Migration Journey: Adxstudio Portals to Dynamics 365 Portals

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12+ years Microsoft Technologies

- 6+ years in web Technologies
- 6+ years in Dynamics CRMs/CE
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Agenda

- Adxstudio Portals?
- Dynamics 365 Portals
- Dynamics 365 Portals Vs Adxstudio Portals (setup, structural change)
- Options
    - Re-implement as Portals Version 7
    - Migrate by Moving to community edition
    - Perform the Upgrade using Data Migration Tools.
- Upgrade Steps
    - Identify Customization
    - Identify what is not supported
    - Consider reimplementation to unsupported components
    - Environment Prep for Upgrade
- Demo : Migration using Data Migration Tool
- Q&A

What are we talking about today?

Adxstudio Portals

Portals v7 on CRM 2015/2013

- Liquid Templates
- ASP.NET Identity replaced ASP.NET CRM Contact Membership Provider
- Supports CRM 2016 and now Dynamics 365 with CRM SDK 6.1.2
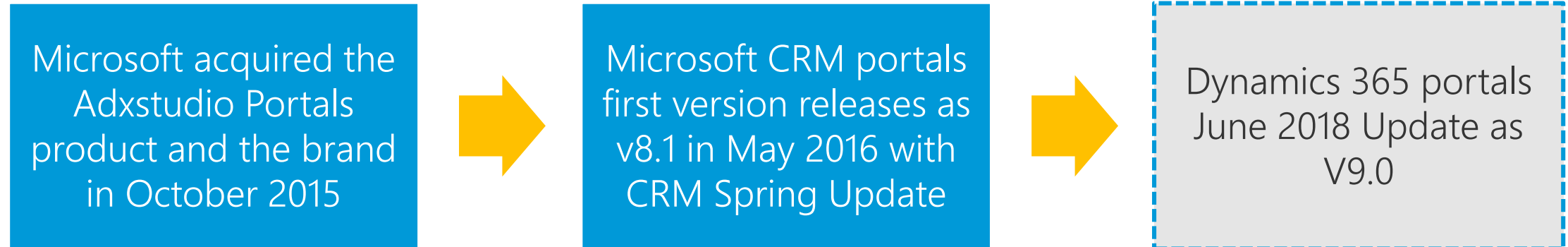
Portals v6 on CRM 2013/2011

- Move to a single code base called MasterPortal
- Moved to late bound instead of early bound/strong types
- Entity Form, Entity List introduced
- Bootstrap introduced for responsive design

Portals v5 on CRM 2011

- Introduce MVC based features and helpers

Portals v4 on CRM 4

xRM Extensions v2.2 / xRM Portals v3 on CRM4

Dynamics 365 Portals, from Microsoft

Microsoft acquired the Adxstudio Portals product and the brand in October 2015

→

Microsoft CRM portals first version releases as v8.1 in May 2016 with CRM Spring Update
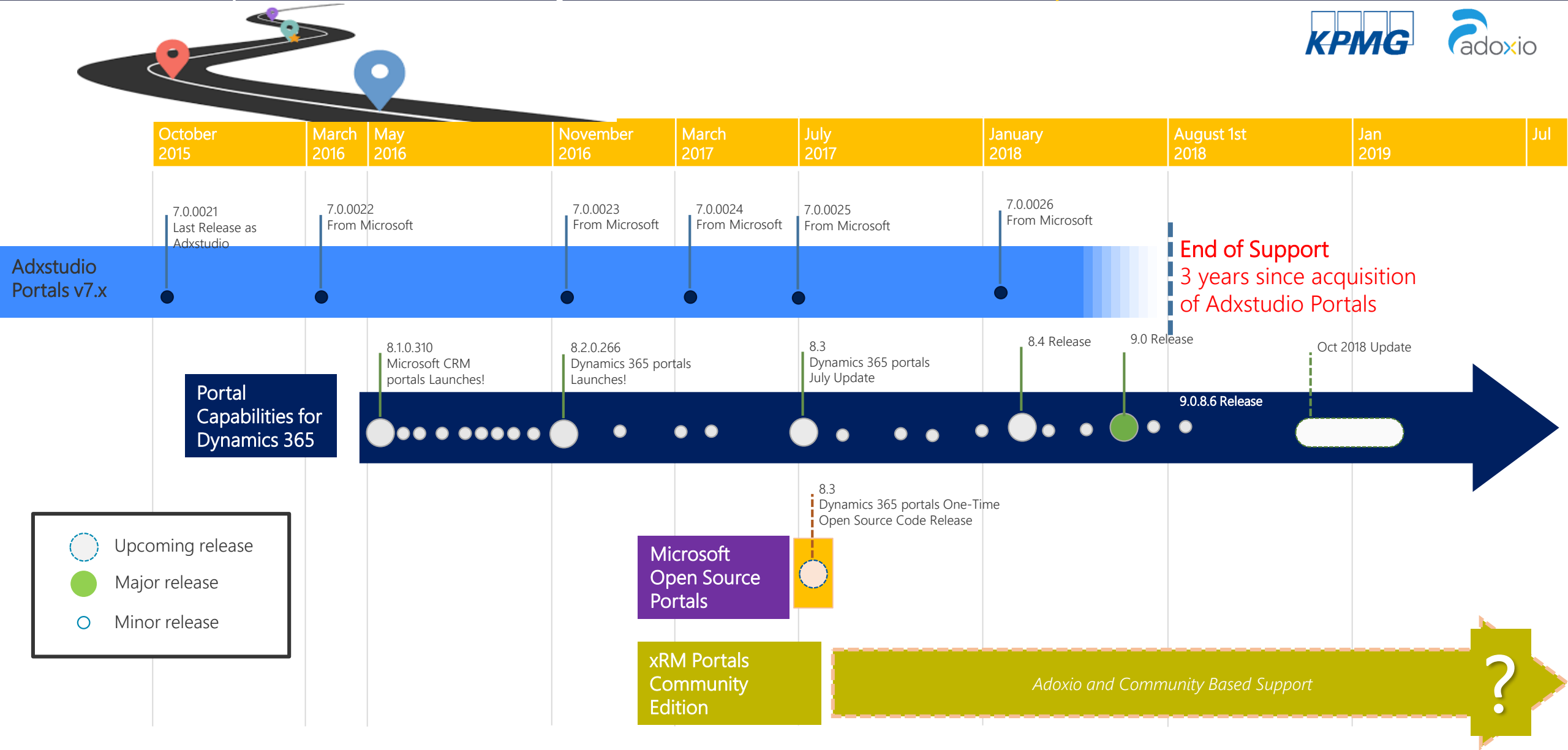
→

Dynamics 365 portals June 2018 Update as V9.0

- Only released as Software as a Service
- No on premise or self hosted version

  - Microsoft hosted portals on Azure
  - No MasterPortal code access – no .NET Framework, no CRM SDK, no C#
  - Limits the customization options compared to previous versions of Adxstudio Portals

Portal Capabilities for Dynamics 365 Roadmap

KPMG adoxio

October 2015	March 2016	May 2016	November 2016	March 2017	July 2017	January 2018	August 1st 2018	Jan 2019	Jul

Adxstudio Portals v7.x

7.0.0021
Last Release as Adxstudio

7.0.0022
From Microsoft

7.0.0023
From Microsoft

7.0.0024
From Microsoft

7.0.0025
From Microsoft

7.0.0026
From Microsoft

End of Support
3 years since acquisition of Adxstudio Portals

Portal Capabilities for Dynamics 365

8.1.0.310
Microsoft CRM portals Launches!

8.2.0.266
Dynamics 365 portals Launches!

8.3
Dynamics 365 portals July Update

8.4 Release

9.0 Release

9.0.8.6 Release

Oct 2018 Update

8.3
Dynamics 365 portals One-Time Open Source Code Release

Microsoft Open Source Portals

xRM Portals Community Edition

Adoxio and Community Based Support

?

Legend:
- Upcoming release
- Major release
- Minor release

Adxstudio Portals – Do I have support?

	Adxstudio Portals v7.x	Portals, from Microsoft	Microsoft Open Source Portals	xRM Portals Community Edition
Bug Fixes	✖	✔	✖	✔
New and Enhanced Features	✖	✔	✖	Custom Development
Custom Server Side Development	✔	Adoxio Connect 365	✔	✔
Supports On-Premises	✔	✖	✔	✔
Portals can be Self-Hosted	✔	✖	✔	✔
Available as Software as a Service	✖	✔	✖	✖
Source Code Available	O	✖	✔	✔
Supported by	✖	Microsoft	✖	Adoxio

O - Partial Support	✔ - Full Support	✖ - No Support

What are my Options?

Migrate to Dynamics 365 Portal Capabilities

- Only viable long term option
- New enhancements
- New Features
- Monthly releases
- Supported by Microsoft
- Dynamics 365 Online Only

Migrate to 8.3 Open Source Code

- Suited as a stepping version before upgrading to CRM Portals
- No support
- No updates, bug fixes and Patch
- Self Hosted

Migrate to xRM Portals Community Edition

- Short Term stepping version prior to upgrading to CRM Portals
- Bug Fixes by Adoxio and Dynamics community
- Supported by Adoxio
- Self Hosted

Continue using Adxstudio Portals

- If you have perpetual license
- Might not be supported on future releases of Dynamics 365
- No support
- No updates, bug fixes and Patch
- Self Hosted

Adxstudio Portals/Dynamics 365 Portal Options

Adxstudio Portals	Dynamics 365 portals Capabilities	Alternate Options
Basic Portal	Custom Portal	
Community Portal	Community Portal	
Company Portal	Not Available	Community Portal/Custom Portal
Conference Portal	Not Available	Event Management Portal/Marketing App
Customer Portal	Customer Self-Service Portal	
Government Portal	Not Available	Custom Portal/Velocity 365
Partner Portal	Partner Portal	
Retail Portal	Not Available	Custom Portal/Connect 365
	Employee Self-Service Portal	

Adxstudio Portals/Dynamics 365 Feature Gaps

Adxstudio Portals	Dynamics 365 portals Capabilities	Alternate Options
SharePoint Integration	Not Available	Connect 365 (Adoxio)/Upcoming (In Preview)
Shopping Cart	Not Available	No Alternative/Custom Connect 365
Payment Integration	Not Available	Connect 365 (Adoxio)
Event Management	Event Management Portal	
Issue Management	Not Available	Repurpose Support Management using Case
Service Requests	Not Available	Velocity 365 (Adoxio)

Upgrade Options & Method

- How was your Adxstudio Portal was Implemented
  - Code Customization (Application code changes)
    Vs Configuration
  - Features used
    - Unsupported Portal Template
    - SharePoint
    - Shopping Cart
    - Payment Handling

Upgrade Methods

Microsoft Whitepaper

- Documented Portal Migration Procedure
- Released in Feb 2018
- Provides two options:
  - Reimplementation
    - Does not provide tool /step for reimplementation
  - Migration
    - Migration using Open source Portal code

Reimplement

- Reimplement functionality in Dynamics 365

Migration using PowerShell scripts

- Migrate to 8.3 Open Source Code as Intermediary
- In Place Migration

Upgrade using Data Migration Tools

- Migrate using third-party Data Migration Tools
- Migration to Dynamics 365 Portals
- Options: SSIS, Scribe, Informatica etc.

Portal Migration using Data Migration Tools

- Portal data structure/model changes between Adxstudio portals & Dynamics 365 portals capabilities.
- Current migration scripts is still data dependent to get it right.
- Data migration tools gives greater control on the process.
- Migration scripts can be used to facilitate upgrade from unsupported template to supported template.

Data Migration using SSIS & KingswaySoft

SQL Server Integration Service(**SSIS**)
- ✓ Enterprise data integration, data transformation and data migration tool by Microsoft
- ✓ Allows Data Transformation in transit
- ✓ Tightly integrated with Microsoft Visual Studio and SQL Server.
- ✓ Better for complex transformations, multi-step operations, aggregating data from different data sources or types, and structured exception handling.

SSIS Integration Toolkit by **KingswaySoft**
- ✓ SSI connection Adopters for Dynamics 365
- ✓ Works with all Dynamics 365 deployment types

SSIS & KingswaySoft Adopter : <u>One of the best tool for migrating data from Legacy apps to Dynamics 365</u>

Upgrade Prep : Identify Customizations

Identify : Application/code Customization
- Remove customization and plan for reimplementing using configuration
- General code customization examples are:
    - Custom code/Aspx pages
    - Custom MVC Project
    - Modifications to the OOB Code(MasterPages modification).

Identify : unsupported features
- Remove dependency on unsupported features
    - Remove webpage and weblink references to event, issues, articles.

Backup:
- Backup before starting on migration process
- Perform Migration on a Sandbox

SQORAS32

⚠️ An unsupported operation was attempted.

OK

Reimplement code customization in supported format:
- Use liquid templates where possible

Unsupported Features from Adxstudio Portals & custom code:
- Consider Portal companion App(Portal buddy)
- Consider Connect 365

Upgrade Prep : Environment Prep

Create a Sandbox copy of Dynamics 365 Instance

Uninstall all Adxstudio portals solutions completely on the Sandbox

Install the Dynamics 365 portal solutions from Applications

Setup and configure Dynamics 365 portal based on original portal used

Validate portal content data and delete/deactivate those you don't need, example blogs, forums.

Demo

Adxstudio Portal ~~Upgrade~~ Migration using SSIS

Post Upgrade : Validation

Disable custom errors on Dynamics portal

Enable diagnostic logging

Validate Styling and adjust to be Dynamics 365 Portals compatible

Complete regression testing

Test, validate and deactivate pages you aren't using in implementation.

Data Migration using SSIS

Stater Package:

https://github.com/kunaltripathy/Dynamics365SSISPackages/tree/master/AdxstudioPortalsMigration

Benefits :

- Could be used as Starter Package for Portal Migration.
- Package allows remapping Adxstudio Portals data to CRM Portals structure.
- One package for Complete Portal Migration.
- Supports Migration from Unsupported Portals.
- Not an In place migration.
- Migrates comments to new Feedback Entity.
- Sets scope to Access Control Rules.
- Migrates Deactivated webpages as Deactivated Webpages.
- Removes spaces from partial url.

Questions?

Contact KPMG Adoxio

for

Support and Assessment

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THANK YOU

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Thank you

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