

Echo Managed Service Scope

REVISIONS

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CONTENTS

Revisions	2
Introduction	4
Service Summary	4
In Scope	4
Out of Scope	4
Dependencies	5
Service Options	6
Technical Upgrade	6
Sharepoint File Transfer	6
Audit History to Annotation	6
Version 3 Technical Upgrade	6
Microsoft Azure Hosted Execution	7
Appendix A – Entity List	8

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.

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 (versions 4,

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 or 2015) 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)
- 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. ***

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
- 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.

- 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.
- 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
- Details (email addresses) of the users in the source system, and the user in the destination to which they are to be mapped.**
- 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).

** 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.*

*** Inactive users in the source are mapped by default to the execution user (the username provided to Synchronicity to perform the migration). Active licenses may be required in order to show createdby and other user lookup fields.*

****For projects that require multiple validation and testing cycles additional project management and administrative time may be chargeable.*

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