

# Echo Managed Service Scope

## REVISIONS

<b>Revision</b>	<b>Prepared By</b>	<b>Description</b>	<b>Date</b>
<b>2.0</b>	Alex Brown	Updated for 2016	January 2016
<b>2.1</b>	Alex Brown	Updated for April 2015, Cascading relationships and other considerations	April 2016
<b>2.2</b>	Alex Brown	Updated to include versions, present and future	April 2018
<b>2.3</b>	Alex Brown	Updated for clarification of different services offered	May 2018
<b>2.4</b>	Alex Brown	Updated to confirm Cascading Behavior functionality	August 2018

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## INTRODUCTION

The purpose of this document is to outline the deliverables, commitments and prerequisites to support the Echo Managed Service data migration offering from Synchronicity Technology Solutions Ltd.

This document is for information and may be referenced within a quote or proposal. Where referenced within a proposal or quote, the version number of this document will be referenced.

The fixed price managed service does not include functional upgrade activity.

Where Synchronicity is working as a sub contractor, partners may freely share this scope with the end customer.

## SERVICE SUMMARY

The Echo Managed Service is a professional services engagement which makes use of the Synchronicity Echo application in order to support the migration of data from a Dynamics CRM application database (version 4, 2011, 2013, 2015, 2016 or Dynamics 365)

The following items are included in the scope of the fixed price managed service available from Synchronicity for this engagement.

## IN SCOPE

- Production migration from source database (version 4, 2011, 2013, 2015, 2016 or Dynamics 365) to destination Dynamics CRM application (usually CRM Online, latest version).
- Delivery of the migration using the 'delta' process, with one initial 'full data' load, followed by a switchover data load (if required)
- If requested (and included in the purchase request) a complete test migration to an identified test environment will be in scope.
- Issue management, and completion reporting.
- Migration of all entities in Appendix A – Entity list.
- Up to 3 hours of project meeting time over the life of the project. \*\*
- At the discretion of Synchronicity Directors, some entities and/or attributes may be excluded (on request) from the migration. This exclusion must be confirmed in writing as part of the data migration contract as an addendum.
- If requested, attachment data (annotation / activitymimeattachment) may be migrated to SharePoint, with the references to SharePoint documentlocation records being created to associate the data using Dynamics standard behavior.

## OUT OF SCOPE

- Updates / amendments to JavaScript functionality to reflect the current solution
- Updates to include integration, either client side or server side.
- Updates to re-develop custom reports, or custom data extracts (Integrations)
- Updates to manage plugin re-development
- Management of any long running workflows (workflow wait states and workflow instances are not included in the Managed Service cost)
- Management of third party solutions, and application of any appropriate upgrades.
- User setup and configuration
- User training and familiarization
- Validation of the customization set (entity model) in the destination environment.

## DEPENDENCIES

Timescales for the specific delivery will be discussed, however there are several areas of responsibility that the client must complete in order to ensure the smooth operation of the Echo Managed Service.

- Confirmation of Cascading relationships. It should be noted that the standard entity model for CRM 2013, 2015 and 2016 may include cascading ownership relationships. The Echo process operates in a priority order, but will update lookups within a given record type in no specified order. It is possible that, once Echo has updated relationships in a 'child' record, the parent records overwrite the ownership when they are updated. Synchronicity has included, within Echo, a function which will deactivate all configurable cascading relationships at the start of the migration. Following the migration these can be re implemented using the same process, or the customer can request that these are not altered. NOTE : this affects the entity model, and may overwrite customisations of this area if there is a change to customization during the migration process.
- Administrative access to the system is required (a system administrator login).
- Provision of the database in .bak format to a specified FTP site, or other transport medium. Or
- Provision of a server which allows remote access such that the Synchronicity team can install and control the Echo migration from the client's infrastructure.
- Provision of all the custom entities (to be included in the migration) in the destination environment.\*
- Deactivation of all plugins and workflows prior to the delta or main migration
- Provision of all active users in the destination
- Resetting of user and team security roles in the destination prior to go live
- Reactivation of all required functional items (including plugins and workflows) prior to go live.
- User Readiness must be managed by the customer, ensuring that the end users understand the differences between the current environment and the new environment (especially where user interface changes are involved).
- Deletion of data during the migration (including in between the primary migration and a delta migration) will result in the process failing and may incur additional charges
- Synchronicity will install the Synchronicity Echo Managed Solution in the destination environment, and the dashboard that this provides will be reviewed by the customer / partner in order to map users from the source system.

*\* It is likely that the system, following the provision of a solution containing just the entity model, will require further testing and validation from a functional perspective.*

*\*\*For projects that require multiple validation and testing cycles additional project management and administrative time may be chargeable following a discussion with the client on the requirements for this activity*

## SERVICE OPTIONS

The following outline the additional scope of delivery, in the event that additional options have been selected to support the migration. Additional charges apply for these service options, please ask for details.

## TECHNICAL UPGRADE

A Technical Upgrade provides the customer with a Dynamics CRM Solution, installed in the destination environment, based on the version 4, 2011 or 2013 database provided. Synchronicity will go through the upgrade process, and install the solution in the destination as part of this addition to the managed service.

Usually, customers will then review their custom code (JavaScript, plugins and integrations) and make the necessary functional changes in order for the system to operate as expected.

Following that, the data migration and switchover can be completed as outlined in the managed service.

Additional Scope for the Technical upgrade is therefore

- The provision of a solution to CRM Online which represents the entity model in the source system.
- The management and installation of any managed (third party) solutions to CRM Online\*
- Management of dependencies for any of the solutions deployed.\*

\*Functionality of third party solutions cannot be guaranteed. Customers should confirm with the vendor that the solution will function in the destination environment, and that no data transformation is required. Transformation of data for third party application is not in scope of a fixed price technical upgrade.

## SHAREPOINT FILE TRANSFER

As part of the migration, Synchronicity can set up the transfer of Annotations (notes) and Attachments (to emails / meetings) to a Sharepoint Online environment.

These attachments will be removed from the CRM Solution and made available within the standard CRM to Sharepoint integration. In this way, users can continue to work with their attachments and annotations following the migration, whilst making best use of the Sharepoint functionality available.

## AUDIT HISTORY TO ANNOTATION

It is not possible to migrate Audit data under the current Echo managed service. If a historic Audit is required, then Synchronicity Echo can include the transformation of Audit history for selected entities into annotation records. This transform is applied to the source database, and the data is then transferred using Synchronicity Echo in the standard way.

## VERSION 3 TECHNICAL UPGRADE

As above, although in this case a version 3 database is provided. There is an additional step before the data migration to take the version 3 database to version 4 in order to complete the migration.

## MICROSOFT AZURE HOSTED EXECUTION

In order to speed up the migration, Synchronicity can host the Echo migration within the destination Data Center on a virtual machine. This has shown to greatly increase the migration time, however guarantees cannot be made.

## APPENDIX A – ENTITY LIST

This appendix lists all entities which are currently migrated by Synchronicity Echo Managed service.

Account  
ActivityMimeAttachment  
Annotation  
Appointment  
BulkOperation (Quick Campaign)  
BusinessUnit  
Campaign  
CampaignActivity  
CampaignItem  
CampaignResponse  
Case  
Competitor  
Contact  
ContractTemplate  
CustomerAddress  
CustomerOpportunityRole  
CustomerRelationship  
DuplicateRecord  
Email  
Fax  
IncidentResolution  
Invoice  
Invoicedetail  
Lead  
Letter  
List  
ListMember  
Opportunity  
OpportunityDetail  
OpportunityProduct  
PhoneCall  
PriceLevel  
Product  
ProductPriceLevel  
Queue  
QueueItem  
Quote  
QuoteDetail  
RecurringAppointmentMaster  
RelationshipRole  
RelationshipRoleMap  
SalesLiterature  
SalesLiteratureItem  
SalesOrder  
SalesOrderDetail  
ServiceAppointment  
Subject  
SystemUser  
SystemUserBusinessUnitEntityMap

Task  
Team  
TransactionCurrency  
UoM  
UoMSchedule  
UserForm  
UserQuery  
UserQueryVisualization  
Any Custom Entity