TekSource
Corporate Learning

365 Evans Suite 300
Toronto, Ontario M8Z 1K2
Phone: 1-647-827-0488
Fax: 1-647-723-5165
www.teksource.ca

Course: **80296A: Microsoft Dynamics CRM 2011 Installation and Deployment**

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.

Price: $1,300.00

Category: Dynamics

Duration: 2 days

Schedule:

Request Dates

Outline:

Module 1: Microsoft Dynamics CRM Components
This module examines the core components of a Microsoft Dynamics CRM deployment.
Lessons
•Microsoft Dynamics CRM Components
•Microsoft Dynamics CRM Server
•Microsoft Dynamics CRM for Office Outlook
•Microsoft Dynamics CRM E-mail Router
•Microsoft SQL Server 2008
•Microsoft Dynamics CRM Reporting Extensions
•Microsoft Dynamics CRM Language Packs
•Microsoft SharePoint
•Internet Information Services
•Active Directory
•Internet Facing Deployment and Active Directory Federation Services
After completing this module, students will be able to:
•Discover which components are required for a successful Microsoft Dynamics CRM implementation.
•Examine the role of the Microsoft Dynamics CRM Server in a Microsoft Dynamics CRM deployment.
•Identify the differences between the two modes of the Microsoft Dynamics CRM for Office Outlook.
•Review the role of Microsoft Dynamics CRM E-mail Router in processing incoming and outgoing e-mail.
•Review the role of Microsoft SQL Server and the databases employed by Microsoft Dynamics CRM.
•Review the role of Microsoft Dynamics CRM Reporting Extensions.
•Review the role of Microsoft Dynamics CRM Language Packs.
•Review the role of Microsoft SharePoint in a Microsoft Dynamics CRM deployment.

TekSource
Corporate Learning

365 Evans Suite 300
Toronto, Ontario M8Z 1K2
Phone: 1-647-827-0488
Fax: 1-647-723-5165
www.teksource.ca

•Discuss the role of Internet Information Services (IIS) in a Microsoft Dynamics CRM deployment.
•Examine the role of Active Directory in a Microsoft Dynamics CRM deployment.
•Examine the role of Active Directory Federation Services in a Microsoft Dynamics CRM Internet-facing deployment.

Module 2: 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.
Lessons
•Planning the Microsoft Dynamics CRM Deployment
•Privileges for the Installation User
•Supported Server Technologies
•Hardware Requirements
•Software Requirements
•Active Directory and Microsoft Dynamics CRM 2011
•Securing Network Traffic
•Microsoft Dynamics CRM Offerings
•Microsoft Dynamics CRM 2011 Licensing Model
After completing this module, students will be able to:
•Identify the need for planning a Microsoft Dynamics CRM Deployment.
•Identify the required privileges for the installation user.
•Identify the supported server topologies.
•Examine the hardware requirements for each component of the Microsoft Dynamics CRM implementation.
•Review the software requirements for each component of a Microsoft Dynamics CRM implementation.
•Identify the Active Directory configurations supported by Microsoft Dynamics CRM 2011.
•Examine how network traffic to and from the Microsoft Dynamics CRM Server can be encrypted.
•Identify the editions of Microsoft Dynamics CRM 2011.
•Examine the licensing model used by Microsoft Dynamics CRM 2011.

Module 3: 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.
Lessons
•Microsoft Dynamics CRM Server Architecture
•Components Installed During Server Setup
•Microsoft Dynamics CRM Website
•Required Installation Rights for Microsoft Dynamics CRM Server
•Install Microsoft Dynamics CRM 2011 Server

TekSource
Corporate Learning

365 Evans Suite 300
Toronto, Ontario M8Z 1K2
Phone: 1-647-827-0488
Fax: 1-647-723-5165
www.teksource.ca

•Installation Troubleshooting
•Post-Installation Tasks
•Install Microsoft Dynamics CRM using the Command Line
•Sample Data
Lab : Install Microsoft Dynamics CRM 2011 Server
Lab : Load Sample Data
After completing this module, students will be able to:
•Review the components of the Microsoft Dynamics CRM Server architecture.
•Identify the components that are installed during Microsoft Dynamics CRM Server Setup.
•Review the options for creating the Microsoft Dynamics CRM Server website.
•Review the rights required to install Microsoft Dynamics CRM Server.
•Install Microsoft Dynamics CRM Server.
•Review installation troubleshooting and identify known issues.
•Identify the tasks and configuration settings that are completed after the installation of Microsoft Dynamics CRM Server.
•Examine how to install Microsoft Dynamics CRM using the command line.
•Examine how sample data can be added to a Microsoft Dynamics CRM implementation.

Module 4: 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.
Lessons
•Microsoft Dynamics CRM 2011 Reporting Overview
•Microsoft Dynamics CRM Reporting Extensions
•Installing Microsoft Dynamics CRM Reporting Extensions
•Microsoft Dynamics CRM Reporting Authoring Extension
Lab : Install Reporting Extensions
After completing this module, students will be able to:
•Examine the two types of Reporting Services reports.
•Review when Microsoft Dynamics CRM Reporting Extensions is required.
•Identify the requirements for installing Microsoft Dynamic CRM Reporting Extensions.
•Review when Microsoft Dynamics CRM Report Authoring Extension is required.

Module 5: 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.
Lessons
•Understanding the E-mail Router
•Install the E-mail Router and Rule Deployment Wizard

•Configure the E-mail Router
•Set Up a Forward Mailbox
•Deploy Inbox Rules
•Approve E-mail Addresses
•Install the E-mail Router on Multiple Computers
•Troubleshooting
•Discussion - E-mail Router
Lab : Install the E-mail Router
Lab : Configure the E-mail Router
After completing this module, students will be able to:
•Examine the role of the Microsoft Dynamics CRM E-mail Router in a
Microsoft Dynamics CRM deployment.
•Discover how the Microsoft Dynamics CRM E-mail Router processes
incoming e-mail and outgoing e-mail messages.
•Install the Microsoft Dynamics CRM E-mail Router.
•Review the E-mail Router configuration options.
•Examine how to create a forward mailbox.
•Review the purpose of deploying forwarding rules.
•Review the requirement to approve e-mail addresses.
•Review options for installing the E-mail Router on multiple computers.
•Review troubleshooting tips.

Module 6: 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.
Lessons
•Microsoft Dynamics CRM for Outlook Overview
•Installation Requirements
•Deployment Methods
•Install Microsoft Dynamics CRM for Outlook
•Configure Microsoft Dynamics CRM for Outlook
•Configure User E-mail Settings
•Installing Microsoft Dynamics CRM for Outlook using the Command Line
•Using Microsoft Dynamics CRM for Outlook with Offline Capability
Lab : Install Microsoft Dynamics CRM for Outlook
Lab : Offline Capability
After completing this module, students will be able to:
•Identify the features of Microsoft Dynamics CRM 2011 for Outlook.
•Review the hardware and software requirements for Microsoft Dynamics
CRM for Outlook.
•Identify the deployment methods for installing Microsoft Dynamics CRM
for Outlook.
•Install Microsoft Dynamics CRM for Outlook.
•Configure Microsoft Dynamics CRM for Outlook to connect to Microsoft
Dynamics CRM organizations.
•Configure user settings and options related to e-mails.

TekSource
Corporate Learning

365 Evans Suite 300
Toronto, Ontario M8Z 1K2
Phone: 1-647-827-0488
Fax: 1-647-723-5165
www.teksource.ca

•Install Microsoft Dynamics CRM for Outlook using the command line.
•Review how Microsoft Dynamics CRM for Outlook with offline capability works and how to configure the offline database.

Module 7: 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
•Overview of Claims-Based Authentication
•General Requirements
•Certificates
•Install Active Directory Federation Services 2.0
•Configure AD FS 2.0
•Configure Claims-Based Authentication
•Configure Internet-Facing Deployment
After completing this module, students will be able to:
•Provide a background to claims-based authentication.
•Describe the requirements for configuring an Internet-Facing Deployment.
•Review the certificates required for an Internet-facing Deployment.
•Identify the steps to install Active Directory Federation Service 2.0.
•Review the Active Directory Federation Service 2.0 configuration steps.
•Review the steps to configure claims-based authentication in Microsoft Dynamics CRM.
•Review the steps to configure an Internet-Facing Deployment in Microsoft Dynamics CRM.

Module 8: 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.
Lessons
•Upgrade Considerations
•Upgrade Process Phases
•Phase 1 - Prepare to Upgrade
•Phase 2 - Establish the Test Environment
•Phase 3 - Upgrade and Validate the Test Environment
•Phase 4 - Upgrade and Validate the Production Deployment
•Perform an In-place Upgrade of Microsoft Dynamics CRM 4.0 Server
•Perform a Migration Upgrade of Microsoft Dynamics CRM 4.0 Server
•Perform a Connect to Existing Deployment Upgrade of Microsoft Dynamics CRM 4.0 Server
•Upgrading the Microsoft Dynamics CRM 4.0 E-mail Router
•Planning the Upgrade of Microsoft Dynamics CRM 4.0 for Outlook
•Upgrading Microsoft Dynamics CRM 4.0 for Outlook

After completing this module, students will be able to:
•Identify the restrictions and requirements before starting an upgrade.
•Review the high-level phases of an upgrade process.
•Review the need for an upgrade strategy.
•Understand the need for a test environment.
•Identify the need to validate an upgrade of a test environment.
•Review the upgrade of the production deployment phase.
•Identify the steps for an in-place upgrade of Microsoft Dynamics CRM 4.0
•Identify the steps for a migration upgrade of Microsoft Dynamics CRM 4.0.
•Identify the steps for a Connect to existing deployment upgrade of Microsoft Dynamics CRM 4.0.
•Understand the upgrade process for the Microsoft Dynamics CRM 4.0 E-mail Router.
•Review issues with upgrading Microsoft Dynamics CRM 4.0 for Outlook.
•Understand the upgrade process for Microsoft Dynamics CRM 4.0 for Outlook.

Module 9: 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.
Lessons
•Redeploying Microsoft Dynamics CRM
•Deployment Administrators
•Create a New Organization
•Manage Existing Organizations
•Importing Organizations
•Manage Servers
•Configure Access from the Internet
•Update Web Addresses
•View License Information
•Upgrade the Microsoft Dynamics CRM Edition
Lab : Duplicate Adventure Works Cycles Organization
After completing this module, students will be able to:
•Review why the redeployment of Microsoft Dynamics CRM is required.
•Describe the role of deployment administrators.
•Review the steps to create new organizations.
•Describe the management tasks for existing organizations.
•Describe how to add an existing organization database to the deployment.
•Review Microsoft Dynamics CRM Server management tasks.
•Review the high-level steps to configure access to Microsoft Dynamics CRM from the Internet.
•Describe how to update the Microsoft Dynamics CRM web addresses.
•Review Microsoft Dynamics CRM license information.
•Describe the Microsoft Dynamics CRM Edition upgrade options.

Module 10: High Availability Options
This module provides a high-level overview of the high-availability options for Microsoft Dynamics CRM.
Lessons
•Install Microsoft Dynamics CRM Server on Multiple Computers
•Network Load Balancing
•Clustering Microsoft SQL Server
•High-availability Options for Other Supporting Components
After completing this module, students will be able to:
•Review the reasons for installing Microsoft Dynamics CRM on multiple computers.
•Describe the role of Network Load Balancing in providing enhanced scaling and availability.
•Describe the role of clustering Microsoft SQL Server in providing enhanced scaling and availability.
•Examine the high-availability options for other supporting components.