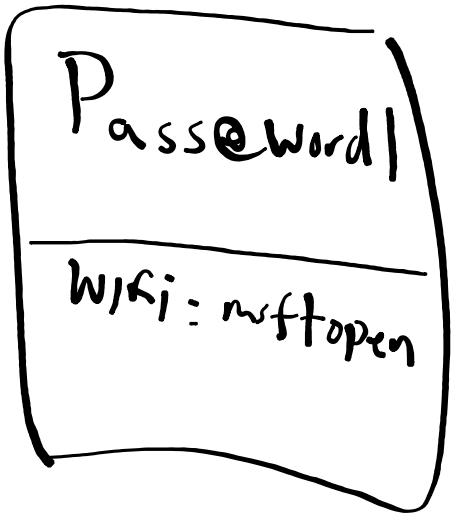
XRMLABS. 4/2

Welcome to Microsoft Reston MtC

David.mcdonald@microsoft.com



Pass@word1

Wifi: msftopen

Goals

- UX ✓
- Config - Data Model ✓
- Integration - Continuous Integration
- Delivery to Customers / User Adoption
- CRM + SP
- Infra / Support
- Vocabulary

Ownership
- Security ✓ / Roles ✓ / FLS –
- ALM
- Workflow ✓
- Analytics
- Cloud / Gov Cloud
  - Cloud vs On Prem vs Gov Cloud
  - Committe Mgmt

Parking Lot (HooverList)

User Adoption

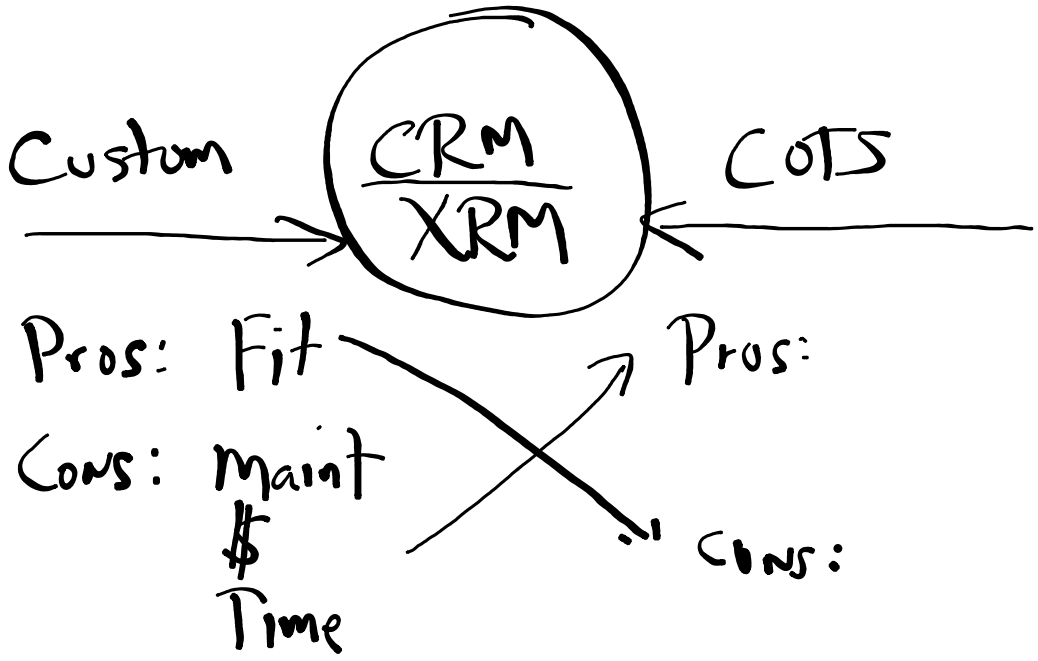
Audit - Sizing Considerations

- Dupe Detection w/Data import
- Excel Templates - ON Prem
- Project Feature Spring 2016

LOB

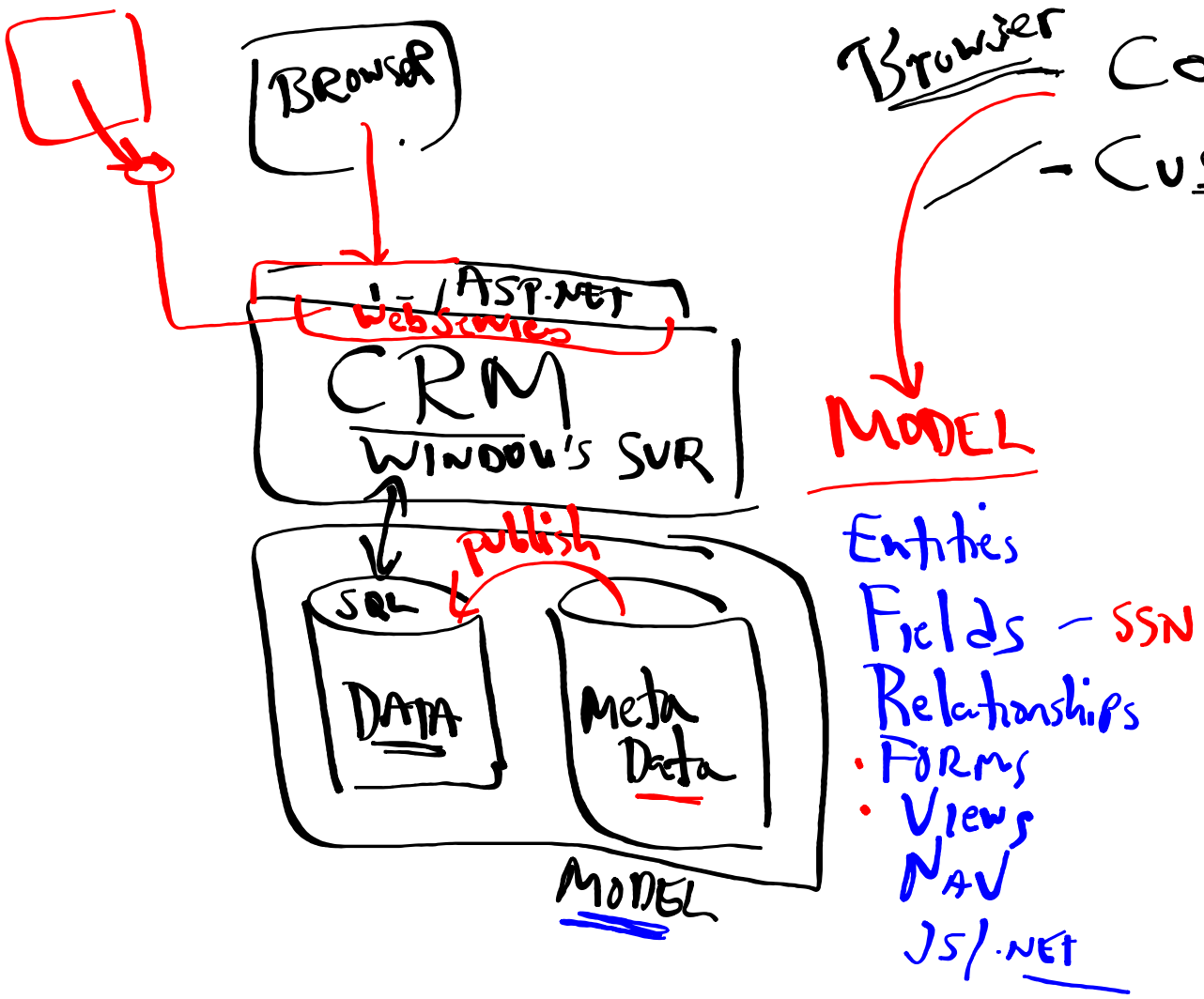
- CRUD – Forms/Views
- Data
- Reporting
- Role based Access
- Logging/Audit

- Workflow
- Integration
- Analytics/Usage
- PKi/Metrics


Custom
CRM
XRM
COTS
Pros: Fit
Cons: Maint
$
Time
Pros:
Cons:

http://aka.ms/xrmlabs/trial

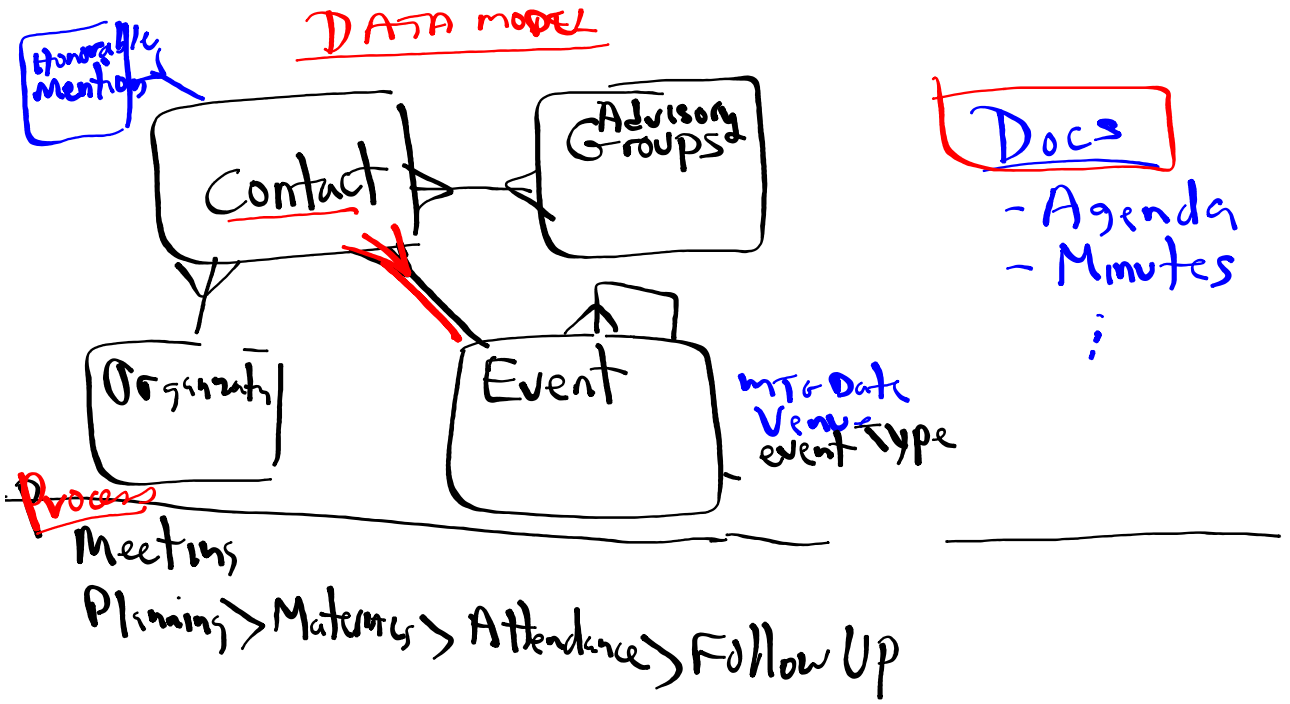
Pass@word1



Browser Configuration
- Customization

MODEL

Entities
Fields - SSN
Relationships
- FORMS
- Views
NAV
JS/.NET



Workflow

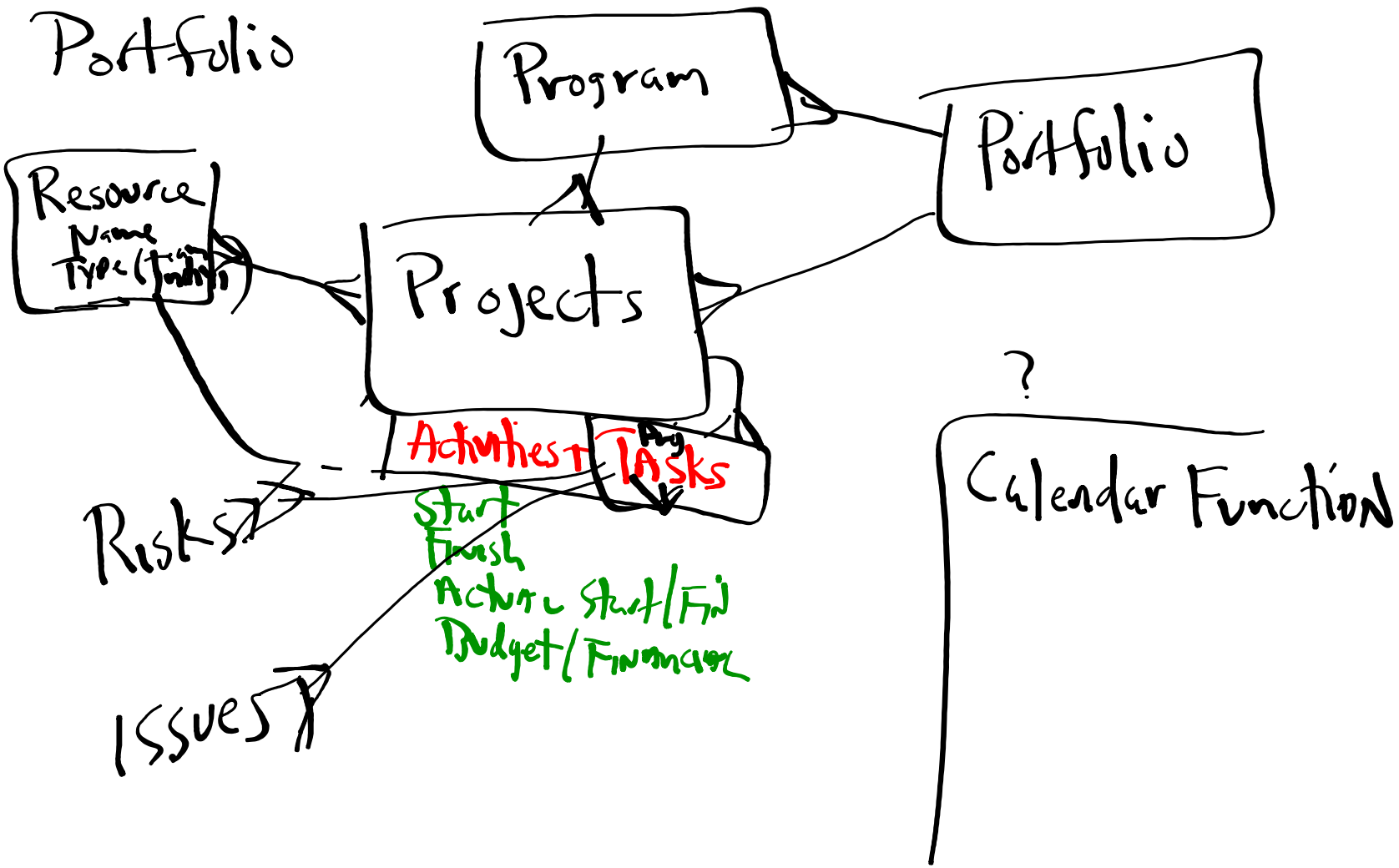
- ex. Honorable Mention Agenda

Roles

Scheduler
Chairman
Executive

Integrations

Reporting


Portfolio
Program
Portfolio
Resource
Name
Type
Projects
?
Activities
Tasks
Calendar Function
Risks
Start
Finish
Actual Start/Fin
Budget/Financial
Issues