MOC 80289A What's New in Microsoft Dynamics CRM 2011

Course Summary

Description

This one-day instructor-led course, What's New in Microsoft Dynamics CRM 2011, provides students with the tools and information to help them better understand and identify the new and enhanced features of Microsoft Dynamics CRM 2011.

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

- Describe how Microsoft Dynamics CRM 2011 improves user experience.
- Identify how Microsoft Dynamics CRM 2011 provides more personalization for users.
- Assess how Microsoft Dynamics CRM 2011 increases collaboration and opportunity for business intelligence and analysis.
- Describe basic customization and extension capabilities of Microsoft Dynamics CRM 2011.
- List the latest improvements to the installation process, hardware and software requirements, administration features, and additional configuration options in Microsoft Dynamics CRM 2011.

Topics

- Introduction
- Improvements to the Microsoft Dynamics CRM Application Modules and Productivity
- Customizing and Extending Microsoft Dynamics CRM 2011
- Administration, Configuration, and Installation
- Configuration and Settings

Audience

This course is intended for customers and partners, who want to learn the basic new features and functionality in Microsoft Dynamics CRM 2011. Training is recommended for anyone who plans to use, implement, maintain, customize, or support Microsoft Dynamics 2011. This course is also recommended for people who have a background in the use of previous versions of Microsoft Dynamics CRM.

Prerequisites

Students should have general knowledge of Microsoft Dynamics CRM 4.0.

Duration

One day

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Course Outline

I. Introduction

This module provides a general overview of the features and benefits of using Microsoft Dynamics CRM 2011.Lessons

A. User Productivity - Features and Benefits
B. Collaboration - Features and Benefits
C. Analysis and Visualizations - Features and Benefits
D. Connections, Recurring Activities, and Goal Management - Features and Benefits
E. Customization and Extensibility - Features and Benefits
F. Administration and Configuration - Features and Benefits

II. Improvements to the Microsoft Dynamics CRM Application Modules and Productivity

This module focuses on the specific improvements to the application modules, in addition to enhancements to user productivity. This module will focus on a number of topics such as navigation changes, visualizations and analytics, personalization of the application, Microsoft Dynamics CRM Client for Microsoft Outlook changes, data import, team ownership, goal management, and many other features and enhancements.

A. Productivity Features
B. Visualizations
C. Personalization and Dashboards
D. Microsoft Dynamics CRM Client for Microsoft Outlook
E. Connections
F. Data Import
G. Team Ownership
H. Goal Management
I. Dynamics Marketing Lists
J. Recurring Activities

III. Customizing and Extending Microsoft Dynamics CRM 2011

This module covers the improvements made to the basic entity customization functionality, in addition to enhancements to additional extensibility components such as workflows, dialogs, web resources, solution management, and integration with Microsoft Office SharePoint Server.

A. Overview of Customization Environment
B. Entity and Form Customizations
C. Chart and View Customizations
D. Microsoft Office SharePoint server Configuration
E. Custom Activities
F. Dashboards
G. Web Resources
H. Connection Roles
I. Processes: Workflows and Dialogs
J. Customization Management
K. Integrations: Microsoft Office SharePoint Server and Windows Azure Platform

IV. Administration, Configuration, and Installation

This module focuses on the hardware and software requirements for Microsoft Dynamics CRM 2011, improvements to the installation process, and an overview of upgrade considerations. This module will cover changes to the Deployment Manager, in addition to licensing and auditing functionality new to this version.

A. Editions of Microsoft Dynamics CRM 2011
B. Hardware and Software Specifications
C. Server Roles
D. Installation Components
E. Upgrade Considerations

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Course Outline (cont'd)

F. Microsoft Dynamics CRM Reporting Extensions
G. Deployment Manager
H. Organization Settings
I. Licensing
J. Auditing

V. Configuration and Settings

This module introduces the changes to the Microsoft Dynamics CRM 2011 server settings, and additional personal options that are new to this version. Additionally, this module introduces role based forms and field level security.

A. Business Units
B. User Management
C. Data Management
D. Document Management
E. Audit Management
F. Microsoft Dynamics CRM Client for Microsoft Outlook Settings and Administration
G. Role Based Forms
H. Field-Level Security

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