MOC 55168 A Customization and Configuration in Microsoft Dynamics CRM 2015

Course Summary

Description

This 3 day instructor led training course is intended for those IT Professionals and IT Developers who are interested in Customizing and Configuring Microsoft Dynamics CRM 2015 Applications.

This course uses structured Walkthroughs throughout each module to put into practice what has just been introduced by the trainer. There's also a Lab at the end of each module with 'high-level' requirements as well as detailed, step-by-step instructions.

A number of the modules also incorporate a 'Stretch Yourself' lab for more advanced delegates or for those who simply work at a faster rate than other delegates.

After each module's lab(s), a set of questions are posed to test delegates' understanding of the material introduced in the module.

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
- 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 and Access Team Templates in Microsoft Dynamics CRM
- Design, create and configure Solutions in Microsoft Dynamics CRM
- Design, create and configure Business Rules and Business Process Flows to guide users through their work

Topics

- Introduction
- Security Issues
- Customizing System and Custom Entities
- Customizing Attributes
- Establishing Relationships
- Form Customization
- Business Rules
- View Customization
- Chart and Dashboard Customization
- Further Security Features of CRM 2015
- Business Process Flows

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Course Summary (cont'd)

Audience

This course is designed for people who have a working knowledge of how to use Microsoft Dynamics CRM 2015, a basic understanding of Microsoft SQL Server and relational database functionality and understand Microsoft Dynamics CRM 2015 applications.

The course is intended for those people who need to customize and configure Microsoft Dynamics CRM 2015 Applications.

Prerequisites

Before attending this course, students must have:

- A working knowledge of how to use Microsoft Dynamics CRM 2015.
- A basic understanding of Microsoft SQL Server and relational database functionality.
- Completed Microsoft Dynamics CRM 2015 applications training.

Duration

Three days

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Course Outline

I. Introduction.

The first module prompts delegates to take control of their development environment through local and system settings. Next, the available Solution types - Unmanaged and Managed - are introduced and their relationship to the Default Solution is explored. Module One ends with the introduction of the rolling scenario, which informs all of the Walkthroughs and Labs in this course, and the companion courses.

A. Enable system-wide changes to the CRM 2015 environment.
B. Understand the role of Solutions in CRM 2015.
C. Establish a Publisher to track the source of changes in a CRM installation.
D. Understand the purpose of the Rolling Scenario.

Lab : Working with an Unmanaged Solution.
Lab : Stretch Yourself' Lab: Working with a Managed Solution

II. Security Issues

The second module focuses on Entity-level security through the deployment of Security Roles. Permissions and Scope are discussed in the context of Users and Owner Teams. Next, a Business Unit structure is built for the rolling scenario. Module Two ends with a discussion of Manager and Position hierarchies.

A. Understand the purpose of Business Units.
B. Examine and understand the purpose of Security Roles.
C. Understand Manager and Position Hierarchies.

Lab : Modifying Users' Roles to meet changing requirements
Lab : Create a Manager Hierarchy

III. Customizing System and Custom Entities

The third module features the ability to customize existing, system entities, as well as the creation of new, custom entities. The module ends with a discussion of Local and Global Option Sets and their relative advantages.

A. Note the Entity types available to CRM 2015
B. Distinguish custom Entities from Activities
C. Understand Entity Configuration.
D. Consider the consequences of deleting an Entity

Lab : Creating Custom Entities
Lab : Extending existing Entities and creating an Activity Entity

IV. Customizing Attributes

The fourth module maps CRM 2015 data types to their underlying representatives in the data storage area (Sql Server). Module Four ends with the introduction of a Business Rule and the use of a Calculated Field.

A. Review the available Data Types.
B. Create and modify a range of CRM 2015 data types.
C. Distinguish between Local and Global Option Sets.
D. Understand the use of Calculated Fields.

Lab : Creating Additional Fields for an Entity
Lab : Building a Calculated Field for Budget Aggregation

V. Establishing Relationships

The fifth module focuses on the formal and informal linkages between CRM 2015 records: one-to-many and many-to-many relationships are discussed and a self-referencing hierarchical relationship between entity records is established. Rollup Fields are introduced. Later in the module, Connections and Connection Roles are used to create 'any-to-any' linkages between records. The module concludes with a discussion of Field Mappings.

A. Understand the different types of Relationships.
B. Choose the appropriate Relationship Behaviour.
C. Create and use Connections/Connection Roles.
D. Set-up Data Mappings.

Lab : Create a 1:N Relationship between Entities
Lab : Build a Hierarchical Relationship within an Entity

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Course Outline (cont'd)

VI. Form Customization

VII. he sixth module discusses the layout and structure of an entity's forms, including the formatting of Tabs, Sections and Columns. The Navigation area is customized and a Sub-Grid is used to display related records. Module Six ends with a discussion of Form Sets and their relationship with Security Roles.

A. Understand the structure of Entity Forms.
B. Deploy Quick Create Forms.
C. Embed Quick View Forms.

Lab : Building Quick Create Forms
Lab : Adding Quick View data to a Form

VIII. Business Rules

The seventh module picks up the discussion of Business Rules, introduced in Module Four. Their significance is explored, as well as their purpose and limitations.

A. Understand the significance of Business Rules.
B. Examine the structure of Business Rules in CRM 2015.
C. Note the range of Actions available.

Lab : Link a Business Rule and a Field Mapping
Lab : Stretch Yourself' Lab: Create a second Business Rule for Evaluation

IX. View Customization

The eighth module explores the range of view types supported by CRM 2015. In particular, the new multi-entity search supported for browser access.

A. Understand the component parts of a View.
B. Distinguish between System and Public Views.
C. Explore the creation of Personal Views.

Lab : Modify a Quick Find View
Lab : Create a Public View

X. Chart and Dashboard Customisation

The ninth module considers Charts and Dashboards as effective ways to present Visualizations and highlight any trends, patterns or exceptions in CRM 2015 data.

A. Create and Modify System Charts.
B. Import and Export Charts as XML.
C. Expand Dashboard Provision.
D. Modify System Dashboards.

Lab : Create a Custom Chart

XI. Further Security Features of CRM 2015

The tenth module takes a deeper dive into security issues by exploring Field-level and Record level security, through Field Security Profiles and Access Teams. The module ends with an exploration of Auditing and collating Audit History using CRM 2015.

A. Understand how to secure fields.
B. Investigate Profiles as a means to control access to secured fields.
C. Explore Access Teams as a sharing mechanism.
D. Understand the Auditing capabilities of CRM 2015.

Lab : Secure Financial Data
Lab : Establish an Access Team

XII. Business Process Flows

The final module takes delegates through the stages of constructing a multi-step, multiple-stage Business Process Flow which uses conditional logic to branch to one or another stage of a business process. The three, major entities built and extended throughout the three days of the course are linked together into an easy-to-use representation of a particular process, linking custom entities and a custom Activity entity.

A. Understand the process of creating and modifying a Process Ribbon.
B. Explore conditional branching in a Business Process Flow.
C. Note how stages can be chained together.
D. Understand the linkages between entities in a Process Flow.

Lab : Branching Process Flows
Lab : Extend the functionality of a Process Flow