MOC 80296A Microsoft Dynamics CRM 2011 Installation and Deployment

Course Summary

Description

This two-day instructor course covers the installation and configuration of Microsoft Dynamics CRM 2011. The course describes the components used within a Microsoft Dynamics CRM 2011 deployment, installation instructions for the Microsoft Dynamics CRM Server, the E-mail Router, Microsoft Dynamics CRM for Office Outlook, how to configure Claims-based authentication and how to implement an Internet-facing deployment.

Objectives
At the end of 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 each component 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 2011.
- Manage Microsoft Dynamics CRM organizations using the Deployment Manager.
- Describe the high availability options for Microsoft Dynamics CRM 2011.

Topics

- Microsoft Dynamics CRM Components
- Planning the Installation
- Microsoft Dynamics CRM Server Installation
- Microsoft Dynamics CRM 2011 Reporting Extensions
- Installing and Deploying the E-mail Router
- Microsoft Dynamics CRM for Microsoft Office Outlook
- Configure an Internet Facing Deployment
- Upgrading to Microsoft Dynamics CRM 2011
- Microsoft Dynamics CRM Deployment Manager
- High Availability Options

Audience

This course is intended for implementation consultants, system integrators, or support professionals who need to install and deploy Microsoft Dynamics CRM 2011.

Prerequisites

Some experience using Microsoft Dynamics CRM 4.0 or Microsoft Dynamics CRM 2011 is desirable but not required.

- Microsoft Windows Server 2008
- Active Directory
- Internet Information Services (IIS)
- Microsoft Exchange
- Microsoft SQL Server 2008
- Microsoft Outlook

Duration

Two days

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Course Outline

I. Microsoft Dynamics CRM Components

This module examines the core components of a Microsoft Dynamics CRM deployment.

A. Microsoft Dynamics CRM Components
B. Microsoft Dynamics CRM Server
C. Microsoft Dynamics CRM for Office Outlook
D. Microsoft Dynamics CRM E-mail Router
E. Microsoft SQL Server 2008
F. Microsoft Dynamics CRM Reporting Extensions
G. Microsoft Dynamics CRM Language Packs
H. Microsoft SharePoint
I. Internet Information Services
J. Active Directory
K. Internet Facing Deployment and Active Directory Federation Services

II. Planning the Installation

This module describes the some of the considerations in planning a Microsoft Dynamics CRM deployment and the hardware and software requirements necessary for deployment.

A. Planning the Microsoft Dynamics CRM Deployment
B. Privileges for the Installation User
C. Supported Server Technologies
D. Hardware Requirements
E. Software Requirements
F. Active Directory and Microsoft Dynamics CRM 2011
G. Securing Network Traffic
H. Microsoft Dynamics CRM Offerings
I. Microsoft Dynamics CRM 2011 Licensing Model

III. Microsoft Dynamics CRM Server Installation

This module describes the components that are installed during Microsoft Dynamics CRM Server Setup and the installation procedures and options

A. Microsoft Dynamics CRM Server Architecture
B. Components Installed During Server Setup
C. Microsoft Dynamics CRM Website
D. Required Installation Rights for Microsoft Dynamics CRM Server
E. Install Microsoft Dynamics CRM 2011 Server
F. Installation Troubleshooting
G. Post-Installation Tasks
H. Install Microsoft Dynamics CRM using the Command Line
I. Sample Data

IV. Microsoft Dynamics CRM 2011 Reporting Extensions

This module provides an overview of the report types that are available in Microsoft Dynamics CRM 2011 and the role of Reporting Extensions.

A. Microsoft Dynamics CRM 2011 Reporting Overview
B. Microsoft Dynamics CRM Reporting Extensions
C. Installing Microsoft Dynamics CRM Reporting Extensions
D. Microsoft Dynamics CRM Reporting Authoring Extension

V. Installing and Deploying the E-mail Router

This module discusses the role of the E-mail Router and installing and configuring the E-mail Router.

A. Understanding the E-mail Router
B. Install the E-mail Router and Rule Deployment Wizard
C. Configure the E-mail Router
D. Set Up a Forward Mailbox
E. Deploy Inbox Rules
F. Approve E-mail Addresses
G. Install the E-mail Router on Multiple Computers
H. Troubleshooting
I. Discussion - E-mail Router

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Course Outline (cont'd)

VI. 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.

A. Microsoft Dynamics CRM for Outlook Overview
B. Installation Requirements
C. Deployment Methods
D. Install Microsoft Dynamics CRM for Outlook
E. Configure Microsoft Dynamics CRM for Outlook
F. Configure User E-mail Settings
G. Installing Microsoft Dynamics CRM for Outlook using the Command Line
H. Using Microsoft Dynamics CRM for Outlook with Offline Capability

VII. Configure an Internet Facing Deployment

This module describes how to configure a Microsoft Dynamics CRM 2011 deployment for access over the Internet and configuring claims-based authentication. Lessons

A. Overview of Claims-Based Authentication
B. General Requirements
C. Certificates
D. Install Active Directory Federation Services 2.0
E. Configure AD FS 2.0
F. Configure Claims-Based Authentication
G. Configure Internet-Facing Deployment

VIII. Upgrading to Microsoft Dynamics CRM 2011

This module examines the planning considerations and the steps for upgrading an existing Microsoft Dynamics CRM 4.0 deployment to Microsoft Dynamics CRM 2011.

A. Upgrade Considerations
B. Upgrade Process Phases
C. Phase 1 - Prepare to Upgrade
D. Phase 2 - Establish the Test Environment
E. Phase 3 - Upgrade and Validate the Test Environment
F. Phase 4 - Upgrade and Validate the Production Deployment
G. Perform an In-place Upgrade of Microsoft Dynamics CRM 4.0 Server
H. Perform a Migration Upgrade of Microsoft Dynamics CRM 4.0 Server
I. Perform a Connect to Existing Deployment Upgrade of Microsoft Dynamics CRM 4.0 Server
J. Upgrading the Microsoft Dynamics CRM 4.0 E-mail Router
K. Planning the Upgrade of Microsoft Dynamics CRM 4.0 for Outlook
L. Upgrading Microsoft Dynamics CRM 4.0 for Outlook

IX. Microsoft Dynamics CRM Deployment Manager

This module examines redeploying Microsoft Dynamics CRM and the role of the Microsoft Dynamics CRM Deployment Manager in carrying out deployment-wide administrations tasks

A. Redeploying Microsoft Dynamics CRM
B. Deployment Administrators
C. Create a New Organization
D. Manage Existing Organizations
E. Importing Organizations
F. Manage Servers
G. Configure Access from the Internet
H. Update Web Addresses
I. View License Information
J. Upgrade the Microsoft Dynamics CRM Edition

X. High Availability Options

This module provides a high-level overview of the high-availability options for Microsoft Dynamics CRM.

A. Install Microsoft Dynamics CRM Server on Multiple Computers
B. Network Load Balancing
C. Clustering Microsoft SQL Server
D. High-availability Options for Other Supporting Components

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