



## Course Syllabus

### Microsoft CRM 3.0 Installation and Configuration

#### Key Data

**Course Number:** 8526A

**Number of Days:** 3

**Available:** December 2005

**Languages:**

US English

**Format:**

Instructor-Led Training  
(lecture and labs)

**Student Materials:**

Student Courseware

**Certification Exam:**

This course helps prepare for the Microsoft CRM 3.0 Installation and Configuration certification exam

**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.**

**Key Related Courses:**

Microsoft CRM Marketing Automation, 8522

Microsoft CRM Customization, 8525

Microsoft CRM Sales Management, 8521

Microsoft CRM Service Management, 8523

Microsoft CRM Service Scheduling, 8524

#### Introduction

This three-day instructor-led course provides students with the knowledge and skills to install and configure Microsoft® CRM 3.0. The course explores the components used within a Microsoft CRM deployment, the hardware and software requirements needed to successfully deploy Microsoft CRM, and the installation instructions for the three primary Microsoft CRM components: the Microsoft CRM Server, the Exchange E-Mail Router, and the Microsoft Office for Outlook Client.

Configuration topics include business management functions such as setting up:

- Business units
- Users
- Teams
- Security privileges and roles
- Database maintenance
- XML importing and exporting utilities
- Web configuration options.

The course also examines the following administrative tasks:

- Configure a Microsoft CRM server to use a new SQL Server
- Redeploy an existing Microsoft CRM installation to a new deployment
- Upgrade a Microsoft CRM 1.2 deployment to Microsoft CRM 3.0
- Uninstall and Repair Microsoft CRM 3.0

This course does not include materials or instructor discussion of Microsoft CRM Workflow Configuration, Customization, or Back Office Integration.

#### Audience

Microsoft CRM 3.0 Installation and Configuration training is recommended for people who plan to install, implement, configure, consult, or support Microsoft CRM 3.0. The class is targeted toward administrators, implementers, developers, and consultants who need to understand the technical aspects and administrative functionality of Microsoft CRM. The course is not intended for non-technical staff.

#### At Course Completion

After completing this course, students should be able to:

- Understand the primary components that support Microsoft CRM, including the Microsoft CRM Server, Microsoft Exchange E-mail Router, Microsoft Office for Outlook client, Microsoft SQL Server, Microsoft SQL Server Reporting Services, Internet Information Services, and Active Directory.
- Identify the Hardware and Software requirements for the various Microsoft CRM deployment scenarios.
- Execute the pre-installation checklist requirements that must be in place prior to installing Microsoft CRM Server
- Complete the Installation procedures for the Microsoft CRM Server, Microsoft CRM client for Microsoft Office Outlook, and Microsoft CRM Exchange E-mail Router.

---

**For a referral to a Microsoft Certified Partner for Learning Solution in your area, see the Microsoft Training and Certification Web site at <http://www.microsoft.com/traincert>. Call your local Microsoft Certified Technical Education Center for more information and to register for classes.**

- Complete the Post-installation review that verifies the validity of the server and client installations.
- Complete several Post-installation tasks, including loading of sample data
- Configure Microsoft CRM business units, users, and teams.
- Understand and manage the Microsoft CRM security model, including security roles, privileges, and access levels.
- Execute the administrative tasks necessary to support the application, including database maintenance, XML importing and exporting procedures, maintenance of system customization settings, and web configuration parameters.
- Redeploy a Microsoft CRM installation
- Update a Microsoft CRM v1.2 installation to 3.0
- Uninstall Microsoft CRM 3.0 server and client

### **Prerequisites**

Before attending this course, students must have a working knowledge of Microsoft® Windows Server 2000, 2003, or Windows XP, Microsoft® Exchange 2000 or 2003, Microsoft® SQL Server® 2000, Microsoft® Outlook, Active Directory, and Internet Information Services.

### **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:

- Two virtual PC images of a server running Microsoft CRM Server 2003; one for installing Microsoft CRM and the other for redeploying Microsoft CRM
- A virtual PC image of a client PC running Windows XP; this is used for installing the Microsoft CRM 3.0 client for Microsoft Office Outlook
- A virtual PC image of a Microsoft CRM 1.2 deployment; this is used for upgrading Microsoft CRM 1.2 to 3.0
- Copy of Microsoft CRM 3.0 and the default sample data

## **Chapter 1: Microsoft CRM Components**

This chapter lays the foundation for the remainder of the course, and examines the primary components that are leveraged by the Microsoft Customer Relationship Management 3.0 application.

<b>Lessons</b>
<ul style="list-style-type: none"><li>▪ Understanding the Microsoft CRM Components</li><li>▪ Microsoft CRM Server</li><li>▪ Microsoft CRM Clients</li><li>▪ Microsoft Exchange 2000 or 2003</li><li>▪ Microsoft SQL Server 2000 or 2005</li><li>▪ SQL Reporting Services 2000 or 2005</li><li>▪ Active Directory</li><li>▪ Internet Information Services</li></ul>
<b>Lab 1: Activity – Fill in the Blank Exercise</b>
<ul style="list-style-type: none"><li>▪ This activity asks each student to fill in the missing word(s) in a number of statements involving the components covered in the chapter.</li></ul>

After completing this Chapter, students should be able to understand the role of the following components in a Microsoft CRM 3.0 deployment:

- Microsoft CRM Server
- Microsoft CRM Clients
- Microsoft Exchange
- Microsoft SQL Server
- SQL Reporting Services
- Active Directory
- Internet Information Services

## **Chapter 2: Planning Your Microsoft CRM Installation**

This chapter examines the hardware and software requirements that must be in place prior to installing Microsoft CRM 3.0, as well as appropriate licensing plans.

<b>Lessons</b>
<ul style="list-style-type: none"><li>▪ Planning your Microsoft CRM Deployment</li><li>▪ Hardware Requirements</li><li>▪ Software Requirements</li><li>▪ Supported Active Directory Configurations</li><li>▪ Support SQL Server Configurations</li><li>▪ Supported Microsoft Exchange Configurations</li><li>▪ Microsoft CRM 3.0 Licensing Model</li><li>▪ Staff Skills Review</li></ul>
<b>Lab 1: Activity – Matching Exercise</b>
<ul style="list-style-type: none"><li>▪ This exercise asks each student to match the correct term with each statement involving planning issues.</li></ul>

After completing this Chapter, students should be able to:

- Analyze network infrastructure to ensure preparedness for a Microsoft CRM installation.
- Understand the hardware and software requirements for each component of the Microsoft CRM installation.
- Understand the new Microsoft CRM licensing model.
- Understand the various Active Directory forest configurations supported by Microsoft CRM 3.0
- Understand the Microsoft Exchange and Microsoft SQL Server configurations supported by Microsoft CRM 3.0

## Chapter 3: Microsoft CRM Server

This chapter begins with a discussion of the key features in Microsoft CRM 3.0 Server, and then examines the Microsoft CRM Server installation process. This includes a review of the pre-installation requirements, the installation process, the post-installation tasks, and loading sample data.

<p><b>Lessons</b></p> <ul style="list-style-type: none"> <li>▪ Microsoft CRM Server Key Features</li> <li>▪ Microsoft CRM Server Pre-Installation Checklist</li> <li>▪ Microsoft CRM Server Installation</li> <li>▪ Microsoft CRM Server Post-Installation Review</li> <li>▪ Microsoft CRM 3.0 Sample Databases</li> </ul>
<p><b>Lab 1: Pre-installation Checklist</b></p> <ul style="list-style-type: none"> <li>▪ This lab asks each student to perform the tasks in the pre-installation checklist to ensure the system infrastructure is ready for the CRM Server installation</li> </ul>
<p><b>Lab 2: CRM Server Installation</b></p> <ul style="list-style-type: none"> <li>▪ This lab has each student to install Microsoft CRM Server 3.0 within a virtual PC environment. Students install the Professional Edition of CRM on a Windows Server 2003 virtual server.</li> </ul>
<p><b>Lab 3: Post-Installation Review</b></p> <ul style="list-style-type: none"> <li>▪ This lab asks each student to perform the tasks in the post-installation checklist to ensure the CRM Server installed correctly.</li> </ul>
<p><b>Lab 4: Installing Microsoft CRM 3.0 Sample Data</b></p> <ul style="list-style-type: none"> <li>▪ This lab asks each student to run the Sample Data Setup Wizard to load the Adventure Works Cycle sample database. The data loaded in this exercise is used throughout the remaining labs in this course.</li> </ul>

After completing this Chapter, students should be able to:

- Identify the key features made to Microsoft CRM Server in version 3.0
- Identify each pre-installation requirement that must be completed before installing Microsoft CRM Server.
- Install Microsoft CRM Server 3.0.
- Identify the post installation requirements that must be performed to prepare Microsoft CRM for use.
- Install, uninstall, and refresh a Microsoft CRM sample database

## Chapter 4: Microsoft CRM Exchange E-mail Router

This chapter discusses the key features in the Microsoft CRM 3.0 Exchange E-mail Router functionality, the steps to follow to install the Microsoft CRM Exchange E-mail Router, and how to create Exchange queues and configure them to receive CRM email.

<p><b>Lessons</b></p> <ul style="list-style-type: none"> <li>▪ Microsoft CRM Exchange E-mail Router Key Features</li> <li>▪ Microsoft CRM Exchange E-mail Router Pre-Installation Checklist</li> <li>▪ Microsoft CRM Exchange E-mail Router Installation</li> <li>▪ Microsoft CRM Exchange E-mail Router Post-Installation Review</li> <li>▪ Microsoft CRM E-mail Queues</li> </ul>
<p><b>Lab 1: Pre-installation Checklist</b></p> <ul style="list-style-type: none"> <li>▪ This lab asks each student to perform the tasks in the pre-installation checklist to ensure the system infrastructure is ready for the Microsoft CRM Exchange E-mail Router installation</li> </ul>
<p><b>Lab 2: Microsoft CRM Exchange E-mail Router Installation</b></p> <ul style="list-style-type: none"> <li>▪ This lab asks each student to install the Microsoft CRM 3.0 Exchange E-mail Router within a virtual PC environment.</li> </ul>
<p><b>Lab 3: Installing E-mail Queues</b></p> <ul style="list-style-type: none"> <li>▪ This lab asks each student to install e-mail queues that can be used by Microsoft CRM as a receiving mailbox for incoming mail.</li> </ul>

After completing this Chapter, students should be able to:

- Identify the key features of the Microsoft CRM Exchange E-mail Router in version 3.0
- Identify how incoming and outgoing e-mail is processed in Microsoft CRM
- Identify each pre-installation requirement that must be completed before installing Microsoft CRM Exchange E-mail Router.
- Install Microsoft CRM 3.0 Exchange E-mail Router.
- Determine whether the router is functioning correctly.
- Create CRM e-mail queues for receiving e-mail to a group mailbox.

## Chapter 5: The Microsoft CRM client for Microsoft Office Outlook

This chapter discusses the key features in the Microsoft CRM client for Microsoft Office Outlook, reviews the two types of Outlook clients that are available with 3.0, and examines the steps that should be followed to install each type of client.

<p><b>Lessons</b></p> <ul style="list-style-type: none"> <li>▪ Microsoft CRM client key features</li> <li>▪ Microsoft CRM client for Microsoft Office Outlook Pre-Installation Checklist</li> <li>▪ Microsoft CRM desktop client for Microsoft Office Outlook Installation</li> <li>▪ Microsoft CRM laptop client for Microsoft Office Outlook Installation</li> <li>▪ Microsoft CRM client for Microsoft Office Outlook Post-Installation Review</li> <li>▪ Using the Microsoft CRM laptop client for Microsoft Office Outlook</li> </ul>
<p><b>Lab 1: Pre-installation Checklist</b></p> <ul style="list-style-type: none"> <li>▪ This lab asks each student to perform the tasks in the pre-installation checklist to ensure the system infrastructure is ready for the Outlook client installation.</li> </ul>
<p><b>Lab 2: Microsoft CRM 3.0 laptop client for Office Outlook Installation</b></p> <ul style="list-style-type: none"> <li>▪ This lab asks each student to create an administrative .msi image of the Microsoft CRM laptop client for Outlook setup program, publish it to all users via Group Policy Objects, and install it on a client machine in a virtual PC environment.</li> </ul>
<p><b>Lab 3: Using the Microsoft CRM 3.0 laptop client for Office Outlook</b></p> <ul style="list-style-type: none"> <li>▪ This lab asks each student to create an offline dataset, take their laptop client offline, perform offline updates, synchronize the client with the server database, and email the queue created in the prior chapter.</li> </ul>

After completing this Chapter, students should be able to:

- Identify the key features in the Microsoft CRM 3.0 client for Outlook
- Identify each pre-installation requirement that must be completed before installing the Outlook clients.
- Install both the desktop and laptop Outlook Clients.
- Install the clients from a Windows installer package
- Determine whether the desktop and laptop clients are functioning properly.
- Create a custom offline dataset
- Take the laptop client offline
- Synchronize offline updates with the Microsoft CRM Server

## Chapter 6: Configuring the Organizational Structure

This lesson examines how to set up and manage business units and sites.

<b>Lessons</b>
<ul style="list-style-type: none"> <li>▪ Business Units</li> <li>▪ Managing Business Units</li> <li>▪ Sites</li> </ul>
<b>Lab 1: Maintaining Business Units and Sites</b>
<ul style="list-style-type: none"> <li>▪ Adding business units</li> <li>▪ Reorganizing the organizational hierarchy</li> <li>▪ Disabling a business unit</li> <li>▪ Enabling a business unit</li> <li>▪ Adding Sites</li> <li>▪ Deleting Sites</li> </ul>

After completing this Chapter, students should be able to:

- Understand how an organizational hierarchy is defined in Microsoft CRM
- Create and maintain Business Units in Microsoft CRM
- Create and maintain Sites in Microsoft CRM

## Chapter 7: Configuring Security

This chapter examines the Microsoft CRM Security model, the components that make up the model, and how to manage them.

<b>Lessons</b>
<ul style="list-style-type: none"> <li>▪ Privileges</li> <li>▪ Access Levels</li> <li>▪ Roles</li> <li>▪ Creating roles in business units</li> <li>▪ Assigning roles to users</li> <li>▪ Resolution of conflicting privileges</li> <li>▪ Copying roles</li> <li>▪ Security Best Practices</li> </ul>
<b>Lab 1: Copying and Creating Roles</b>
<ul style="list-style-type: none"> <li>▪ Create new roles by copying existing roles</li> <li>▪ Maintaining privileges and access levels for roles</li> <li>▪ Assigning roles to users</li> <li>▪ Test affects of various privileges and access levels</li> </ul>

After completing this chapter, students should be able to:

- Understand the basic concepts of security privileges and access levels
- Understand the use of security roles in Microsoft CRM
- Perform such tasks as copying and creating new roles as well as assigning users to existing roles

## Chapter 8: Configuring Users and Teams

This chapter examines user management functionality in Microsoft CRM.

<b>Lessons</b>
<ul style="list-style-type: none"> <li>▪ User Management Overview</li> <li>▪ User Manager Wizard</li> <li>▪ Microsoft CRM User Management</li> <li>▪ Restricted Access Mode</li> <li>▪ Team Management</li> </ul>
<b>Lab 1: Managing User Accounts</b>
<ul style="list-style-type: none"> <li>▪ Adding multiple users at one time via the User Manager tool</li> <li>▪ Adding one user at a time via Microsoft CRM</li> <li>▪ Maintaining user accounts</li> <li>▪ Assigning a manager to a user account</li> <li>▪ Disabling a user account</li> <li>▪ Enabling a user account</li> <li>▪ Setting/Resetting the Restricted Access Mode option</li> </ul>
<b>Lab 2: Managing Teams</b>
<ul style="list-style-type: none"> <li>▪ Adding teams</li> <li>▪ Assigning users to a team</li> </ul>

After completing this Chapter, students should be able to:

- Create and maintain user accounts in Microsoft CRM
- Create user accounts in Microsoft CRM using the User Manager tool
- Understand the characteristics of Microsoft CRM's user management structure
- Understand the role of the Restricted Access Mode option
- Create and maintain teams of users in Microsoft CRM

## Chapter 9: Configuring System Settings

This chapter examines the series of configuration settings that are found within the Microsoft CRM application.

<b>Lessons</b>
<ul style="list-style-type: none"> <li>▪ Configuring System Settings</li> <li>▪ Configuring Auto Numbering</li> <li>▪ Configuring Fiscal Year Settings</li> <li>▪ Configuring the web.config file</li> </ul>
<b>Lab 1: Configuring System Parameters</b>
<ul style="list-style-type: none"> <li>▪ This lab asks each student to maintain each of the System Settings parameters.</li> <li>▪ Students also modify some of the default web.config settings to see the effects on the Microsoft CRM User Interface.</li> </ul>

After completing this Chapter, students should be able to:

- Set several system settings that control various system-wide functionalities
- Understand the use of the web.config file and the system functionality which it controls

## **Chapter 10: Configuration Management**

The chapter examines each of the administrative tasks to perform at one time or another within a Microsoft CRM implementation.

<b>Lessons</b>
<ul style="list-style-type: none"><li>▪ Server Manager</li><li>▪ Reconfigure Microsoft CRM to use a new database server</li><li>▪ License Manager</li><li>▪ Upgrade Trial Licenses</li><li>▪ Add additional client access licenses</li><li>▪ Customization Transport Manager</li><li>▪ Export and import of an XML configuration file</li><li>▪ Environmental Diagnostic Wizard</li></ul>
<b>Lab 1: License Manager and Server Manager</b>
<ul style="list-style-type: none"><li>▪ Review License Summary</li><li>▪ Reconfigure Microsoft CRM to point to a new database server</li></ul>
<b>Lab 2: Customization Transport Manager</b>
<ul style="list-style-type: none"><li>▪ Export the XML configuration to a flat file</li><li>▪ Import an XML flat file into Microsoft CRM and publish the configuration</li></ul>
<b>Lab 2: Environmental Diagnostic Wizard</b>
<ul style="list-style-type: none"><li>▪ Run the Environmental Diagnostic Wizard</li><li>▪ Save the generated report for troubleshooting purposes</li></ul>

After completing this Chapter, students should be able to:

- Use License Manager to maintain licenses for an existing deployment
- Use Server Manager to administer the Microsoft CRM server(s)
- Export the XML configuration to a flat file, or import a flat file back into Microsoft CRM
- Run the Environmental Diagnostic Wizard and save the generated report

## Chapter 11: Redeploying Microsoft CRM 3.0

This chapter provides information about redeploying Microsoft CRM.

Lessons
<ul style="list-style-type: none"><li>▪ Redeployment Scenarios</li><li>▪ Software components that are captured during a redeployment</li><li>▪ Redeployment Tool</li><li>▪ Redeployment process</li></ul>
Lab 1: Redeploying Microsoft CRM
<ul style="list-style-type: none"><li>▪ This lab asks each student to use the Redeployment Tools to redeploy their existing CRM installation into a new implementation.</li></ul>

After completing this Chapter, students should be able to:

- Identify the planning considerations that must be reviewed prior to redeploying a CRM implementation.
- Redeploy a Microsoft CRM implementation using the Redeployment Tools.

## Chapter 12: Upgrading Microsoft CRM 1.2 to 3.0

This chapter provides information about upgrading a Microsoft CRM 1.2 deployment to Microsoft CRM 3.0.

Lessons
<ul style="list-style-type: none"><li>▪ Features associated with the upgrade process</li><li>▪ Types of customizations that are supported and not supported by the upgrade process</li><li>▪ Software configurations that occur during an upgrade</li><li>▪ Upgrade process</li><li>▪ Post-upgrade tasks</li></ul>

After completing this Chapter, students should be able to:

- Identify the planning considerations that must be reviewed prior to redeploying a CRM implementation.
- Identify which customizations are supported and unsupported during the upgrade process
- Upgrade a Microsoft CRM 1.2 implementation to Microsoft CRM 3.0

## Chapter 13: Uninstalling and Repairing Microsoft CRM 3.0

This chapter provides information about uninstalling and repairing Microsoft CRM.

Lessons
<ul style="list-style-type: none"><li>▪ Two types of uninstall options</li><li>▪ Steps involved in uninstalling Microsoft CRM Server, Microsoft CRM client for Office Outlook, Microsoft CRM Exchange E-mail Router, and Microsoft SQL Server Reporting Services</li><li>▪ Repair process for both Microsoft CRM Server and Microsoft CRM clients for Outlook</li></ul>
Lab 1: Uninstalling Microsoft CRM
<ul style="list-style-type: none"><li>▪ This lab asks each student to perform a complete uninstall of the Microsoft CRM Server, Exchange E-mail Router, and SQL Server Reporting Services.</li></ul>

After completing this Chapter, students should be able to:

- Identify the two types of uninstall options
- Uninstall Microsoft CRM 3.0 Server, Microsoft CRM client for Office Outlook, Microsoft CRM Exchange E-mail Router, and Microsoft SQL Server Reporting Services
- Repair Microsoft CRM Server and Microsoft CRM clients for Outlook