



Vertex Offers Returns 9.0 Migration Help

The next release of Vertex Sales & Use Tax Returns, version 9.0, supports only Microsoft SQL Server and all customers must be upgraded and live on this new version by April 1, 2012. To help with this transition, Vertex is pleased to offer enhanced migration assistance:

1. Standard Support: The Customer Cafe will have migration documentation and the Vertex Support team will be available to answer your general questions.

2. Returns 9.0 Migration Service: Vertex can also walk you through the Returns 9.0 upgrade. With this service, you will be assigned a Vertex specialist who will remotely guide you through your migration at a scheduled time. See below for details. This service is **\$3,995**; please contact us to make a reservation.

For more details, please contact us at ServicesInfo@vertexinc.com or (484) 595-2530.

Returns 9.0 Migration Service Details

Phase 1: Requirements Gathering

(1-3 Hours)

1. SQL Server Installation and Configuration
 - A. What recommended SQL Server will you be using?
 - I. Microsoft SQL
 - a) What version?
 - b) Please provide SQL Server connection information:
 - i. servername\instancename\databasename
 - ii. authentication method desired: Windows or SQL?
 - A. If SQL, please provide credentials for login
 - II. Vertex's VSUTRServer (**Note:** This option is only available for single user implementations.)
 - B. Who is installing and setting up your Returns 9.0 SQL database?
 - C. Are you planning on more than one Returns 9.0 SQL database?
 2. Current v8.5 Database Information
 - A. How many Vertex Returns databases do you have now?
 - B. What is the current location of your database(s)?
 - C. If you have multiple databases, would you like to merge them together? (**Note:** This will need to be done prior to migration and cannot be done once upgraded to 9.0)
 - D. What is the size of each Vertex Returns database (**Note:** These will need to be copied locally at the time of migration).



- E. Do you want to delete any companies currently listed in any of your databases? (**Note:** This will need to be done prior to migration and cannot be done once upgraded to 9.0)
- F. Do you have archive files that you want to “un-archive” at this time?
 - I. How many
 - II. Size of each
- G. Do you use any part of the Management Tool Kit?
 - a) Report Writer?
 - b) Document Manager?
 - c) Tax Calendar?
 - I. How many Databases for each?
 - II. Location of each
- H. How do you want to configure Management Tool Kit databases in your new deployment?
 - I. How many users do you have?
- J. On how many computers will the program files need to be installed?
- K. How much unfragmented free space do you have on the computer the migration will be run from?
- L. Will you be setting up Returns Role Based Security at this time?
 - I. Gather requirements

Phase 2: Upgrade/Migration Process (all tools provided by Vertex Returns)

1. Install Vertex Returns 9.0 on a computer running in parallel to your current Vertex Returns 8.5 installation. You can install Vertex Returns 9.0 program files on the same computer as Vertex Returns 8.5, however you must install it in a different directory. You cannot install Vertex Returns 9.0 over Vertex Returns 8.5. (1 – XX Hrs)
2. Use the Data Migration tool to copy your data from the existing Qsutr32.VTD 8.5 database(s) to your new Returns SQL database. (Note: The 8.5 database(s) should be moved to the local machine to speed the migration - the larger the db and # of db's the longer the time) (1 – XX Hrs)
3. Repeat (above) for each database you have, including your Management Toolkit (Tax Calendar, Document Manager, and Report Writer) databases. (1 – XX Hrs)
4. Connect Vertex Returns 9.0 to your new database(s) and enter new subscription key. (1 – XX Hrs)
5. Open Vertex Returns 9.0 and check that your data has been successfully copied. (1 – XX Hrs)
6. Reconfigure Toolkit database connections. Reconnect Tax Calendars and Document Manager databases to the correct companies and reset the source database connections for Report Writer.

General Notes:



1. All of the following must be complete prior to the start of Phase 2:
 - A. SQL Server must be installed and connection information provided (unless VSUTRServer)
 - B. Delete any companies desired
 - C. Merge any databases desired
2. Once you are comfortable that your data has successfully migrated and Vertex Returns 9.0 is working as expected, you can uninstall Vertex Returns 8.5.
3. Vertex recommends running 8.5 and 9.0 in parallel for 1 to 3 months. During this time you must make sure that whatever data you enter (import or manually) in 8.5 must also be entered (import or manually) in 9.0 for testing results to be accurate.
4. When you uninstall Vertex Returns 8.5, the Database Wizard and your ability to merge and split any 8.5 Qsutr32.VTD databases will no longer be available. You may choose to keep Vertex Returns 8.5 until you are sure that you no longer need the Database Wizard.

For more details, please contact us at ServicesInfo@vertexinc.com or (484) 595-5950.