

## **80539: Installation and Deployment in Microsoft Dynamics CRM 2013**

### **Course Outline**

#### Module 1: System Requirement and Required Technologies

This module provides a high-level overview of the supporting technologies and describes the components of a Microsoft Dynamics CRM implementation.

##### Lessons

- Microsoft Dynamics CRM Offerings
- On-Premises Licensing Model
- Online Licensing Model
- Supporting Technologies
- Microsoft Dynamics CRM Server
- Accessing Microsoft Dynamics CRM
- Microsoft Dynamics CRM for Office Outlook
- Managing Emails
- Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Language Packs
- Planning Overview

#### Module 2: Install Microsoft Dynamics CRM Server

This module focuses on installing Microsoft Dynamics CRM Server. It also discusses the required components and Server requirements.

##### Lessons

- Microsoft Dynamics CRM Server Requirements
- Microsoft SQL Server Requirements
- Active Directory Requirements
- Components Installed During Server Setup
- Microsoft Dynamics CRM Website
- Required Installation Rights for Microsoft Dynamics CRM Server
- Supported Server Topologies
- Install Microsoft Dynamics CRM Server
- Installation Troubleshooting
- Post-Installation Tasks
- Install Microsoft Dynamics CRM Using the Command Line
- Deploy Microsoft Dynamics CRM Online

Lab : Install Microsoft Dynamics CRM Server

Lab : Load Sample Data

### Module 3: Install Microsoft Dynamics CRM Reporting Extensions

This module describes the role of Reporting Extensions and provides an overview of the report types that are available in Microsoft Dynamics CRM.

Lessons

- Microsoft Dynamics CRM Reporting Overview
- Microsoft Dynamics CRM Reporting Extensions
- Requirements for Microsoft Dynamics CRM Reporting Extensions
- Microsoft Dynamics CRM Report Authoring Extension
- Install Microsoft Dynamics CRM Reporting Extensions

Lab : Install Reporting Extensions

### Module 4: Manage Microsoft Dynamics CRM with the Deployment Manager

This module explains how you can redeploy Microsoft Dynamics CRM and use the Microsoft Dynamics CRM Deployment Manager to carry out deployment-wide administration tasks.

Lessons

- Deployment Manager
- Deployment Administrators
- Create a New Organization
- Manage Existing Organizations
- Manage Servers
- Configure Access from the Internet
- Update Web Addresses
- View License Information
- Upgrade the Microsoft Dynamics CRM Edition
- Redeploy Microsoft Dynamics CRM
- Import Organizations
- Administer the Deployment Using Windows PowerShell

Lab : Duplicate the Adventure Works Cycles Organization

### Module 5: Upgrade to Microsoft Dynamics CRM 2013

This module examines the planning considerations and the steps for upgrading an existing Microsoft Dynamics CRM deployment to Microsoft Dynamics CRM 2013.

Lessons

- Upgrade Considerations

- Base and Extension Table Merge
- 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 2011 Server
- Perform a Migration Using the Same Instance of SQL Server
- Perform a Migration Using a New Instance of SQL Server
- Upgrade the Microsoft Dynamics CRM 2011 Email Router
- Plan the Upgrade of Microsoft Dynamics CRM 2011 for Outlook
- Upgrade Microsoft Dynamics CRM 2011 for Outlook

#### Module 6: Email Management

This module describes management topics that are common to each of the email processing methods and the email processing methods.

##### Lessons

- Email Processing
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronization Methods
- Email Address Approval
- Overview of the Email Router
- Install the Email Router and Rule Deployment Wizard
- Configure the Email Router
- Set Up a Forward Mailbox for the Email Router
- Deploy Inbox Rules
- Install the Email Router on Multiple Computers
- Troubleshooting
- Overview of Server-Side Synchronization
- Configure Server-Side Synchronization
- Set Up a Forward Mailbox for Server-Side Synchronization

- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronize Appointments, Contacts, and Tasks

Lab : Install the Email Router

Lab : Configure the Email Router

Lab : Configure Server-Side Synchronization

#### Module 7: 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 Email Settings
- Install 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

- Configure Windows Firewall to allow incoming connections on port 5555.
- Install Microsoft Dynamics CRM for Outlook.

Lab : Offline Capability

#### Module 8: Configure an Internet-Facing Deployment

This module describes how to configure a Microsoft Dynamics CRM deployment for access over the Internet. A deployment that is configured in this way is referred to as an “Internet-Facing Deployment (IFD).”

Lessons

- Overview of Claims-Based Authentication
- Requirements for Configuring an Internet-Facing Deployment
- Certificates
- Install Active Directory Federation Services
- Configure AD FS
- Configure Claims-Based Authentication

- Configure an IFD

#### Module 9: Maintain and Troubleshoot a Deployment

This module provides information on maintaining performance, troubleshooting, and updating Microsoft Dynamics CRM.

##### Lessons

- Service Accounts
- Manage System Jobs
- Delete Records
- Disaster Recovery
- Manage SQL Databases
- Troubleshooting
- Configure Tracing
- Update Microsoft Dynamics CRM
- Manage Data Encryption
- Best Practices Analyzer (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace

##### Lab : Configure Tracing

#### Module 10: High-Availability Options

This module provides a high-level overview of the high-availability options.

##### Lessons

- Install Microsoft Dynamics CRM Server on Multiple Computers
- Network Load Balancing
- Clustering Microsoft SQL Server
- Other SQL Server High-Availability Solutions
- High-Availability Options for Other Supporting Components