MOC 80294 Microsoft Dynamics CRM 2011 Customization and Configuration

Course Summary

Description

This course describes the techniques required to customize Microsoft Dynamics CRM to meet the specialized needs of businesses. The topics covered include Security; creation and configuration of entities; design of forms views and charts; auditing and Solutions. The course describes each topic and how each topic relates to the other topics to produce a full configured, effective solution.

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

- Design and implement strategies for the creation of Business Units and Security Roles
- Create and configure Microsoft Dynamics CRM Users and Teams
- Describe the principles of customizing the system
- Create and configure fields for both custom and system entities
- Create and configure custom entities, including standard and activity entities
- Design, create and configure relationships between entities
- Create and configure Views, Charts and Forms for both system and custom entities
- Implement Field Security in Microsoft Dynamics CRM
- Configure and monitor audition on Microsoft Dynamics CRM components
- Design, create and configure Solutions in Microsoft Dynamics CRM; implementing both managed and unmanaged Solutions

Topics

- Business Units and Security Roles
- Configuring Users and Teams
- Customizing Microsoft Dynamics CRM Overview
- Customizing Fields
- Customizing Entities
- Customizing Relationships and Mappings
- Customizing Forms, Views and Charts
- Configuring Field Security
- Configuring Auditing
- Configuring Solutions

Audience

This course is intended for both novice and experienced customizers of Microsoft Dynamics CRM who are familiar with the end-user principles of the software. No programming skills are required, but a basic understanding of database principles will be an advantage.

Prerequisites

Students must have a working knowledge of how to use Microsoft Dynamics CRM 2011. It is recommended, but not required, that individuals have completed Microsoft Dynamics CRM 2011 applications training. Because this training material focuses on customizing database entities, attributes, relationships, and mappings, it is recommended that individuals have a basic understanding of Microsoft SQL Server and relational database functionality.

Duration

Three days

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Course Outline

I. Business Units and Security Roles

This module explains how to create and configure Business Units in Microsoft Dynamics CRM. It also explains the design principles behind Security Roles, and how to create and modify new Security Roles.

A. Business Units
B. Managing Business Units
C. Security Features

II. Configuring Users and Teams

This module describes how to create and configure Users and Teams in Microsoft Dynamics CRM. The module explains the interaction between Active Directory and Users and examines how to assign Security Roles to both Users and Teams.

A. User Management Overview
B. Adding and Maintaining User Accounts
C. Team Configuration

III. Customizing Microsoft Dynamics CRM Overview

This module describes the customization architecture of CRM. The principles behind Solutions and their components are introduced.

A. Customization Methodology
B. Who can Customize Microsoft Dynamics CRM?
C. Types of Customizations
D. Types of Customizations - Solutions

IV. Customizing Fields

This module explains the use of fields in Microsoft Dynamics CRM. The module describes the concept of data types and formats for fields; and, how to create them in for system and custom entities.

A. Customization Concepts
B. Field Data Types
C. Field Properties
D. Creating Fields
E. Creating Option Sets

V. Customizing Entities

This module describes the concept of an entity in Microsoft Dynamics CRM. The module explains how to create new entities and the various configuration options available. It explains the difference between standard and activity entities and the different scenarios in which they can be used.

A. Entity Concepts
B. Modifying Custom Entities

VI. Customizing Relationships and Mappings

This module explains the purpose of entity relationships in Microsoft Dynamics CRM. The module describes how to create and customize 1:N, N:1 and N:N relationships and explains the difference between native and manual N:N relationships.

A. Types of Entity Relationships
B. Creating Entity Relationships
C. Entity Mapping

VII. Customizing Forms, Views and Charts

This module explains the design, creation and customization of Views, Charts and Forms. Views design includes the use of filters and columns lists; and, the idea of system and personal views. The module goes on to explain how to create charts and how to configure charts for various Microsoft Dynamics CRM areas. Form design is covered in detail, including the use of web components on forms, form security and filtered lookups.

A. Basic UI Customization Capabilities
B. View Customization Overview
C. Charts
D. Form Customization Overview
E. Other Form Objects
F. Creating New Forms

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Course Outline (cont'd)

VIII. Configuring Field Security

This module explains the concept of field security in Microsoft Dynamics CRM. The module describes how to create and implement Field Security Profiles and how those profiles complement the other security mechanisms in Microsoft Dynamics CRM.

A. Field Security Scope
B. Field Security and Other Security Methods

IX. Configuring Auditing

This module describes the auditing architecture of Microsoft Dynamics CRM. It explains how auditing can be enabled at three levels in Microsoft Dynamics CRM: system, entity and field. The module describes how to view and interpret auditing data.

A. Enabling Auditing
B. Viewing Audit Data
C. Managing Audit Partitions

X. Configuring Solutions

This module builds on the principles described in module 3 to explain how to create and configure Solutions. The module describes the difference between managed and unmanaged Solutions and illustrates the methods used to export and import both types

A. Solutions Review
B. Exporting and Importing Unmanaged Solutions
C. Exporting and Importing Managed Solutions

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