

Microsoft 8911 – Installation and Deployment in Microsoft Dynamics CRM 4.0

Vendor Course Code: MS8911

Course Length: 2 days

Overview: This two-day instructor-led course provides students with the tools to install and configure Microsoft Dynamics CRM 4.0. The course focuses on the components used within a Microsoft Dynamics CRM deployment, the hardware and software requirements needed to successfully deploy Microsoft Dynamics CRM, and the installation instructions for the primary Microsoft Dynamics CRM components: the Microsoft Dynamics CRM Server, the E-Mail Router, and Microsoft Dynamics CRM for Office Outlook.

Skills Gained:

At Course Completion

The course completion objectives are:

- Identify the Hardware and Software requirements for the various Microsoft Dynamics CRM deployment scenarios.
- Execute the pre-installation checklist requirements that must be in place before installing Microsoft Dynamics CRM Server
- Complete the Installation procedures for the Microsoft Dynamics CRM Server, Microsoft Dynamics CRM for Microsoft Office Outlook, and Microsoft Dynamics CRM E-mail Router.
- Complete the Post-installation review that verifies the validity of the installation.
- Complete several Post-installation tasks. This includes loading of sample data.
- Upgrade a Microsoft Dynamics CRM v3.0 installation to 4.0
- Uninstall Microsoft Dynamics CRM 4.0

Key Topics:

Course Materials

The student kit includes a comprehensive workbook and other necessary materials for this class.

The following software is provided in the student kit:

One virtual PC image of a server running Microsoft Dynamics CRM Server 2003, for installing Microsoft Dynamics CRM. A virtual PC image of a client PC running Windows XP; this is used for installing the Microsoft Dynamics CRM 4.0 for Microsoft Office Outlook
Copy of Microsoft Dynamics CRM 4.0 and the default sample data

Additional Reading

To help you prepare for this class, review the following resources:

- Microsoft Dynamics CRM 4.0 Implementation Guide.

Module 1: Microsoft Dynamics CRM Components

This module lays the foundation for the remainder of the course and examines the primary components that are leveraged by Microsoft Dynamics CRM 4.0.

Lessons

Microsoft Dynamics CRM Server
Microsoft Dynamics CRM for Microsoft Office Outlook
Microsoft Dynamics CRM E-mail Router
Microsoft SQL Server
SQL Reporting Services
Active Directory
Internet Information Services

The goals for completing this module are for students to:

- Discover which components are required for 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
- Examine the Microsoft Dynamics CRM Web browser client
- Review the role of Microsoft Dynamics CRM E-mail Router in processing incoming and outgoing e-mail
- Discuss the role of Microsoft SQL Server and the databases employed by Microsoft Dynamics CRM
- Examine the role of Active Directory in a Microsoft Dynamics CRM deployment
- Discuss the role of Internet Information Services (IIS) in a Microsoft Dynamics CRM deployment

Module 2: Planning the Microsoft Dynamics CRM Installation

This module examines the hardware and software requirements that must be in place prior to installing Microsoft Dynamics CRM 4.0, as well as appropriate licensing plans.

Lessons

Analyse network infrastructure to ensure preparedness for a Microsoft Dynamics CRM installation. Identify the hardware and software requirements for each component of the Microsoft Dynamics CRM installation.

Examine the new Microsoft Dynamics CRM licensing model and Microsoft Dynamics CRM editions. Review the various configurations supported by Microsoft Dynamics CRM 4.0

Lab : Dialogue – Planning the Microsoft Dynamics CRM Installation

Identify obstacles that may interfere with a Microsoft Dynamics CRM installation and discover the possible solutions for these obstacles.

The goals for completing this module are for students to:

- Analyse the network infrastructure to make sure it is ready for a Microsoft Dynamics CRM installation
- Understand the hardware requirements for each component of the Microsoft Dynamics CRM installation
- Understand the software requirements for each component of the Microsoft Dynamics CRM installation
- Understand the Active Directory forest configurations supported by Microsoft Dynamics CRM 4.0
- Understand the SQL Server 2005 configurations supported by Microsoft Dynamics CRM 4.0.
- Understand how SSL Certificates ensure more secure network traffic flow from the Microsoft Dynamics CRM Web server
- Understand the licensing model used by Microsoft Dynamics CRM 4.0.

Module 3: Microsoft Dynamics CRM Server

This module examines the hardware and software requirements that must be in place prior to installing Microsoft Dynamics CRM 4.0, as well as appropriate licensing plans.

Lessons

Identify the key features made to Microsoft Dynamics CRM Server in version 4.0

Identify each pre-installation requirement that must be completed before installing Microsoft Dynamics CRM Server.

Install Microsoft Dynamics CRM Server 4.0.

Identify the post installation requirements that must be performed to prepare Microsoft Dynamics CRM for use.

Install and uninstall a Microsoft Dynamics CRM sample database

Lab : Microsoft Dynamics CRM Pre-Installation Checklist Verification

Verify the pre-installation steps required to successfully install Microsoft Dynamics CRM.

Lab : Loading Sample Data

Install Microsoft Dynamics CRM sample data.

Dialogue : Installation Troubleshooting

Discover the troubleshooting resources available to the Microsoft Dynamics CRM installation team

after a Microsoft Dynamics CRM installation.

The goals for completing this module are for students to:

- Discover the components of the Microsoft Dynamics CRM Server architecture.
- Understand the key features of the Microsoft Dynamics CRM Server.
- Verify each pre-installation requirement that must be completed before you install Microsoft Dynamics CRM 4.0 Server.
- Learn how to install Microsoft Dynamics CRM 4.0 Server.
- Understand what components are installed during Server Setup
- Type lesson objective (usually just one).
- Identify the tasks and configuration settings that are completed after you install Microsoft Dynamics CRM Server.
- Learn how to deploy Microsoft Dynamics CRM for Internet Access
- Understand how to install Microsoft Dynamics CRM Server from the Microsoft Dynamics CRM Server CD using the command line.
- This training describes how to troubleshoot installation and known issues.
- Understand how sample databases can be used to give users realistic business data for the Microsoft Dynamics CRM application. Identify the post installation requirements that must be performed to prepare Microsoft Dynamics CRM for use.
- Install and uninstall a Microsoft Dynamics CRM sample database

Module 4: Microsoft Dynamics CRM Components

This module discusses the key features in the Microsoft Dynamics CRM 4.0 E-mail Router functionality and the steps to follow to install the Microsoft Dynamics E-mail Router.

Lessons

Identify the key features of the Microsoft Dynamics CRM E-mail Router in version 4.0

Identify how incoming and outgoing e-mail is processed in Microsoft Dynamics CRM

Identify each pre-installation requirement that must be completed before installing Microsoft Dynamics CRM E-mail Router.

Install Microsoft Dynamics CRM 4.0 E-mail Router.

Determine whether the router is functioning correctly.

Lab : Dialogue – E-mail Router

This scenario helps explain the operations of incoming and outgoing Microsoft Dynamics CRM e-mail functionality and the purpose of the E-mail Router.

The goals for completing this module are for students to:

- Understand the role of the Microsoft Dynamics CRM E-mail Router in a Microsoft Dynamics CRM deployment.
- Understand how the Microsoft Dynamics CRM E-mail Router processes incoming e-mail and outgoing e-mail messages.
- Identify each pre-installation requirement that must be completed before installing the Microsoft Dynamics CRM E-mail Router.
- Learn how to install the Microsoft Dynamics CRM E-mail Router.
- Learn how to use the Rule Deployment Wizard to deploy forwarding rules.
- Learn how to create a queue within Microsoft Dynamics CRM that displays e-mail messages.

Module 5: Microsoft Dynamics CRM for Microsoft Office Outlook

This module examines the primary components of Microsoft Dynamics CRM for Microsoft Office Outlook, reviews the two types of access that are available with 4.0, and examines the steps to successfully install Microsoft Dynamics CRM Office Outlook.

Lessons

Identify the key features in the Microsoft Dynamics CRM 4.0 for Outlook

Identify each pre-installation requirement that must be completed before installation.

Install both the Microsoft Dynamics CRM for Office Outlook with and without offline access.

Determine whether the installation is functioning properly.

Work Offline

Synchronise offline updates with the Microsoft Dynamics CRM Server

Lab : Installing Microsoft Dynamics CRM for Outlook

Install Microsoft Dynamics CRM for Outlook

Lab : Offline Access

Work with Microsoft Dynamics CRM for Outlook with Offline Access

Dialogue : Remote Outlook Client

This scenario covers how Microsoft Dynamics CRM allows remote users away from the office to access Microsoft Dynamics CRM data.

The goals for completing this module are for students to:

- Identify the features of Microsoft Dynamics CRM 4.0 for Microsoft Office Outlook.
- Identify the prerequisites for installing the Microsoft Dynamics CRM for Office Outlook.
- Install Microsoft Dynamics CRM for Outlook with Offline Access.
- Understand how the Microsoft Dynamics CRM for Office Outlook with Offline Access operates in both online and offline modes.

Module 6: Redeploying Microsoft Dynamics CRM 4.0

This module provides information about redeploying Microsoft Dynamics CRM 4.0.

Lessons

Identify the planning considerations that must be reviewed prior to redeploying a Microsoft Dynamics CRM implementation.

Redeploy a Microsoft Dynamics CRM implementation.

Configure the E-mail Router

The goals for completing this module are for students 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.
- Identify each pre-installation requirement that must be completed before installing the Microsoft Dynamics CRM E-mail Router.
- Install the Microsoft Dynamics CRM E-mail Router.

Discover the role of the Microsoft Dynamics E-mail Router Configuration Manager

Module 7: Upgrading to Microsoft Dynamics CRM 4.0

This module provides information about upgrading a Microsoft Dynamics CRM 3.0 deployment to Microsoft Dynamics CRM 4.0.

Lessons

Identify the planning considerations that must be reviewed prior to upgrading a Microsoft Dynamics CRM implementation.

Identify what is supported and unsupported during the upgrade process.

Upgrade a Microsoft Dynamics CRM 3.0 implementation to Microsoft Dynamics CRM 4.0

Dialogue : Microsoft Dynamics CRM Upgrades

This scenario covers some of the best practices to mitigate risks and minimise downtime when upgrading a customer to Microsoft Dynamics CRM 4.0

The goals for completing this module are for students to:

- Understand the features associated with upgrading the Microsoft Dynamics CRM Server on a computer that already has Microsoft Dynamics CRM 3.0 installed.
- Learn which components are not supported for upgrade to Microsoft Dynamics CRM 4.0.

Module 8: Repairing and Uninstalling Microsoft Dynamics CRM 4.0

This module provides information about repairing and uninstalling Microsoft Dynamics CRM 4.0.

Lessons

Repair Microsoft Dynamics CRM Server and Microsoft Dynamics CRM for Outlook, and the Microsoft Dynamics CRM E-mail Router.

Identify the options for uninstalling Microsoft Dynamics CRM

Uninstall Microsoft Dynamics CRM 4.0 Server, Microsoft Dynamics CRM for Office

Lab : Uninstall Microsoft Dynamics CRM 4.0
Uninstall Microsoft Dynamics CRM

The goals for completing this module are for students to:

- Examine how to repair the Microsoft Dynamics CRM system
- Examine how to repair the Microsoft Dynamics CRM Server
- Examine how to repair the Microsoft Dynamics CRM E-mail Router.
- Disable a Multilingual User Interface Pack (MUI)
- Uninstall the Microsoft Dynamics CRM Server
- Uninstall the Microsoft Dynamics CRM E-mail Router.
- Uninstall the Connector for Microsoft Dynamics SQL Reporting Services.
- Uninstall or disable a Multilingual User Interface Pack (MUI) in the organisation.
- Uninstall or repair the Microsoft Dynamics CRM for Outlook.
- Outlook, Microsoft Dynamics CRM E-mail Router, the Connector for Microsoft SQL Reporting Services, and a Multilingual User Interface Pack (MUI).

Target Audience:

This course is intended for novice and experienced system administrators, implementation consultants, system integrators, technical staff, or support professionals who plan to install and deploy Microsoft Dynamics CRM 4.0 and understand the technical aspects and administrative functionality of Microsoft Dynamics CRM.

Prerequisites:

Before attending this course, students must have:

Working knowledge of Microsoft Dynamics Windows Server 2003, Active Directory, Internet Information Services (IIS), Microsoft Exchange, Microsoft SQL Server 2005, and Microsoft Outlook.