MIGRATE

Dynamics 365 from on-premise to Online

This is a practical guide to successfully migrate Dynamics 365 on-premise to the online (cloud)

Evaluate your on-premise system

Depending on the version of the on-premise based system you are on will help dictate the amount of work involved in readying your system to be migrated. Specific items to check: Java Script, Custom Code, amount of attached documents, data integrations and 3rd party applications.

Licensing Considerations - Map each user to a Dynamics 365 license

When Microsoft re branded the product to Dynamics 365, the licensing model also changed. In prior versions, there were three license types: Essential, Basic, and Advanced. Dynamics 365 has Application licenses, Plan licenses, and Team Member license options each offering different levels of access to functionality.

Application licenses enable a User to access specific functionality (Sales versus Service for example). Plan level licenses allow users access to all application functionality. The Team Member license allows a User to view existing records. When considering migrating to online, each User must be reviewed to determine the specific functionality they need access to and select the proper Dynamics 365 license.

Custom Reports

If your system has custom reports developed in SQL reporting services or other tools they will need to be modified. On-premise versions of Microsoft Dynamics CRM/365 allow direct access to the SQL database, the online model does not. Custom reports will need to be modified to utilize Fetch XML or T-SQL to function within the cloud version. Additionally, scheduling reports is not a supported feature in online.

Differences in Functionality

Depending on the on-premise version of the product you are on will dictate the amount of differences in overall functionality. Once your system is upgraded to the most current version (preferably in a staging environment) all use cases should be reviewed to determine differences in functionality. This can be a significant factor in a smooth roll-out and user adoption.

Storage Requirements

Database storage in an on-premise model is only limited by the amount of hard drive space you have, with Dynamics 365 online you are allotted space based on the amount of users licensed. The available storage in online can quickly get absorbed by file attachments. Make sure to analyze your storage requirements and budget appropriately or consider an alternative approach to storing documents such as SharePoint Online.

Assess New Functionality you will have

One of the biggest mistakes we see made in on-premise to online migrations is not taking the time to evaluate all the new innovation that has been added to the platform. If you are on an older version (4, 2011 even 2013) there will be a multitude of new powerful functionality included in your online subscription. Now is a great time to review and evaluate the way you are using the system and plan to leverage the innovation Microsoft has added to the online platform.

FREE Evaluation of your on-premise system
We offer a free in-depth migration readiness evaluation of your current system
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