

## 80539 - Installation and Deployment in Microsoft Dynamics CRM 2013

Duration: 2 days

### Overview:

This two-day training course provides individuals with the skills to install and deploy Microsoft Dynamics CRM 2013. The training material 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. The course also covers upgrading from earlier versions, configuring an Internet-facing Deployment and administration tasks.

### Target Audience:

This course is intended for implementation consultants, system integrators, or support professionals who need to install and deploy Microsoft Dynamics CRM 2013.

### Pre-requisites:

Before attending this course, students must have:

- Microsoft Windows Server
- Active Directory
- Internet Information Services (IIS)
- Microsoft Exchange
- Microsoft SQL Server
- Microsoft Outlook

Some experience using Microsoft Dynamics CRM 2011 or Microsoft Dynamics CRM 2013 is desirable but not required.

### Module 1: System Requirement and Required Technologies

#### 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

#### 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

#### 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

#### Lessons

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

#### Lab : Duplicate the Adventure Works Cycles Organisation

### Module 5: Upgrade 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

### At Course Completion:

After completing this course, students will be able to:

- Describe the components that are required for a successful Microsoft Dynamics CRM implementation.
- Identify the hardware and software requirements for components of a Microsoft Dynamics CRM implementation.
- Install Microsoft Dynamics CRM Server.
- Install Microsoft Dynamics CRM Reporting Extensions.
- Install and configure the Microsoft Dynamics CRM E-mail Router.
- Describe the deployment methods for installing Microsoft Dynamics CRM for Outlook.
- Configure Claims-based authentication and Internet-facing deployment.
- Upgrade to Microsoft Dynamics CRM 2013.
- Manage Microsoft Dynamics CRM organisations using the Deployment Manager.
- Describe the high availability options for Microsoft Dynamics CRM 2013.

### Module 6: Email Management

#### Lessons

- Email Processing
- Email Tracking and Correlation
- Mailbox Monitoring
- Synchronisation 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 Synchronisation
- Configure Server-Side Synchronisation
- Set Up a Forward Mailbox for Server-Side Synchronisation
- Migrate Email Router Settings
- Email Integration Service Role
- Test Email Configuration
- Synchronise Appointments, Contacts, and Tasks

#### Lab : Install the Email Router

#### Lab : Configure the Email Router

#### Lab : Configure Server-Side Synchronisation

### Module 7: Microsoft Dynamics CRM for Microsoft Office Outlook

#### 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

#### 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

#### 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 Analyser (BPA)
- VSS Writer Service for Microsoft Dynamics CRM
- Marketplace

#### Lab : Configure Tracing

### Module 10: 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