Microsoft Dynamics CRM Online for G Cloud

Service Description

Contents

1.   Service Definition

The name of the service is "Microsoft Dynamics CRM Online"

1.1   An overview of the G-Cloud Service

Microsoft Dynamics CRM online is a remotely hosted fully integrated customer relationship management (CRM) system. Microsoft Dynamics CRM gives you the capability to easily create and maintain a clear view of customers from first contact through purchase and post-sales. With tools to enhance your company's sales, marketing, and customer service processes—along with native Microsoft Office Outlook integration—Microsoft Dynamics CRM delivers a fast, flexible, and affordable solution .Microsoft Dynamics CRM helps you drive consistent and measurable improvement in everyday business processes.

Marketing: A clearer view of customers and more informed marketing investments
Segment customer lists into distinct benefit groups and then market to one or more of the identified segments using a workflow-driven model. With Microsoft Dynamics CRM, your marketing professionals can leverage tools for:

- Customer segmentation.
- Campaign planning and execution.
- Data extraction and cleansing.
- Analytics and reporting.
- Marketing/sales collaboration tools.
- Information sharing portals.

Sales: Get more leads and close more business
Access a complete view of customer data online or offline, and leverage tools that enable your sales professionals to get real-time access to leads, identify cross-sell and up-sell opportunities, and close more deals, faster. Microsoft Dynamics CRM provides:

- Lead and opportunity management.
- Account and contact management.
- Territory management.
- Forecasting and sales analytics.
- Offline and mobile device access.
- Quick access to products, pricing, and quotes.

Customer service: Provide more value to customers

Respond faster to customer service issues and empower your service organization to anticipate, address and deliver consistent, efficient customer care that contributes to long-term business profitability. Microsoft Dynamics CRM provides functionality for:

- Account and contact management.

- Case and interaction management.

- Product and contract management.

- Knowledge-base management.

- Service scheduling.

- Workflow across teams and groups.

- Service reporting and analytics.

1.2   Key Features, Capabilities & Workloads

Here's some more information on how Microsoft Dynamics CRM enables extended CRM:

Activity Feeds

Microsoft Dynamics CRM Activity Feeds provide real-time notifications and quick sharing of information through short updates. They appear on your personal wall in the **What's New** area of the **Workplace**. Activity Feeds enable you to follow and learn about important activities that take place around people, accounts, contacts, leads, and anything else that you care about.

Updates can be posted manually by you, or automatically based on predefined system rules through a workflow. Activity Feeds can also be posted to by external applications through the Microsoft Dynamics CRM web services API. Activity Feeds expose Microsoft Office Lync real-time presence functionality so that you can initiate communication activities such as IM, phone calls, and emails.

Using Activity Feeds on Mobile Express offers users the chance to stay up to date with their organization while on the go. From mobile phones equipped with Windows Phone 7.5, users can keep in touch with colleagues by posting and commenting on each other's pages, as well as keeping up with the latest news on the leads, contacts, accounts, and opportunities they care about.

Auditing

The auditing feature in Microsoft Dynamics CRM 2011 lets you track changes made to your business data. Use auditing to analyse the history of a particular record, view a summary of everything that changed, or to comply with regulation standards. Keep track of the changes done to a record, a field, or by a user. Microsoft Dynamics CRM automatically creates logs for the changes that are tracked. In addition to these, in Microsoft Dynamics CRM 2011 Update Rollup 5, you can also track when a user has accessed Microsoft Dynamics CRM.

Improved Microsoft Office interface

Microsoft Dynamics CRM 2011 introduces a new Office 2010 contextual ribbon for the Microsoft Dynamics CRM Online and Microsoft Dynamics CRM browser clients and for Microsoft Dynamics CRM for Microsoft Office Outlook. The new ribbon delivers a consistent, familiar navigation and user experience that helps you better integrate Microsoft Dynamics CRM with your Office 2010 environment.

Advanced user personalization

Microsoft Dynamics CRM 2011 lets you configure a workspace that is personalized to meet your unique role and information needs. Personalizing a workspace means that you can set the default pane and tab that display when you open Microsoft Dynamics CRM. You also have control over what links appear in the workplace view, how many records appear in lists, how numbers and dates display, and the language for your user interface. Combine this personalization with the new dashboard feature to create a personalized dashboard for your default view.

Role-based forms

Microsoft Dynamics CRM 2011 displays forms based on user roles. This role-tailored design ensures that the business professionals in your organization have fast access to the relevant information they need. Role-based forms also prevent users from viewing data that they are not authorized to view.

Inline data visualization

In Microsoft Dynamics CRM 2011, you can quickly create and share inline charts with drill-down intelligence. Using these charts, you can visually navigate data and uncover new insights that contribute to your organization's success. View the charts you create from the main list of records or from the list of associated records for an individual record. Share your charts with other users or teams in the organization. Import charts created by other users into your records.

Dashboards

Dashboards are a powerful feature in Microsoft Dynamics CRM 2011. Use a dashboard to see at a glance all the important information you need to make key business decisions every day. Assemble and present information from several places in Microsoft Dynamics CRM in a quickly-read format. This means that you do not have to search multiple areas for the information you want. Dashboards are easy to create, and are easy to revise as your changing business needs require.

Better Office Outlook experience

Microsoft Dynamics CRM 2011 improves the integration of Microsoft Dynamics CRM into Microsoft Office Outlook with the Microsoft Dynamics CRM for Microsoft Office Outlook. It takes full advantage of native Outlook functionality, such as previews and conditional formatting, and presents Microsoft Dynamics CRM areas as sub-folders in Outlook mail folders. With a few exceptions, these Microsoft Dynamics CRM areas in Outlook include all of the same functionality as the browser clients.

Contextual document management

If your organization uses Microsoft SharePoint Server 2010, you can easily manage documents that are related to records within a particular entity. Using Windows SharePoint as your document depository, the seamless interface in Microsoft Dynamics CRM 2011 allows you to quickly add and edit documents that are associated with a particular record. When you set up document management, Microsoft Dynamics CRM creates the structure on your Windows SharePoint site that works with the entities and records that you want for document management.

Goal management

Microsoft Dynamics CRM 2011 gives you the ability to define key performance and business health indicators. This way you can track and measure results against your organization's goals or metrics. Easily and quickly define goals for a campaign or fiscal period. Combine smaller goals, such as for specific teams or territories, into the overall goals for your organization. Create a rollup of all the goals into the actuals that show how you are tracking.

Interactive process dialogs

Microsoft Dynamics CRM 2011 expands its workflow capability by adding interactive dialogs. Dialogs present a consistent message to your customers. Also, dialogs collect and process information by using step-by-step scripts to direct users through every process. At one level, you can use dialogs to guide customer interactions and internal processes. At another level, you can increase dialog performance and versatility by incorporating workflow logic. This logic invokes automated tasks by using the responses a customer or user makes during the dialog script.

Cloud development

Microsoft Dynamics CRM 2011 is at the leading edge of cloud computing. Developers can take advantage of the Windows Azure platform to develop and deploy custom code for Microsoft Dynamics CRM Online by using powerful tools, such as Microsoft Visual Studio. Using the Microsoft .NET Framework 4.0, developers can also incorporate Microsoft Silverlight, Windows Communication Foundation, and .NET Language Integrated Query (LINQ) into their cloud solutions. Cloud development for Microsoft Dynamics CRM 2011 is a powerful tool for customizing your Microsoft Dynamics CRM solution for optimal performance and business results.

Solution management

Solutions in Microsoft Dynamics CRM 2011 are a new way to save customizations and share them with other users. You can create a solution or import a solution created by a developer outside your organization. It is easy to share a solution with other users. A managed solution can be edited only by specific users. An unmanaged solution can be edited by any user with an appropriate user role. A solution can have version numbering, relationships with entities and other components, and security features based on user roles.

Microsoft Dynamics Marketplace

Microsoft Dynamics Marketplace is your online solutions catalogue. These solutions help you accelerate and extend your Microsoft Dynamics CRM implementation.

Quickly discover and apply industry-specific applications and extensions from Microsoft and its partners. Then, Marketplace distributes your solution directly to you.

Microsoft Dynamics Marketplace is fully integrated with Microsoft Dynamics CRM 2011. Find your solution directly from Microsoft Dynamics CRM.

Summary

The new and enhanced features in Microsoft Dynamics CRM 2011 offer new levels of user productivity and collaboration. These features help you meet your specific business needs with a low total cost of ownership. Microsoft Dynamics CRM 2011 delivers familiar, intelligent, and connected experiences to increase the productivity and effectiveness of people inside and outside your organization.

Microsoft Dynamics CRM 2011 unlocks new opportunities and provides a single development environment for cloud-based and on-premise deployments. Partners, including independent software vendors, global system integrators, and value-added resellers, can quickly create, package, and distribute Microsoft Dynamics CRM extensions and custom solutions.

Microsoft Dynamics CRM delivers exceptional flexibility and business fit, combined with familiar user experiences through its deep stack alignment with the Microsoft Office productivity suite, namely Microsoft Outlook, Excel, and Word. It also works well with other Microsoft technologies such as SQL Server, Communication Server, BizTalk Server, Exchange Server, and SharePoint Server for a complete Microsoft solution.

The application framework of the Microsoft Dynamics CRM product provides a range of capabilities that enable solution builders to deliver the best of the platform approach to custom application development. Applications are built with reusable services that can span multiple applications on a single platform. The framework can be extended to create line-of-business (LOB) applications for a wide range of business purposes. The technology is highly scalable, leveraging the combined power and breadth of the Microsoft stack.

Applications are built using reusable services, as depicted in Figure 1. The framework includes integrated business services, such as e-mail, task and activity management, and rich connectivity with Microsoft Office Outlook® messaging and collaboration client and other Microsoft Office system applications.

For example, as shown in the CRM reference architecture in Figure 2, a business entity component can be reused across a number of different CRM applications as a service.

CRM application development is based on models, a capability that enables non-technical business owners of a custom solution to guide its development. CRM apps are models of ASP.NET user interfaces, Windows Workflow Foundation (WF) workflows, ADO.NET data entities, and Microsoft Active Directory® security. With these tools, CRM applications take advantage of forms to manage data. This serves to abstract complex database level "Create, Read, Update, Delete" (CRUD) functionality from the end user and solution developer.

Figure 1

The solution builder benefits from the ability of CRM to offer choice and flexibility to the LOB client. As depicted in Figure 3, the CRM framework provides solution builders, and their customers, with choices in solution development that can fit a variety of business requirements. With CRM, the client can choose between buying software, building new solutions, customizing existing applications, or subscribing to third party software-as-a-service (SaaS) offerings. When combined with its integration with Office Outlook, other Office applications, and the Microsoft Windows® operating systems, CRM becomes a vehicle for cost-effective custom application development. Furthermore, an CRM application's forms, workflows, and data entities are persisted in metadata. The multi-tenant capability of CRM results in applications that are portable across on-premises and hosted deployments. This capability has important strategic implications for solution builders.

Today, Microsoft Dynamics CRM Online is packaged and sold as a single configuration. A "light" version of the service is currently not available, nor is dedicated offerings or custom terms of service.

Microsoft

Microsoft Dynamics CRM Online *(Standard/Only Configuration) DSD-00001*

Application Components	
Workflows	200
Custom Entities	300
Storage Included	5 GB (Additional storage may be purchased for a fee.)
User Access	Online and offline
Mobility Support	Yes - Mobile express
Application Administration	
Custom Architecture Configurations	Not available but components there to deliver
Unlimited Application Troubleshooting	Included
Patch Installations	Included
Version Upgrades	Included
Data Migration Tools	Included
Data Migration Service	Not available
Monitoring	
Proactive Response to Alerts	Included
Port and Network Device Monitoring	Included
Proactive Hardware Failure Monitoring	Included
System Software Monitoring	Included
Application Server Monitoring	Included
Database Monitoring	Included
Third Party Packaged Application Monitoring	Not available
Reporting	
Custom Application Performance Reports	Not available
Performance and Capacity Reporting	Not available
Online Ticket Submission and Tracking	Included
Online Documentation	Included
Backup and Recovery	
Managed Backup	Included
Custom Backup	Not available
Test Restore Validation	Not available
Custom Restore	Not available
Off-Site Data Storage on Removable Media	Included
Storage	
Hardware RAID	Included
On-board Disks	Included
Security	
Proactive Critical Patching	Included
Custom Patching	Not available
Managed Firewall	Included
Virus Protection	Included
Service Level Agreement	
Application Availability *Credit of 25% of the monthly per user fee for <99.9%.* *Credit of 50% of the monthly per user fee for <99%.* *Credit of 100% of the monthly per user fee for <95%.*	99.9%
Customer Availability Reporting	Not available
Service Interrupting Event Ticket Acknowledgement	8 business hours
Professional Support Plan	Included (Ticket acknowledgement—8 hours)

Microsoft

Premier Support Plan	Optional (Ticket acknowledgement— immediate to 4 hours based on ticket severity)

Service Design

Microsoft operates datacentres around the world. Each datacentre houses a network of highly reliable equipment that hosts customers' CRM instances and delivers 99.9 percent uptime. Microsoft Dynamics CRM Online customers are provided with a managed resource instance of CRM that is allocated based on their needs. Each customer is provisioned with their own customer database. This maximizes the security and integrity of the customer's data. Unlike other hosted CRM solutions, there is no co-mingling of customer data. The Microsoft Dynamics CRM Online architecture provides customers with complete autonomy over how they operate, manage, configure, and secure their CRM solution. For example, customers can configure their own data schema, user interface, business processes, and security model for their specific instance. In this way, they have full control over the application and its functionality as if they were running it on their servers.

Microsoft Dynamics CRM Online also provides synchronization capabilities that enable on-premises customer information to be synched continuously with their CRM instance in the Microsoft datacentres. As a result, users have seamless access to their CRM system from a wide range of devices, whether they are inside their corporate network or utilizing CRM from the Internet.

1.3   Key Technical Benefits

The Microsoft Dynamics CRM Online service offers the following benefits:

- **Comprehensive CRM capabilities.** Spanning sales, marketing, and customer service, Microsoft Dynamics CRM Online is a full-featured CRM solution that is available to customers in 40 markets and 41 languages.

- **Multi-layer security.** Safeguards are applied on multiple fronts including securing the web application with SSL, custom defined security roles which govern what users can access and the actions they can perform, field level security, full business data auditing, and stringent physical security of Microsoft datacentres including building and system/database access. Additionally, the application itself uses standard security features of the Microsoft software infrastructure on which Microsoft Dynamics CRM runs (such as Windows Server, SQL Server, and Exchange Server).

- **Individual tenant administration.** Customer and user administration features are designed to increase self-reliance. Customers have complete control over all aspects of data structure, user experience, business intelligence, and business process management.

- **Regulatory compliance features.** Meeting increasingly complex regulatory requirements is eased with ISO 27001-2 and SAS 70 Type II credentials for Microsoft datacentres.

- **Mobility device support.** Microsoft Dynamics CRM Online provides a configurable mobile client that allows users to consume and update CRM information on a wide range of mobile devices.

1.4 Authentication

Microsoft Dynamics CRM Online uses the Windows Live ID service to manage identity and trust within the Windows Live ecosystem, including Microsoft Dynamics CRM Online. Windows Live ID provides a single sign on experience that allows businesses and customers to use a single set of credentials (logon name and password) for accessing various Web sites or Web applications. Upon signing in, a user may elect to have his or her credentials preserved by Windows Live to facilitate direct access to the system without having to sign in again.

With Windows Live ID, the password recovery is based on a secret question/response provided by the user upon registration. Adding a new user is as simple as entering the user's name, email address, and role into the new user administration and inviting them to the system. Users can be removed from the system by disabling the user in CRM Online.

Microsoft Dynamics CRM Online is planning to offer support for different authentication providers from November 2011 upon request and broadly in 2012 thereby allowing:

- Users to be authenticated against services managed by the customer.

- Specific password policies to be specified and enforced by the customer.

Additional information about Windows Live ID is available at http://msdn.microsoft.com/en-us/library/bb288408.htm.

1.5   CRM Online Infrastructure Diagram

The CRM Online solution includes CRM Online server deployments that are integrated with other components to provide a comprehensive, remotely hosted CRM Online service for organizations of all sizes. In some cases, multiple primary datacentres are deployed, depending on the size and location of user groups for a customer. A diagram of the high-level architecture for this service is shown in figure 2 which follows.
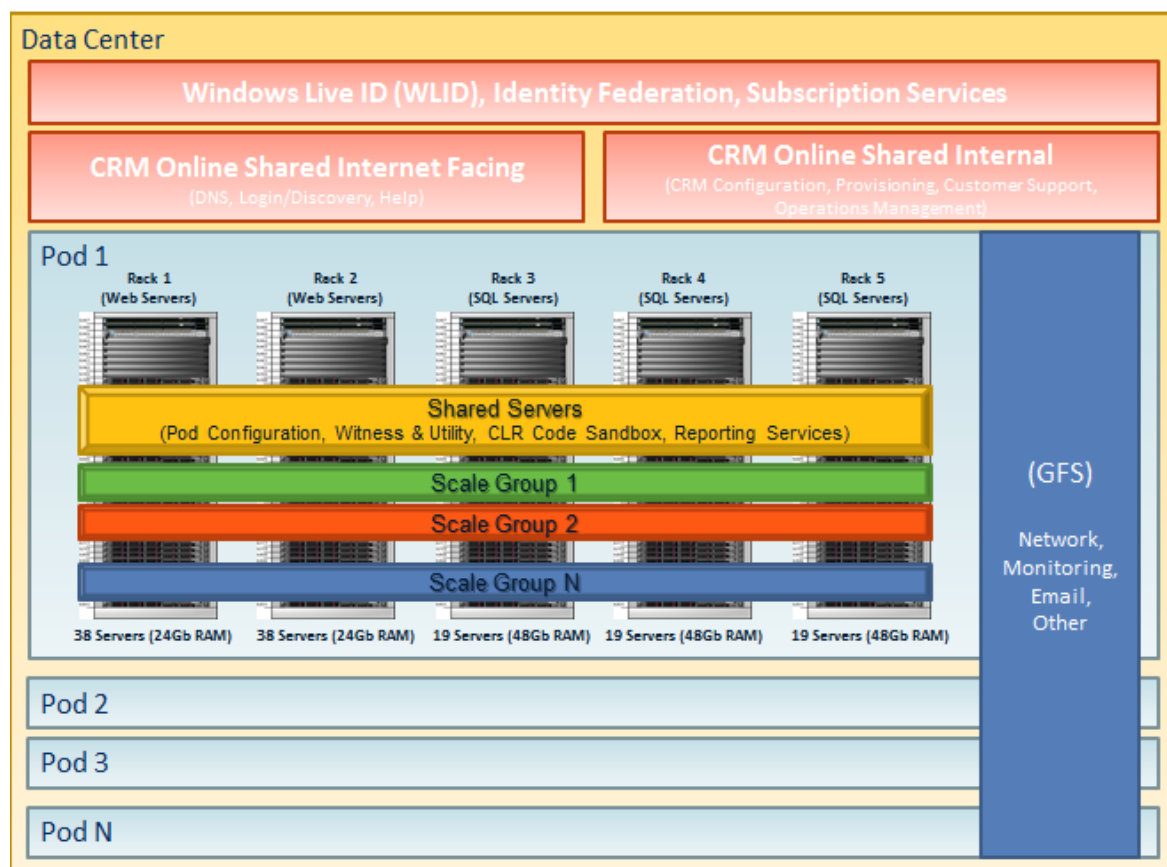
Figure 2: Microsoft Dynamics CRM Online Infrastructure Diagram

1.6   Customization Options

Microsoft Dynamics CRM Online is a highly customizable and flexible business application. The bulk of customizations can be carried out through a set of Microsoft Dynamics CRM web-based tools and do not require custom development. For cases where custom development is required, Microsoft publishes a software developer kit (SDK) that includes guidance and code samples for further customization of the CRM solution.

The Microsoft Dynamics CRM SDK can be downloaded from http://msdn.microsoft.com/en-us/library/bb928212.aspx.

1.7 Configuration Tools

Microsoft Dynamics CRM Online provides several avenues for configuration of the application through a set of web-based tools. Customers can configure many aspects of the application including:

- **Web Service:** Create a custom data model to structure and manage your data. This is configured in the customization area of the application and can be included in a transportable solution.

- **User Interface:** Create or modify the user interface (forms) to see or input relevant data to the system. You can specify which users or teams see a specific form by assigning security roles to them.

- **Views:** Create or modify system views to help people easily apply specific filters to CRM data.

- **Reports:** Create new reports or modify existing Microsoft Dynamics CRM Online reports to customize the way you capture, store, and view data.

- **Business Processes:** Create or modify business processes which are an integral part of any enterprise software application. A business process can be of two types: automated processes (called workflows) that rely solely on communication among applications based on a set of rules, and interactive processes (called dialogs) that rely on users to initiate and run the process, and to make the appropriate decisions during the running of the process.

1.8 Integration Options

APIs, SDK

Microsoft Dynamics CRM 2011 offers several programming paradigms designed to give you the flexibility to decide what works best for your integration needs

Microsoft Dynamics CRM 2011 provides an entity data model and Windows Communication Foundation (WCF) Data Services technologies to provide a set of tools that simplify the development of Internet-enabled applications that interact with Microsoft Dynamics CRM. This also enables an additional programming paradigm: an organization service context that tracks changes to objects and supports Language Integrated Query (LINQ) queries to retrieve data from Microsoft Dynamics CRM.

Representational State Transfer (REST) – The REST endpoint for AJAX and Microsoft Silverlight clients provides an alternative interface that you can use to work with Microsoft Dynamics CRM data. Rather than directly invoking a Simple Object Access Protocol (SOAP)-based Web service, you can execute requests using a service that is based on a URI.

Web Services Definition Language (WSDL) – This programming paradigm lets you develop code from non-.NET clients, and does not depend on the use of Microsoft Dynamics CRM assemblies. For example, you can use this programming model to write code for Microsoft Dynamics CRM in Java.

For information about integration, including code samples, refer to the Microsoft Dynamics CRM SDK at http://msdn.microsoft.con/en-us/library/bb928396.aspx.
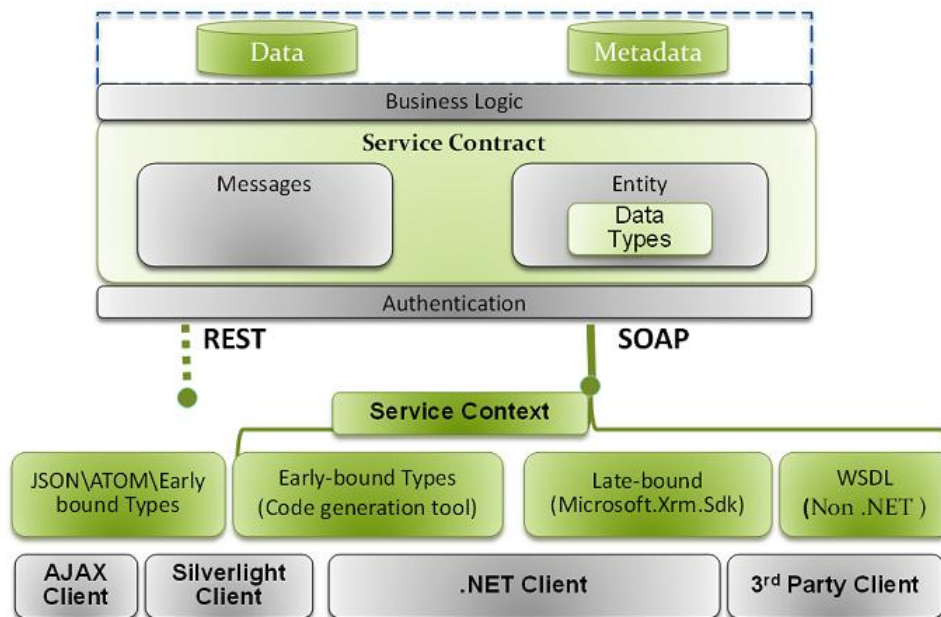
Figure 3: Development technologies and APIs

Custom Code on Microsoft Servers

With Microsoft Dynamics CRM Online you have the ability to extend or customize the functionality of the system through the integration of custom business logic (.NET code called Plug-ins). You can customize the product to support the way your company does business, and you can add new features to the product. The technology that enables your custom code to be developed and integrated into the Microsoft Dynamics CRM server is called the event framework. The event framework enables you to create rich vertical and horizontal solutions on top of Microsoft Dynamics CRM Online by supporting the development and integration of custom business logic with Microsoft Dynamics CRM Online in a reliable and portable way. After your custom business logic has been integrated into Microsoft Dynamics CRM Online, it can be executed either synchronously or asynchronously. Business data can be passed to your custom code, which can then perform actions based on the nature of the data, or modify the data itself. A plug-in is custom business logic that you can integrate with Microsoft Dynamics CRM Online to modify or augment the standard behaviour of the system. Plug-ins are event handlers that are registered to execute in response to a particular event in the system, e.g. on create of a contact record a plug-in can run and pass this information to another system. Plug-ins are the foundation of CRM server integration.

Composite Interface (Mashups)

For a simpler approach to rapid integration, applications can be exposed as an iFrame within the Microsoft Dynamics CRM user interface.

Another option for composite interfaces are Web Resources, they are files such as html, Jscript, and Silverlight applications that can be used to extend the Microsoft Dynamics CRM Web application. You can use Web resources in form customizations, dashboards and the application navigation.

Because Web resources are stored in Microsoft Dynamics CRM Online and are solution components, they can be easily exported and installed to any Microsoft Dynamics CRM Online instance.

Third-Party Solutions

Application integration software from companies such as Scribe Software and Pervasive Software provide pre-configured adapters for many third-party applications and compliant database applications that can free developers from creating and maintaining code when either Microsoft or other software vendors upgrade their applications.

Privacy Policy

The Microsoft Dynamics CRM Online privacy policy covers the following topics:

- Collection and Use of Your [Customer] Information
- Collection and User of Information About Your [Customer] Computer
- Changes to [the] Privacy Statement
- Specific Features
    - Transfer of Data
    - User Invitation
    - Error Reporting
    - Data Export to Microsoft Office Excel
    - Microsoft Dynamics CRM 5.0 for Microsoft Office Outlook
    - Microsoft Dynamics CRM 5.0 E-Mail Router
    - Customer Experience Improvement Program
    - Import/Export Customizations
    - Internet Lead Capture
    - Help

To access the most recent version of the Microsoft Dynamics CRM Online privacy policy, go to https://signin.crm.dynamics.com/portal/static/4105/privacy.htm.

To learn more about how customer credential information is used when they sign in to participating sites, please read the Microsoft Online Privacy Statement at http://privacy.microsoft.com/.

Microsoft Obligations as a Data Processor

Safe Harbor

Safe Harbor refers to the U.S. Department of Commerce's privacy framework regarding the collection, use, transfer, and retention of data from the European Union (EU), the European Economic Area, and Switzerland. Microsoft abides by the Safe Harbor Framework and certification to support data transfers from the EU to the United States as part of normal operations.

EU Model Clauses

EU Model Clauses are a set of contractual clauses pre-approved by EU regulators that allow companies to transfer personal data from the EU to a data processor (vendor) in a country or region that does not provide adequate protection of personal data (such as Singapore or Hong Kong). The data can be moved around as long as the data processor complies with the model clauses. For Microsoft Dynamics CRM Online, Microsoft will not sign model clauses at this time, but anticipates being able to do so in H1 CY2012. Investigation is underway to assess the implications of signing this agreement. Microsoft continues to review and evolve its approach to addressing regulatory privacy concerns for customers worldwide.

Refer to the Data Storage section of this document for complementary information on this topic.

Data Processing Agreement

The Data Processing Agreement (DPA) is a document that is designed to address the seven principles governing the recommendations of the Organization for Economic Co-operation and Development (OECD) for protection of personal data in Europe. These principles are:

1. Notice—data subjects should be given notice when their data is being collected.

2. Purpose—data should only be used for the purpose stated and not for any other purposes.

3. Consent—data should not be disclosed without the data subject's consent.

4. Security—collected data should be kept secure from any potential abuses.

5. Disclosure—data subjects should be informed as to who is collecting their data.

6. Access—data subjects should be allowed to access their data and make corrections to any

   inaccurate data.

7. Accountability—data subjects should have a method available to them to hold data collectors

   accountable for following the above principles.

Microsoft Dynamics CRM Online is currently signing an "Interim Data Processing Agreement" under NDA. The Interim DPA will cover customers who need a DPA to cover their business until Microsoft Dynamics CRM Online is able to sign a full DPA (see the Certifications, Audits and Compliance section of this document for additional information).

As a point of reference, Microsoft Office 365 currently signs Model Clauses and the DPA for their EU customers. Microsoft Dynamics CRM Online is in the process of completing the engineering and operations work to support this. Please refer to the section on Certifications, Audits and Compliance Roadmap for more information.

1.9 Information assurance

The accreditation target for Dynamics CRM online is IL2.

1.10 Data Centre Tier

While Microsoft supports the spirit of the Uptime Institute's Availability classifications, which are prescriptive-based for easy adoption by the industry as a whole, we have chosen to use a more performance-based approach that uses science to match the SLAs to the customer need. Microsoft's data centers are engineered to provide 99.999% availability to meet our customer's SLAs and service needs. Microsoft invests significantly in the global operations, management, networks, and sustainability of our facilities that deliver over 200 online services 24 x 7 x 365. Some of those services you may already know and use today like Bing, Hotmail, MSN, Office 365, Xbox Live and Windows Live, which hosts more than half a billion active IDs each day, in 59 markets and is localized in 36 languages.

As most data center operators know, the physical design of the facility is only part of the equation; Microsoft has invested over $3 billion in building our global facilities and networks and over $9 billion in research and development to continue to build innovation and efficiency in our IT solutions. As a result, Microsoft's data centers are evolving at a more rapid pace than many facilities in the industry and thus do not follow the guidelines outlined by Uptime Institute's tier classifications. Therefore, we do not pursue Uptime certification of our facilities. In addition to the wealth of operational insight that comes with running one of the world's largest data center portfolios, Microsoft uses IEEE Gold Book data and third party reliability simulation software to continuously improve our data center design standards. Microsoft's global data center portfolio enables us to deliver the right data center capability at the right time to match the specific service needs of our every day.

Generation 1, 2 and 3 facilities are designed to deliver 99.999% availability to meet our customer's SLAs and service needs. These facilities are fault tolerant and currently maintainable – meaning that while critical components are being maintained, we can still absorb an outage of another critical component. These data centers include:

* Amsterdam (Generation 2)

* Chicago Colocation Rooms (Generation 3)

* Dublin 3 (Generation 3)

* Japan (Generation 1)

* San Antonio 1&2 (Generation 2)

* Quincy 1&2 (Generation 2)

Generation 4 facilities are designed to deliver 99.999% availability. They significantly reduce infrastructure and IT complexity, and allow us to compartmentalize risk depending on application priorities. If an outage occurs simultaneously with maintenance, we have built capabilities into the distribution that limit potential server failure to a subset of one colocation area. Considerable engineering effort has gone into our Generation 4 facilities to simplify operation and minimize opportunities for human error. These data centers include:

* Boynton 1 (Generation 4)

* Dublin 4 (Generation 4)

* Des Moines 1 (Generation 4)

1.11 Backup/restore and Disaster Recovery

Service Interrupting Events

A service interrupting event (SIE) is any event in an online service which affects the delivery of a service, whether or not customers are online and actually affected.

There are two types of SIEs:

1. Unplanned (e.g. interruption of the WLID service where users would be able to log into their org)

    - One or more online services are unavailable

    - Employees notified by email (crmln) and updated as defined by the Customer Escalation & Notification (CEN) documentation

    - 90 percent detected by Operations, 10 percent detected by customers

2. Planned (e.g. moving of an org from one scale group to another)

    - Based on regional time windows with lowest historical service usage/connect

    - Customers proactively notified five days in advance

While service maintenance qualifies as a planned SIE, Microsoft Dynamics CRM Online is typically not taken offline to perform routine service maintenance.

When a customer wants to understand the cause of an SIE, the following is the process and documentation available to them:

- **Post-incident review (PIR)**—A detailed report from Operations explaining what caused an SIE and what Microsoft has done to prevent a similar occurrence in the future. Includes:
    - Incident summary and event timeline

    - Customer impact and root cause analysis

    - Lessons learned and actions taken for continuous improvement

    o PIR report is delivered seven business days or sooner once root cause is identified

    and service is restored.

    o PIR criteria is Severity 1 or Severity A conditions impacting more than five customers.

- **Root cause analysis (RCA)**—For customers who do not meet the criteria of a PIR, it is a brief explanation, less detailed than a PIR and issued for Severity 1 or Severity A conditions only.
    o If a customer requests an RCA for Severity B or Severity C, a best effort is made to deliver it in a timely manner.

    o Customers can request a PIR/RCA from Microsoft Dynamics CRM Support.

    o Premier TAMs can coordinate PIR through the support paths outlined in the readiness training.

Severity Code Definitions

Priority in PS	Impact
P1 "Service Down"	Outage, Business Interruption, Business Risk, Public Security Issue, Public Privacy Issue
P1 "Service Critical"	Outage, Business Interruption, Business Risk, Public Security Issue, Public Privacy Issue
P1 "Customer Critical"	Outage, Business Interruption, Business Risk, Public Security Issue, Public Privacy Issue
P2	Issue that does not have a reasonable workaround, and has customer, operational, or business impact.
P3	Issue that has a reasonable workaround for customer, operational, or business impact.
P4	Design Change Request (DCR)
A - Critical	Situations that involve a system, network, server, or critical program down situation that severely affects customer production or profitability. High-impact issues where production, operations, or development are proceeding but could be severely affected within several days.
B - Urgent	Signifies a moderate business impact. The customer's business has a moderate loss or degradation of services, but work can reasonably continue. The customer is not experiencing an immediate work stoppage.
C - Important	Indicates an issue with minimum business impact. The customer's business is substantially functioning and has minor or no impediment of services.
D - Monitor	Issues do not require additional action beyond monitoring for follow-up.

Backup and Recovery

Backup and recovery management is designed to mitigate the risk of permanent data loss. Backup management includes systematic and periodic backups of server data. Recovery management enables the restoration of entire server volumes or the reinstatement of data files to the last saved state.

Backup Management

Many aspects of the Microsoft Dynamics CRM Online system are configured in an N+1 redundant configuration, to eliminate single points of failure. As a precaution against catastrophic failure of multiple systems, full data backup to tape is done on a daily basis. Microsoft Data Protection Services (DPS) encrypts all data prior to it being written to tape. DPS uses an encryption appliance with a central key management system. The encryption process is a standard procedure in all Microsoft datacentres and is [FIPS](#) compliant. The process is tested annually as part of the Global Foundation Service (GFS) certification process.

Recovery Management

Microsoft Dynamics CRM Online has invested significant capital to help ensure no single point of failure. Furthermore, equivalent effort has been placed on operational best practices to help promote continuous service availability. The Microsoft Dynamics CRM Online Operations team maintains a Systems Operations Manual that thoroughly documents the technical aspects of numerous processes related to the availability of the Microsoft Dynamics CRM Online service. A monthly audit of different

restore scenarios is conducted by R&D. This scenario includes steps to test back-up tape integrity. Back-up policies also include testing the restoration process regularly.

Restoration of service is dependent on the situation. Microsoft Dynamics CRM Online posts notifications of pending service disruptions, including scheduled and unscheduled maintenance, to the Organization Notification and Status area in the application.

The Microsoft Dynamics CRM Online systems will also send service disruption notifications to administrators and users through email. The Microsoft Dynamics CRM Online Support team will respond to such incidents within 24 hours, provide guidance on the process, and set expectations regarding a service restoration timeline.

At this time service restoration is limited to datacentre incidents. Individual customer requests for restoration are not supported as part of the existing standard Microsoft Dynamics CRM Online offering. Refer to the Data Storage section for related information.

Data Storage

Microsoft stores customer data in region, in a local hosting datacentre. For troubleshooting and support purposes only, Microsoft may need to transfer data out of region to the U.S. development centre. When transferring data Microsoft follows applicable laws, and in the EU, that includes transferring data only in accordance with EU Safe Harbor provisions or to areas the EU considers to have an adequate level of data protection. Microsoft signed the EU Safe Harbor agreement in 2001. See http://www.microsoft.com/presspass/Press/2001/May01/05-15SafeHarbourPR.mspx.

Microsoft Site Services produces vault reports that are furnished to a certified third party daily. When the tapes are shuttled offsite, each tape is checked and accounted for on each end of the trip. Every tape is tracked by a bar code, and that number is maintained in a secure system that tracks the inventory and data on every individual tape.

Microsoft uses highly secure offsite storage for tape media during the retention period. Tapes are protected against any threat, from natural disasters to man-made threats. From the outside, the facility is anonymous, with no signs or logos to give away its purpose. Vehicles arrive at a secure perimeter and must be positively identified by security personnel before gaining admittance to a second perimeter, which requires successful authentication with a security card. Foot traffic is also a double perimeter in the same manner. Each person who gains access to the facility must present government ID, sign into a log, wear a visitor badge, and have an escort. The vault area is protected by at least two intrusion detection systems and is monitored 24x7 by two separate security firms. Random audits are conducted by a separate security firm on a regular basis.

The transportation of backup media to and from the vault is conducted by specially screened and trained personnel in environmentally controlled and secured vehicles.

Metadata can be preserved by exporting customizations using the new CRM 2011 solutions packaging features, which are a part of the customization administration tools. Data can be extracted from Microsoft Dynamics CRM Online in various formats including Microsoft Excel, XML, and other user-defined formats using the Microsoft Dynamics CRM Online API and data extract, transform, and load tools. There is no limit to the amount of data that can be extracted and no limit on the frequency of the extractions, as long as the customer's activities do not damage, disable, overburden, or impair the service.

Data Retention

Customer data is backed up daily to tape and taken offsite. The data is retained on tape for 90 days. The data exists for disaster recovery purposes; we do not offer "point-in-time recovery" as part of the service.

Data retention is an important piece of any compliance program and necessary to fulfil proper stewardship of data. It consists of requirements on deleting data and retaining data.

- **Maintaining data for shorter than necessary can violate contractual or legal requirements, or affect security.**

- **Maintaining data for longer than necessary can violate privacy regulations and is a top customer concern and sales inquiry.**

- **Once data is deleted, Microsoft has no obligation to provide it to the customer or law enforcement.**

- **Keeping data for long periods carries an additional burden requiring special systems to track and make data accessible long term.**

Microsoft Dynamics CRM Online does not provide any guidelines or services for archiving old data at this time.

Data Asset Classification, Transfer or Exchange

An asset is defined as any physical object, virtual object, or logical information possessing business value to the owner. The following are examples of logical, physical, and virtual assets[1]:

- Intellectual property (source code, design documents) or data associated with a Microsoft online service, customer information, and customer/subscriber data.

- Data assets associated with administrative, management, and support activities such as employee directories and operational documentation.

Data assets are identified, given a security classification, and tracked by physical location. The inventory also records ownership and indicate when last verification of all inventory detail occurred. The data's asset owner, as defined in Microsoft's Online Services Security Policy, is ultimately accountable for the confidentiality, integrity, and availability of their data. Their specific duties related to data they own or manage are as follows:

- Classification should occur upon acquisition of the asset, or during the design of a product whose specifications include handling potentially sensitive data.

- Ensuring that each asset thus classified is protected in accordance with the guidelines established throughout the existence of the asset (acquisition through disposal).

All data created by, transiting, or stored by Microsoft's online services must be classified into the following categories (ranked in order of decreasing sensitivity):

- High Business Impact (HBI)
- Moderate Business Impact (MBI)
- Low Business Impact (LBI)

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[1] Based on NIST Special Publication 800-60, "Volume I: Guide for Mapping Types of Information and Information Systems to Security Categories," Revision 1.0.

Once classified, assets must be protected according to the standards appropriate for their defined asset class. For example, data assets falling into the moderate impact category are subject to encryption requirements when they are residing on removable media or when they are involved in external network transfers. High impact data, in addition to those requirements, is subject to encryption requirements for storage and for internal system and network transfers as well. Microsoft acknowledges that in certain scenarios the value and risk associated with transferred or exchanged data may increase due to its combination with other data assets. For example, a list of user names derived from one service and transferred to another, when combined with a list of corresponding postal address information could result in the creation of personally identifiable information (PII). Therefore, when transferring or exchanging data assets, Microsoft personnel thoroughly reviews the intended usage, as well as the potential for increased business value or risk, and applies appropriate safeguards to ensure adequate protection of the transferred data in a combined state. In order to minimize the risks associated with the exchange of data between organizations, all such exchanges between internal or external organizations must be reviewed and approved by the data owner or associated agent per comprehensive Microsoft asset handling guidelines. Data exchanged with Microsoft Dynamics CRM Online uses the Microsoft implementation of the industry-standard Secure Sockets Layer (SSL) protocol. SSL helps to secure data at several levels, providing server authentication, data encryption, and data integrity.

Individuals who are authorized to access any asset must use the appropriate measures to gain access. Access to any production system requires multifactor authentication, including such measures as password, hardware tokens, smart cards, or biometrics. Reconciliation of user accounts against authorizations for use happens on a monthly basis to ensure that use of an asset is appropriate and needed to complete a given activity. Accounts no longer needing access to a given asset are disabled and an audit report is produced monthly.

Refer to the EU Model Clauses section for information on data transfer within the EU.

Data/Asset Destruction

Any paper documentation containing MBI, HBI or PII is destroyed by a secure shredding service.

The storage subsystem makes customer data unavailable once delete operations are called. All storage operations including delete are designed to be instantly consistent. Successful execution of a delete operation removes all references to the associated data item and it cannot be accessed via the storage APIs. All copies of the deleted data item are then garbage collected. The physical bits are overwritten when the associated storage block is reused for storing other data, as is typical with standard computer hard drives.

After the 90 day retention window, the back-up tape media is sanitized prior to reuse or destruction.

The Microsoft policy for disposal of obsolete/damaged hardware requires that all retired technology assets be sent to Microsoft Technology Recycling. Microsoft Technology Recycling protects Microsoft IP/customer data and ensures all hardware is handled in an environmentally sound manner. All broken and retired technology hardware – including, but not limited to notebook and desktop PCs, workstations and servers, monitors, printers, telecom and network peripherals, hard drives, smartphones, and PDAs – must be turned over to Microsoft Technology Recycling. All data is completely removed from media prior to asset recycling by Microsoft data centre personnel. The utility is designed to wipe (eradicate with zeros) data on physical hard drives, and is based on the wiping technology found in the forensic utility DRIVESPY.

Disaster Management and Business Continuity

Today the Microsoft Dynamics CRM Online service protects against data loss and provides high availability through redundant system components and backup/recovery management procedures. To minimize the impact of planned or unplanned downtime, the Microsoft Dynamics CRM Online service

offers customer data redundancy within our datacentres. As a precaution against catastrophic failure of multiple systems, full data backup to tape is done on a daily basis and taken to a secure offsite facility. In addition, periodic backups of server data are taken to enable the restoration of entire server volumes or the reinstatement of data files to the last saved state.

Beginning with the November 2011 Service Update, the Microsoft Dynamics CRM Online team plans to further enhance the recovery management services by offering data redundancy across multiple data centres within a region. This update will be progressively rolled out and currently planned for completion by Q1 CY2012.

This is enabled through technology introduced with the latest version of Microsoft SQL Server (2012). Below is a description of the technology and architecture that will support our future disaster recovery plans.

Microsoft SQL Server 2012

Utilizing Microsoft SQL Server 2012 as the backend, the Microsoft Dynamics CRM Online November 2011 Service update offers an integrated high availability and disaster recovery solution that provides redundancy within a data centre and across data centres. This enables fast application failover during planned and unplanned downtime. Microsoft Dynamics CRM Online utilizes the AlwaysOn Availability Groups feature of SQL Server 2012 to ensure the availability of application databases. This capability provides an integrated set of options for fast application failover and automatic page repair. Microsoft Dynamics CRM Online utilizes the AlwaysOn Failover Cluster Instances to support multi-site clustering which enable cross-data centre failover of SQL Server instances.

Datacenter Redundancy

As part of Microsoft's vision and business mission around the cloud, Microsoft has invested in additional data centre capacity in three geographies around the world:

1. North America (NA),
2. Europe Middle-East and Africa (EMEA),
3. and Asia Pacific (APAC)

Each of the Geographies will have two data centres to support Disaster Recovery. This will ensure that you still have your mission-critical customer data physically residing in data centres in your region in the unlikely event of a data centre interruption. This is enabled through technology introduced with the latest version of Microsoft SQL Server (2012).

Disaster Recovery

All customers will be provisioned on at least two data centres for disaster recovery. Customer data is stored on a primary database with three real time mirrors (one local and two remote). This provides continuous data protection with near instant recovery of damaged database. Network components, load balancers, Web servers, and application servers are all configured in a redundant configuration. Periodic tests are executed through the year to validate Disaster Recovery plans

Failovers

Using the capabilities of SQL Server 2012, local server failures within a data centre will be seamless and a transition to the local secondary server will happen in real time.

For an unplanned failover that requires a cross datacentre move, customers will experience minimal data loss. The Recovery Point Objective (RPO) for the service is < 5 minutes. The Recovery Time Objective (RTO) for the service is < 43 minutes. During a failover, the customer perceived performance should remain unchanged (all customers can be serviced from either data centre)

Back up

All Customer data is backed-up nightly to external storage and moved off-site.

Business Continuity Plan

While Microsoft has put in place comprehensive measures to ensure a high level of performance and availability for its Microsoft Dynamics CRM Online service, it is continually enhancing its service delivery infrastructure. In particular, Microsoft Dynamics CRM Online is looking to improve its disaster recovery and business continuity plan in Q1 CY2012. The plan will cover, but is not limited to, the following components:

- Business impact analysis
    - Business process criticality
    - Specification of recovery point objective
    - Maximum allowable downtime
    - Recovery site capacity
- Risk assessment
    - Covering regulatory, operational, technological, legal, financial, information security, physical security, and personnel concerns
- Plan development and maintenance
    - Conditions for activating the plan
    - Procedures to relocate essential business activities
    - Maintenance schedule that specifies how and when the plan is to be revised and tested
    - Roles and responsibilities describing who is responsible for executing all aspects of the plan
    - Change management process to ensure changes are replicated to contingency environments
    - Identification of applications, equipment, facilities, personnel, supplies, and vital records necessary for recovery
    - Regular updates from the inventory of IT and telecom assets
- Incident management and communications
    - Strategy and communications plan for disaster declaration
    - Designated virtual or physical command centre
    - A backup command centre if the primary command centre is not available
- Testing and reporting
    - Annual test plan
    - Facilities, Infrastructure, and backup sites
    - Detail the distance between organization's primary datacentre and all your organization's datacentre backup sites
    - Provisions for the continuous replenishment of generator fuel from vendors
    - Backup facilities with a UPS system and emergency power generators
    - Reliance on a different power grid and telecommunications grid from those used by the primary site

Look for updated information on the Business Continuity plan in early Q1 CY2012

1.12   On-boarding and Off-boarding

Customers can use the on-boarding team available on **0800-376-2862**

This team can set up new trials for customers or help guide in conversion of existing trials into the full service and set up the billing service.

The same team can be used for customers wishing to off-board from the service.

1.13   Pricing

DSD-00001 – The Microsoft Dynamics CRM Online standard configuration (as defined on Page 8) is priced for G-Cloud at **£25.96 per user per month**.

Customers can purchase CRM Online in either of the following ways:

1) Credit Card

2) Invoice

3) Volume Agreements : Enterprise Agreements, Campus and School Agreement Programs

Microsoft

2. CRM Online Service Management

Microsoft Dynamics CRM Online has a well-defined change control process to provide applicable patches and/or upgrades. This includes deployment and verification of patches in a pre-production environment, scheduled maintenance windows for production deployment, and a defined notification processes to help minimize interruption of the service. Microsoft Dynamics CRM Online notifies customers (administrators and in some cases users) through various methods including the website, application, and email of scheduled or unscheduled updates and changes to the service. For planned service interrupting events (such as service maintenance), customers are notified five days in advance.

2.1 Service Monitoring

The Microsoft Dynamics CRM Online application and website are monitored on a 24x7 basis for reliability and performance. The Operations group monitors the network for security vulnerabilities and intrusion using monitoring and detection systems on a continuous basis. All of the monitoring tools route any issues, warnings, and problems directly to service engineers.

The service has multiple layers of monitoring in place. The infrastructure/platform layer is monitored using Microsoft System Centre Operations Manager (SCOM). SCOM monitors for events related to provisioning, service failures, and threshold attainment (such as memory consumption). Transaction monitoring to simulate critical customer scenarios is accomplished with a third-party monitoring solution. This third-party solution monitors for events related to the CRM portal, trial sign-up, application sign-in, organization discovery, and scale group availability.

2.2 Monitoring Approach

Third-party solution

- Summary
    - Transactional monitoring
    - Simulates customer actions
    - Sends alerts when scenarios fail
    - Does not diagnose why the problem exists, only that the problem does exist

- Monitors every five minutes across all datacentres using public agents
    - Signup with Windows Live ID
    - Signup without Windows Live ID
    - Sign in (to each scale group)

- Support
    - Third-party solution engineer designs the scripts
    - 24x7 support for script deployment

Microsoft System Centre Operations Manager
- Summary
    - Infrastructure monitoring
    - Management packs for Windows Server, SQL Server, IIS, and CRM application
    - Critical alerts sent to the Microsoft Operations Centre for resolution and/or escalation
    - SCOM deployed in all datacentres

When an issue is detected at the platform or transactional layer, it is escalated to the Microsoft Operations Centre (MOC), where an attempt is made to resolve the issue based on the library of troubleshooting guides defined by the CRM Service Operations team. If the attempt at resolution is not successful, the MOC will escalate to a CRM service engineer for resolution. The MOC has a full escalation matrix, which uses a system that contains email and phone contact information for all service engineers for the service. The CRM Service Operations team defines the escalation order each week and the MOC follows those instructions for escalations to the team. In most cases, the MOC is able to resolve issues on its own without needing to escalate to the CRM Service Operations team.

Incident data is stored in logs which are available for review by internal Microsoft staff, namely Microsoft Operations personnel. Incident data is currently not available for review by external audiences, be it customers or partners.

2.3   Service Reporting

All monthly incidents are reviewed and categorized to identify the biggest problem areas. A monthly quality of service (QoS) meeting is held to review findings and action plans. Previous month's action items are reviewed until closed. The CRM Service Operations team is in a constant cycle of improving the quality of the service month over month.

Service availability is also reviewed monthly for each datacentre. Microsoft has a monitoring service that checks for sign-in availability to a specific organization every five minutes. The ratio of failures to successes gives Microsoft Dynamics CRM Online its availability for the month.

2.4 Training

Recommended Roles

Organizations should consider staffing the following roles:

- Business owner and managers—Business owners and managers provide the leadership necessary for success, and guide decisions about the way Microsoft Dynamics CRM Online is deployed. Although they do not have to understand the details of installation and configuration, they must be aware of the system configuration and maintenance requirements.

- Executive sponsor—in small organizations, this role may be the same as the business owner or managers. In larger organizations, this person provides the link between the project manager and upper management. This person must understand the details of the installation and configuration, understand the schedule, and work with outside vendors.

- Implementation project manager—The project manager is the person who directs the work and makes things happen. This person must understand the details of the installation and configuration, understand the schedule, know the other team members and their contributions, and work with outside vendors.

- System customizer—The system customizer is responsible for configuring and customizing the system to fit your specific business needs. This may include adding or removing fields, implementing workflows, updating system views, and other configuration elements.

- System administrator—The system administrator may have several responsibilities, including configuring system settings, configuring and assigning security Roles, setting up and configuring the Microsoft Dynamics CRM Online for Outlook software, and performing regular data b9999ackup using the bulk data export tool. Note that is in addition to performing business continuity backups maintained by Microsoft operations personnel.

Training

Training requirements will vary according to many factors, including the type of training, role being trained for, and the number of people to be trained.

Several training options are available for Microsoft Dynamics CRM Online, including both free and paid options:

- E-learning—E-learning courses are available at no additional charge.

- Classroom training—classroom training is available on a fee basis worldwide from a network of Microsoft Certified Learning Solutions Partners.

- Course manuals—Course manuals for classroom training offerings are available for free download.

- Customized training—customized training based on your customizations to the CRM application is available from Microsoft partners.

- Ongoing training—Ongoing training is also available from Certified Microsoft Partners.

For more information, see http://crm.dynamics.com/en-us/support/training.aspx.

2.5   Ordering and invoicing process

Customers can order in the following ways

1) Credit Card – customer can provide details and pay online for monthly billing

2) Invoicing – Customer can call 0800-376-2862 and set up a monthly invoice for usage.

3) Volume Agreements - Enterprise Agreements, Campus and School Agreement Programs. Customers can transact through the reseller of their agreement as a one off annual cost.

Microsoft

2.6   Termination terms

TERM AND TERMINATION

4.1   Termination by Microsoft. Microsoft may cancel or suspend Customer's use of the Service or a portion of thereof at any time if Customer violates the terms of this Agreement, if Microsoft believes that Customer's use of the Service represents a direct or indirect threat to its network function or integrity or anyone else's use of the Service, or if Microsoft is otherwise required by law to do so. Upon notification by Microsoft of any such cancellation or suspension, Customer's right to use the Service will stop immediately. Cancellation or suspension of the Service for Customer's violation of the terms of this Agreement will not change Customer's obligation to pay any Subscription fees due for the applicable Term.

4.2   Termination by Customer. Customer may cancel the Service at any time for any reason. To cancel, Customer should call Microsoft Dynamics CRM Online support. To find regional contact information for support, go to: **http://go.microsoft.com/fwlink/?LinkID=76092**. If Customer cancels the Service before the end of the Term, Customer will be charged a cancellation fee of $175 per User for the total number of Users on Customer's Subscription as of the date of cancellation, except if Customer cancels within 30 days of the end of Term, in which case no cancellation fee shall apply, but Customer will pay any remaining Subscription Fees through the remainder of the Term. Notwithstanding the foregoing, during the initial Term, Customer may cancel its Subscription at any time within the first 30 days of the Term without being charged a cancellation fee. If Customers cancel the Services in order to migrate to Microsoft's on-premise or partner-hosted offerings, the cancellation fee will be waived; provided, however, that this waiver is only available in connection with active Subscriptions for which Customer has paid at least three months of Subscription Fees. Customer must provide proof of purchase of the on-premise or partner-hosted offering in order to have its cancellation fee waived. To begin the migration process, Customer should call Microsoft Dynamics CRM Online support. To find regional support contact information, go to **http://go.microsoft.com/fwlink/?LinkID=76092**.

4.3   Reduction of Users. Customer may reduce the number of User Licenses that it has with the Service at any time for any reason. If Customer reduces the number of User Licenses in Subscription at any time during the Term, it will be charged a fee of $175 per User License disabled, plus the applicable pro-rated fee for each User License disabled for the period of usage up to the date of cancellation. To reduce the number of User Licenses, Customer should contact Microsoft Dynamics CRM Online support. To find regional support contact information, use the following link:
http://go.microsoft.com/fwlink/?LinkID=76092

4.4   Effect of termination. Upon termination or cancellation of the Service by either party for any reason, Microsoft may delete Customer's data permanently from its servers. Notwithstanding the foregoing, Microsoft will keep Customer's data for a period of 90 days before it is deleted from Microsoft's servers. Customer is solely responsible for taking the necessary steps to back up its data and ensure that it maintains its primary means of business.

4.5   Waiver of rights and obligations. To the extent necessary to implement the termination of this Agreement, each party waives any right and obligation under any applicable law or regulation to request or obtain intervention of the courts to terminate this Agreement.

4.6   No liability for deletion of data. Customer acknowledges that, other than as expressly described in these terms, Microsoft will have no obligation to continue to hold, export or return Customer's data. Customer acknowledges that Microsoft will have no liability whatsoever for deletion of Customer data pursuant to these terms.

2.7 Data restoration / service migration

Microsoft Dynamics CRM Online customers have the option of migrating to an on-premises implementation of Microsoft Dynamics CRM or a partner-hosted solution.

To initiate a migration, customers must request an export of their organization data from Microsoft Dynamics CRM Support. Requests for trial exports are processed every Tuesday by using the latest existing backups, and there is no effect on the use of Microsoft Dynamics CRM Online. For the final export, Microsoft Dynamics CRM Support must disable the organization and make a full backup of the data. Processing of final export requests starts on Thursday; the data is prepared and published on Friday. Total downtime is approximately 1-2 business days. Importing the data to a partner-hosted or on-premises deployment should take less than a day.

Microsoft Dynamics CRM Data Migration Manager can be used to convert and upload data from another CRM system to Microsoft Dynamics CRM. Microsoft Dynamics CRM Online also supports the ability to export data to Excel based on specific user-defined views.

Cancellation fees for Microsoft Dynamics CRM Online are waived when a customer migrates to another Microsoft Dynamics CRM option, and there are no fees charged for the migration other than standard licensing costs for the new deployment type.

Additional information is available at:

http://www.microsoft.com/download/en/details.aspx?DisplayLang=en&id=18039.

Separately, Microsoft Services offers a Microsoft Dynamics CRM Online Migration Service for customers migrating from competitive solutions whereby a Microsoft Premier Field Engineer will:

- Work with the customer to determine data requirements
- Develop a migration strategy and identify proper tools and techniques to use during the data migration project
- Complete a test data migration to determine whether data mappings are correct
- Migrate existing customer data to Microsoft Dynamics CRM Online

More information on this service is available at www.microsoft.com/services.

2.8 Consumer responsibilities

The customer (and/or partner) has the following support responsibilities:

- Microsoft may provide the customer (or partner) with certain support and diagnostic tools from time to time to perform problem determination and resolution activities. It is our expectation that the customer (and/or partner) will use these tools as appropriate to resolve issues prior to escalating to Microsoft.

- Customer (and partner) agrees to respond to satisfaction surveys provided by Microsoft from time to time regarding Microsoft services.

- Customer should generally resolve all Tier 1 and Tier 2 issues, including but not limited to:

    - Issues that can be resolved by reference to "how to" articles and FAQs.
    - Software configuration.
    - Client connectivity.
    - Client desktop support.
    - Service availability issues within the customer's span of control.
    - Performance issues within the customer's span of control.

2.9 Technical requirements

The following operating systems are supported for the Microsoft Dynamics CRM Web client:

- Windows 7 (all versions)

- Windows Vista (all versions)

- Microsoft Windows XP Professional SP3

- Microsoft Windows XP Home SP3

- Windows XP Media Centre Edition SP3

- Microsoft Windows XP Tablet SP3

In addition, the Microsoft Dynamics CRM Web client requires one of the following Internet Explorer Web browser versions:

- Internet Explorer 7 and above.

Future updates to the product, which are due in 2012 will include support for 3rd party browsers, which currently are:

- Firefox

- Safari

- Chrome

To use Microsoft Dynamics CRM with Microsoft Office integration features, such as Export to Excel and Mail Merge, you must have one of the following installed Microsoft Office versions on the computer that is running the Microsoft Dynamics CRM Web client:

- Microsoft Office 2003 SP3

- 2007 Microsoft Office system SP2

- Office 2010

Note

Microsoft Windows 2000 editions are not supported for installing and running the Microsoft Dynamics CRM Web client.

Microsoft

2.10   Client Performance

The performance of Dynamics CRM clients is directly affected by to two primary factors:

- The <u>hardware</u> on which the clients are running
- The <u>network</u> over which the service is accessed

While upgrading hardware to improve client performance is relatively straightforward, optimizing the network that supports a Microsoft Dynamics CRM implementation is a critical step for ensuring that the overall system operates efficiently.

The primary factors that define network performance are bandwidth and latency.

- *Bandwidth* is the width or capacity of a specific communications channel.
- *Latency* is the time required for a signal to travel from one point on a network to another; latency is a fixed cost between two points. To optimize for latency, eliminate as many round trips per request as possible.

Networks with high bandwidth do not guarantee low latency. For example, a network path traversing a satellite link often has high latency, even though throughput is very high. It is not uncommon for a network round trip traversing a satellite link to have five or more seconds of latency. An application designed to send a request, wait for a reply, send another request, wait for another reply, and so on, will wait at least five seconds for each packet exchange, regardless of how fast the server is.

Important: It is recommended to test the implications of client performance in any WAN environment with potential bandwidth or latency issues. As is the case with most cloud services, there are certain aspects of network performance that are outside of the direct control of either Microsoft (Microsoft Dynamics CRM Online) or the customer. The customer may want to investigate different options for network optimization. In some situations, the customer may consider changing their current Internet connectivity provider in favour of a different one that offers better routing to the Microsoft datacentre.

2.11   Details of any trial service available

Details of the Dynamics CRM Online Trial can be found at http://crm.dynamics.com/en-gb/trial-overview.

The trail runs for 30 days and is completely free. No Credit card details are required and the trial has the full features and capabilities of the live service.

Microsoft

3. G-Cloud Award Question Cross Reference

The following section provides a cross reference to the Award Questions into respective sections within the service definition.

3.1 Generic Questions

Q-G06	Networks to which the service is connected (directly)?	Public Internet
Q-G07	'API' access available, documented and supported?	See APIs, SDK
Q-G08	Open Standards supported and documented?	See APIs, SDK and Technical requirements
Q-G09	Open source software used and documented?	No

3.2 Service Management

Q-G10	Technical boundaries/interfaces of the service documented?	See Technical requirements
Q-G11	Services available to other suppliers so they can use them to provide services to government?	1.1 Yes – See Custom Code on Microsoft Servers
Q-G12	On-boarding process e.g. moving on to the service?	See On-boarding and Off-boarding
Q-G13	Off-boarding process e.g. moving off the service?	See On-boarding and Off-boarding
Q-G14	Data extraction/removal criteria met?	See Data restoration / service migration
Q-G15	Data processing and storage locations defined?	See Data Centre Tier
Q-G16	Data location option can be defined by user?	No
Q-G17	Data held in Safe Harbour (if applicable)?	See Data Storage
Q-G18	Data centre(s) used adhere to best practices described by the EU Code of Conduct for Data Centre Operations?	See Data Centre Tier
Q-G19	Data centre tier?	See Data Centre Tier

Microsoft

Q-G20	Support boundaries/interfaces of the service documented?	See CRM Online Service Management
Q-G21	Service roadmap provided?	Yes – Inbuilt to each of the service elements
Q-G22	Performance attributes defined and documented?	See Client Performance
Q-G23	Backup & Disaster Recovery?	See Backup/restore and Disaster Recovery
Q-G24	Is a support service provided and documented?	See CRM Online Service Management
Q-G25	'Real time' management information available?	No
Q-G26	Reports include each billed unit?	Yes
Q-G27	Self service provisioning/de-provisioning?	No
Q-G28	Indicative time for provisioning/de-provisioning documented?	Yes See On-boarding and Off-boarding Termination terms
Q-G29	3rd party service monitoring tool access?	No
Q-G30	Service Desk can be used by 3rd party suppliers for their services - e.g. small SaaS provider?	Yes; This is implicit in Microsoft's agreements

3.3   LOT 3 - Software as a Service (SaaS)

Clients		
Q-LOT3-1	Web browser interface?	Primary
Q-LOT3-2	Supported web browsers documented?	See Technical requirements
Q-LOT3-3	Details of other thin client modes documented?	See Technical requirements

Microsoft

Q-LOT3-4	Other client software documented?	See Technical requirements
Q-LOT3-5	Smartphone Access?	See Mobility device support
Q-LOT3-6	Off-line working & synching?	See Microsoft Dynamics CRM Online (Standard/Only Configuration)
General Features		
Q-LOT3-7	Attachment support?	Yes
Q-LOT3-8	Anti-virus protection?	No
Q-LOT3-9	International Language Support?	See Key Technical Benefits
Q-LOT3-10	Workflow facilities?	Yes
Q-LOT3-11	Importable taxonomy?	No
Q-LOT3-12	Folksonomy support?	No
Q-LOT3-13	Taxonomy facilities?	No
Q-LOT3-14	Plug-in / extension ready?	1.2 See Custom Code on Microsoft Servers
Q-LOT3-15	Plug-in / extension marketplace?	1.3 See Custom Code on Microsoft Servers
Q-LOT3-16	Syndication?	Yes
Q-LOT3-17	Native search?	Yes
Q-LOT3-18	Native support of bulk input / export of data & meta-data in standard formats?	See Data restoration / service migration
Q-LOT3-19	Link Management?	Yes
Business Continuity		

Q-LOT3-20	Separated environments: Publishing / Editing / Search?	No
Q-LOT3-21	Caching?	Local caching and Geo-redundant datacentres

See Data Centre Tier |
Authorisation, Authentication and Personalisation		
Q-LOT3-22	Integration with Identity Systems?	See Authentication
Q-LOT3-23	User profile page?	See Authentication
Q-LOT3-24	Comment on item?	No
Integrated Communications tools		
Q-LOT3-25	Instant Messaging?	No
Q-LOT3-26	eDiscovery?	No
Q-LOT3-27	Migration Tools Available?	No
Q-LOT3-28	Video Conferencing?	No
Q-LOT3-29	Social Networking?	Yes
Q-LOT3-30	Social Networks?	Social connectors available for: Facebook, MSN, LinkedIn, Twitter and native integration with Lync Federation allows I.M/Video conversations with other Organisations using Lync, OCSR2 or OCS and also users of MSN/Live Messenger Social Networks.
Q-LOT3-31	Calendars?	Yes
Q-LOT3-32	Contact Management?	See An overview of the G-Cloud Service
Q-LOT3-33	To Do Management?	See An overview of the G-Cloud Service

Microsoft

	User Generated Content	
Q-LOT3-34	Solution provides Blogging capabilities?	No
Q-LOT3-35	Solution provides wiki capabilities?	No
Q-LOT3-36	Solution provides forum capabilities?	Yes
Q-LOT3-37	Solution provides content rating capabilities?	Yes
Q-LOT3-38	Solution provides content recommendation capabilities?	Yes
Q-LOT3-39	Solution provides social media sharing e.g. tweet this?	Yes
Q-LOT3-40	Solution provides automated stop word filtering?	No

3.4 Customer Relationship Management (CRM)

Q-LOT3-191	What is the name for the service (if different from response in "About your Services" section)?	Microsoft Dynamics CRM Online
Q-LOT3-192	Price for most common configuration (i.e. Supplier's best selling or expected best selling configuration)?	£25.96 per user per month - DSD-00001 See Pricing
Q-LOT3-193	Minimum service unit pricing interval?	Per user per month - See Pricing
Q-LOT3-194	Is the service Public or Private?	Public
Q-LOT3-195	Impact Levels (ILs) at which the service is accredited to process and/or store information (actual or target)?	See Information assurance
Q-LOT3-196	Has the service been accredited?	See Information assurance
	Features	

Microsoft

Q-LOT3-197	Service automates business processes such as marketing / customer engagements?	See An overview of the G-Cloud Service
Q-LOT3-198	Account Level Management?	See An overview of the G-Cloud Service
Q-LOT3-199	Campaign Management?	See An overview of the G-Cloud Service
Q-LOT3-200	Forecasting?	See An overview of the G-Cloud Service
Q-LOT3-201	Partner Integration?	See Custom Code on Microsoft Servers
Q-LOT3-202	3rd party tool / plug-in ready?	See Custom Code on Microsoft Servers
Q-LOT3-203	Tool library / store?	See An overview of the G-Cloud Service (MarketPlace)
Q-LOT3-204	Data export?	See Data restoration / service migration
Q-LOT3-205	Data export formats?	.doc, .docx, .txt, .xls, .csv, .XML, .html, .PDF See Data restoration / service migration
Q-LOT3-206	Native Integrated Functions?	Workflow / Instant messaging & Presence / Video conferencing / Email / etc See An overview of the G-Cloud Service