

Echo Managed Service Scope

REVISIONS

Revision	Prepared By	Description	Date
2.0	Alex Brown	Updated for 2016	January 2016
2.1	Alex Brown	Updated for April 2015, Cascading relationships and other considerations	April 2016
2.2	Alex Brown	Updated to include versions, present and future	April 2018
2.3	Alex Brown	Updated for clarification of different services offered	May 2018
2.4	Alex Brown	Updated to confirm Cascading Behavior functionality	August 2018
2.5	Alex Brown	Updated with clarification for Technical Upgrade Processor	November 2020
2.6	Alex Brown	Updates to include Echo SharePoint to SharePoint migration scope.	November 2021
2.7	Alex Brown	Update to include Echo SharePoint Annotation Transposition scope	November 2022

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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 (2011, 2013, 2015, 2016 or Dynamics 365). Migrations for version 4 or below require custom engagement scope to upgrade to a supported 2011 version for migration.

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

IN SCOPE (ECHO1)

- Production migration from source database (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 (UNLESS OTHERWISE AGREED)

- 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). The execution user can be an Application User (configured within Azure), but front end application access is also required for the process.
- 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 (this step is automated by Echo, but should be considered during tested).
- 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. (This process can also be automated, but must be validated)
- 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).
- 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. Only applicable if the Technical Upgrade process is not selected.*

***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 (ECHTU01)

A Technical Upgrade provides the customer with a Dynamics CRM Solution, installed in the destination environment, based on the version 2011,2013, 2016 or D365 database provided. The Synchronicity Echo Technical upgrade processor manages the delivery of a target solution component by component as outlined below.

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. Synchronicity can be engaged for additional scope in this area if required.

The Technical Upgrade processor can be instructed to include managed solutions from the source system, and install these as unmanaged in the destination. It should be noted that this will only be completed where IP ownership can be demonstrated.

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 automated generation of a solution in a target D365 environment based on the source database and it's components, which include
 - Security roles
 - Web Resources
 - Entities
 - Relationships (excluding mappings on 1:N relationship)
 - Attributes
 - Forms
 - Views
 - Processes

Where dependencies exist on some forms (i.e. managed web resources), the technical upgrade will attempt to remove these dependencies, but in some cases forms will not be migrated and may need to be manually recreated (in such cases, the customer will be notified).

*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 (ECHSP1)

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.

Some flexibility may be available, but the standard configuration for the SharePoint file transfer is to include a documentlocation record associated with the parent record holding the file. For an activity (i.e. an email) this will be the *email* record itself. For Annotations, the regardingobject (objectid) will be the host of the sharepointdocumentlocation. In each case the GUID of the documentlocation will be the same guid as the related record (for ease of review and validation)

SHAREPOINT ANNOTATION TRANSPOSITION (ECHSP3)

In addition to the services above, Synchronicity can optionally add a link to the end of all annotations that originally contained a file. This link can be formatted as Rich Text, and effectively give the user a link within the annotation saying something like 'Original file is now in SharePoint – click [HERE](#)'.

SHAREPOINT TO SHAREPOINT MIGRATION(ECHSP4)

In addition to movement of attachments from CRM into SharePoint, Synchronicity offers a service to migrate the current SharePoint data 'as is' from an on premise instance of SharePoint (compatible with the current SharePoint API) in addition to transformation of sharepoint documentlocations. This service includes

1. Mapping of relative URLs from the source SharePoint sites to the target sites in SharePoint online.
2. Migration of the DocumentLocation records from one CRM instance to another, to include these relative URLs
3. Transformation of absolute URLs from source to destination, where the root of those absolute URLs can be transformed into a target Site
4. Preservation of the relative URLs present in the CRM source data, and their reconstruction in the target.

NOTE : Metadata cannot be migrated, documents will be migrated by an application user. Security set up is not included in this delivery, sharepoint security can be applied before, during or after the migration, but the migration user accounts must be able to create documents in the target.

AUDIT HISTORY TO ANNOTATION (ECHAU01)

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.

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