call in Partner Help



GP Network Infrastructure

- **Dynamics GP Installs**
 - Keep a shared drive with all of your GP related installs
 - Organize under one share:
 - GP Installation Media
 - Create Client Install Package for uniformity among individual installations
 - Third Party Installation Media
 - Notes on Installs
 - (TIP) The best organization I've seen is with folders ordered in numerical sequence of installation
- **Windows Server, SQL Server, GP and Client Computer compatibility**
 - It's imperative that all of these are compatible with one another.
- **ISV's**
 - ISV Products also need to be compatible to the GP version, SQL version and Windows Version
 - This does take research.

GP Network Maintenance

- GP is a resource-heavy application and relies on both SQL and the Windows server it resides on to be able to function correctly.
 - This means maintaining firewalls and antivirus' that do not interrupt GP Performance
 - If these scan GP Code folders and SQL Code during work hours it can cause significant slowness and almost a feeling of Lock-up to GP users



SQL Server Install, Config, Maintenance

- **SQL Server for GP has some specific requirements!**
 - Default or Named instance
 - Up to You!
 - Server Configuration:
 - Binary (sort order 50) or Dictionary Order, Case-Insensitive (sort order 52) sorting is required.
 - Database Engine Configurations
 - Mixed Mode **REQUIRED**
 - Data Directories are an internal decision, but best practice is to keep data and logs on separate drives and monitor them closely
 - SQL Server Reporting Services
 - GP has out of the box SSRS reporting that provides users a great deal of flexibility.
 - This should almost **ALWAYS** be installed and configured



SQL

SQL Maintenance of GP Databases

- **GP Databases have very specific maintenance needs**
 - Never shrink them!
 - Standard Maintenance Plan attached!
 - At the very least ensure you are grabbing full backups
 - DYNOSA should always have the ownership role of GP databases
 - Recovery Model should be full
 - If you Upgrade be cognizant of changing the Compatibility Level
 - Access should always be MULTI_USER unless maintenance is being run on the DB
 - Change Tracking on newer versions of GP should be True
- **SQL Server Itself:**
 - Improve performance by modifying how much memory on the server SQL Server is allowed to take (Server Properties)
 - There are 3rd party tools to monitor the health of SQL Server



GP Users and Security

- **GP Users can only be created by a user that has system admin rights in SQL**
 - This does NOT mean you have to use the 'sa' login to create users
 - Set the creating GP User ID to be a sys admin in SQL and they can create users without having the 'sa' password
- **GUARD your 'sa' password**
- **Security in GP is GRANTED, which means users must be GIVEN the security, not have security taken from them upon creation**
 - You control which databases, and can have different securities in different companies
- **There are 3rd party tools available that can help you 'discover' what users routinely use to design very specific roles.**



GP Setups and New Companies

- **Copy Company**

- A PSTL Tool that usually works well for creating new companies
 - Will NOT add companies to reports and you will still need to alter third party applications both within GP and external to GP to see the new company
- WILL copy vendors and customers and items so be careful that this is what you want, if not think of using the Import Setup Tables below

- **Import Setup Tables**

- Old way of doing things was to use the SQL Import to copy over setups

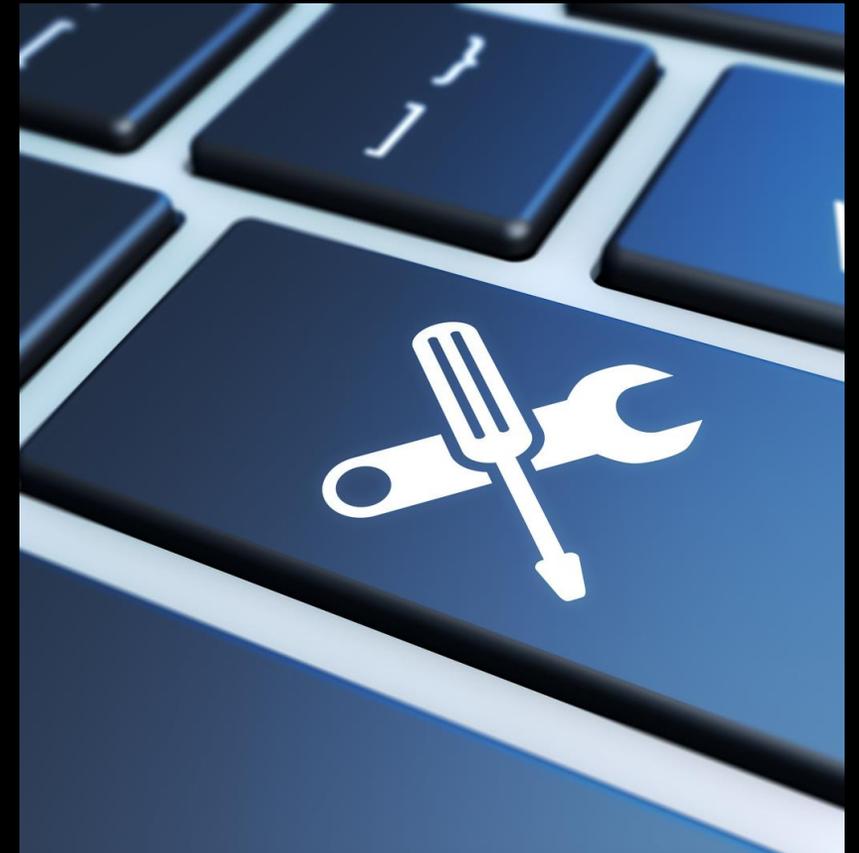
- **General Information on Setups**

- Setups in GP can be configured to be very meaningful and impact how and what you are recording.
- Be cognizant that end users should not always have access to these



GP Maintenance in the User Interface

- **GP Utilities**
 - Reconciles (Take actual data and modify the summary “balances” in inquiry windows and reports to better reflect what's actually in the transaction tables.
 - Remove History has its place, but should be used only under specific circumstances
 - Combiners and Modifiers: great utility!
- **Routines**
 - Should be explored thoroughly so that you understand their impact on normal GP processing!
- **Setups**
 - Can control more than you think and be very customized
- **Check Links**
 - Widely considered as Data Repair, Check Links is useful but be prepared that it will not fix every issue and can even cause issues.



The background features a dark blue field with a pattern of light blue gears. On the left side, there is a vertical line with several circular icons hanging from it. These icons include a group of three people, a document with lines of text, and a gear. In the foreground, a pair of hands is shown holding a circular icon of a document with lines of text. The overall theme is technical and user-oriented.

GP Modifications in the User Interface

- **Report Modifications**
- **The Dynamics.set File**
- **ISVs**
- **Professional Services Tools Library (PSTL)**
- **Implementing Document Attachments**
- **System and SmartList Preferences**
- **Implementing Emailing**
- **Implementing Workflows**
- **Integrations to Dynamics GP**



GP Troubleshooting and Issue Resolution

- **Start wide then whittle down**
 - Is it happening for everyone or just this user, is usually the first question you need to have answered
- **If users are processing any type of transaction and their GP hangs, do NOT kill their GP.**
 - You will need to wait a reasonable amount of time, sometimes upwards of an hour
 - If you do not you may cause yourself much more harm than the time savings of killing the system
 - If it is a report that is hanging it up, then feel free to kill it, but be careful
- **Google will be your best friend!**

Liaising between Accounting and IT

- **Training should be considered a top priority**
 - As a GP Consultant MOST of the support calls I get are caused by training issues.
- **Understanding of both Accounting and IT functionality is a critical aspect of any GP Admin.**
 - If you do not have both, begin trying to learn the one you are missing
- **Be able to communicate with both teams effectively to provide the best solution for the company**



Go to www.menti.com and use the code 1373 8344

In Three Individual Words, Let Us Know Your Thoughts on The Five Star GP Admin Presentation!

