MICROSOFT DYNAMICS CRM ONLINE

Geo to Geo Migration Information

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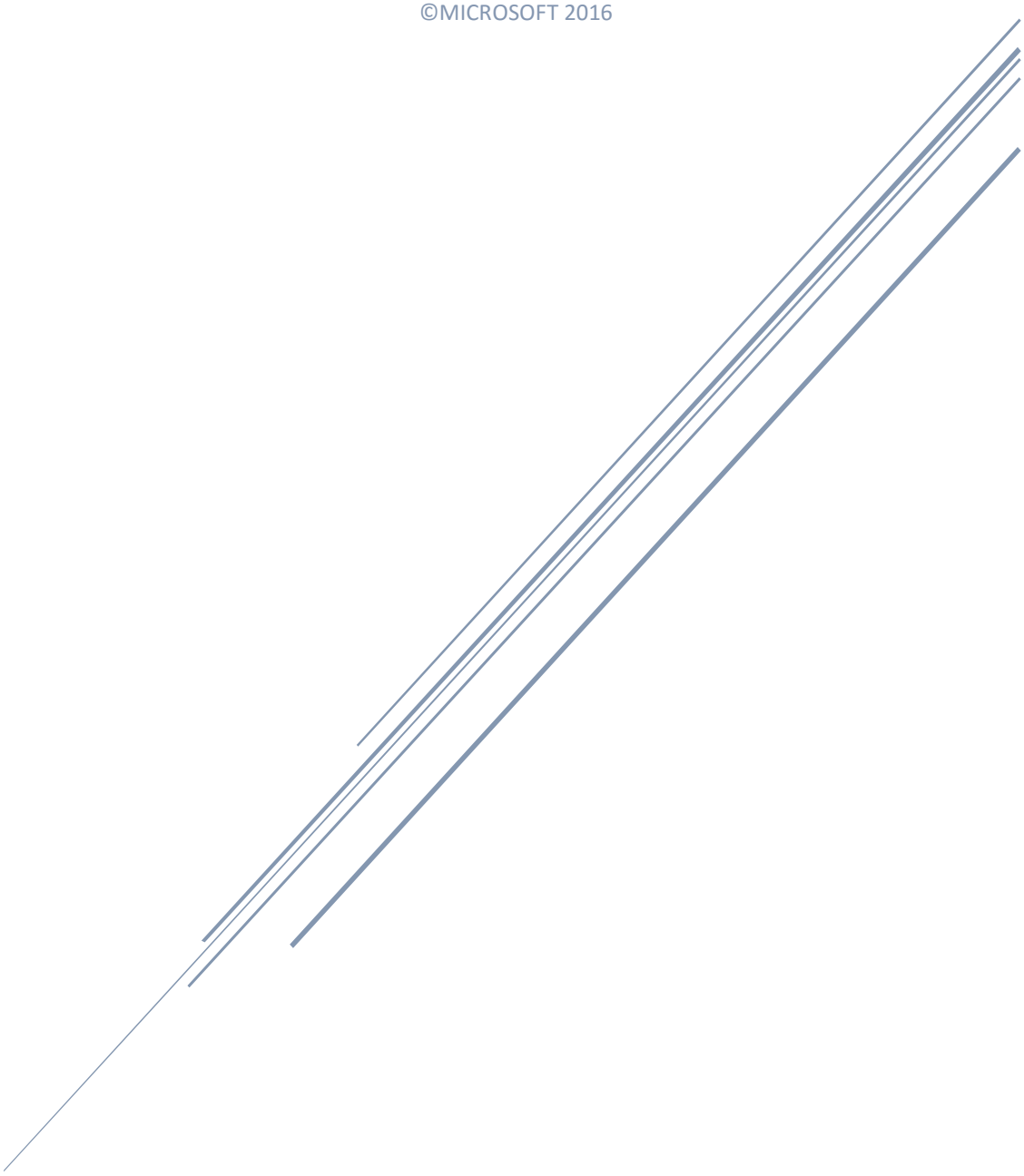

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Introduction

Microsoft launched new datacenters in South America, Australia, Japan, India, and Canada. With the introduction of these new datacenters, we are now pleased to offer you the opportunity to move your existing CRM Online organization from your current datacenter to one closer to your geographic location.

The new local Microsoft Cloud enables data residency for commercial customers, bringing world-class reliability and performance to regulated industries and other businesses. This includes data replication in multiple regions for backup and recovery, reduced network distance, lower latency, and the option of a private connection to the cloud.

This document outlines the process and details the pre and post requisites that you need to review to understand and plan for any impact to your business.

Terms and acronyms used in this document

Term	Definition
Tenant	For Microsoft Dynamics CRM Online, a tenant is the account you create in the Microsoft Online Services environment when you sign up for a CRM Online subscription. A tenant contains uniquely identified domains, users, security groups, and subscriptions and can contain multiple CRM Online instances. The tenant created for you has a domain name of <account>.onmicrosoft.com. For example, contoso.onmicrosoft.com.
Instance	When you sign up for a trial or purchase a Microsoft Dynamics CRM Online subscription, a CRM Online production instance is created. Each additional production or non-production (Sandbox) CRM Online instance you add creates a separate and isolated Microsoft Dynamics CRM organization on the same tenant. An instance has the URL format: https://<URL name>.crm.dynamics.com. For example, https://contososales.crm.dynamics.com.
Subscription	A subscription consists of the CRM licenses and add-ons included with the trial or paid service you signed up for in your CRM Online account. CRM subscriptions can vary in license type, price, and end date. For example, a subscription might be 100 licenses of Microsoft Dynamics CRM Online Professional, 10 licenses of Microsoft Dynamics CRM Online Enterprise, and 100 licenses of Office 365.

The process

At present, the process to move an instance from one datacenter to another is a manually managed process that is driven by the CRM Online Service Engineering team in Microsoft.

To request an instance move, please open a Technical Support case and the CRM Online Support team will help to coordinate your request with the CRM Online Service Engineering team. The Support Engineer assigned to your case will raise an internal request and work with you and the CRM Online Service Engineering team to schedule a suitable date and time to migrate and follow up to ensure the migration has gone smoothly.

It is essential that you review the pre/post requisites detailed in this document to understand what actions you will need to take and what impact the migration will have to your business. What's listed in the pre/post requisites are the common areas that Microsoft is aware of; this might not be an exhaustive list. Consider your usage of CRM Online carefully to ensure there are no other areas that will be affected by the move.

Note: In the case of a CRM Online instance residing in an Office 365 instance in a single tenant, moving the CRM instance does not move the Office 365 instance. They are separate entities. Your CRM instance will still appear within your tenant alongside the Office 365 instance.

The impact of the move

Other than the physical location of your data after the migration, the only other impactful change is the change to your organization URL.

Each of the CRM Online regional datacenters has a unique identifier in the URL. When your organization is moved from one regional datacenter to another, this identifier will change. For example:

Asia Pacific (APAC) = *.crm5.dynamics.com

Australia (OCE) = *.crm6.dynamics.com

Japan (JPN) = *.crm7.dynamics.com

India (IND) = *.crm8.dynamics.com

Canada (CAN) = *.crm3.dynamics.com

Full details of the regional identifiers can be found on the following site:
https://msdn.microsoft.com/en-us/library/gg328127.aspx

For example, if your existing organization URL is https://myorg.crm**5**.dynamics.com and you request it to be moved to India, the new organization URL will be https://myorg.crm**8**.dynamics.com.

You will need to update any direct references to your CRM Online organization URL.

Note: Organization URLs must be unique. If your organization name has already been reserved in the destination datacenter, it will not be available. In the unlikely event this happens, we will work with you to decide how to proceed.

Pre-requisites for Geo Migration

Below are specific pre-requisite actions that need to be completed prior to the migration. Be sure to read the post-requisites and ensure you have planned accordingly for the work that will be involved.

Area	Pre Migration	Notes
Outlook client	Be sure to have every licensed user launch their Outlook client before migration so their personal data does not get lost.	
Custom SDK Clients/SCRIBE/SSIS	Confirm what custom solutions utilize the current URL.	
CRM Version	Your CRM Online organization must be running CRM 2015 or CRM 2015 Update 1 prior to the migration. If you have several organizations, they need to be running the same version of CRM 2015 or CRM 2015 Update 1. You can verify this by the last four numbers of the version. Example: x.x.x.XXXX	To check the version of your CRM Online organization, open the web application, click on the gear icon in the top right corner, and then choose **About**. If the version number shown at the top of the About window starts with 7, you are already on CRM 2015 and no action is required.

Post-requisites for Geo Migration

The following table contains a list of actions that, depending on your usage of CRM, might need to be taken following the migration. Please consider any other links you might have to your CRM organization either locally or from other online service providers.

Area	Post Migration
Outlook client	Clients need to be reconfigured by removing the previous org configuration and adding the latest org configuration to support the new URL
CRM for phones and CRM for tablets	Reconfigure clients to use the new URL.
CRM for phones express	Reconfigure/reinstall the app using the new URL.
Email Router	Reconfigure the CRM Email Router to ensure the Outgoing Profile is pointing to the correct org URL.
Yammer	Do an admin-level reconfiguration since the token is not copied over. All links from Yammer that refer back to records in CRM will be broken – including auto created posts.
Unified Service Desk (USD)	Reconfigure clients to use the new URL.
Microsoft Dynamics Marketing	Reconfigure the Marketing Connector.
Authentication	Users might need to log in with a new session; from then on, single sign-on should work.
Custom SDK clients/SCRIBE/SSIS	Reconfigure SDK clients to use the new URL.
Custom app	If you have any custom apps or integration that accesses your CRM org, these will need to be reconfigured. Work with your developers or partner.
Azure Service Bus	Reconfigure the service bus endpoint with the new URL and service bus certificate. See: Configuring Azure Service Bus endpoint and CRM Plugin Steps
Browser bookmarks or favorites	If users have the CRM org URL saved as a bookmark or a favorite, they must update or recreate these with the new URL.

Expected down time

Many factors can affect the overall time it takes to migrate your organization. In general, we recommend that you factor in a 6-hour window where your CRM organization will be unavailable to your users while the migration is completed and verified.

You will be notified when the migration is started, completed, and signed off by Microsoft as complete.

Rollback / recovery

Should an issue occur during the migration that cannot be immediately resolved, the original organization in its current location will be re-enabled and made fully accessible with no loss of data. The issue will be investigated and the migration rescheduled for another date.

After a successful migration, if you are unhappy with the result or are experiencing issues that cannot be quickly addressed, we can migrate you back to the original datacenter. This can occur up to 15 days after the migration. This will ensure you are back up and running again in your current configuration.

Questions

If you have any questions or concerns, please discuss with the Support Engineer that owns the case you created requesting the move. The Support Engineer will be able to answer quickly or can work with the CRM Online Service Engineering team to address your concern.