

(80539A) –Installation and Deployment in Microsoft Dynamics CRM 2013

OBJECTIVE

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.

COURSE TOPICS

Module 1: System Requirement and Required Technologies

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

Module 2: Install Microsoft Dynamics CRM Server

- 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

Module 3: Install Microsoft Dynamics CRM Reporting Extensions

- 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

Module 4: Manage Microsoft Dynamics CRM with the Deployment Manager

- 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

Module 5: Upgrade to Microsoft Dynamics CRM 2013

- 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

Module 6: Email Management

- 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

Module 7: Microsoft Dynamics CRM for Microsoft Office Outlook

- 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

Module 8: Configure an Internet-Facing Deployment

- 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

Module 9: Maintain and Troubleshoot a Deployment

- 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

Module 10: High-Availability Options

- 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 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.

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

TRAINING APPROACH

This course includes lectures, course notes, exercises and hands-on practice.

COURSE DURATION

18 Hours (in 2 days)

CERTIFICATION COMPLETION

A certificate of completion is provided for all trainees attending the course