



Course Syllabus

Installation and Deployment in Microsoft Dynamics® CRM 4.0

Key Data

Course #: 8911

Number of Days: 2

Format: Instructor-Led

Certification Exams:

This course helps you prepare for the following Microsoft Certified Professional exams:

- Installation and Deployment in Microsoft Dynamics CRM 4.0, MB2-633.

Certification Track: Installation and Deployment in Microsoft Dynamics CRM 4.0

This course syllabus should be used to determine whether the course is appropriate for the students, based on their current skills and technical training needs.

Course content, prices, and availability are subject to change without notice.

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.

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.

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

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.

Student 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
<ul style="list-style-type: none">▪ Microsoft Dynamics CRM Components▪ Microsoft Dynamics CRM Server▪ Microsoft Dynamics CRM for Microsoft® Office Outlook▪ Microsoft Dynamics CRM E-mail Router▪ Microsoft SQL Server 2005▪ 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 CRM4.0, as well as appropriate licensing plans.

Lessons
<ul style="list-style-type: none">▪ Planning the Microsoft Dynamics CRM Deployment.▪ Hardware Requirements.▪ Software Requirements.▪ Active Directory and Microsoft Dynamics CRM 4.0▪ Microsoft SQL Server 2005 and Microsoft Dynamics CRM 4.0▪ IIS and Microsoft Dynamics CRM 4.0▪ Microsoft Dynamics CRM 4.0 Licensing Model▪ Microsoft Dynamics CRM Editions▪ Privileges for the Installation User

The goals for completing this module are for students to:

- Analyze the network infrastructure to make sure it is ready for a Microsoft Dynamics CRM installation
- Examine the hardware requirements for each component of the Microsoft Dynamics CRM installation
- Review the software requirements for each component of the Microsoft Dynamics CRM installation
- Discuss the Active Directory forest configurations supported by Microsoft Dynamics CRM 4.0
- Review the SQL Server 2005 configurations supported by Microsoft Dynamics CRM 4.0
- Identify how SSL Certificates ensure more secure network traffic flow from the Microsoft Dynamics CRM Web server
- Discuss the licensing model used by Microsoft Dynamics CRM 4.0
- Discover the three editions of Microsoft Dynamics CRM 4.0
- Discover the privileges required for the Microsoft Dynamics CRM installation user

Module 3: Microsoft Dynamics CRM Server 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
<ul style="list-style-type: none">▪ Microsoft Dynamics CRM Server Architecture▪ Key Features of Microsoft Dynamics CRM Server.▪ Install Microsoft Dynamics CRM Server 4.0 Setup.▪ Microsoft Dynamics CRM Server Pre-Installation Checklist.▪ Installing Microsoft Dynamics CRM 4.0 Enterprise▪ Components Installed During Server Setup.▪ Installing the Microsoft Dynamics CRM Data Connector for Microsoft SQL Server Reporting Services.▪ Post-Installation Tasks.▪ Deploying Microsoft Dynamics CRM for Internet Access.▪ Installing Microsoft Dynamics CRM 4.0 using Command Line.▪ Installing the Sample Database.
Lab 3.1: Microsoft Dynamics CRM Pre-Installation Checklist Verification
<ul style="list-style-type: none">▪ Verify the pre-installation steps required to successfully install Microsoft Dynamics CRM.
Lab 3.2: Installing Microsoft Dynamics CRM 4.0 Server
<ul style="list-style-type: none">▪ Install the Microsoft Dynamics CRM 4.0 Server
Lab 3.3: Loading Sample Data
<ul style="list-style-type: none">▪ Install Microsoft Dynamics CRM sample data.
Dialogue – Installation Troubleshooting
<ul style="list-style-type: none">▪ 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
- Review the key features of the Microsoft Dynamics CRM Server Setup
- Verify each pre-installation requirement that must be completed before you install Microsoft Dynamics CRM 4.0 Server
- Install Microsoft Dynamics CRM 4.0 Server
- Identify the components that are installed during Server Setup
- Describe the purpose of the Connector for SRS
- Identify the tasks and configuration settings that are completed after you install Microsoft Dynamics CRM Server
- Deploy Microsoft Dynamics CRM for Internet Access
- Install Microsoft Dynamics CRM Server from the Microsoft Dynamics CRM Server CD Using the command line
- Describes how to troubleshoot installation and known issues
- Examine how sample databases can be used to give users realistic business data for the Microsoft Dynamics CRM application

Module 4: Microsoft Dynamics CRM E-Mail Router

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
<ul style="list-style-type: none">▪ Understanding the E-mail Router.▪ Installing the E-mail Router and Rule Deployment Wizard.▪ Configuring the E-mail Router.
Dialogue – E-mail Router
<ul style="list-style-type: none">▪ 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:

- 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 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
<ul style="list-style-type: none">▪ Microsoft Dynamics CRM 4.0 for Microsoft Office Outlook Overview.▪ Installing Microsoft Dynamics CRM for Office Outlook.▪ Using Microsoft Dynamics CRM for Outlook with Offline Access.
Lab 5.1: Installing Microsoft Dynamics CRM for Office Outlook
<ul style="list-style-type: none">▪ Install Microsoft Dynamics CRM for Office Outlook
Lab 5.2: Offline Access
<ul style="list-style-type: none">▪ Work with Microsoft Dynamics CRM for Outlook with Offline Access

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.
- Discover 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
<ul style="list-style-type: none">▪ Reasons for Redeploying Microsoft Dynamics CRM.▪ Planning the Redeployment.▪ The Redeployment Process.

The goals for completing this module are for students to:

- Review why redeploying Microsoft Dynamics CRM may be helpful to your organization
- Examine the software components that are captured during a redeployment
- Examine why the Import Organization Wizard is required to redeploy Microsoft Dynamics CRM

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
<ul style="list-style-type: none">▪ Overview of the Upgrade Process.
Dialogue – Microsoft Dynamics CRM Upgrades
<ul style="list-style-type: none">▪ This scenario covers some of the best practices to mitigate risks and minimize 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.
- Discover which components are not supported for upgrade to Microsoft Dynamics CRM 4.0.

Module 8: Uninstalling and Repairing Microsoft Dynamics CRM 4.0

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

Lessons
<ul style="list-style-type: none">▪ Repair Microsoft Dynamics CRM Server.▪ Repair Microsoft Dynamics CRM for Outlook.▪ Repair and the Microsoft Dynamics CRM E-mail Router.▪ Uninstall Microsoft Dynamics CRM 4.0 Server.▪ Uninstall the Microsoft Dynamics CRM E-mail Router.▪ Uninstall Connector for Microsoft SQL Reporting Services.▪ Uninstall Microsoft Dynamics CRM for Office Outlook.
Lab 8.1: Uninstall Microsoft Dynamics CRM 4.0 Server
<ul style="list-style-type: none">▪ Uninstall Microsoft Dynamics CRM 4.0 Server

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.
- 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 repair the Microsoft Dynamics CRM for Outlook.