

Course 80539A: Installation and Deployment in Microsoft Dynamics CRM 2013

Length	: 2 Days
Audience(s)	: IT Professionals
Level	: 200
Technology	: Microsoft Dynamics CRM 2013
Delivery Method	: Instructor-led (classroom)

Course Overview

This two-day training course provides individuals with the skills to install and deploy Microsoft Dynamics CRM 2013. The training material focuses on the components used within a Microsoft Dynamics CRM deployment, the hardware and software requirements needed to successfully deploy Microsoft Dynamics CRM, and the installation instructions for the primary Microsoft Dynamics CRM components: the Microsoft Dynamics CRM Server, the E-Mail Router, and Microsoft Dynamics CRM for Office Outlook. The course also covers upgrading from earlier versions, configuring an Internet-facing Deployment and administration tasks.

Audience Profile

This course is intended for implementation consultants, system integrators, or support professionals who need to install and deploy Microsoft Dynamics CRM 2013.

Course Objectives

After completing this course, students will be able to:

- Describe the components that are required for a successful Microsoft Dynamics CRM implementation.
- Identify the hardware and software requirements for components of a Microsoft Dynamics CRM implementation.
- Install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Reporting Extensions.
- Install and configure the Microsoft Dynamics CRM E-mail Router.
- Describe the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Configure Claims-based authentication and Internet-facing deployment.
- Upgrade to Microsoft Dynamics CRM 2013.
- Manage Microsoft Dynamics CRM organizations using the Deployment Manager.
- Describe the high availability options for Microsoft Dynamics CRM 2013.

Course Outline

Module 1: System Requirement and Required Technologies

This module provides a high-level overview of the supporting technologies and describes the components of a Microsoft Dynamics CRM implementation.

Lessons

- Microsoft Dynamics CRM Offerings
- On-Premises Licensing Model
- Online Licensing Model

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- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview

After completing this module, students will be able to:

- Describe the Microsoft Dynamics CRM offerings.
- Describe the licensing model and client access license types.
- Provide an overview of the supporting technologies.
- Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
- Describe the ways to access Microsoft Dynamics CRM.
- Identify the differences between the two modes of Microsoft Dynamics CRM for Office Outlook.
- Review the options for managing emails.
- Review the role of Microsoft Dynamics CRM Reporting Extensions.
- Review the role of Microsoft Dynamics CRM Language Packs.

Module 2: Install Microsoft Dynamics CRM Server

This module focuses on installing Microsoft Dynamics CRM Server. It also discusses the required components and Server requirements.

Lessons

- Microsoft Dynamics CRM Server Requirements
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online

Lab : Install Microsoft Dynamics CRM Server

Lab : Load Sample Data

After completing this module, students will be able to:

- Describe the hardware and software requirements for the Microsoft Dynamics CRM Server.
- Describe the hardware and software requirements for the Microsoft SQL Server.
- Identify the components that are installed during Microsoft Dynamics CRM Server Setup.

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- Review the options for creating the Microsoft Dynamics CRM Server website.
- Review the rights required to install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Server.
- Review installation troubleshooting and identify known issues.
- Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
- Describe how to install Microsoft Dynamics CRM using the command line.
- Describe how sample data can be added to a Microsoft Dynamics CRM implementation.

Module 3: Install Microsoft Dynamics CRM Reporting Extensions

This module describes the role of Reporting Extensions and provides an overview of the report types that are available in Microsoft Dynamics CRM.

Lessons

- Microsoft Dynamics CRM Reporting Overview
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions

Lab : Install Reporting Extensions

After completing this module, students will be able to:

- Examine the two types of Reporting Services reports.
- Review when Microsoft Dynamics CRM Reporting Extensions is required.
- Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
- Review when Microsoft Dynamics CRM Report Authoring Extension is required.

Module 4: Manage Microsoft Dynamics CRM with the Deployment Manager

This module explains how you can redeploy Microsoft Dynamics CRM and use the Microsoft Dynamics CRM Deployment Manager to carry out deployment-wide administration tasks.

Lessons

- Deployment Manager
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell

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Lab : Duplicate the Adventure Works Cycles Organization

After completing this module, students will be able to:

- Describe the Deployment Manager and the role of deployment administrators.
- Review the steps to create new organizations.
- Describe the management tasks for existing organizations.
- Describe how to add an existing organization database to the deployment.
- Review Microsoft Dynamics CRM Server management tasks.
- Describe how to update the Microsoft Dynamics CRM web addresses.
- Review Microsoft Dynamics CRM license information.
- Describe the Microsoft Dynamics CRM Edition upgrade options.
- Explore why the redeployment of Microsoft Dynamics CRM is required.
- Examine Windows PowerShell for performing deployment commands.

Module 5: Upgrade to Microsoft Dynamics CRM 2013

This module examines the planning considerations and the steps for upgrading an existing Microsoft Dynamics CRM deployment to Microsoft Dynamics CRM 2013.

Lessons

- Upgrade Considerations
- Base and Extension Table Merge
- Upgrade Process Phases
- Phase 1 – Prepare to Upgrade
- Phase 2 – Establish the Test Environment
- Phase 3 – Upgrade and Validate the Test Environment
- Phase 4 – Upgrade and Validate the Production Deployment
- Perform an In-Place Upgrade of Microsoft Dynamics CRM 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook

After completing this module, students will be able to:

- Identify considerations before starting an upgrade.
- Describe the base and extension table merge process
- Review the high-level phases of an upgrade process.
- Explain the need for a test environment.
- Identify the need to validate an upgrade of a test environment.
- Review the upgrade of the production deployment.
- Describe an in-place upgrade of Microsoft Dynamics CRM.
- Describe a migration upgrade of Microsoft Dynamics CRM.
- Describe the upgrade of the Microsoft Dynamics CRM Email Router.
- Describe the upgrade of Microsoft Dynamics CRM for Outlook.

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Module 6: Email Management

This module describes management topics that are common to each of the email processing methods and the email processing methods.

Lessons

- Email Processing
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks

Lab : Install the Email Router

Lab : Configure the Email Router

Lab : Configure Server-Side Synchronization

After completing this module, students will be able to:

- Describe the email processing options in Microsoft Dynamics CRM.
- Explain email tracking and correlation.
- Discover how mailboxes are monitored.
- Describe the purpose of Microsoft Dynamics CRM mailbox records.
- Examine the email synchronization options.
- Review the requirement to approve email addresses.
- Explain the role of the Microsoft Dynamics CRM Email Router.
- Install the Microsoft Dynamics CRM Email Router.
- Review the Email Router configuration options.
- Create a forward mailbox.
- Review the purpose of deploying forwarding rules.
- Review options for installing the Email Router on multiple computers.
- Review troubleshooting tips.
- Describe the role of Server-Side Synchronization.

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- Configure Server-Side Synchronization.
- Test Server-Side Synchronization settings.

Module 7: Microsoft Dynamics CRM for Microsoft Office Outlook

This module describes the installation requirements for the Microsoft Dynamics CRM for Outlook client and how to install and configure the client.

Lessons

- Microsoft Dynamics CRM for Outlook Overview
- Installation Requirements
- Deployment Methods
- Install Microsoft Dynamics CRM for Outlook
- Configure Microsoft Dynamics CRM for Outlook
- Configure User Email Settings
- Install Microsoft Dynamics CRM for Outlook Using the Command Line
- Using Microsoft Dynamics CRM for Outlook with Offline Capability

Lab : Install Microsoft Dynamics CRM for Outlook•Configure Windows Firewall to allow incoming connections on port 5555.

- Install Microsoft Dynamics CRM for Outlook.

Lab : Offline Capability

After completing this module, students will be able to:

- Review the hardware and software requirements for Microsoft Dynamics CRM for Outlook.
- Identify the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Install Microsoft Dynamics CRM for Outlook.
- Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft Dynamics CRM organizations.
- Configure user settings and options related to emails.
- Install Microsoft Dynamics CRM for Outlook using the command line.
- Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.

Module 8: Configure an Internet-Facing Deployment

This module describes how to configure a Microsoft Dynamics CRM deployment for access over the Internet. A deployment that is configured in this way is referred to as an "Internet-Facing Deployment (IFD)."

Lessons

- Overview of Claims-Based Authentication
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services

- Configure AD FS
- Configure Claims-Based Authentication
- Configure an IFD

After completing this module, students will be able to:

- Provide a background to claims-based authentication.
- Describe the requirements for configuring an IFD.
- Review the certificates required for an IFD.
- Identify the steps to install Active Directory Federation Service.
- Review the Active Directory Federation Service configuration steps.
- Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
- Review the steps to configure an IFD in Microsoft Dynamics CRM.

Module 9: Maintain and Troubleshoot a Deployment

This module provides information on maintaining performance, troubleshooting, and updating Microsoft Dynamics CRM.

Lessons

- Service Accounts
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace

Lab : Configure Tracing

After completing this module, students will be able to:

- Describe how to change Microsoft Dynamics CRM service accounts.
- Examine how to manage system jobs.
- Show how to delete records using the Bulk Delete Wizard.
- Discuss areas to consider for a disaster recovery plan.
- Describe tasks in Microsoft SQL Server that can improve performance.
- Review ways to troubleshoot and diagnose problems and monitor performance.
- Examine how to configure tracing.
- Describe how to update Microsoft Dynamics CRM.
- Examine data encryption.

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- Describe the Best Practices Analyzer.
- Describe the VSS Writer Service for Microsoft Dynamics CRM.
- Examine the Microsoft Dynamics marketplace.

Module 10: High-Availability Options

This module provides a high-level overview of the high-availability options.

Lessons

- Install Microsoft Dynamics CRM Server on Multiple Computers
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components

After completing this module, students will be able to:

- Review the reasons for installing Microsoft Dynamics CRM on multiple computers.
- Describe the role of Network Load Balancing in providing enhanced scaling and availability.
- Describe the options for Microsoft SQL Server in providing enhanced scaling and availability.
- Examine the high-availability options for other supporting components.

Prerequisites

Before attending this course, students must have a working knowledge of:

- Microsoft Windows Server
- Active Directory
- Internet Information Services (IIS)
- Microsoft Exchange
- Microsoft SQL Server
- Microsoft Outlook

Some experience using Microsoft Dynamics CRM 2011 or Microsoft Dynamics CRM 2013 is desirable but not required.