

Dynamics CRM Administration Essentials

Tuesday, January 17th - Thursday, January 19th, 2017
Chicago, Illinois

Day 1 (9:00am - 5:00pm)

Overview 9:00-10:30

- Introductions
- Terminology
- Customization vs Development
- System Navigation
- Personal Options
- Administration - System Settings

Break 10:30-10:45

Data Management and Solutions 10:45-12:00

- Data Management
 - Import
 - Duplicate Detection
- Solutions
 - Solutions - Publishers
 - Solutions - Publisher Details
 - Solutions - Components
 - Solutions - Managed vs Unmanaged
 - Solutions - Exporting and Importing

Lunch Break 12:00-1:00

Entities 1:00-2:45

- Entity Customization
- Entity Types
- Entity Ownership
- Activity Entities
 - Custom Activity Entities

Break 2:45-3:00

Fields 3:00-5:00

- Entity Details
 - Fields
 - Field Types
 - Field Properties
 - Fields: Creating, Modifying and Deleting



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Day 2 (9:00am - 5:00pm)

Views and Charts 9:00-10:45

Views

- View Types
- Creating Views

Charts

- Overview
- Properties
- Creating a New Chart
- Exporting and Importing

Break 10:45-11:00

Relationships and Web Resources 11:00-12:00

Relationships

- N : 1
- 1 : N
- N : N

Web resources

Lunch Break 12:00-1:00

Sitemap 1:00-2:30

Sitemap

- xrm Toolkit
- Sitemap - Tips and Tricks

Break 2:30-2:45

Security 2:45-5:00

Security

- Access Teams
- Business Units
 - Business Unit Considerations
- Field Level Security
- Hierarchical Security
- Security Roles
- Sharing
- Teams



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- Day 3 (9:00am - 4:00pm)
 - Workflows 9:00-10:30
 - Terms
 - Overview
 - Setup
 - Break 10:30-10:45
 - Dialogs 10:45-11:15
 - Terms
 - Overview
 - Setup
 - Business Process Flows 11:15-12:00
 - Terms
 - Overview
 - Setup
 - Lunch Break 12:00-1:00
 - Reporting 1:00-2:30
 - Reporting
 - Terms
 - Overview
 - Report Wizard
 - Chart
 - Sharing
 - Break 2:30-2:45
 - Dashboards 2:45-4:00