MOC 80002 A Administration in Microsoft Dynamics CRM 4.0

Course Summary

Description

This two-day course, Administration in Microsoft Dynamics CRM 4.0, provides students with the necessary techniques to plan, develop, apply, and examine administrative tasks within Microsoft Dynamics CRM 4.0.

Objectives
At the end of this course, students will be able to:

- Configure the organizational structure in Microsoft Dynamics CRM
- Configure security, users and teams, and organizational settings
- Manage change
- Configure reporting options
- Optimize performance
- Use Advanced Find

Topics

- Configuring the Organizational Structure
- Configuring Security
- Configuring Users and Teams
- Configuring System Settings
- Change Management
- Report Customizations
- Performance and Maintenance
- Advanced Find

Audience

This course is intended for people who plan to install, implement, configure, or support Microsoft Dynamics CRM 4.0. The course is intended for administrators, implementers, developers, and consultants who need to understand the technical aspects and administrative functionality of Microsoft Dynamics CRM. The course is not intended for non-technical staff.

Prerequisites

Before attending this course, students must have: Experience using Microsoft Dynamics CRM 4.0 or Microsoft Dynamics CRM 2011.

Duration

Two days

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Course Outline

I. Configuring the Organizational Structure
This module examines how to set up and manage business units.
A. Business Units
B. Managing Business Units
Lab: Maintaining Business Units
- Create new business units
- Change a parent business unit
- Disable a business unit

The goals for completing this module are for students to:
- Define an organizational hierarchy in Microsoft Dynamics CRM.
- Create and maintain business units in Microsoft Dynamics CRM.

II. Configuring Security
This module examines the Microsoft Dynamics CRM Security model, the components that make up the model, and how to manage them.
A. Privileges
B. Access Levels
C. Roles
D. Creating roles in business units
E. Assigning roles to users
F. Resolution of conflicting privileges
G. Copying roles
H. Security best practices
Lab: Copying and Creating Roles
- Create new roles by copying existing roles
- Maintaining privileges and access levels for roles
- Assigning roles to users
- Test effects of various privileges and access levels

The goals for completing this module are for students to:
- Explain the basic concepts of security privileges and access levels.
- Use security roles in Microsoft Dynamics CRM.
- Copy and create new roles and assign users to existing roles.

III. Configuring Users and Teams
This module examines user management functionality in Microsoft Dynamics CRM.
A. User management overview
B. Microsoft Dynamics CRM User Management
C. User Manager Wizard
D. Team Management
Lab: Managing User Accounts
Create single user accounts
- Create multiple user accounts with the Add Users Wizard
- Assign a user manager
- Disable a user account

Lab: Managing Teams
- Add teams
- Assign users to a team
- Share a record with a team

The goals for completing this module are for students to:
- Create and maintain user accounts in Microsoft Dynamics CRM.
- Create user accounts in Microsoft Dynamics CRM with the Add User Wizard.
- Identify the characteristics of the Microsoft Dynamics CRM user management structure.
- Explain the role of the Access Mode options.
- Create and maintain teams of users in Microsoft Dynamics CRM.

IV. Configuring System Settings
This module examines the series of configuration settings that are found within the Microsoft Dynamics CRM application.
A. Configure System Settings
B. Configure Multi-Currency Exchange Rates
C. Install Multilingual User Interface (MUI) Language Packs
D. Enable and use duplicate detection
E. Create data maps
Lab: Configuring Currency Exchange Rates
- Import transaction currency exchange rates
- Manually update exchange rates
- Create transactions to verify that the correct currency is selected

Lab: Create Duplicate Detection Rules
- Create duplicate detection rule
- Publish and verify the rule

Lab: Create a Data Map
- Create a data map
- Import Contact data
- Verify data import

The goals for completing this module are for students to:
- Set several system settings that control various system-wide functionalities.
- Identify Multi-Currency and Multilingual User Interface functionality.
- Use duplicate detection and data maps.

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Course Outline (cont'd)

V. Change Management

This module examines best practices related to planning, executing, and testing changes in an implementation of Microsoft Dynamics CRM.

A. Change Management Principles
B. Planning Changes
C. Executing Changes
D. Testing Changes

The goals for completing this module are for students to:

E. Identify the basic concepts of change management.
F. Explain planning considerations for changes in Microsoft Dynamics CRM.
G. Review best practices for executing and testing changes made in an implementation of Microsoft Dynamics CRM.

VI. Report Customizations

This module examines options available for reporting in Microsoft Dynamics CRM and basic report customization capabilities.

A. Reporting and Microsoft Dynamics CRM
B. Reporting Features
C. Creating Basic Reports
D. Display and categorization options
E. Controlling access to reports

Lab: Create Excel Reports

- Export data to Microsoft Office Excel
- Upload a report into Microsoft Dynamics CRM

Lab: Use the Report Wizard

- Create an Accounts report
- Add a report to the Sales Reports category
- Make a report viewable to the organization

The goals for completing this module are for students to:

- Explain the features and options for reporting in Microsoft Dynamics CRM.
- Create basic reports.
- Configure display and categorization options.
- Control access to reports.

VII. Performance and Maintenance

This module examines basic system performance and maintenance items related to improving the speed and user experience of Microsoft Dynamics CRM.

A. Hardware Requirements
B. Outlook Client Performance
C. Report Performance
D. System Performance Optimization
E. E-mail Router Optimization
F. Database Performance
G. Best Practices

The goals for completing this module are for students to:

- Identify hardware requirements for Microsoft Dynamics CRM.
- Optimize the performance of Microsoft Dynamics CRM, Microsoft Dynamics CRM for Microsoft Office Outlook, reports, the Exchange E-mail Router, and the Microsoft Dynamics CRM databases.

VIII. Advanced Find

This module examines the query capability of Microsoft Dynamics CRM Advanced Find functionality.

A. Scenarios
B. Personal Views and Exports
C. Best Practices

The goals for completing this module are for students to:

D. Identify the different search options available in Microsoft Dynamics CRM.
E. Work with Advanced Find queries.
F. Save and export query result

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