

Installation and Deployment in Microsoft Dynamics CRM 4.0

Introduction

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.

Pre-Requisites

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.

Outcomes

At the completion of this course, participants will be able to:

- 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 Microsoft Dynamics CRM v3.0 installation to 4.0
- Uninstall Microsoft Dynamics CRM 4.0



Learning Solutions

(1300 86 87246
1300 TO TRAIN

Course Details

Course Code: MS 8911
Duration: 2 days
Starting time: 9am
Finishing time: 4.30pm
Lunch and refreshments are provided.

Booking guidelines

Contact our Learning Consultants on 1300 86 87246 and we will assist you with your booking.

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Course Outline

Ø Microsoft Dynamics CRM Components

- 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
- 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

Ø Planning the Microsoft Dynamics CRM Installation

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

Ø Microsoft Dynamics CRM Server

- 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
- Verify the pre-installation steps required to successfully install Microsoft Dynamics CRM
- Install Microsoft Dynamics CRM sample data
- Discover the troubleshooting resources available to the Microsoft Dynamics CRM installation team after a Microsoft Dynamics CRM installation
- 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

Course Outline

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
- 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

∅ Microsoft Dynamics CRM Components

- 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
- 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

∅ Microsoft Dynamics CRM for Microsoft Office Outlook

- 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
- Synchronize offline updates with the Microsoft Dynamics CRM Server
- Install Microsoft Dynamics CRM for Outlook
- Work with Microsoft Dynamics CRM for Outlook with Offline Access
- 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

∅ Redeploying Microsoft Dynamics CRM 4.0

- 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
- 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

∅ Upgrading to Microsoft Dynamics CRM 4.0

- 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

Course Outline

- Upgrade a Microsoft Dynamics CRM 3.0 implementation to Microsoft Dynamics CRM 4.0
- 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
- Pack (MUI) in the organization
- 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)

∅ **Repairing and Uninstalling Microsoft Dynamics CRM 4.0**

- 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
- Uninstall Microsoft Dynamics CRM
- 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