

Course 80446A:

Administering Microsoft Dynamics CRM 2011

Length: 2 Days
Published: Oct 18, 2012
Language(s): English
Audience(s): IT Professionals
Level: 200
Technology: Microsoft Dynamics CRM 2011
Type: Course
Delivery Method: Instructor-led (classroom)

OVERVIEW

About this Course

This two-day course, Administering Microsoft Dynamics CRM 2011, provides individuals with the necessary techniques to plan, develop, apply, and examine administrative tasks within Microsoft Dynamics CRM 2011.

Audience Profile

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 2011 and understand the technical aspects and administrative functionality of Microsoft Dynamics CRM

At Course Completion

After completing this course, students will be able to:

- Identify the supporting technologies and configuration tasks required for a Microsoft Dynamics CRM implementation.
- Recognize the purpose of business units and describe how to manage them within the Microsoft Dynamics CRM Security Model.
- Examine security roles and the purpose of sharing records.
- Explain field level security in Microsoft Dynamics CRM and how users can create multiple forms for entities.
- Complete user authentication in Microsoft Dynamics CRM, and provide an overview of the licensing requirements.
- Create and maintain user accounts and teams, and examine the architecture of auditing.
- Examine the role of the Microsoft Dynamics CRM E-mail Router in a Microsoft Dynamics CRM deployment.
- Use forward mailbox creation, and queue management and creation.
- Describe the configuration options in System Settings, and shows how to configure additional languages.
- Identify when the redeployment of Microsoft Dynamics CRM could be required.
- Manage system jobs and delete records, and describe the tasks in Microsoft SQL Server that will improve performance.

Course Outline

Module 1: Administering Overview

This module identifies the supporting technologies and configuration tasks required for a Microsoft Dynamics CRM implementation. Additionally, this module provides an overview of the routine administration tasks in Microsoft Dynamics CRM, and how Microsoft Dynamics CRM can be customized.

Lessons

- Supporting Technologies
- CRM Administration Tasks Overview
- Customization Overview

After completing this module, students will be able to:

- Identify the supporting technologies and configuration tasks required for a Microsoft Dynamics CRM implementation
- Describe the routine administration tasks in Microsoft Dynamics CRM
- Provide an overview of how Microsoft Dynamics CRM can be customized

Module 2: Security

This module clarifies the purpose of business units and describes how to manage them within the Microsoft Dynamics CRM Security Model. Additionally, this module examines security roles and explains the purpose of sharing records. Also covered in this module is clarification of field level security in Microsoft Dynamics CRM and how users can create multiple forms for entities.

Lessons

- Business Units
- Security Permissions
- Security Roles
- Sharing Records
- Field Security
- Role-based Forms

Lab : Maintaining Business Units

Lab : Create and Modify a Security Role

Lab : Create a Field Security Profile

Lab : Create a New Form

After completing this module, students will be able to:

- Describe the purpose of business units
- Explain how to manage business units
- Describe the Microsoft Dynamics CRM security model
- Examine security roles
- Describe the purpose of sharing and how to share records
- Explain field level security in Microsoft Dynamics CRM
- Create multiple forms for entities

Module 3: Users, Teams and Auditing

This module describes user authentication in Microsoft Dynamics CRM, and provides an overview of the licensing requirements. Users will also create and maintain user accounts and teams, and examine the architecture of auditing.

Lessons

- User Authentication
- User Licensing
- Administering User Accounts
- Configuring Teams
- Auditing

Lab : Managing User Accounts

Lab : Managing Teams

Lab : Configure Auditing

After completing this module, students will be able to:

- Describe how users are authenticated in Microsoft Dynamics CRM
- Describe the licensing requirements
- Create and maintain user accounts
- Create and maintain teams
- Examine the architecture of auditing

Module 4: Configuring the Microsoft Dynamics CRM 2011 E-mail Router

This module examines the role of the Microsoft Dynamics CRM E-mail Router in a Microsoft Dynamics CRM deployment. In this module users will examine forward mailbox creation, and queue management and creation. In addition, users review the E-mail Router configuration options and the requirements and options for installing the E-mail router.

Lessons

- Understanding the E-mail Router
- 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
- Create and Manage Queues

Lab : Configure the E-mail Router

Lab : Create a Workflow to Route Cases

Lab : Routing Cases to Queues

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 email and outgoing email messages
- 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 email addresses
- Review options for installing the E-mail Router on multiple computers
- Explore how to create and manage queues

Module 5: Configuring Settings

This module describes the configuration options in System Settings, and shows how to configure additional languages. Users will be able to examine both fiscal year settings and auto-numbering settings. It also provides an overview of integration with Microsoft SharePoint Service and explains how to configure duplicate detection.

Lessons

- System Settings
- Multiple Languages
- Fiscal Year Settings
- Auto-Numbering
- Document Management Settings
- Duplicate Detection

Lab : Configure Read-Optimized Forms

Lab : Configure Duplicate Detection

After completing this module, students will be able to:

- Describe the configuration options in System Settings
- Configure additional languages
- Examine fiscal year settings
- Describe the auto-numbering settings
- Provide an overview of integration with Microsoft SharePoint Server
- Explain how to configure duplicate detection

Module 6: Deployment Manager

This module reviews why the redeployment of Microsoft Dynamics CRM could be required, and describe the role of deployment administrators. It also provides an overview of management tasks for organizations from implementation through deployment. In addition, the module reviews server roles and configuring access to Microsoft Dynamics CRM. A review of licensing information and settings is also presented. This provides an overview of integration with Microsoft SharePoint Service. Duplicate detection is also discussed.

Lessons

- Redeploying Microsoft Dynamics CRM
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Importing Organizations
- Manage Servers
- Server Roles
- 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 could be 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
- Describe the Microsoft Dynamics CRM server roles
- 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 7: Maintenance and Troubleshooting

This module describes how to change Microsoft Dynamics CRM service accounts. It examines how to manage system jobs and delete records. It also discusses areas to consider for system recovery, and reviews ways to troubleshoot and diagnose problems and monitor performance. In addition, it describes the tasks in Microsoft SQL Server that will improve performance, and explains the options to update Microsoft Dynamics CRM. Information about the Microsoft Dynamics Marketplace is also featured in this module.

Lessons

- Service Accounts
- Managing System Jobs
- Deleting Records
- Disaster Recovery
- Managing SQL Databases
- Troubleshooting
- Configuring Tracing
- Updating Microsoft Dynamics CRM
- Marketplace

Lab : Install the Activity Feeds Solution

Lab : Configure Tracing

After completing this module, students will be able to:

- Describe how to change Microsoft Dynamics CRM service accounts
- Examine how to manage system jobs
- Show how to delete records
- Discuss areas to consider for a disaster recovery plan
- Describe the tasks in Microsoft SQL Server that will improve performance
- Review ways to troubleshoot and diagnose problems and monitor performance
- Examine how to configure tracing
- Explain the options for updating Microsoft Dynamics CRM
- Describe the Microsoft Dynamics Marketplace

PREREQUISITES:

Students must have experience using Microsoft Dynamics CRM 2011.

Before reviewing this training material, it is advised that individuals have a working knowledge of Windows Server 2008, Windows Server 2008 with Hyper-V, Microsoft Exchange, Microsoft SQL Server 2008 SP1 or Later, Microsoft SharePoint, Microsoft Office Outlook, Active Directory, and Internet Information Services 7 (IIS7) or later.

It is recommended, but not compulsory, that individuals have completed Microsoft Dynamics CRM application training. In addition, it is recommended, but not essential, that individuals have experience working with relational databases.