

FRx Questionnaire
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General Questions:

1. What version of FRx are you using? (Go to Help>About: 6.7.xxxx) _____
2. On which GL? Examples GP, SL, Epicor, Mas500 _____
3. What's your account structure? i.e. natural-department-location-profit center

4. Do you use Report Manager or Report Server?
Report Manager Report Server Neither
5. Is this a new implementation or do you have existing reports? _____
6. Do you have multiple companies to consolidate? Yes No
7. Do all your companies use the same General Ledger software? Yes No
8. Do all your companies use exactly the same chart of accounts? Yes No
9. Do all your companies use the same fiscal year? Yes No
10. Do you use any alternative accounting periods such as 52/53 week or 4/4/5? _____
11. Have any multicurrency issues? Yes No
12. Do you have security enabled in FRx? Yes No
13. Do you need to report using statistics like headcount or units? Yes No
14. If so, are your stats in the GL or do you need to link to excel? _____
15. Have you experienced any installation-related issues with FRx, or is everything stable?

16. Any specific difficulties you're having? _____
17. What's your timeframe? _____
18. I'm in Austin. Where are you? _____
19. Do you want assistance onsite or is this a Remote Access project? _____

A few more questions if you want users trained:

1. How much training do you want for your users, just a quick overview on how to run the new reports, or do you want them doing the report development (or somewhere in between)?

2. What's the experience of users (beginner, intermediate)? _____

3. How many users are to be trained? _____

4. Are there any specific issues you want covered? _____

5. What reports do you want completed at the end of training? Be as specific as possible at this early stage of the game. _____

6. How many Designer licenses do you have? _____