Microsoft Dynamics CRM 2013 development server installation

Jukka Niiranen

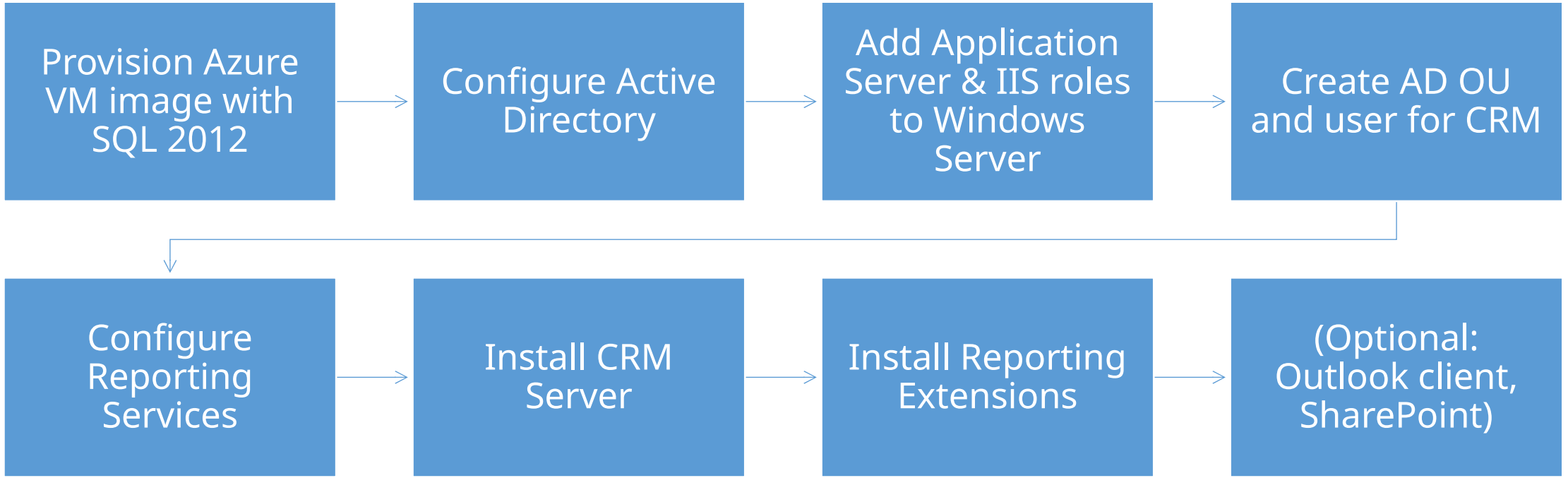
http://niiranen.eu/crm/

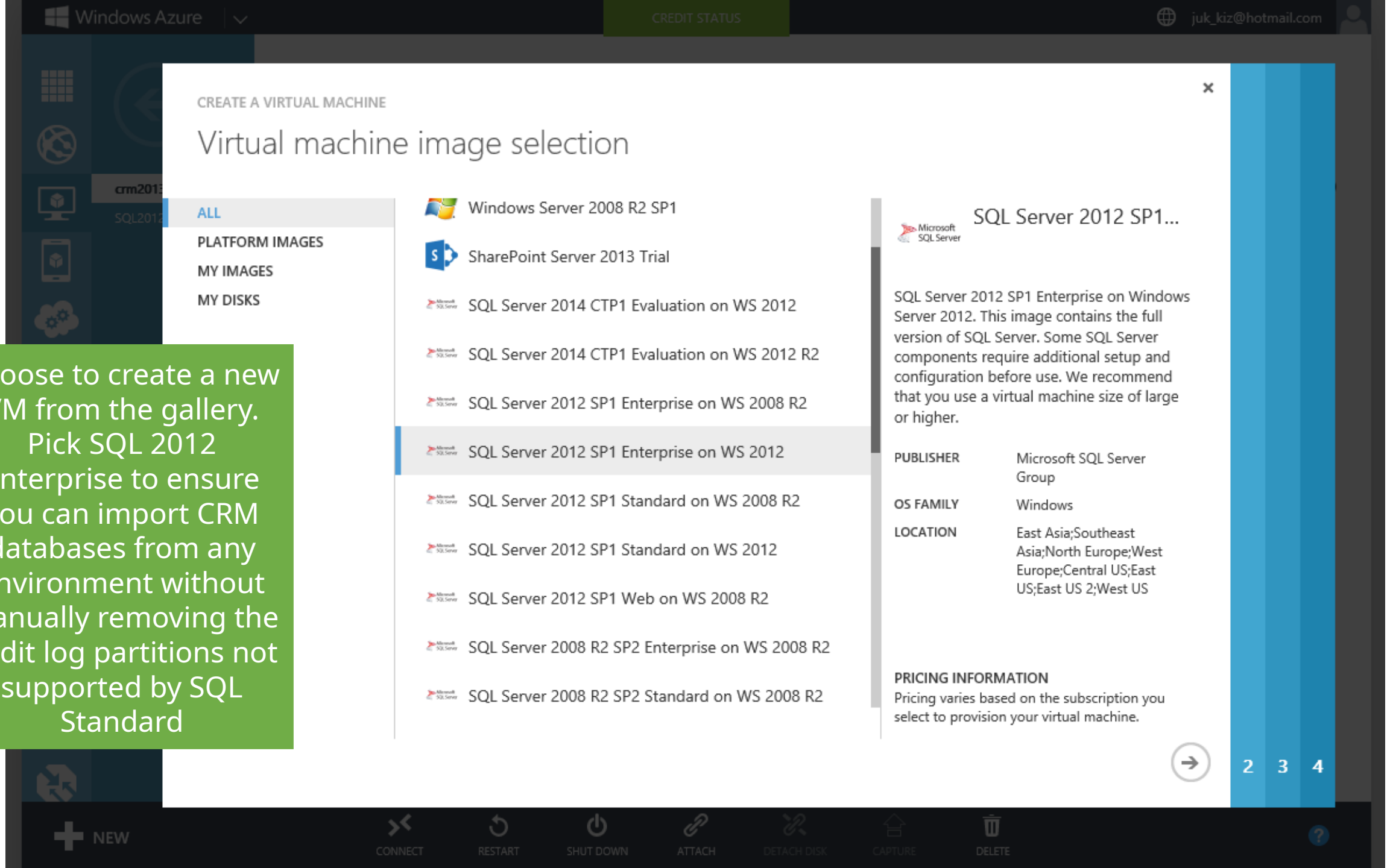
@jukkan

Running a CRM 2013 dev machine in Azure

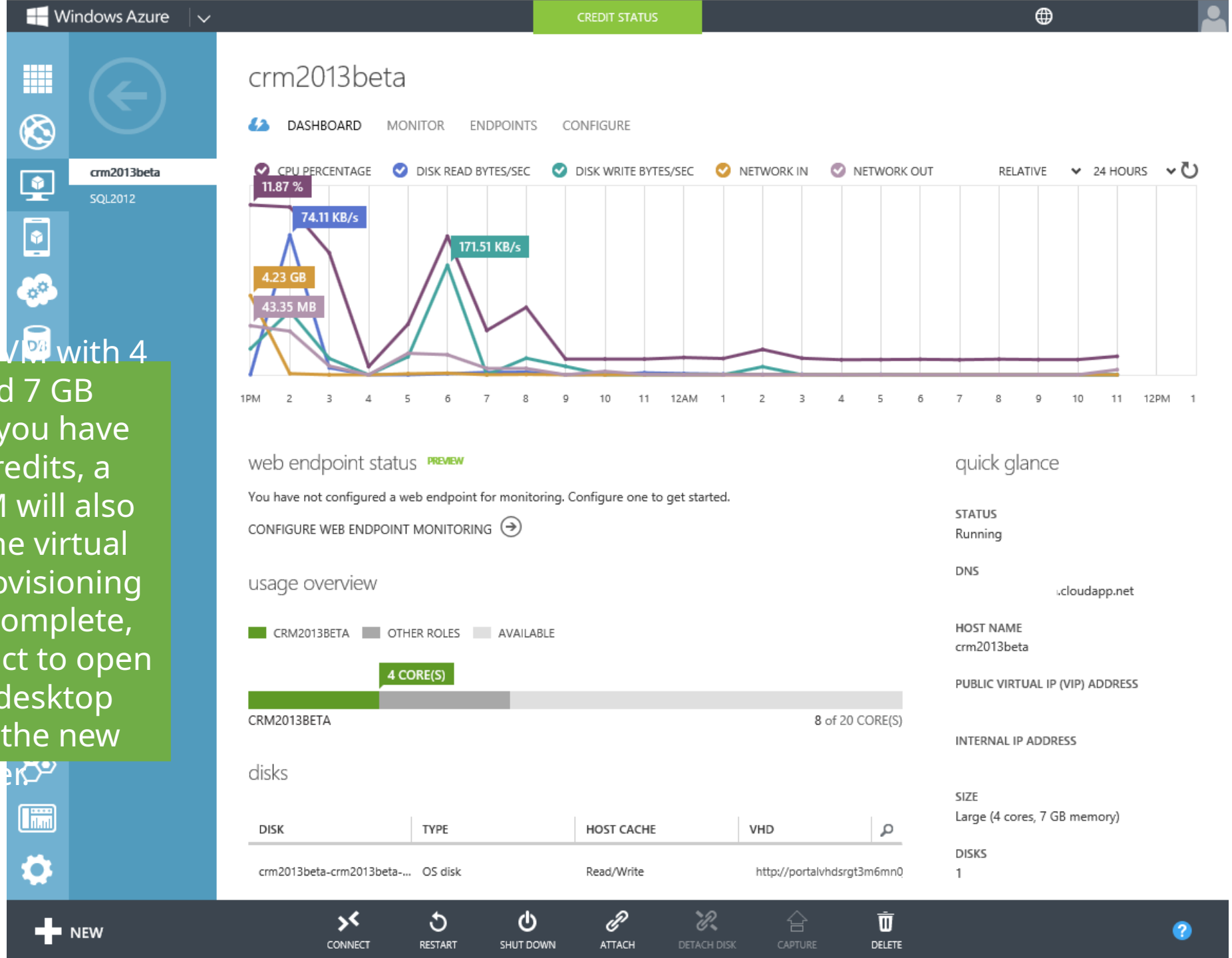
- These slides will show you the minimum required steps for setting up a Microsoft Dynamics CRM 2013 development server
- The platform used for running the server is Windows Azure Virtual Machines, but any Windows Server 2012 virtual machine will do
- We'll use a pre-configured SQL Server image that can leverage the MSDN subscriber benefit of free Azure Credits
  - See this post by Scott Guthrie for details on MSDN discount pricing for VMs
- Note: DO NOT follow these steps when deploying a production environment! We're building a single dev box and skipping all the important configuration tasks that are required when setting up a live CRM server. Check out the implementation guide for more details.

Installation process steps





Choose to create a new VM from the gallery. Pick SQL 2012 Enterprise to ensure you can import CRM databases from any environment without manually removing the audit log partitions not supported by SQL Standard



cores and 7 GB memory if you have enough credits, a Medium VM will also do. Once the virtual machine provisioning process is complete, select Connect to open a remote desktop session to the new

Server Manager

Server Manager ▸ Dashboard

Manage Tools View Help

Dashboard
Local Server
All Servers
File and Storage Services

WELCOME TO SERVER MANAGER

QUICK START

1 Configure this local server

2 Add roles and features

Hide

1

10:54 AM

Add Roles and Features Wizard

Select server roles

DESTINATION SERVER
crm2013beta

Before You Begin
Installation Type
Server Selection
Server Roles
Features
AD DS
Confirmation
Results

Select one or more roles to install on the selected server.

Roles

- [ ] Active Directory Certificate Services
- [x] Active Directory Domain Services
- [ ] Active Directory Federation Services
- [ ] Active Directory Lightweight Directory Services
- [ ] Active Directory Rights Management Services
- [ ] Application Server
- [ ] DHCP Server
- [ ] DNS Server
- [ ] Fax Server
- [ ] File And Storage Services (Installed)
- [ ] Hyper-V
- [ ] Network Policy and Access Services
- [ ] Print and Document Services
- [ ] Remote Access
- [ ] Remote Desktop Services

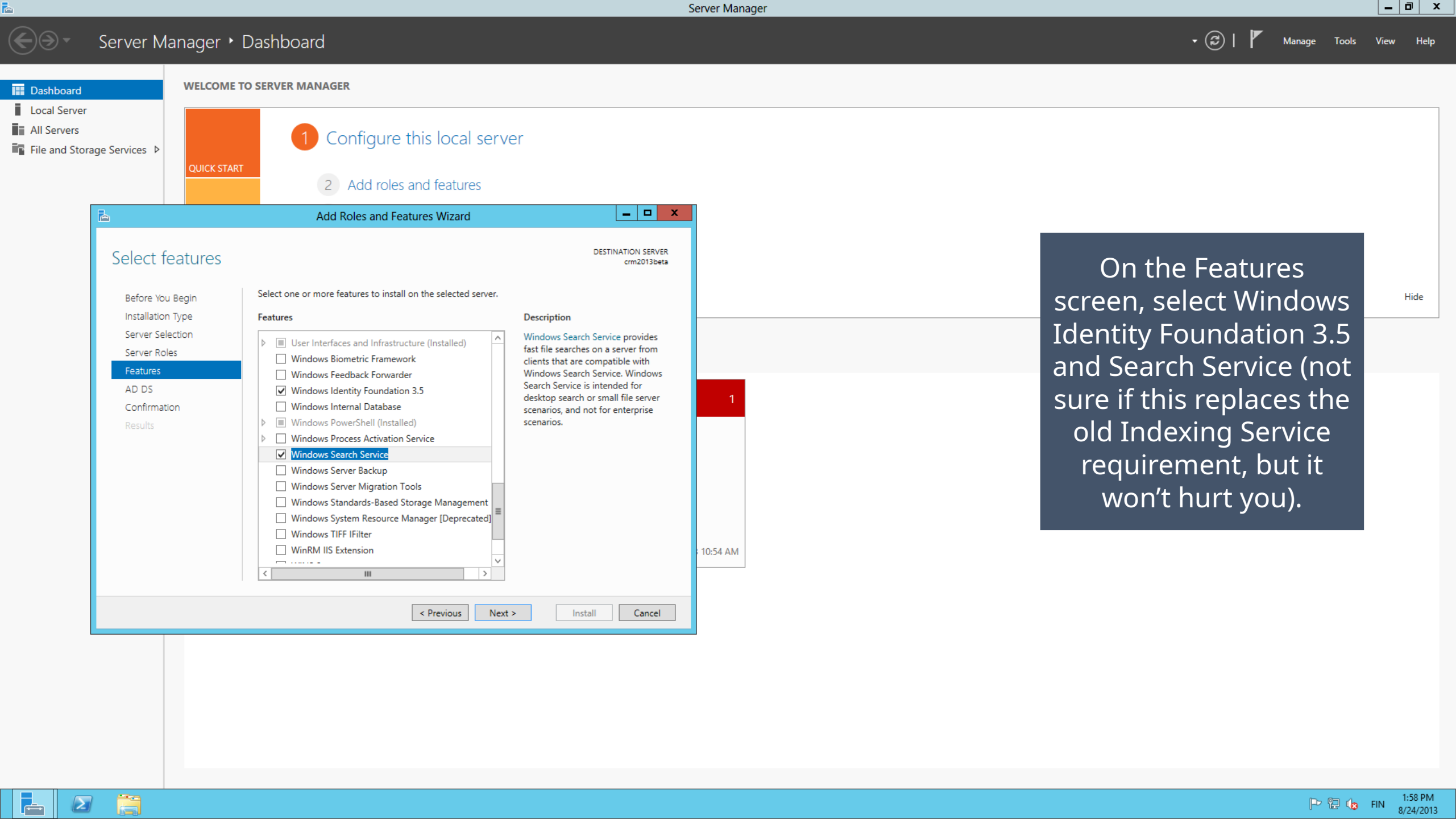
Description

Active Directory Domain Services (AD DS) stores information about objects on the network and makes this information available to users and network administrators. AD DS uses domain controllers to give network users access to permitted resources anywhere on the network through a single logon process.

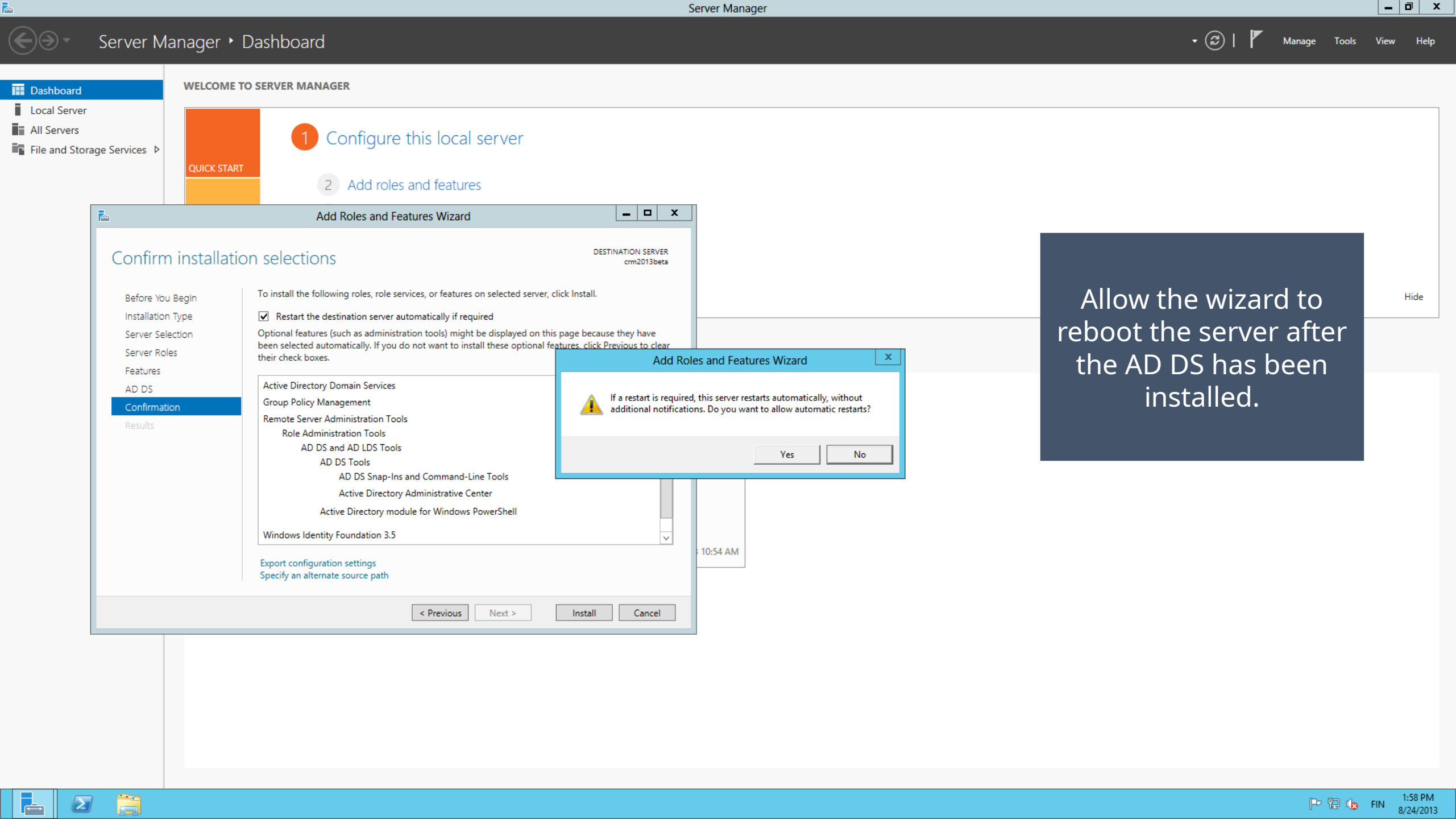
< Previous Next > Install Cancel

Go to Server Manager and click “Add roles and features”. Choose Active Directory Domain Services.

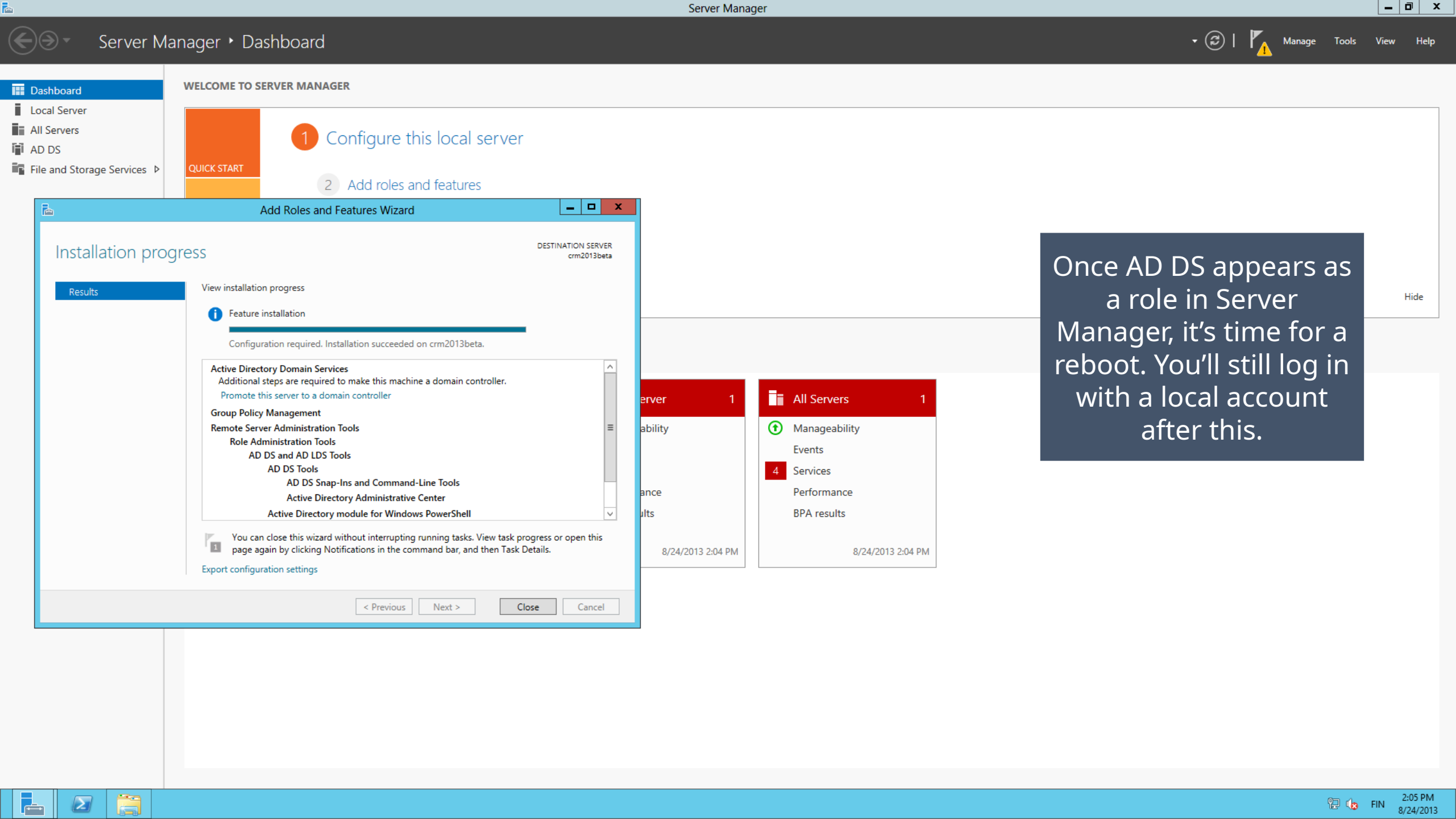
FIN 1:56 PM 8/24/2013

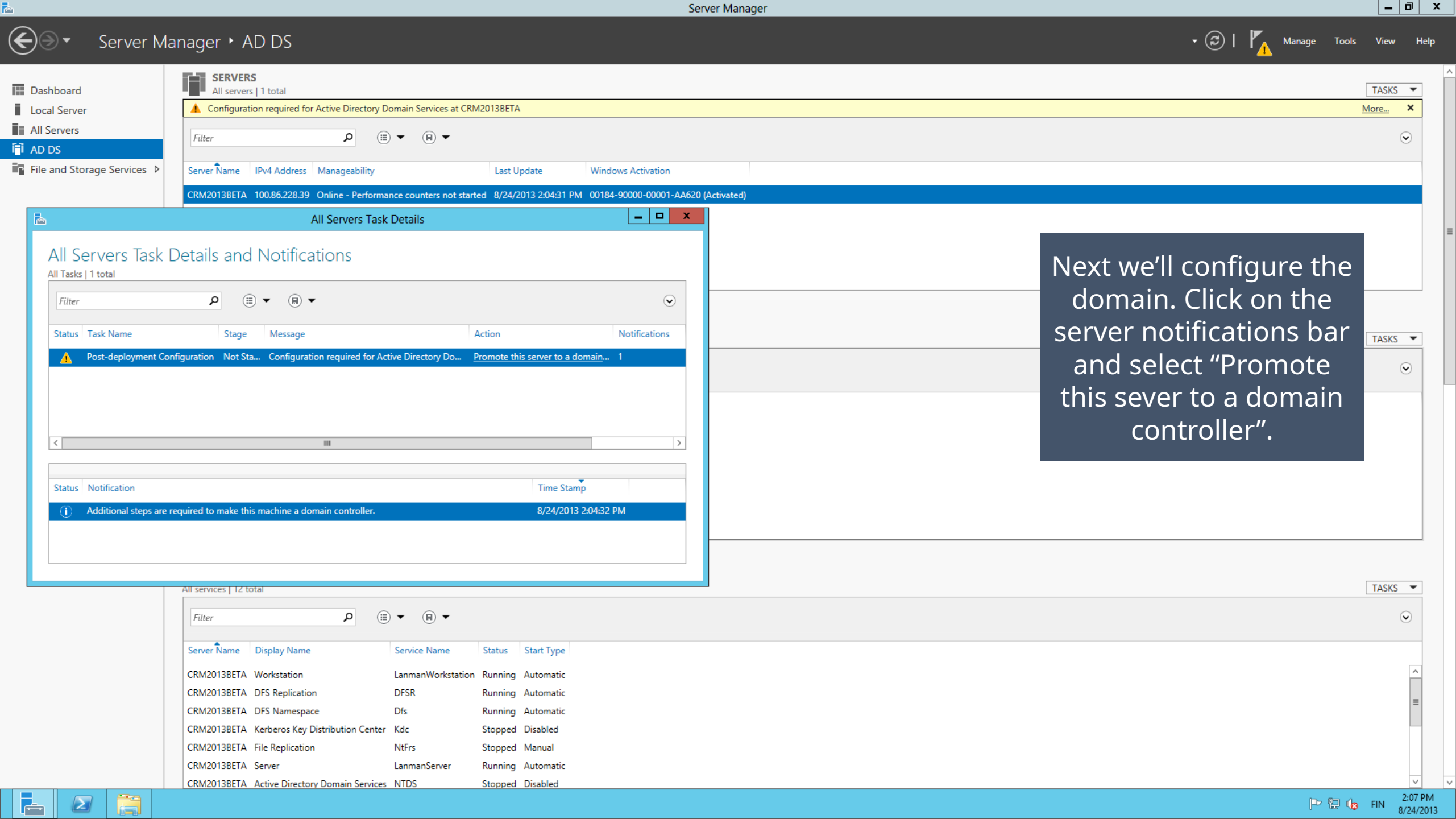


On the Features screen, select Windows Identity Foundation 3.5 and Search Service (not sure if this replaces the old Indexing Service requirement, but it won't hurt you).



Allow the wizard to reboot the server after the AD DS has been installed.


Server Manager
Server Manager ▸ Dashboard
Manage
Tools
View
Help
Dashboard
Local Server
All Servers
AD DS
File and Storage Services
WELCOME TO SERVER MANAGER
QUICK START
1 Configure this local server
2 Add roles and features
Add Roles and Features Wizard
Installation progress
DESTINATION SERVER
crm2013beta
Results
View installation progress
Feature installation
Configuration required. Installation succeeded on crm2013beta.
Active Directory Domain Services
Additional steps are required to make this machine a domain controller.
Promote this server to a domain controller
Group Policy Management
Remote Server Administration Tools
Role Administration Tools
AD DS and AD LDS Tools
AD DS Tools
AD DS Snap-Ins and Command-Line Tools
Active Directory Administrative Center
Active Directory module for Windows PowerShell
You can close this wizard without interrupting running tasks. View task progress or open this page again by clicking Notifications in the command bar, and then Task Details.
Export configuration settings
< Previous
Next >
Close
Cancel
All Servers 1
Manageability
Events
4 Services
Performance
BPA results
8/24/2013 2:04 PM
8/24/2013 2:04 PM
Hide
Once AD DS appears as a role in Server Manager, it's time for a reboot. You'll still log in with a local account after this.
FIN
2:05 PM
8/24/2013


Server Manager
Server Manager ▸ AD DS
Manage
Tools
View
Help
Dashboard
Local Server
All Servers
AD DS
File and Storage Services
SERVERS
All servers | 1 total
TASKS
Configuration required for Active Directory Domain Services at CRM2013BETA
More...
Filter
Server Name
IPv4 Address
Manageability
Last Update
Windows Activation
CRM2013BETA 100.86.228.39 Online - Performance counters not started 8/24/2013 2:04:31 PM 00184-90000-00001-AA620 (Activated)
All Servers Task Details
All Servers Task Details and Notifications
All Tasks | 1 total
Status
Task Name
Stage
Message
Action
Notifications
Post-deployment Configuration Not Sta... Configuration required for Active Directory Do... Promote this server to a domain... 1
Status
Notification
Time Stamp
Additional steps are required to make this machine a domain controller. 8/24/2013 2:04:32 PM
Next we'll configure the domain. Click on the server notifications bar and select "Promote this sever to a domain controller".
All services | 12 total
Server Name
Display Name
Service Name
Status
Start Type
CRM2013BETA Workstation LanmanWorkstation Running Automatic
CRM2013BETA DFS Replication DFSR Running Automatic
CRM2013BETA DFS Namespace Dfs Running Automatic
CRM2013BETA Kerberos Key Distribution Center Kdc Stopped Disabled
CRM2013BETA File Replication NtFrs Stopped Manual
CRM2013BETA Server LanmanServer Running Automatic
CRM2013BETA Active Directory Domain Services NTDS Stopped Disabled
FIN
2:07 PM
8/24/2013

Server Manager

Server Manager ▸ AD DS

Manage Tools View Help

Dashboard
Local Server
All Servers
AD DS
File and Storag

SERVERS
All servers | 1 total

TASKS

More...

620 (Activated)

TASKS

SERVICES
All services | 12 total

TASKS

Filter

Server Name	Display Name	Service Name	Status	Start Type
CRM2013BETA	Workstation	LanmanWorkstation	Running	Automatic
CRM2013BETA	DFS Replication	DFSR	Running	Automatic
CRM2013BETA	DFS Namespace	Dfs	Running	Automatic
CRM2013BETA	Kerberos Key Distribution Center	Kdc	Stopped	Disabled
CRM2013BETA	File Replication	NtFrs	Stopped	Manual
CRM2013BETA	Server	LanmanServer	Running	Automatic
CRM2013BETA	Active Directory Domain Services	NTDS	Stopped	Disabled

Active Directory Domain Services Configuration Wizard

Deployment Configuration

TARGET SERVER
crm2013beta

- Deployment Configuration
- Domain Controller Options
- Additional Options
- Paths
- Review Options
- Prerequisites Check
- Installation
- Results

Select the deployment operation

- ○ Add a domain controller to an existing domain
- ○ Add a new domain to an existing forest
- ◉ Add a new forest

Specify the domain information for this operation

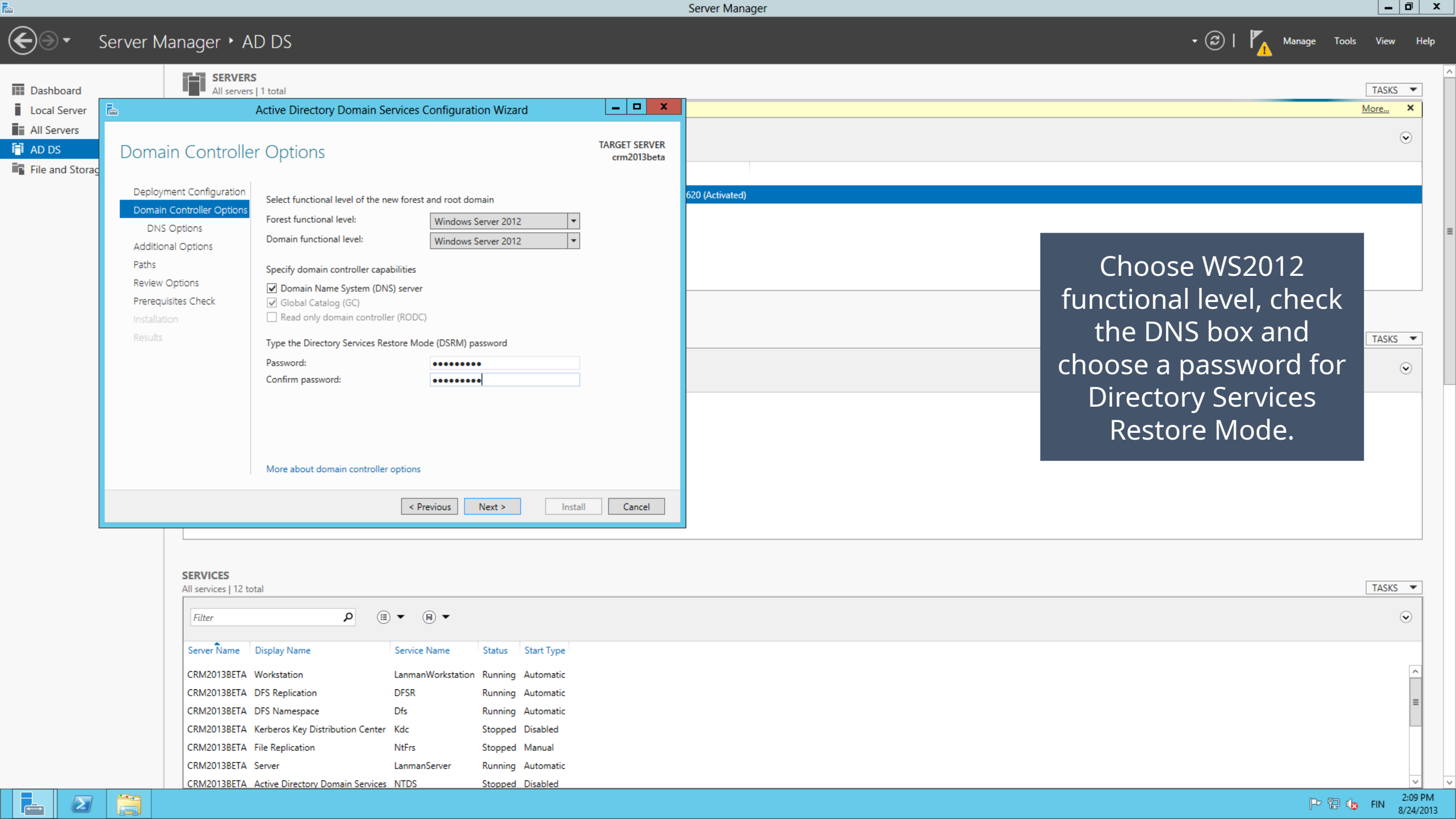
Root domain name: GLOBAL.local

More about deployment configurations

< Previous | Next > | Install | Cancel

Choose to add a new forest and enter a root domain name like NAME.local.

FIN 2:08 PM 8/24/2013


Server Manager
Server Manager ▸ AD DS
Manage
Tools
View
Help
Dashboard
Local Server
All Servers
AD DS
File and Storag
SERVERS
All servers | 1 total
TASKS
More...
Active Directory Domain Services Configuration Wizard
Domain Controller Options
TARGET SERVER
crm2013beta
Deployment Configuration
Domain Controller Options
DNS Options
Additional Options
Paths
Review Options
Prerequisites Check
Installation
Results
Select functional level of the new forest and root domain
Forest functional level:
Windows Server 2012
Domain functional level:
Windows Server 2012
Specify domain controller capabilities
Domain Name System (DNS) server
Global Catalog (GC)
Read only domain controller (RODC)
Type the Directory Services Restore Mode (DSRM) password
Password:
Confirm password:
More about domain controller options
< Previous
Next >
Install
Cancel
620 (Activated)
Choose WS2012 functional level, check the DNS box and choose a password for Directory Services Restore Mode.
SERVICES
All services | 12 total
Filter
Server Name
Display Name
Service Name
Status
Start Type
CRM2013BETA Workstation LanmanWorkstation Running Automatic
CRM2013BETA DFS Replication DFSR Running Automatic
CRM2013BETA DFS Namespace Dfs Running Automatic
CRM2013BETA Kerberos Key Distribution Center Kdc Stopped Disabled
CRM2013BETA File Replication NtFrs Stopped Manual
CRM2013BETA Server LanmanServer Running Automatic
CRM2013BETA Active Directory Domain Services NTDS Stopped Disabled
FIN
2:09 PM
8/24/2013

Server Manager

Server Manager ▸ AD DS

Manage Tools View Help

Dashboard
Local Server
All Servers
AD DS
File and Storag

SERVERS
All servers | 1 total

TASKS

More...

620 (Activated)

Active Directory Domain Services Configuration Wizard

DNS Options

TARGET SERVER
crm2013beta

A delegation for this DNS server cannot be created because the authoritative parent zone cannot be found... Show more

Deployment Configuration
Domain Controller Options
DNS Options
Additional Options
Paths
Review Options
Prerequisites Check
Installation
Results

Specify DNS delegation options

Create DNS delegation

DNS Options

A delegation for this DNS server cannot be created because the authoritative parent zone cannot be found or it does not run Windows DNS server. If you are integrating with an existing DNS infrastructure, you should manually create a delegation to this DNS server in the parent zone to ensure reliable name resolution from outside the domain "GLOBAL.local". Otherwise, no action is required.

OK

More about DNS delegation

< Previous Next > Install Cancel

You will get a notification saying “a delegation for this DNS server cannot be created”, which you can safely ignore on a development server.

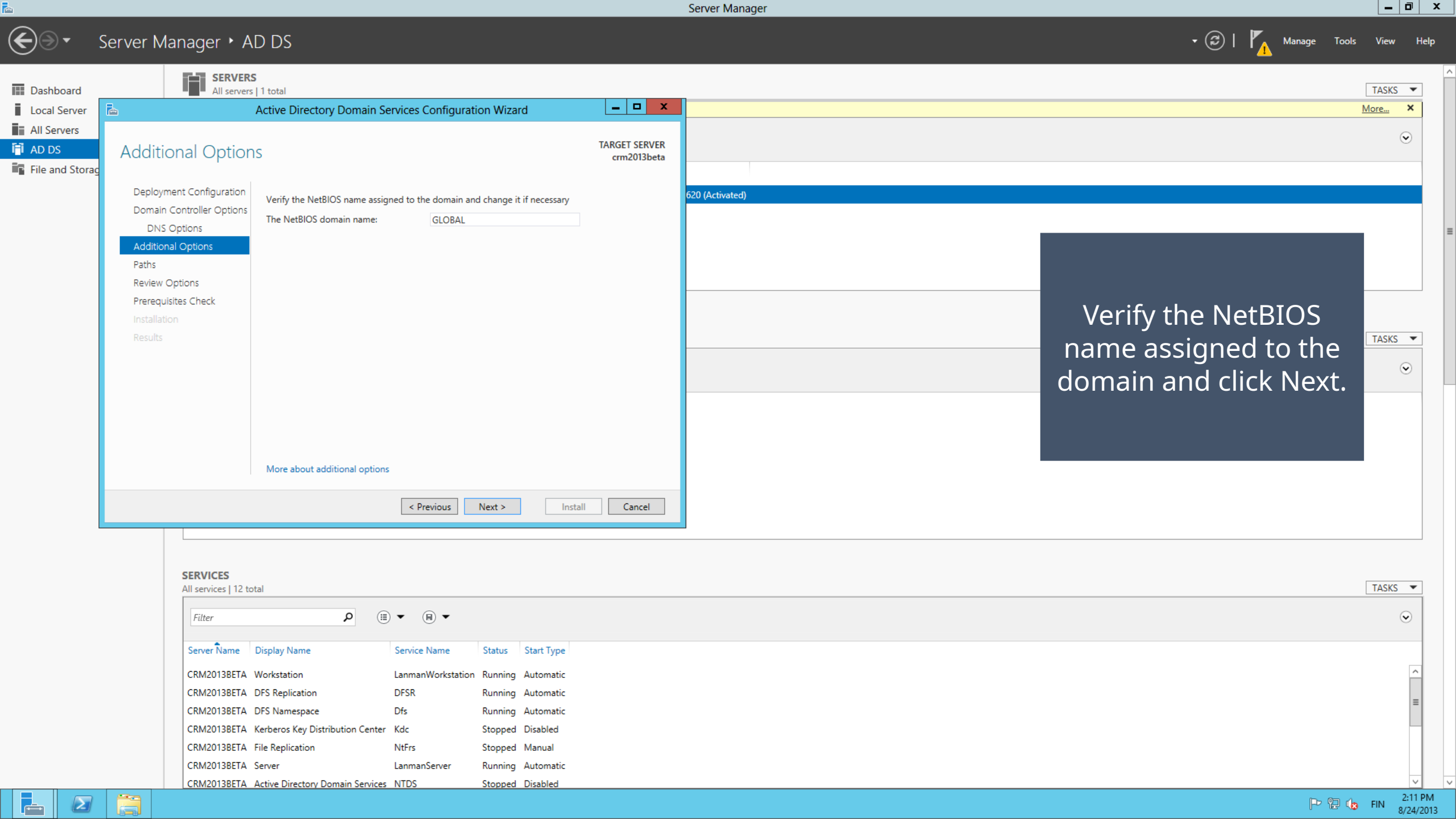
SERVICES
All services | 12 total

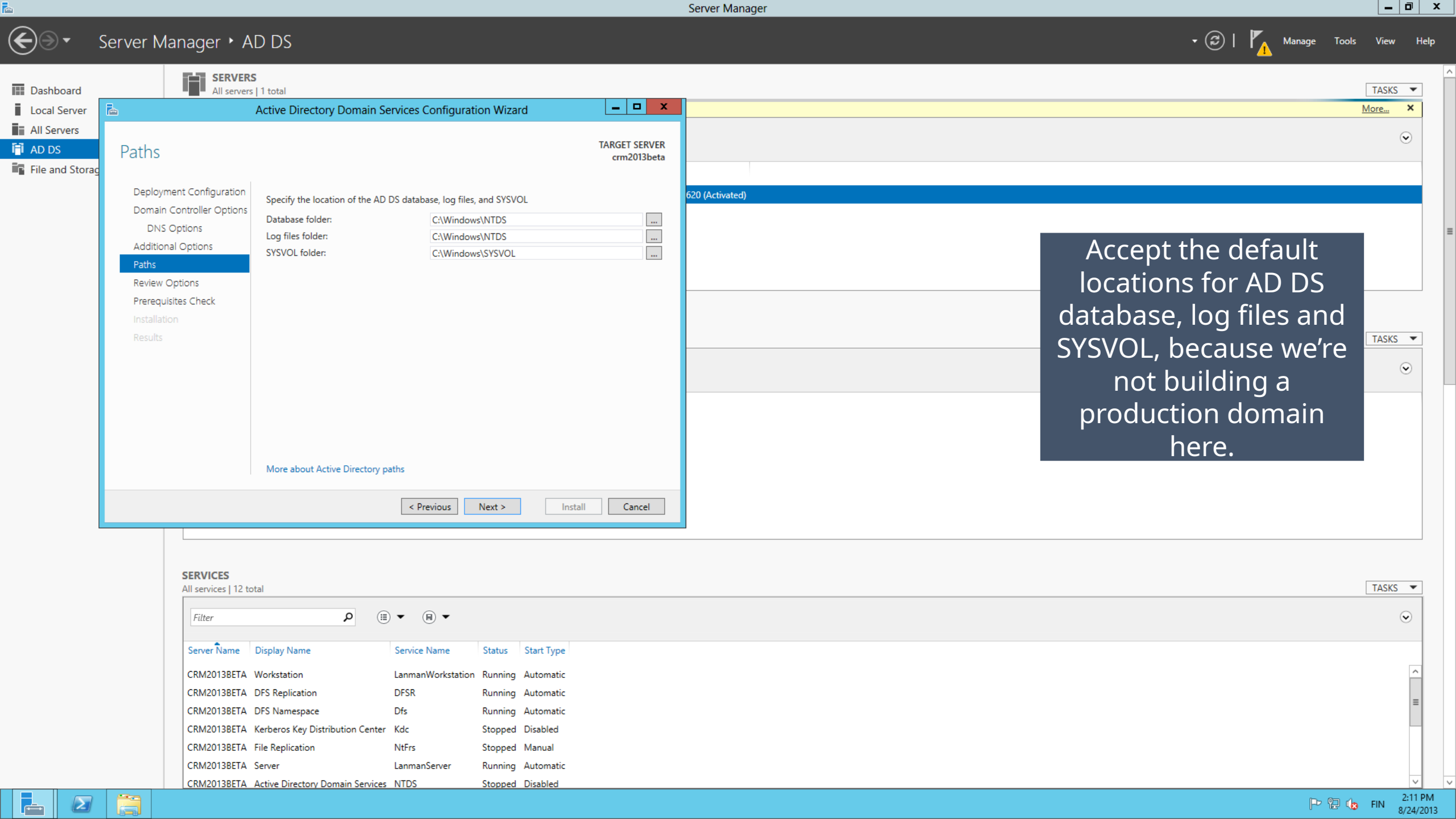
TASKS

Filter

Server Name	Display Name	Service Name	Status	Start Type
CRM2013BETA	Workstation	LanmanWorkstation	Running	Automatic
CRM2013BETA	DFS Replication	DFSR	Running	Automatic
CRM2013BETA	DFS Namespace	Dfs	Running	Automatic
CRM2013BETA	Kerberos Key Distribution Center	Kdc	Stopped	Disabled
CRM2013BETA	File Replication	NtFrs	Stopped	Manual
CRM2013BETA	Server	LanmanServer	Running	Automatic
CRM2013BETA	Active Directory Domain Services	NTDS	Stopped	Disabled

FIN 2:10 PM 8/24/2013


Server Manager
Server Manager ▸ AD DS
Manage
Tools
View
Help
Dashboard
Local Server
All Servers
AD DS
File and Storag
SERVERS
All servers | 1 total
TASKS
More...
Active Directory Domain Services Configuration Wizard
Additional Options
TARGET SERVER
crm2013beta
Deployment Configuration
Domain Controller Options
DNS Options
Additional Options
Paths
Review Options
Prerequisites Check
Installation
Results
Verify the NetBIOS name assigned to the domain and change it if necessary
The NetBIOS domain name:
GLOBAL
More about additional options
< Previous
Next >
Install
Cancel
620 (Activated)
Verify the NetBIOS name assigned to the domain and click Next.
SERVICES
All services | 12 total
Filter
Server Name
Display Name
Service Name
Status
Start Type
CRM2013BETA Workstation LanmanWorkstation Running Automatic
CRM2013BETA DFS Replication DFSR Running Automatic
CRM2013BETA DFS Namespace Dfs Running Automatic
CRM2013BETA Kerberos Key Distribution Center Kdc Stopped Disabled
CRM2013BETA File Replication NtFrs Stopped Manual
CRM2013BETA Server LanmanServer Running Automatic
CRM2013BETA Active Directory Domain Services NTDS Stopped Disabled
FIN
2:11 PM
8/24/2013


Server Manager
Server Manager ▸ AD DS
Manage
Tools
View
Help
Dashboard
Local Server
All Servers
AD DS
File and Storag
SERVERS
All servers | 1 total
TASKS
More...
Active Directory Domain Services Configuration Wizard
Paths
TARGET SERVER
crm2013beta
Deployment Configuration
Domain Controller Options
DNS Options
Additional Options
Paths
Review Options
Prerequisites Check
Installation
Results
Specify the location of the AD DS database, log files, and SYSVOL
Database folder:
C:\Windows\NTDS
Log files folder:
C:\Windows\NTDS
SYSVOL folder:
C:\Windows\SYSVOL
More about Active Directory paths
< Previous
Next >
Install
Cancel
620 (Activated)
Accept the default locations for AD DS database, log files and SYSVOL, because we're not building a production domain here.
SERVICES
All services | 12 total
Filter
Server Name
Display Name
Service Name
Status
Start Type
CRM2013BETA Workstation LanmanWorkstation Running Automatic
CRM2013BETA DFS Replication DFSR Running Automatic
CRM2013BETA DFS Namespace Dfs Running Automatic
CRM2013BETA Kerberos Key Distribution Center Kdc Stopped Disabled
CRM2013BETA File Replication NtFrs Stopped Manual
CRM2013BETA Server LanmanServer Running Automatic
CRM2013BETA Active Directory Domain Services NTDS Stopped Disabled
FIN
2:11 PM
8/24/2013

Server Manager

Server Manager ▸ AD DS

Manage Tools View Help

Dashboard
Local Server
All Servers
AD DS
File and Storag

SERVERS
All servers | 1 total

TASKS

More...

620 (Activated)

TASKS

SERVICES
All services | 12 total

TASKS

Filter

Server Name	Display Name	Service Name	Status	Start Type
CRM2013BETA	Workstation	LanmanWorkstation	Running	Automatic
CRM2013BETA	DFS Replication	DFSR	Running	Automatic
CRM2013BETA	DFS Namespace	Dfs	Running	Automatic
CRM2013BETA	Kerberos Key Distribution Center	Kdc	Stopped	Disabled
CRM2013BETA	File Replication	NtFrs	Stopped	Manual
CRM2013BETA	Server	LanmanServer	Running	Automatic
CRM2013BETA	Active Directory Domain Services	NTDS	Stopped	Disabled

Active Directory Domain Services Configuration Wizard

Review Options

TARGET SERVER
crm2013beta

- Deployment Configuration
- Domain Controller Options
- DNS Options
- Additional Options
- Paths
- Review Options
- Prerequisites Check
- Installation
- Results

Review your selections:

Configure this server as the first Active Directory domain controller in a new forest.

The new domain name is "GLOBAL.local". This is also the name of the new forest.

The NetBIOS name of the domain: GLOBAL

Forest Functional Level: Windows Server 2012

Domain Functional Level: Windows Server 2012

Additional Options:

Global catalog: Yes

DNS Server: Yes

Create DNS Delegation: No

These settings can be exported to a Windows PowerShell script to automate additional installations

View script

More about installation options

< Previous | Next > | Install | Cancel

Everything is ready for the domain services configuration, so accept the options shown.

FIN 2:11 PM 8/24/2013

Server Manager

Server Manager ▸ AD DS

Manage Tools View Help

Dashboard
Local Server
All Servers
AD DS
File and Storag

SERVERS
All servers | 1 total

TASKS

More...

620 (Activated)

TASKS

SERVICES
All services | 12 total

TASKS

Filter

Server Name	Display Name	Service Name	Status	Start Type
CRM2013BETA	Workstation	LanmanWorkstation	Running	Automatic
CRM2013BETA	DFS Replication	DFSR	Running	Automatic
CRM2013BETA	DFS Namespace	Dfs	Running	Automatic
CRM2013BETA	Kerberos Key Distribution Center	Kdc	Stopped	Disabled
CRM2013BETA	File Replication	NtFrs	Stopped	Manual
CRM2013BETA	Server	LanmanServer	Running	Automatic
CRM2013BETA	Active Directory Domain Services	NTDS	Stopped	Disabled

Active Directory Domain Services Configuration Wizard

Prerequisites Check

TARGET SERVER
crm2013beta

All prerequisite checks passed successfully. Click 'Install' to begin installation. Show more

- Deployment Configuration
- Domain Controller Options
- DNS Options
- Additional Options
- Paths
- Review Options
- Prerequisites Check
- Installation
- Results

Prerequisites need to be validated before Active Directory Domain Services is installed on this computer

Rerun prerequisites check

View results

⚠ This computer has at least one physical network adapter that does not have static IP address(es) assigned to its IP Properties. If both IPv4 and IPv6 are enabled for a network adapter, both IPv4 and IPv6 static IP addresses should be assigned to both IPv4 and IPv6 Properties of the physical network adapter. Such static IP address(es) assignment should be done to all the physical network adapters for reliable Domain Name System (DNS) operation.

⚠ A delegation for this DNS server cannot be created because the authoritative parent zone cannot be found or it does not run Windows DNS server. If you are integrating with an existing DNS infrastructure, you should manually create a delegation to this DNS server in the parent zone to ensure reliable name resolution from outside the domain "GLOBAL.local". Otherwise, no action is required.

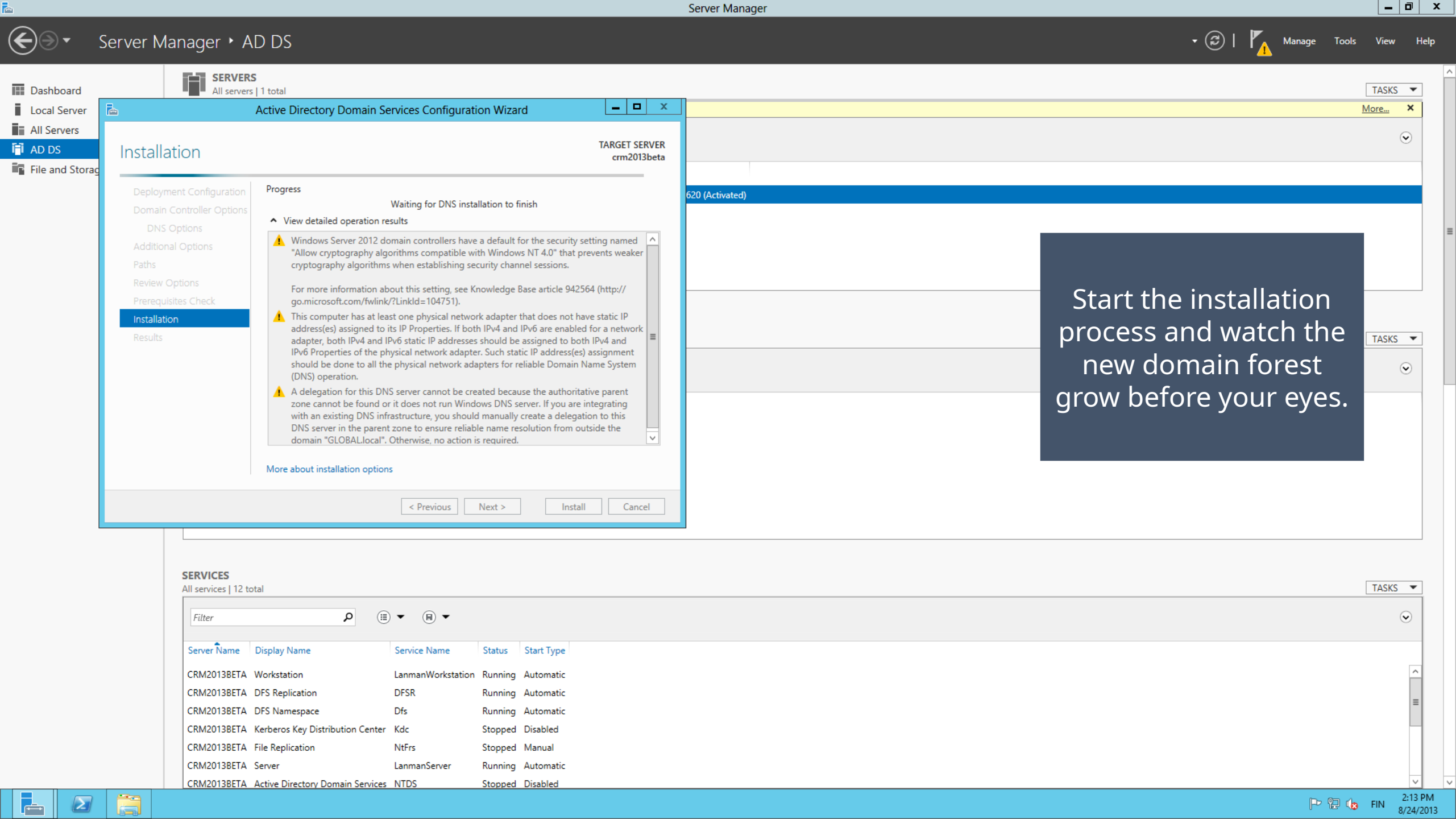
⚠ If you click Install, the server automatically reboots at the end of the promotion operation.

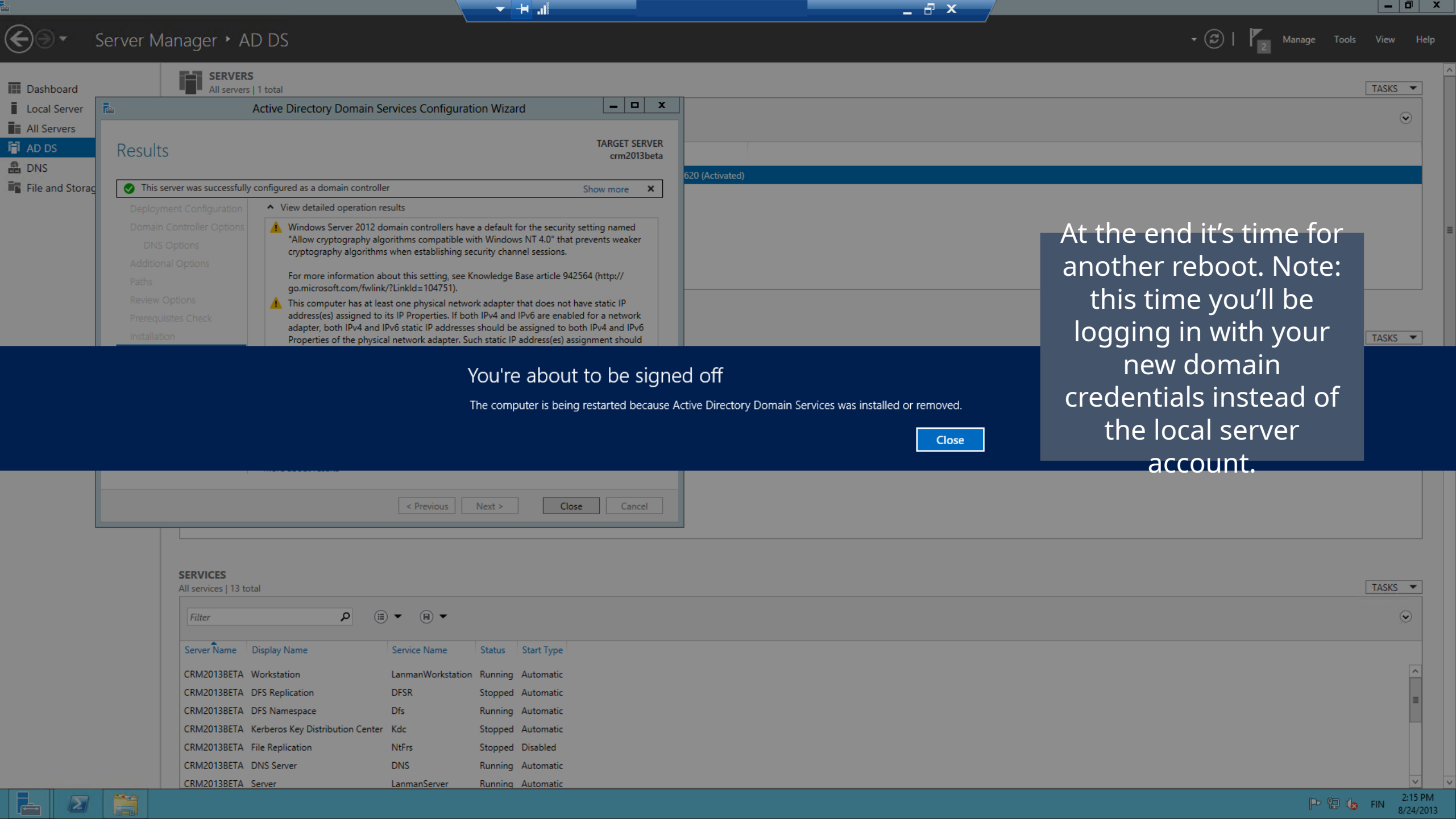
More about prerequisites

< Previous | Next > | Install | Cancel

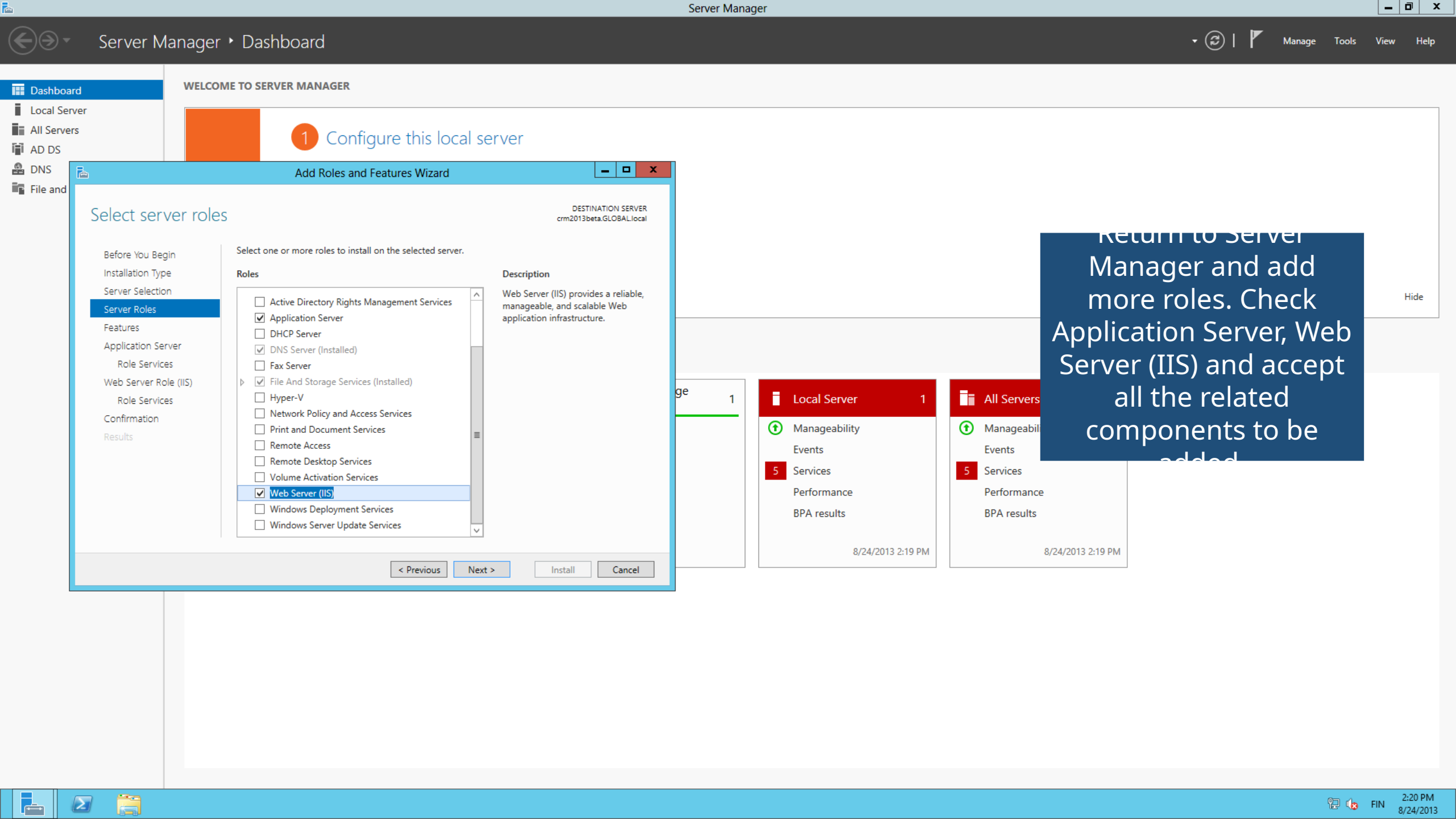
Ignore the warnings from the prerequisites check on lack of static IP and DNS delegation, as we'll do fine without them.

FIN 2:12 PM 8/24/2013


Server Manager
Server Manager ▸ AD DS
Manage
Tools
View
Help
Dashboard
Local Server
All Servers
AD DS
File and Storag
SERVERS
All servers | 1 total
TASKS
More...
Active Directory Domain Services Configuration Wizard
Installation
TARGET SERVER
crm2013beta
Deployment Configuration
Domain Controller Options
DNS Options
Additional Options
Paths
Review Options
Prerequisites Check
Installation
Results
Progress
Waiting for DNS installation to finish
View detailed operation results
Windows Server 2012 domain controllers have a default for the security setting named "Allow cryptography algorithms compatible with Windows NT 4.0" that prevents weaker cryptography algorithms when establishing security channel sessions.
For more information about this setting, see Knowledge Base article 942564 (http://go.microsoft.com/fwlink/?LinkId=104751).
This computer has at least one physical network adapter that does not have static IP address(es) assigned to its IP Properties. If both IPv4 and IPv6 are enabled for a network adapter, both IPv4 and IPv6 static IP addresses should be assigned to both IPv4 and IPv6 Properties of the physical network adapter. Such static IP address(es) assignment should be done to all the physical network adapters for reliable Domain Name System (DNS) operation.
A delegation for this DNS server cannot be created because the authoritative parent zone cannot be found or it does not run Windows DNS server. If you are integrating with an existing DNS infrastructure, you should manually create a delegation to this DNS server in the parent zone to ensure reliable name resolution from outside the domain "GLOBAL.local". Otherwise, no action is required.
More about installation options
< Previous
Next >
Install
Cancel
620 (Activated)
Start the installation process and watch the new domain forest grow before your eyes.
SERVICES
All services | 12 total
Filter
Server Name
Display Name
Service Name
Status
Start Type
CRM2013BETA Workstation LanmanWorkstation Running Automatic
CRM2013BETA DFS Replication DFSR Running Automatic
CRM2013BETA DFS Namespace Dfs Running Automatic
CRM2013BETA Kerberos Key Distribution Center Kdc Stopped Disabled
CRM2013BETA File Replication NtFrs Stopped Manual
CRM2013BETA Server LanmanServer Running Automatic
CRM2013BETA Active Directory Domain Services NTDS Stopped Disabled
FIN
2:13 PM
8/24/2013



At the end it's time for another reboot. Note: this time you'll be logging in with your new domain credentials instead of the local server account.


Server Manager
Server Manager ▸ Dashboard
Manage
Tools
View
Help
Dashboard
Local Server
All Servers
AD DS
DNS
File and
WELCOME TO SERVER MANAGER
1 Configure this local server
Add Roles and Features Wizard
Select server roles
DESTINATION SERVER
crm2013beta.GLOBAL.local
Before You Begin
Installation Type
Server Selection
Server Roles
Features
Application Server
Role Services
Web Server Role (IIS)
Role Services
Confirmation
Results
Select one or more roles to install on the selected server.
Roles
Active Directory Rights Management Services
Application Server
DHCP Server
DNS Server (Installed)
Fax Server
File And Storage Services (Installed)
Hyper-V
Network Policy and Access Services
Print and Document Services
Remote Access
Remote Desktop Services
Volume Activation Services
Web Server (IIS)
Windows Deployment Services
Windows Server Update Services
Description
Web Server (IIS) provides a reliable, manageable, and scalable Web application infrastructure.
< Previous
Next >
Install
Cancel
Return to Server Manager and add more roles. Check Application Server, Web Server (IIS) and accept all the related components to be
Hide
Local Server 1
Manageability
Events
5 Services
Performance
BPA results
8/24/2013 2:19 PM
All Servers
Manageabil
Events
5 Services
Performance
BPA results
8/24/2013 2:19 PM
FIN
2:20 PM
8/24/2013

Server Manager

Server Manager ▸ Dashboard

Manage Tools View Help

- Dashboard
- Local Server
- All Servers
- AD DS
- DNS
- File and

WELCOME TO SERVER MANAGER

1 Configure this local server

Hide

Add Roles and Features Wizard

Select features

DESTINATION SERVER
crm2013beta.GLOBAL.local

- Before You Begin
- Installation Type
- Server Selection
- Server Roles
- Features
- Application Server
  - Role Services
- Web Server Role (IIS)
  - Role Services
- Confirmation
- Results

Select one or more features to install on the selected server.

Features

- .NET Framework 3.5 Features (Installed)
- .NET Framework 4.5 Features (Installed)
- Background Intelligent Transfer Service (BITS)
- BitLocker Drive Encryption
- BitLocker Network Unlock
- BranchCache
- Client for NFS
- Data Center Bridging
- Enhanced Storage
- Failover Clustering
- Group Policy Management (Installed)
- Ink and Handwriting Services
- Internet Printing Client
- IP Address Management (IPAM) Server

Description

.NET Framework 3.5 combines the power of the .NET Framework 2.0 APIs with new technologies for building applications that offer appealing user interfaces, protect your customers' personal identity information, enable seamless and secure communication, and provide the ability to model a range of business processes.

< Previous | Next > | Install | Cancel

No need for additional features, click Next.

ge 1

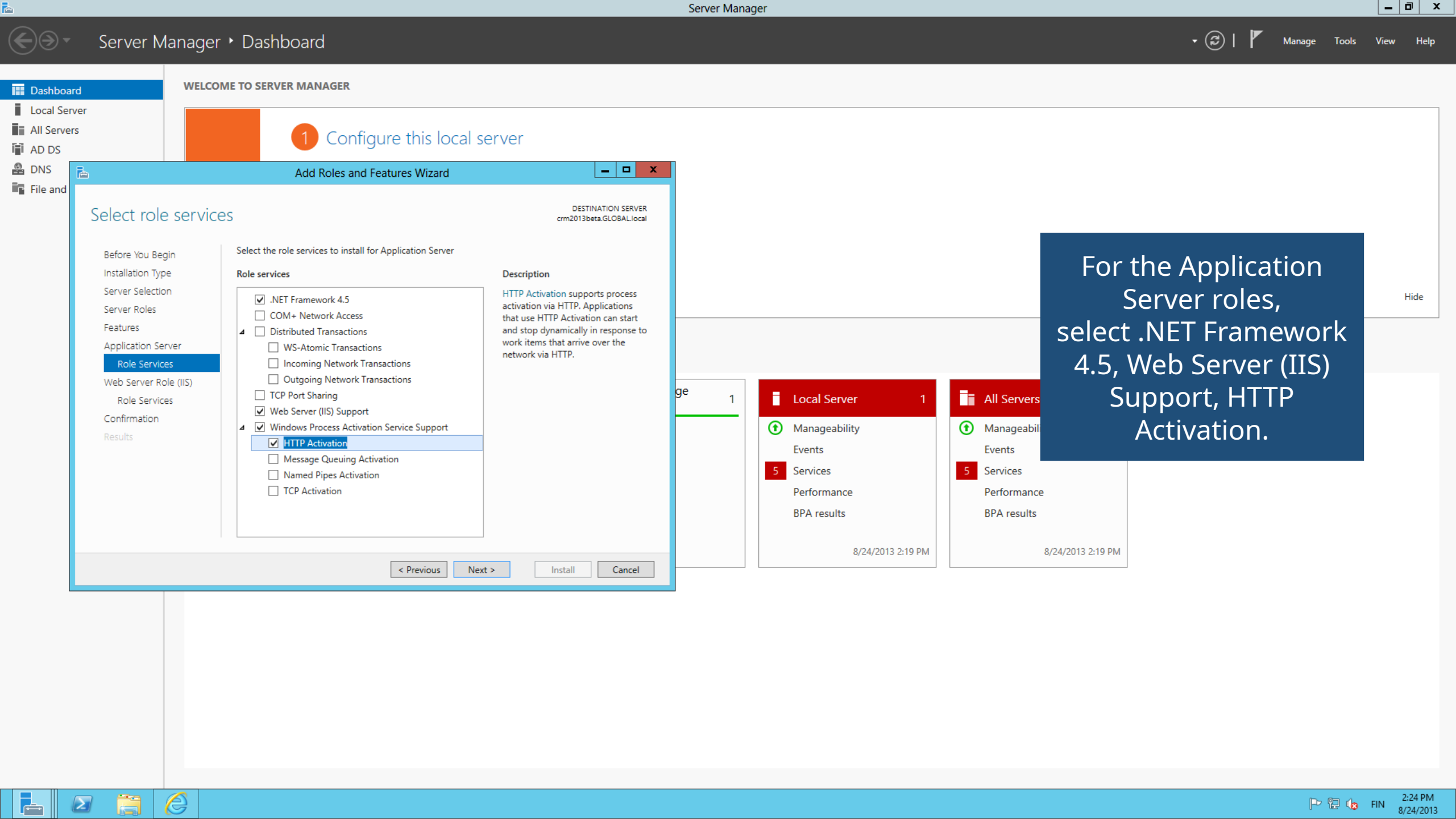
Local Server 1
- Manageability
- Events
- 5 Services
- Performance
- BPA results

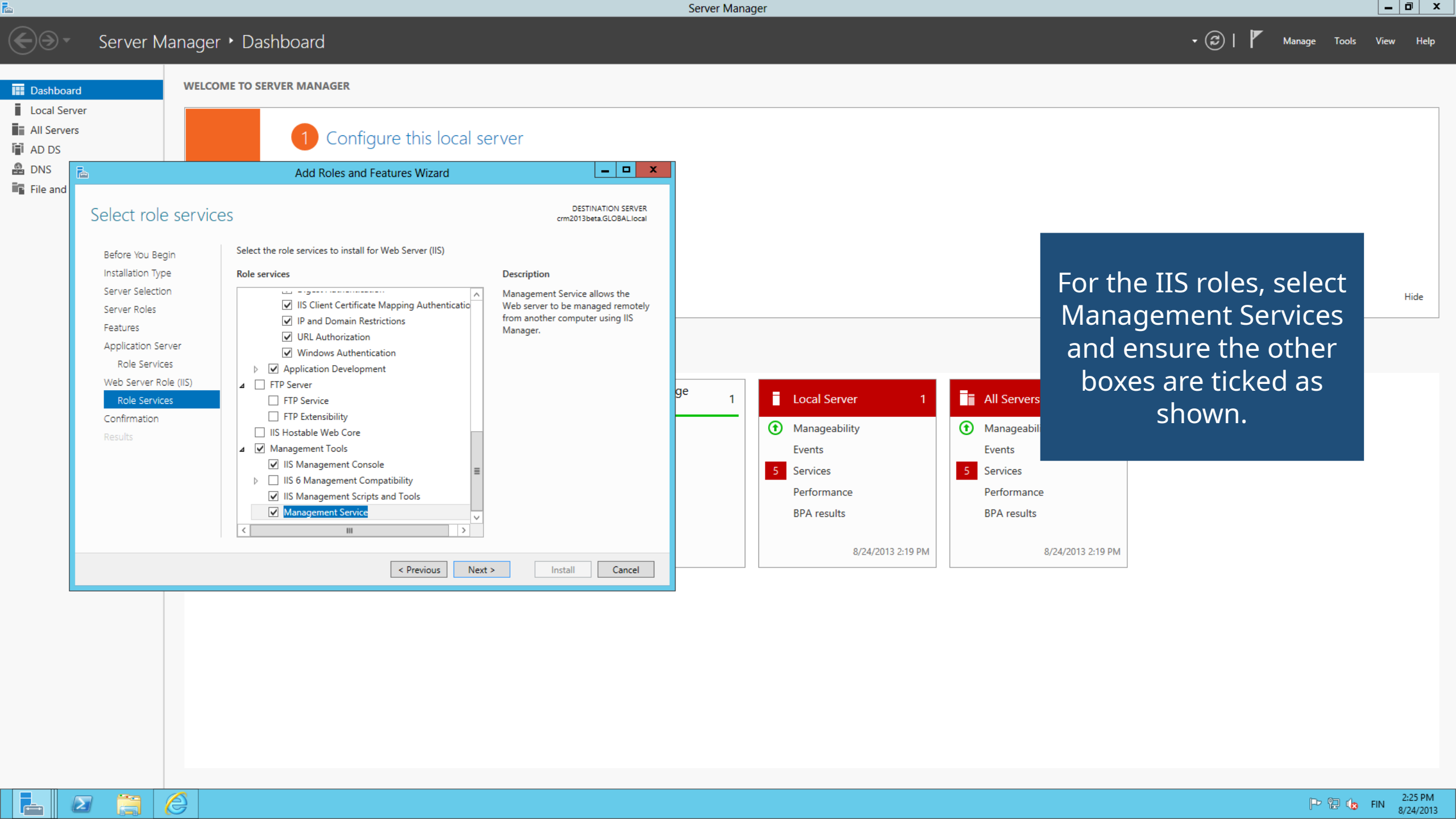
8/24/2013 2:19 PM

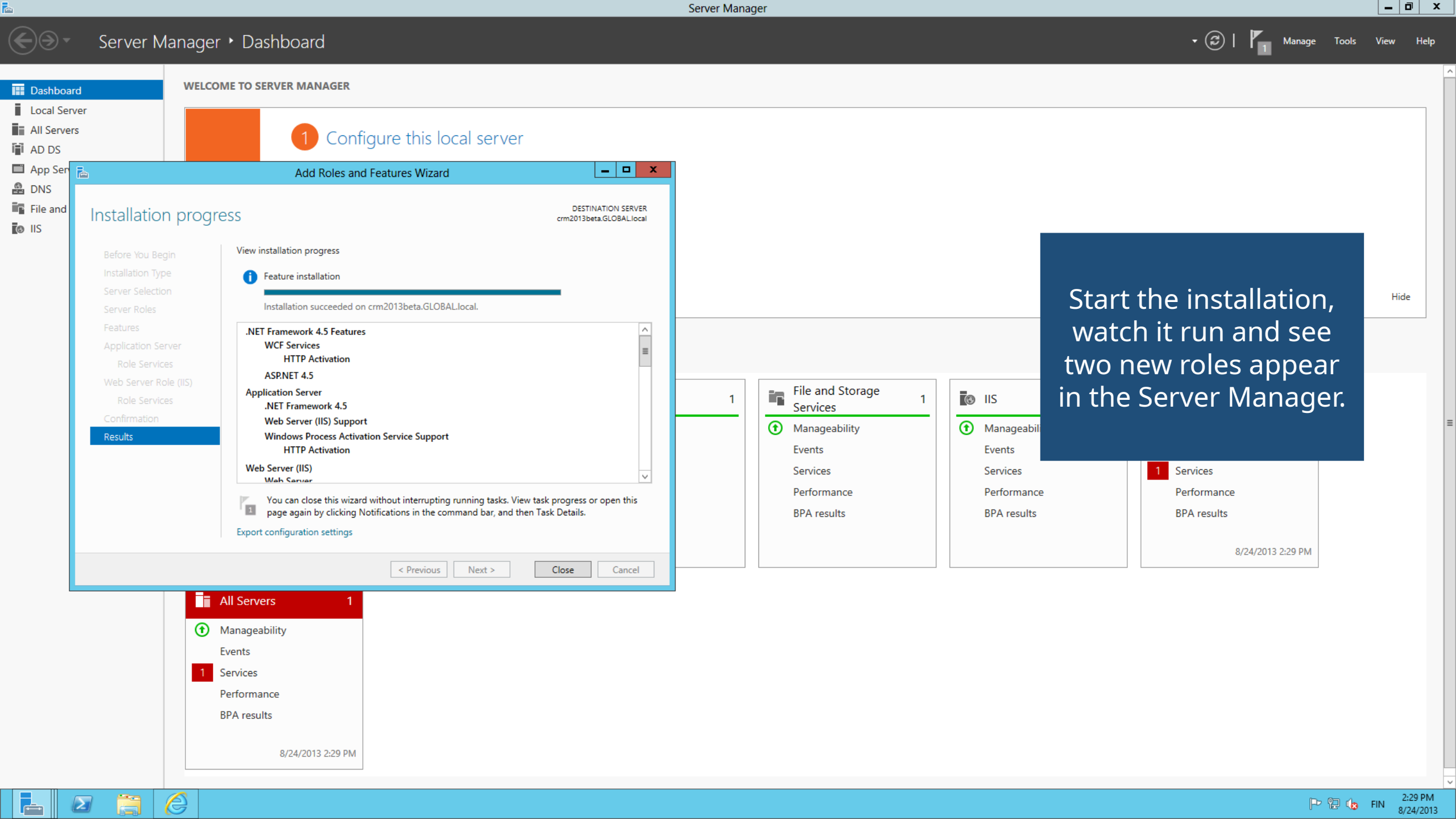
All Servers
- Manageabil
- Events
- 5 Services
- Performance
- BPA results

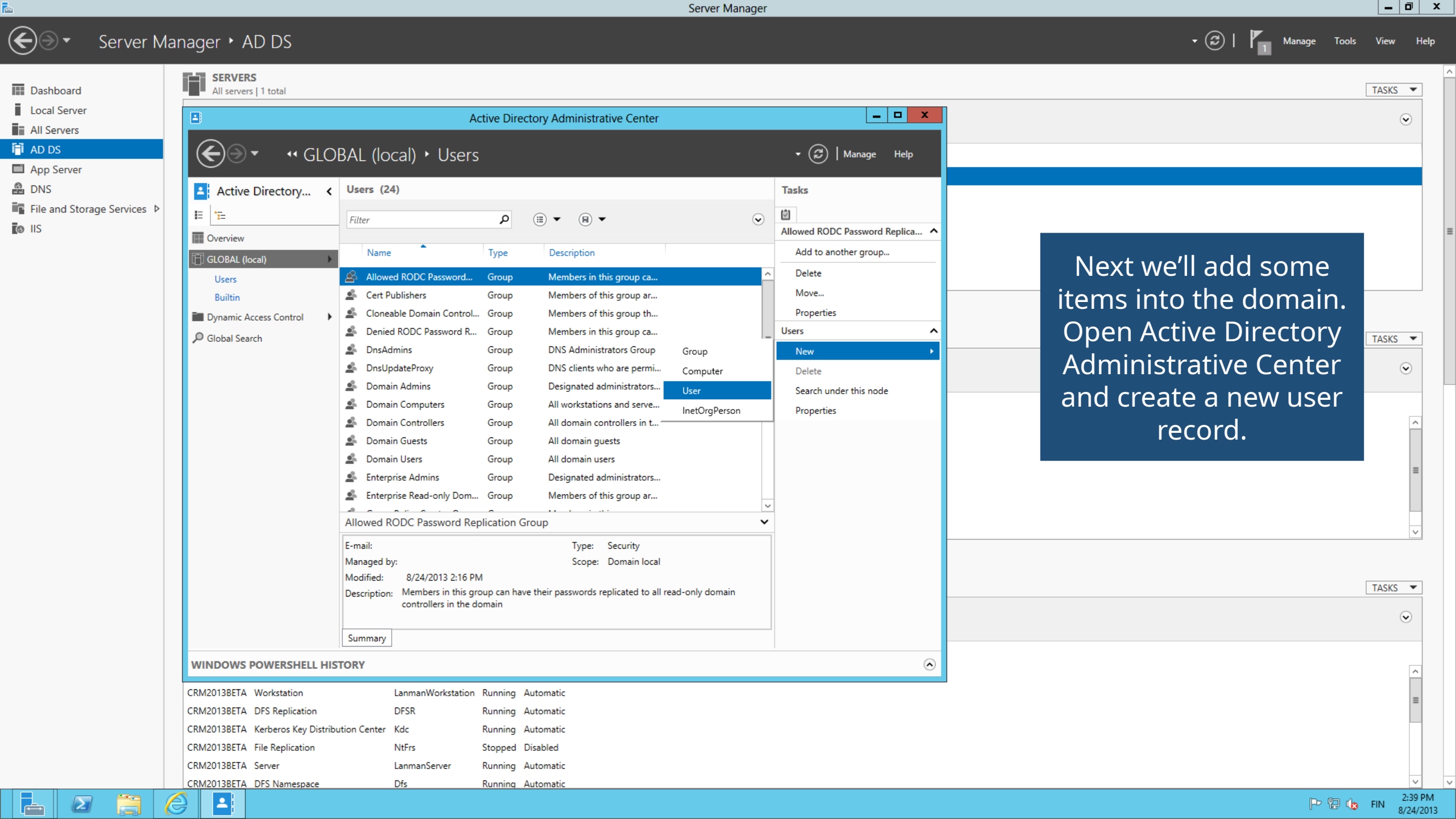
8/24/2013 2:19 PM

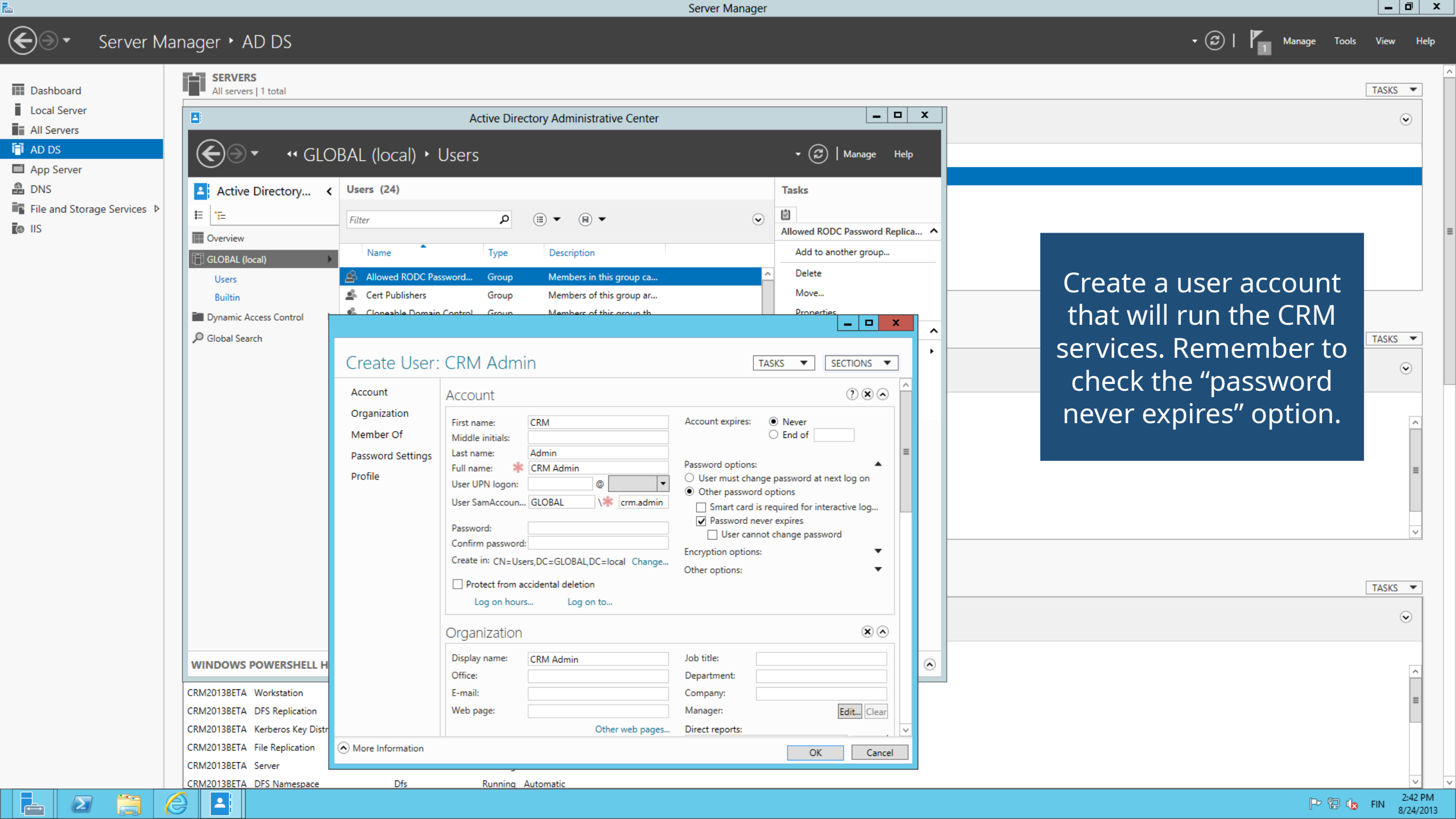
FIN 2:21 PM 8/24/2013

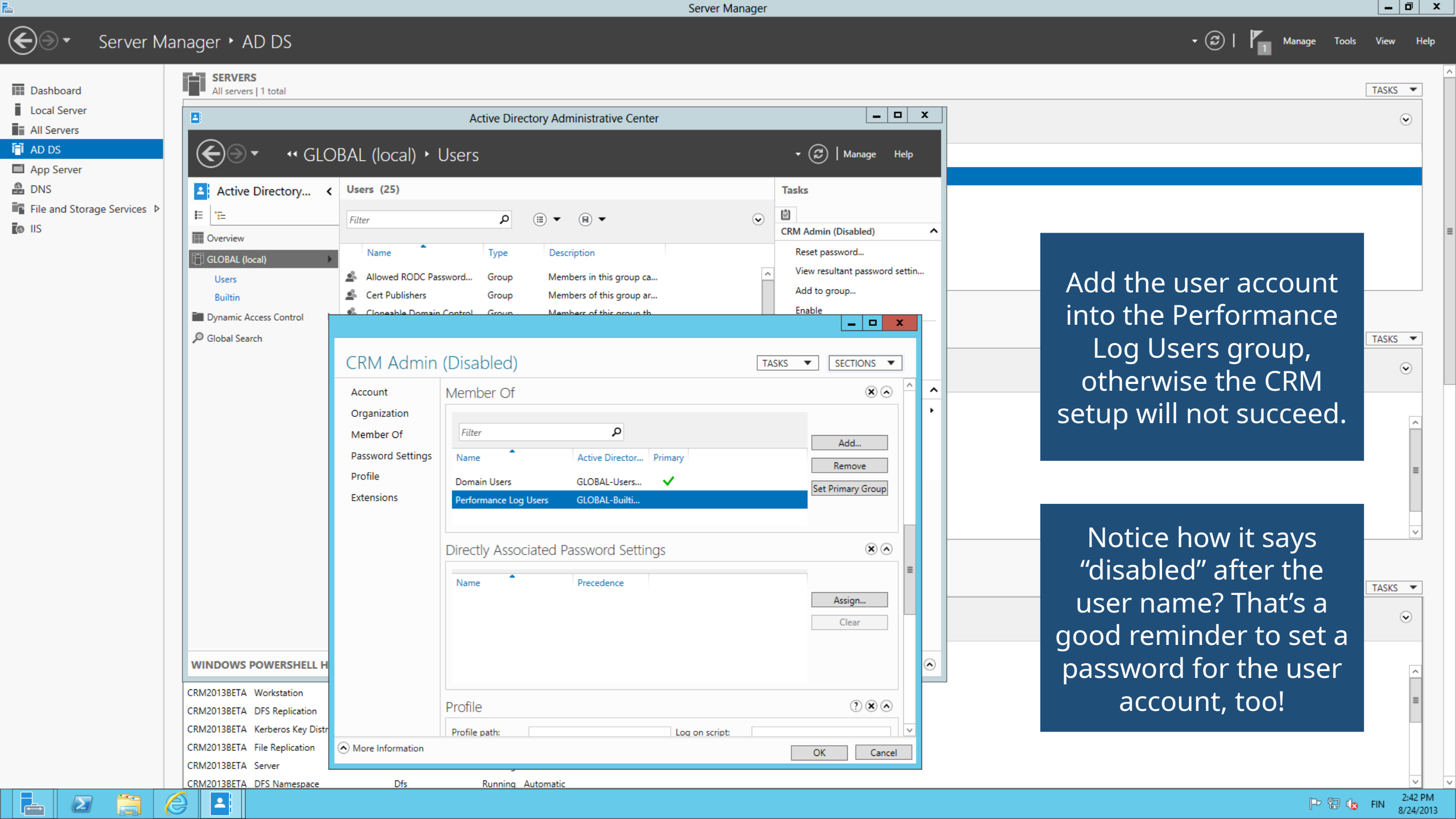

Server Manager
Server Manager ▸ Dashboard
Manage
Tools
View
Help
Dashboard
Local Server
All Servers
AD DS
DNS
File and
WELCOME TO SERVER MANAGER
1 Configure this local server
Add Roles and Features Wizard
Select role services
DESTINATION SERVER
crm2013beta.GLOBAL.local
Before You Begin
Installation Type
Server Selection
Server Roles
Features
Application Server
Role Services
Web Server Role (IIS)
Role Services
Confirmation
Results
Select the role services to install for Application Server
Role services
.NET Framework 4.5
COM+ Network Access
Distributed Transactions
WS-Atomic Transactions
Incoming Network Transactions
Outgoing Network Transactions
TCP Port Sharing
Web Server (IIS) Support
Windows Process Activation Service Support
HTTP Activation
Message Queuing Activation
Named Pipes Activation
TCP Activation
Description
HTTP Activation supports process activation via HTTP. Applications that use HTTP Activation can start and stop dynamically in response to work items that arrive over the network via HTTP.
< Previous
Next >
Install
Cancel
For the Application Server roles, select .NET Framework 4.5, Web Server (IIS) Support, HTTP Activation.
Local Server 1
Manageability
Events
5 Services
Performance
BPA results
8/24/2013 2:19 PM
All Servers
Manageabil
Events
5 Services
Performance
BPA results
8/24/2013 2:19 PM
Hide
FIN
2:24 PM
8/24/2013

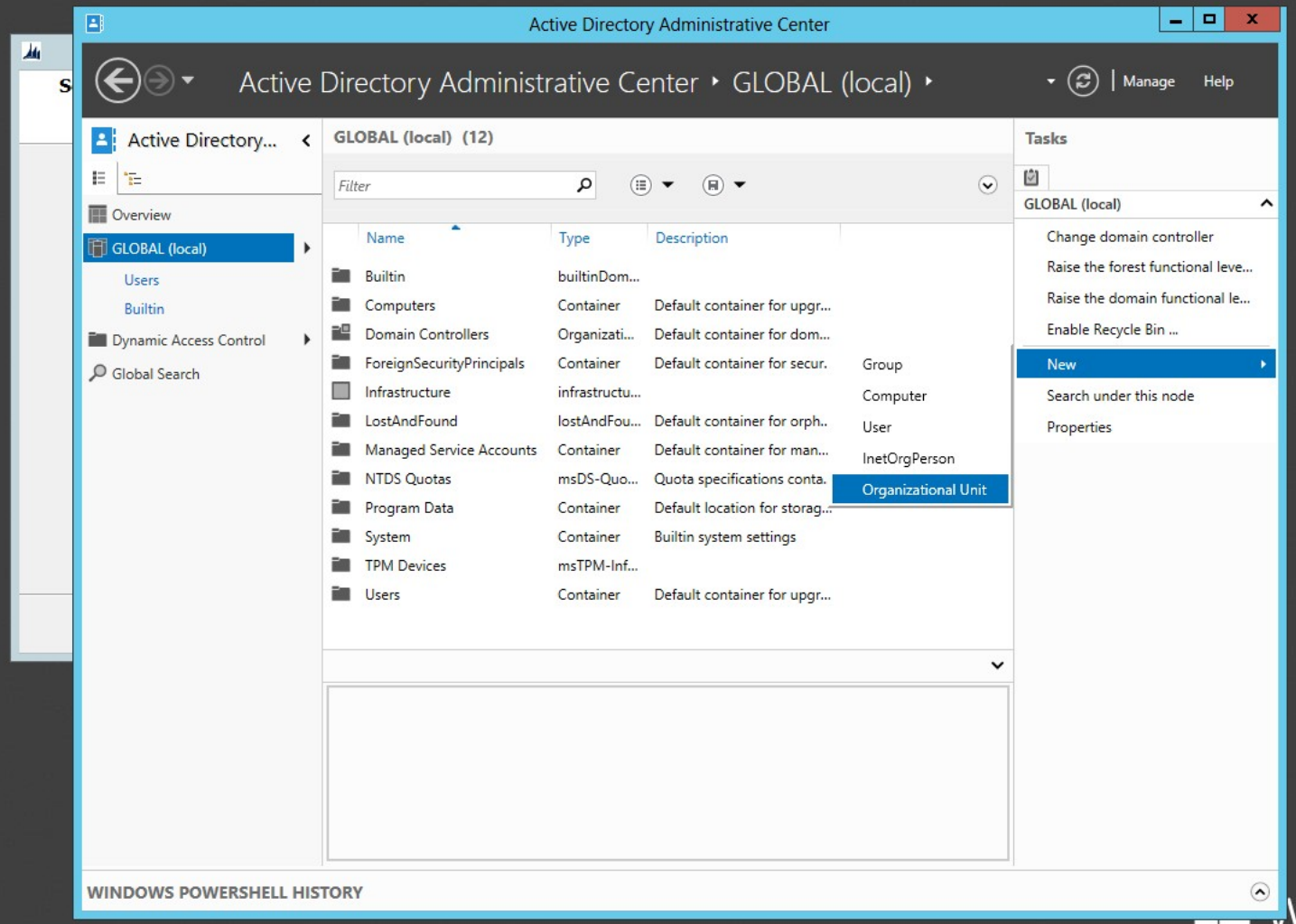

Server Manager
Server Manager ▸ Dashboard
Manage
Tools
View
Help
Dashboard
Local Server
All Servers
AD DS
DNS
File and
WELCOME TO SERVER MANAGER
1 Configure this local server
Hide
Add Roles and Features Wizard
Select role services
DESTINATION SERVER
crm2013beta.GLOBAL.local
Before You Begin
Installation Type
Server Selection
Server Roles
Features
Application Server
Role Services
Web Server Role (IIS)
Role Services
Confirmation
Results
Select the role services to install for Web Server (IIS)
Role services
IIS Client Certificate Mapping Authenticatio
IP and Domain Restrictions
URL Authorization
Windows Authentication
Application Development
FTP Server
FTP Service
FTP Extensibility
IIS Hostable Web Core
Management Tools
IIS Management Console
IIS 6 Management Compatibility
IIS Management Scripts and Tools
Management Service
Description
Management Service allows the Web server to be managed remotely from another computer using IIS Manager.
< Previous
Next >
Install
Cancel
For the IIS roles, select Management Services and ensure the other boxes are ticked as shown.
Local Server 1
Manageability
Events
5 Services
Performance
BPA results
8/24/2013 2:19 PM
All Servers
Manageabil
Events
5 Services
Performance
BPA results
8/24/2013 2:19 PM
FIN
2:25 PM
8/24/2013


Server Manager
Server Manager ▸ Dashboard
Manage
Tools
View
Help
Dashboard
Local Server
All Servers
AD DS
App Ser
DNS
File and
IIS
WELCOME TO SERVER MANAGER
1 Configure this local server
Add Roles and Features Wizard
Installation progress
DESTINATION SERVER
crm2013beta.GLOBAL.local
Before You Begin
Installation Type
Server Selection
Server Roles
Features
Application Server
Role Services
Web Server Role (IIS)
Role Services
Confirmation
Results
View installation progress
Feature installation
Installation succeeded on crm2013beta.GLOBAL.local.
.NET Framework 4.5 Features
WCF Services
HTTP Activation
ASP.NET 4.5
Application Server
.NET Framework 4.5
Web Server (IIS) Support
Windows Process Activation Service Support
HTTP Activation
Web Server (IIS)
You can close this wizard without interrupting running tasks. View task progress or open this page again by clicking Notifications in the command bar, and then Task Details.
Export configuration settings
< Previous
Next >
Close
Cancel
Start the installation, watch it run and see two new roles appear in the Server Manager.
Hide
File and Storage Services
1
Manageability
Events
Services
Performance
BPA results
IIS
Manageabil
Events
Services
Performance
BPA results
1
Services
Performance
BPA results
8/24/2013 2:29 PM
All Servers
1
Manageability
Events
1
Services
Performance
BPA results
8/24/2013 2:29 PM
FIN
2:29 PM
8/24/2013


Server Manager
Server Manager ▸ AD DS
Manage Tools View Help
Dashboard
Local Server
All Servers
AD DS
App Server
DNS
File and Storage Services
IIS
SERVERS
All servers | 1 total
TASKS
Active Directory Administrative Center
GLOBAL (local) ▸ Users
Manage Help
Active Directory...
Overview
GLOBAL (local)
Users
Builtin
Dynamic Access Control
Global Search
Users (24)
Filter
Name Type Description
Allowed RODC Password... Group Members in this group ca...
Cert Publishers Group Members of this group ar...
Cloneable Domain Control... Group Members of this group th...
Denied RODC Password R... Group Members in this group ca...
DnsAdmins Group DNS Administrators Group
DnsUpdateProxy Group DNS clients who are permi...
Domain Admins Group Designated administrators...
Domain Computers Group All workstations and serve...
Domain Controllers Group All domain controllers in t...
Domain Guests Group All domain guests
Domain Users Group All domain users
Enterprise Admins Group Designated administrators...
Enterprise Read-only Dom... Group Members of this group ar...
Allowed RODC Password Replication Group
E-mail:
Managed by:
Modified: 8/24/2013 2:16 PM
Type: Security
Scope: Domain local
Description: Members in this group can have their passwords replicated to all read-only domain controllers in the domain
Summary
Tasks
Allowed RODC Password Replica...
Add to another group...
Delete
Move...
Properties
Users
New
Delete
Search under this node
Properties
Group
Computer
User
InetOrgPerson
WINDOWS POWERSHELL HISTORY
CRM2013BETA Workstation LanmanWorkstation Running Automatic
CRM2013BETA DFS Replication DFSR Running Automatic
CRM2013BETA Kerberos Key Distribution Center Kdc Running Automatic
CRM2013BETA File Replication NtFrs Stopped Disabled
CRM2013BETA Server LanmanServer Running Automatic
CRM2013BETA DFS Namespace Dfs Running Automatic
Next we'll add some items into the domain. Open Active Directory Administrative Center and create a new user record.
FIN
2:39 PM
8/24/2013

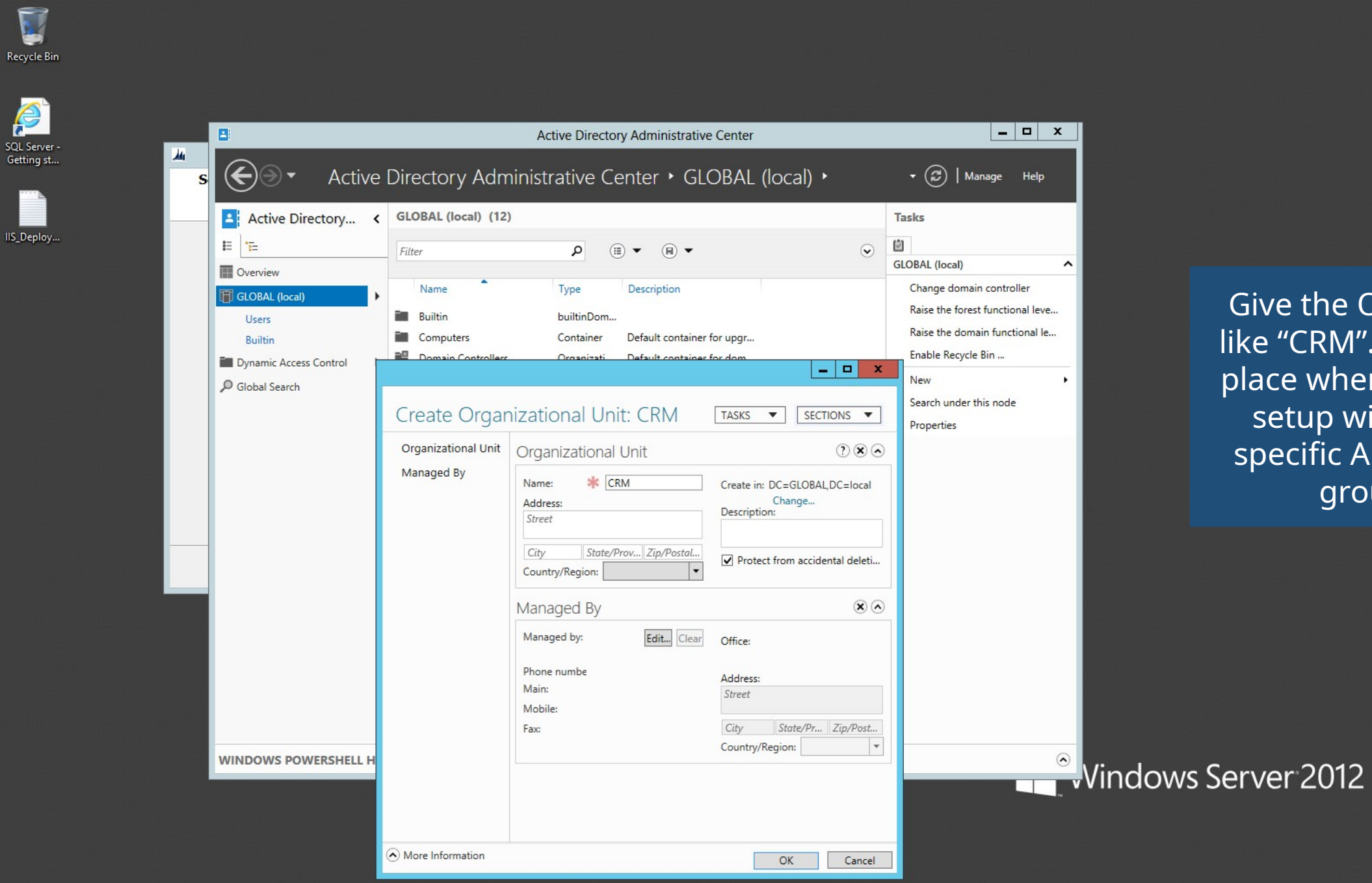

Server Manager
Server Manager ▸ AD DS
Manage Tools View Help
Dashboard
Local Server
All Servers
AD DS
App Server
DNS
File and Storage Services
IIS
SERVERS
All servers | 1 total
TASKS
Active Directory Administrative Center
GLOBAL (local) ▸ Users
Manage Help
Active Directory...
Overview
GLOBAL (local)
Users
Builtin
Dynamic Access Control
Global Search
Users (24)
Filter
Name Type Description
Allowed RODC Password... Group Members in this group ca...
Cert Publishers Group Members of this group ar...
Tasks
Allowed RODC Password Replica...
Add to another group...
Delete
Move...
Properties
Create User: CRM Admin
TASKS SECTIONS
Account
Organization
Member Of
Password Settings
Profile
Account
First name: CRM
Middle initials:
Last name: Admin
Full name: CRM Admin
User UPN logon: @
User SamAccoun... GLOBAL \ crm.admin
Password:
Confirm password:
Create in: CN=Users,DC=GLOBAL,DC=local Change...
Protect from accidental deletion
Log on hours... Log on to...
Account expires: Never End of
Password options:
User must change password at next log on
Other password options
Smart card is required for interactive log...
Password never expires
User cannot change password
Encryption options:
Other options:
Organization
Display name: CRM Admin
Office:
E-mail:
Web page:
Other web pages...
Job title:
Department:
Company:
Manager: Edit... Clear
Direct reports:
More Information
OK Cancel
WINDOWS POWERSHELL H
CRM2013BETA Workstation
CRM2013BETA DFS Replication
CRM2013BETA Kerberos Key Distr
CRM2013BETA File Replication
CRM2013BETA Server
CRM2013BETA DFS Namespace Dfs Running Automatic
Create a user account that will run the CRM services. Remember to check the “password never expires” option.
FIN 2:42 PM 8/24/2013


Server Manager
Server Manager ▸ AD DS
Manage Tools View Help
Dashboard
Local Server
All Servers
AD DS
App Server
DNS
File and Storage Services
IIS
SERVERS
All servers | 1 total
TASKS
Active Directory Administrative Center
GLOBAL (local) ▸ Users
Manage Help
Active Directory...
Overview
GLOBAL (local)
Users
Builtin
Dynamic Access Control
Global Search
Users (25)
Filter
Name Type Description
Allowed RODC Password... Group Members in this group ca...
Cert Publishers Group Members of this group ar...
Tasks
CRM Admin (Disabled)
Reset password...
View resultant password settin...
Add to group...
Enable
CRM Admin (Disabled)
TASKS SECTIONS
Account
Organization
Member Of
Password Settings
Profile
Extensions
Member Of
Filter
Name Active Director... Primary
Domain Users GLOBAL-Users...
Performance Log Users GLOBAL-Builti...
Add...
Remove
Set Primary Group
Directly Associated Password Settings
Name Precedence
Assign...
Clear
Profile
Profile path:
Log on script:
More Information
OK Cancel
WINDOWS POWERSHELL H
CRM2013BETA Workstation
CRM2013BETA DFS Replication
CRM2013BETA Kerberos Key Distr
CRM2013BETA File Replication
CRM2013BETA Server
CRM2013BETA DFS Namespace Dfs Running Automatic
Add the user account into the Performance Log Users group, otherwise the CRM setup will not succeed.
Notice how it says “disabled” after the user name? That’s a good reminder to set a password for the user account, too!
FIN
2:42 PM
8/24/2013

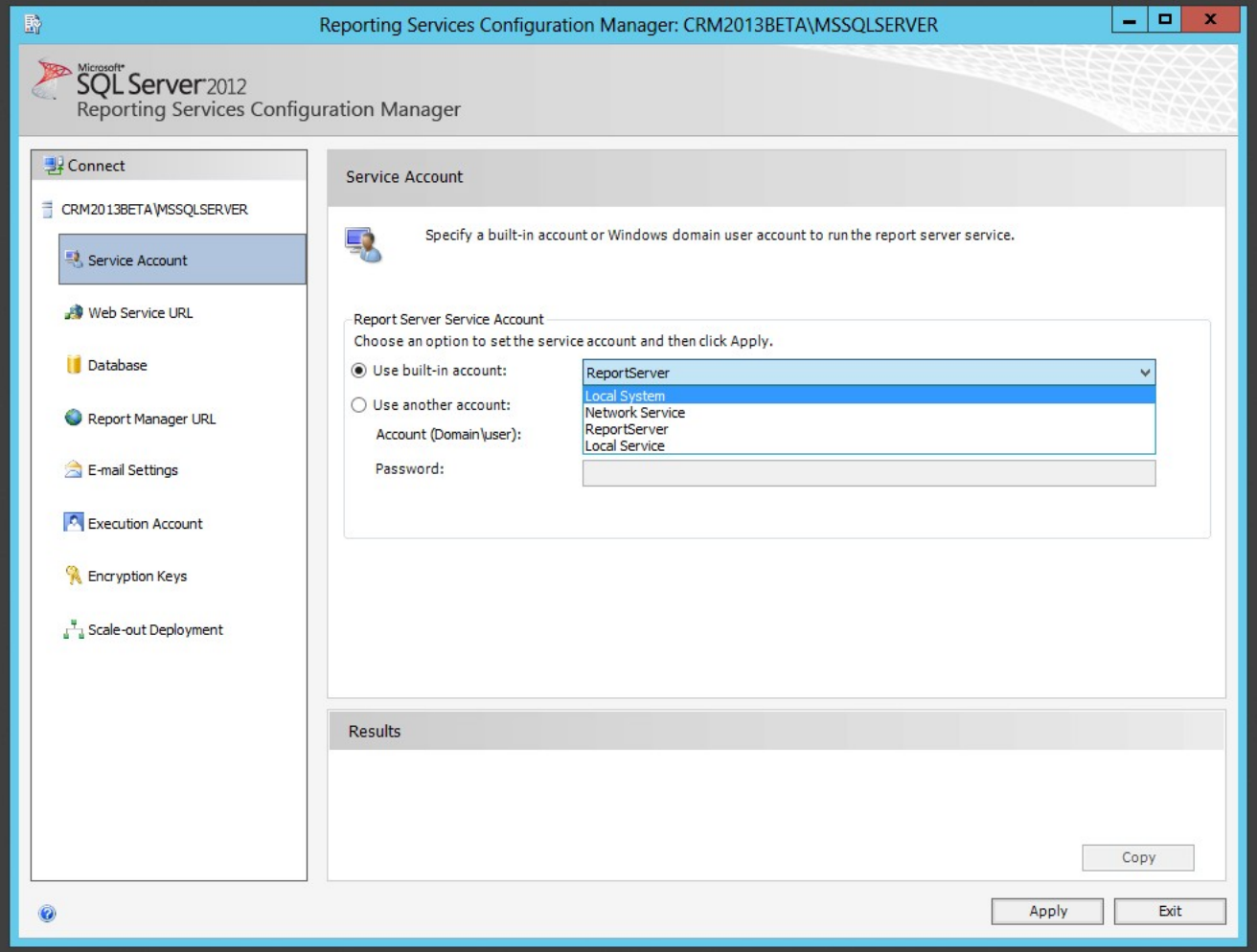


While remaining in the AD Admin Center, create a new Organizational Unit.

Windows Server 2012

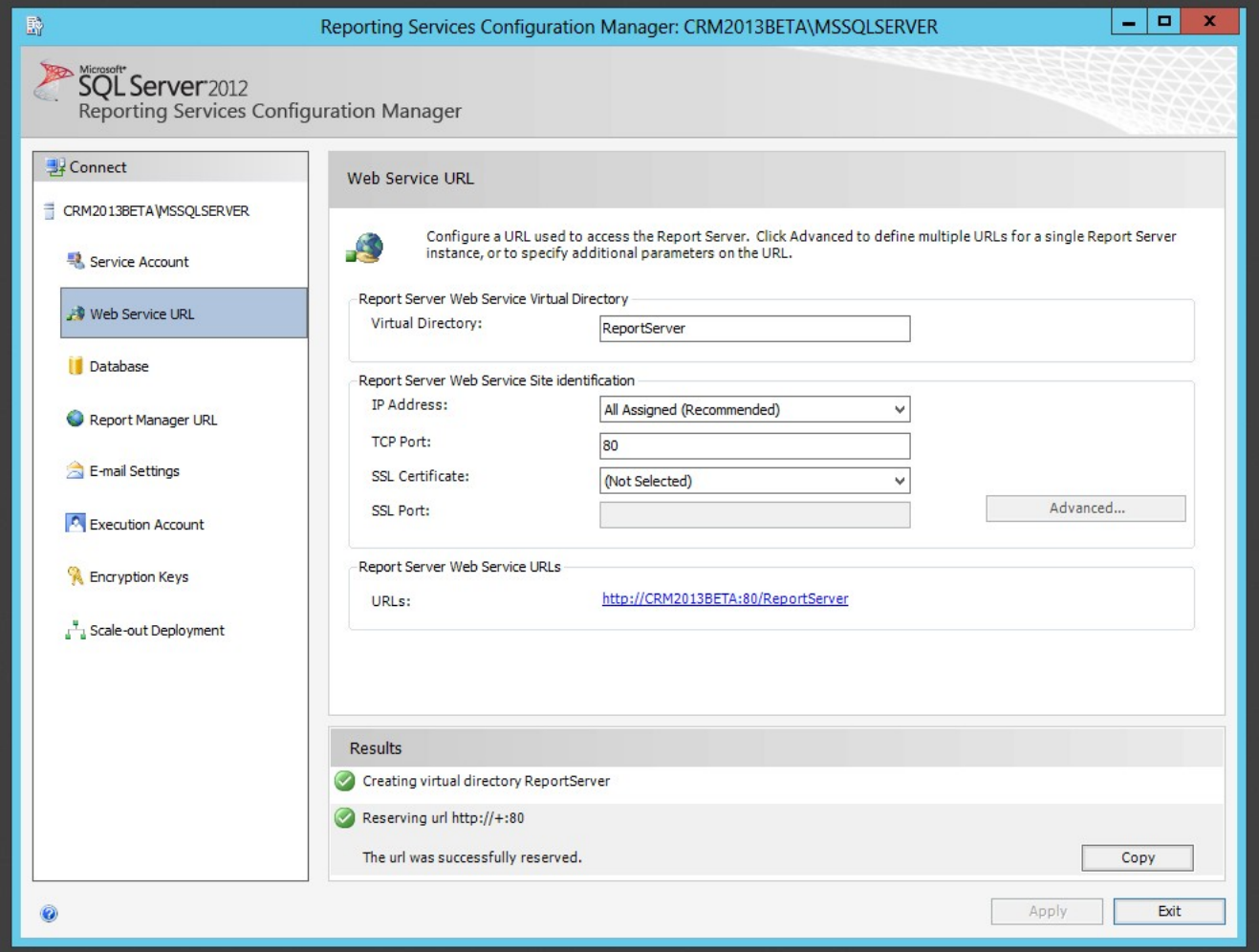


Give the OU a name like “CRM”. This is the place where the CRM setup will add its specific AD security groups.



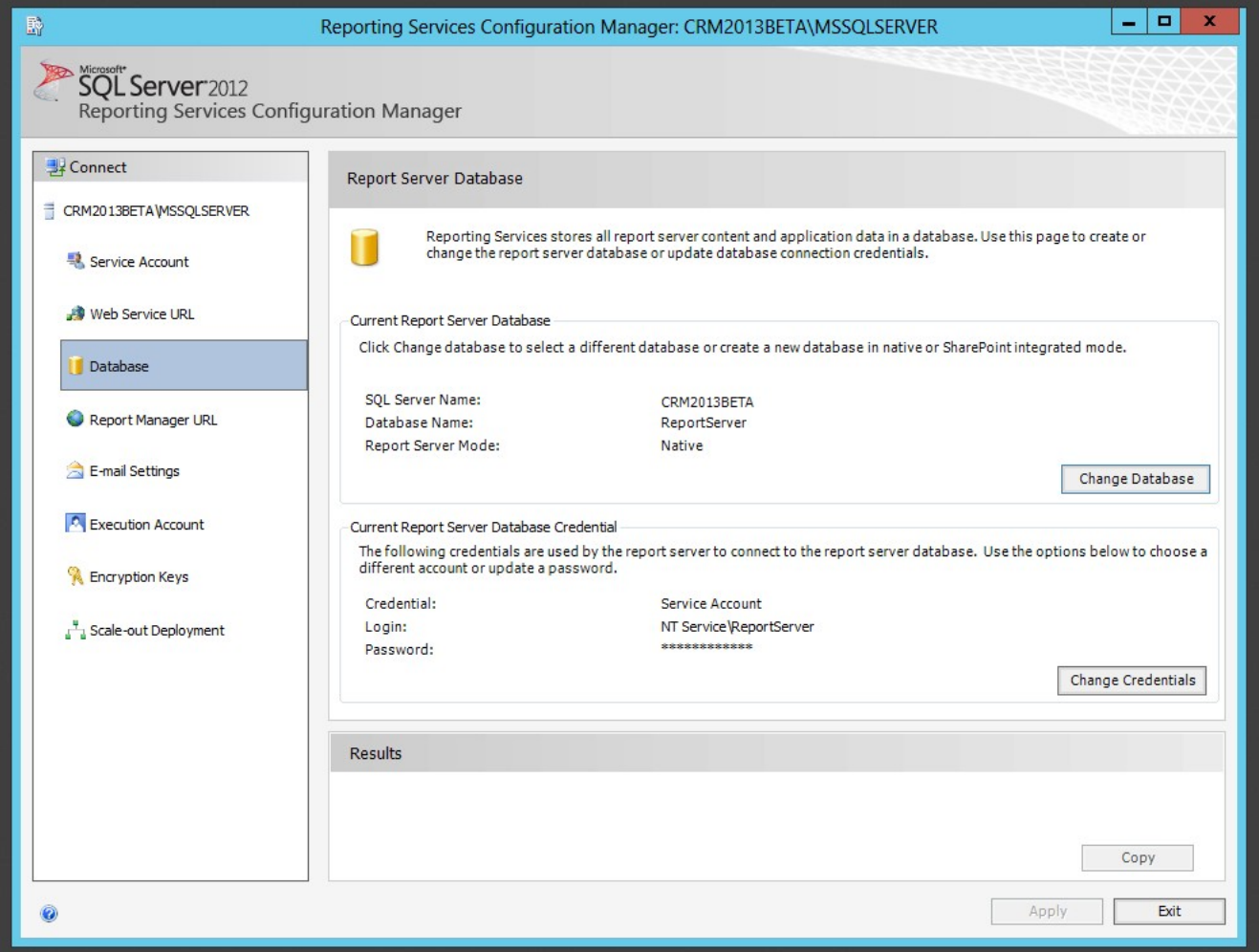
Reporting Services comes installed on the Azure SQL 2012 Enterprise image, but we'll still need to perform a few configuration steps. Open the Reporting Services Configuration Manager and connect to the local server

On the Service Account tab, change the account to Local System, since using the ReportServer local account is not supported by CRM.



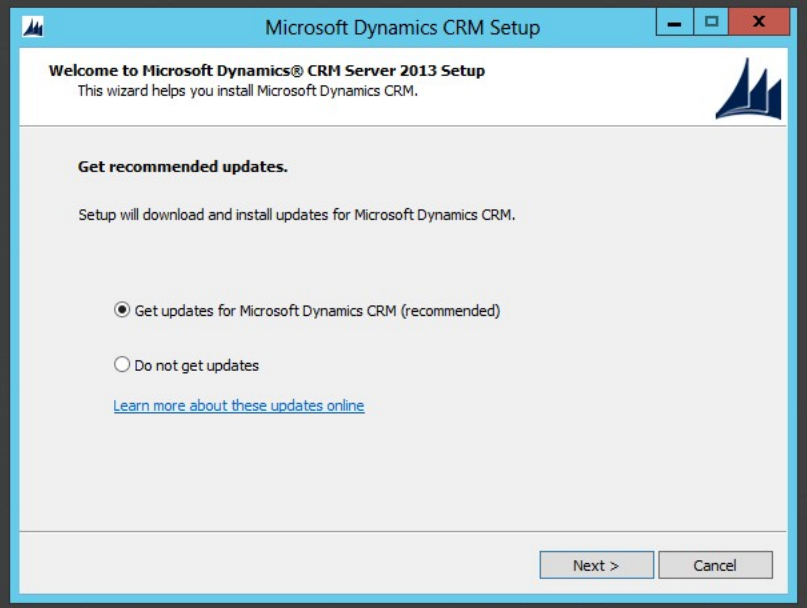
Proceed to the Web Service URL tab. Click Apply to create the IIS directory with default settings.

Windows Server 2012



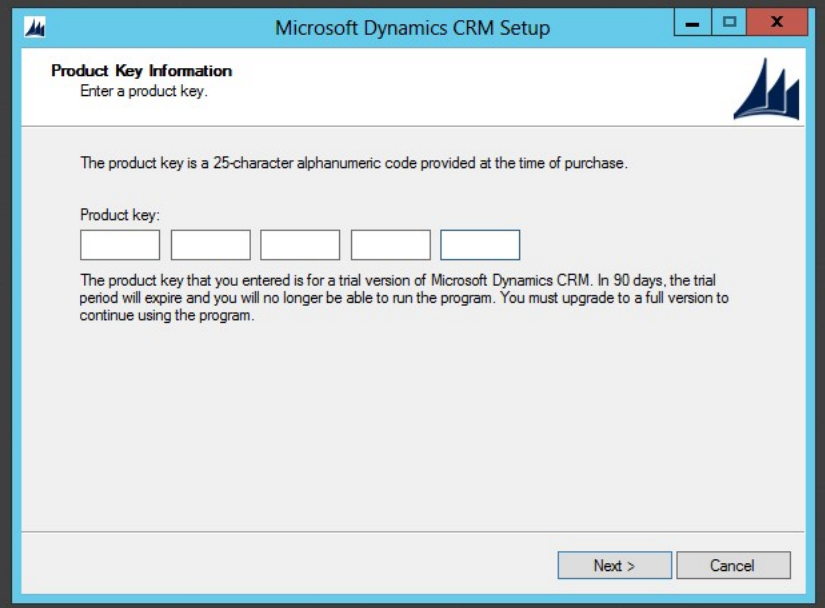
On the Database tab click Change Database and use the defaults to create a new Report Server Database. Now we're ready with the SSRS configuration part.

Windows Server 2012



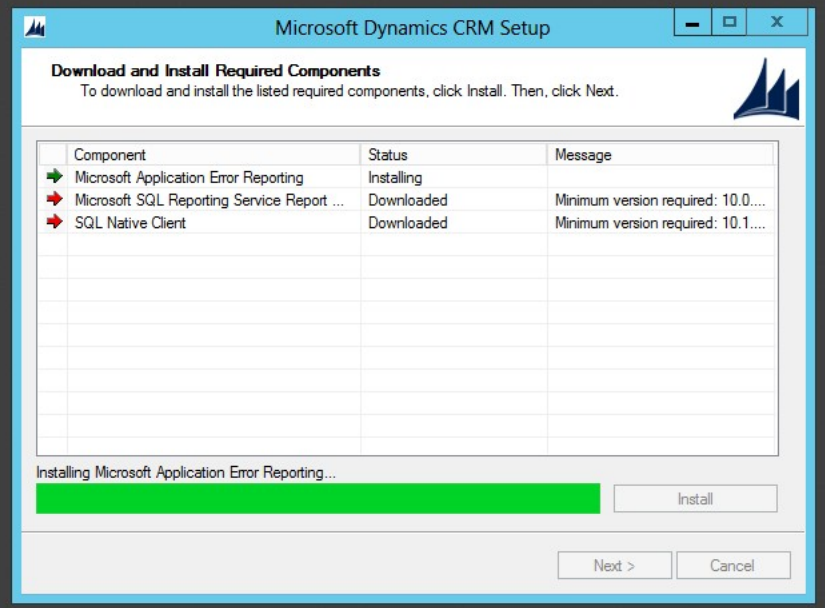
Launch the CRM Server setup, give a path for installation file extraction, then allow the setup to check for updates to those files before proceeding further.

Windows Server 2012



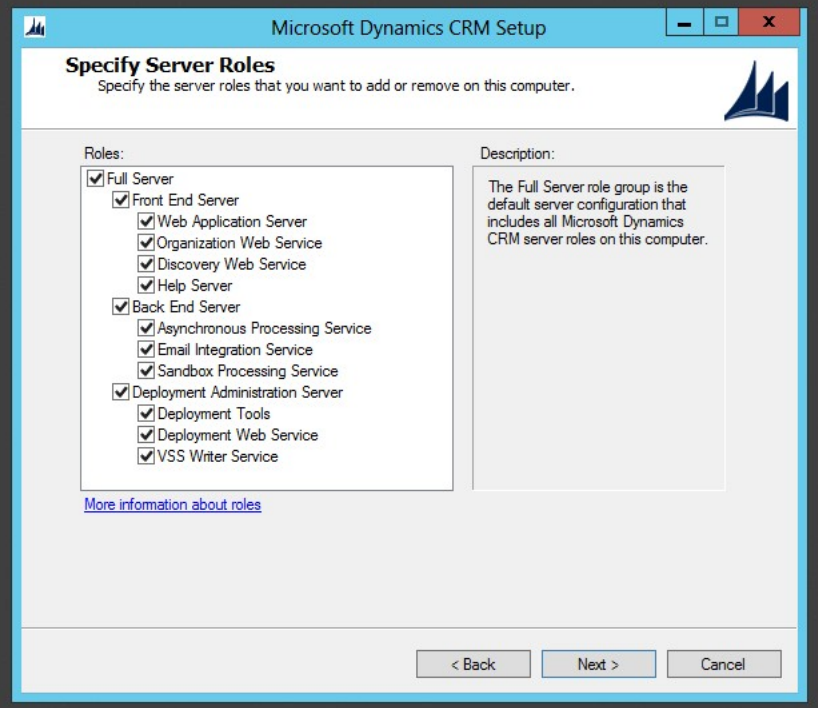
Enter the CRM product key, either a 90 day trial or MSDN full product key. Note: do not use the Workgroup Edition, always go for Enterprise.

Windows Server 2012



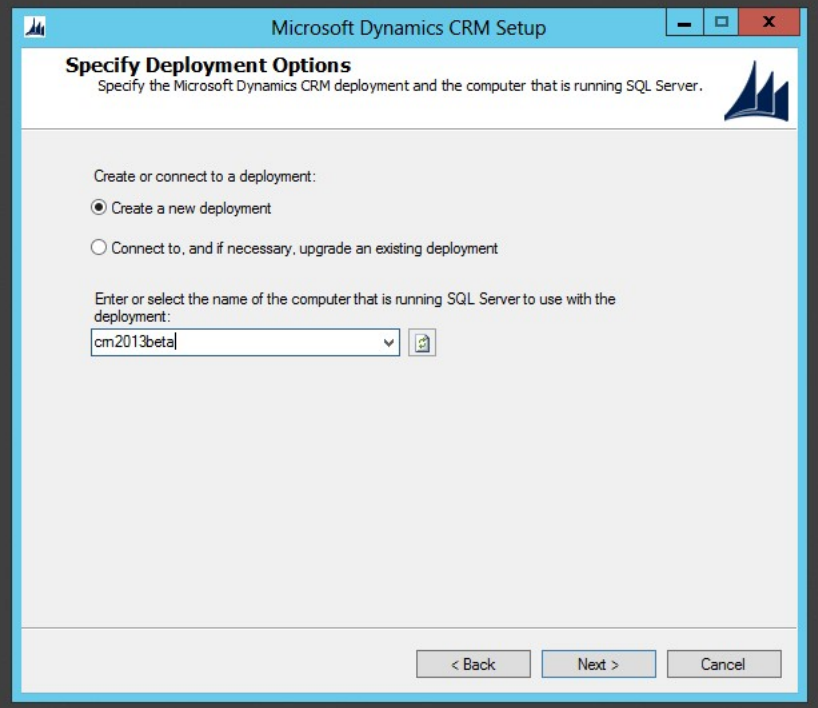
The setup will detect missing required components for error reporting, SSRS and SQL Native Client. Allow it to install the components.

Windows Server 2012



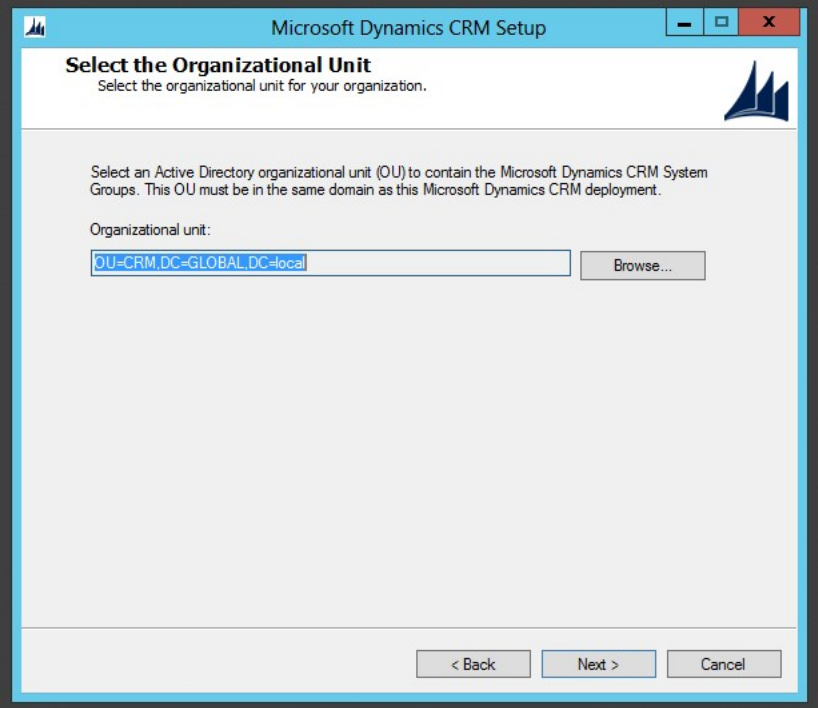
Since we're building a single box development environment, select all the available CRM server roles for this installation.

Windows Server 2012



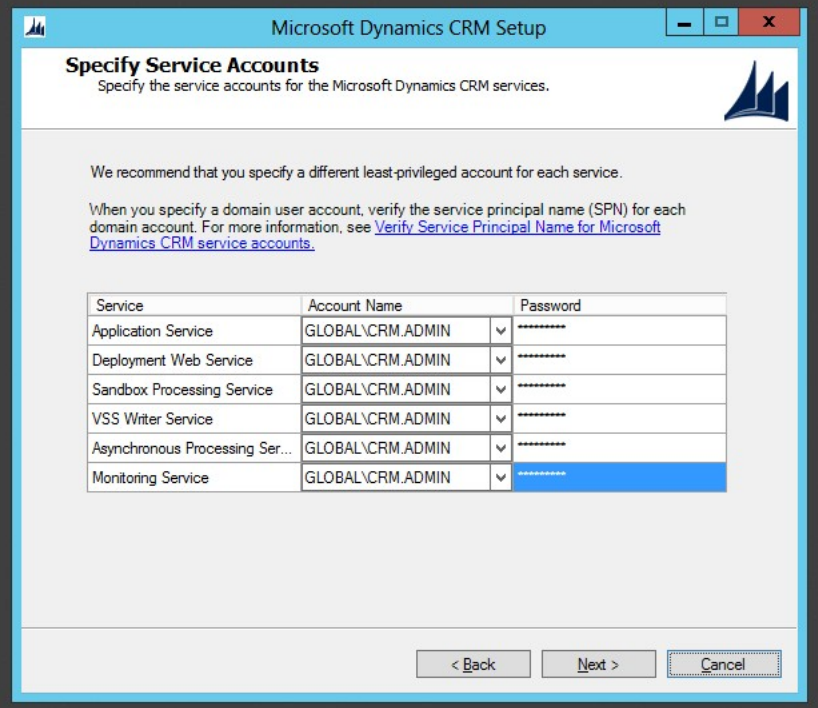
Select “Create a new deployment” and enter the name of your server as the SQL Server instance to be used.

Windows Server 2012



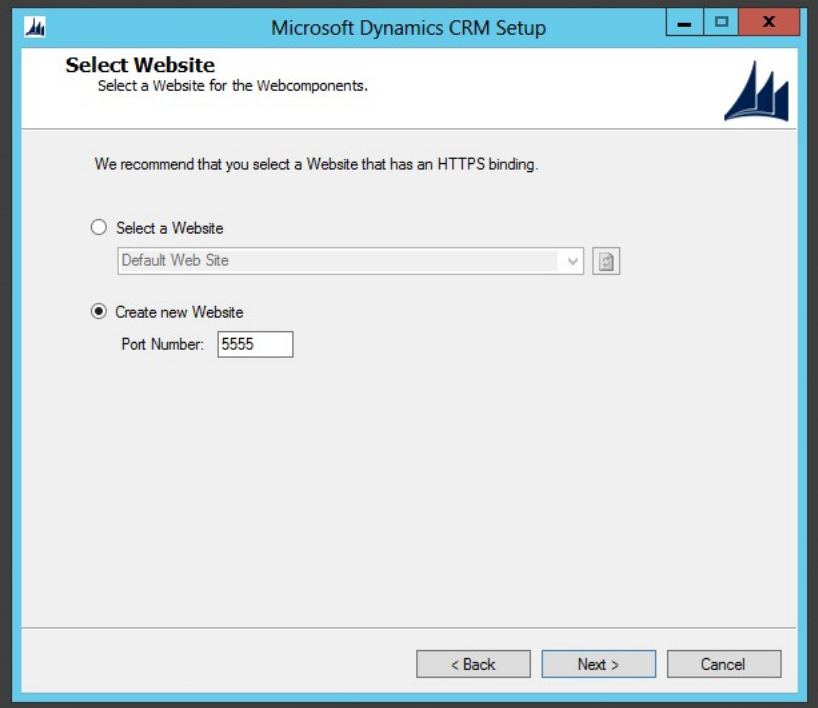
Browse and select the Active Directory Organization Unit (OU) you created in an earlier stage.

Windows Server 2012



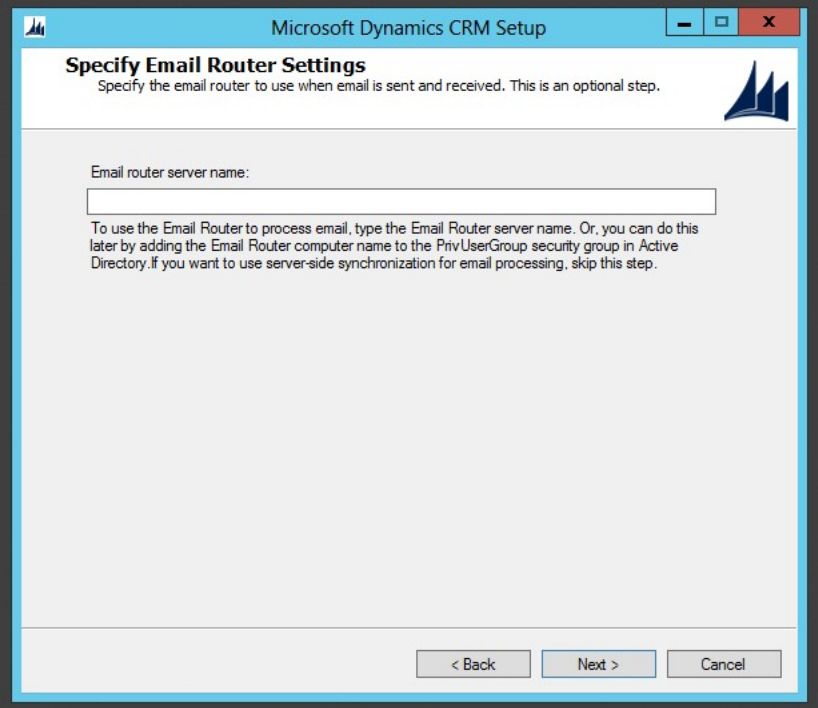
Enter the account name and credentials for all the service accounts required. In a development environment the same account can be used for all services.

Windows Server 2012



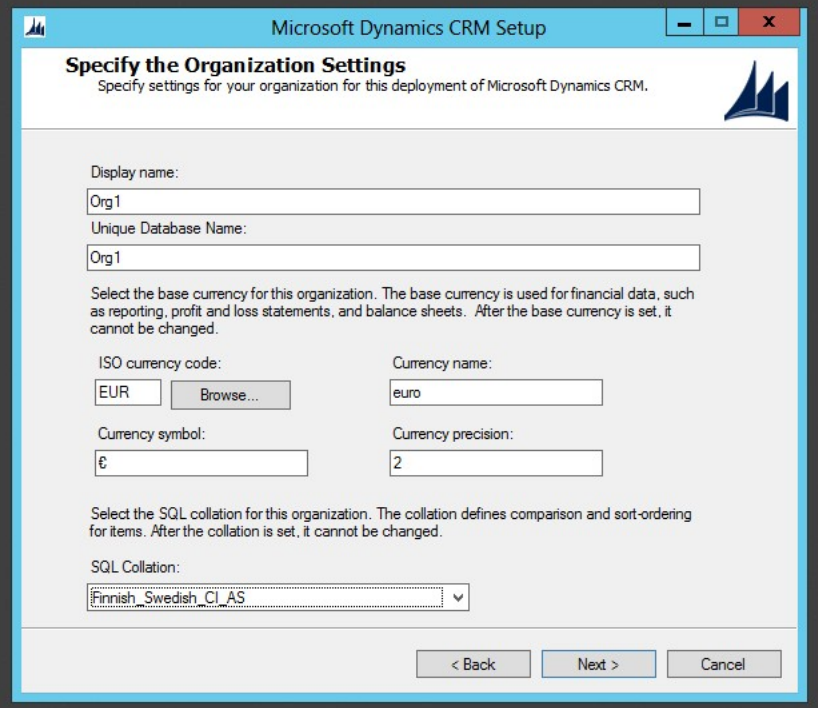
Create a new website for CRM at port 5555, in case you ever need to work with other services that require using the default web site (like ADFS)

Windows Server 2012



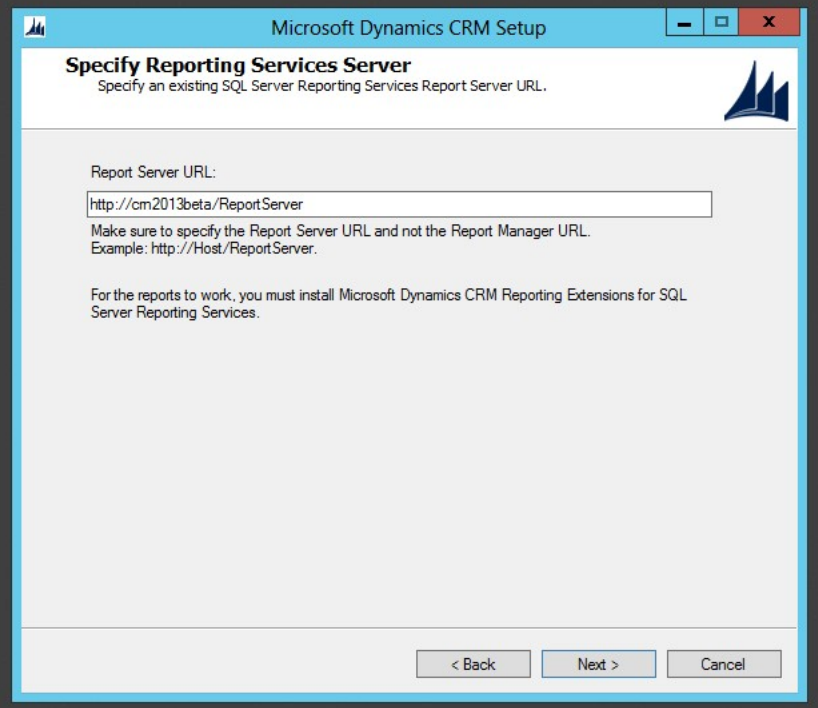
Unless you plan to have the development server send out emails into the real world, leave the email router server name blank.

Windows Server 2012



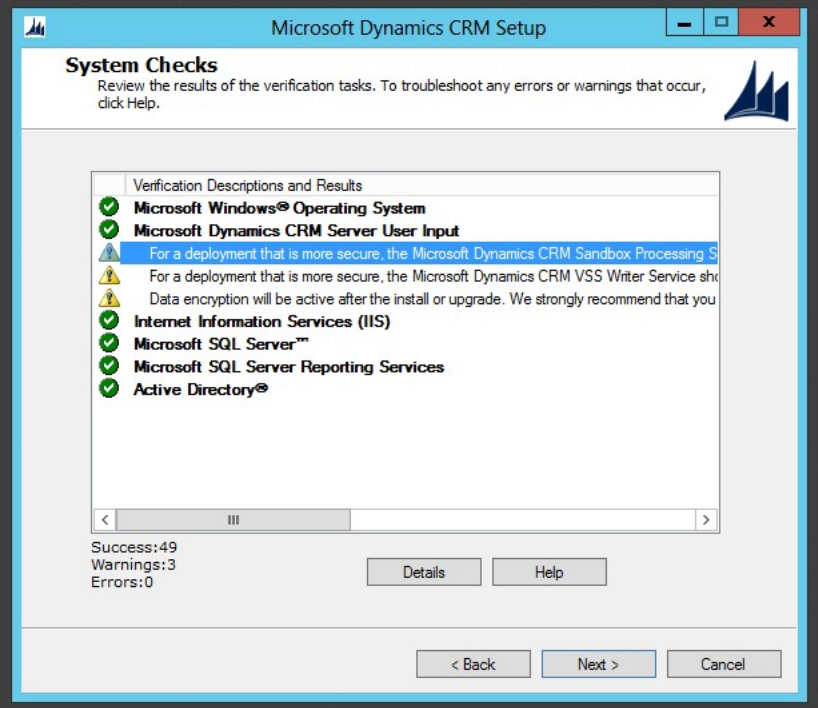
Choose your preferred organization settings for the first (default) CRM organization. Remember that you can always add more organizations after the installation is done.

Windows Server 2012



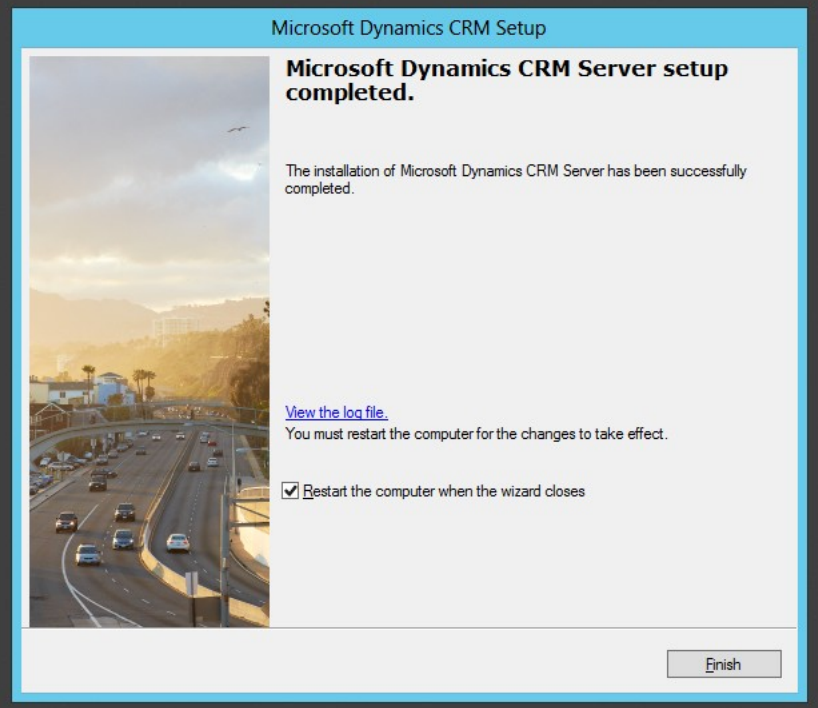
If you are using the default settings for SSRS, the Report Server URL offered by the setup should be correct. If in doubt, test the URL in a browser window.

Windows Server 2012



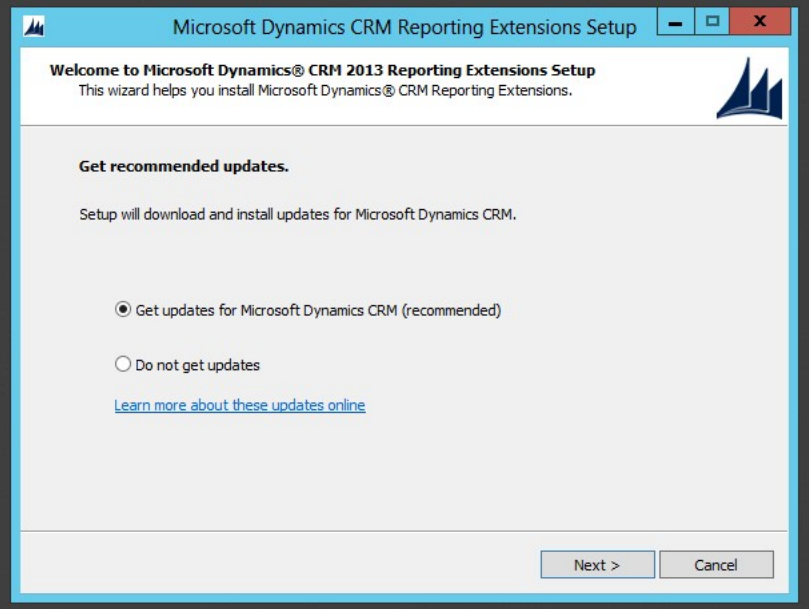
The system checks will give you warnings on security and encryption, which you can ignore in this case. Now we're ready to start the CRM server installation.

Windows Server 2012



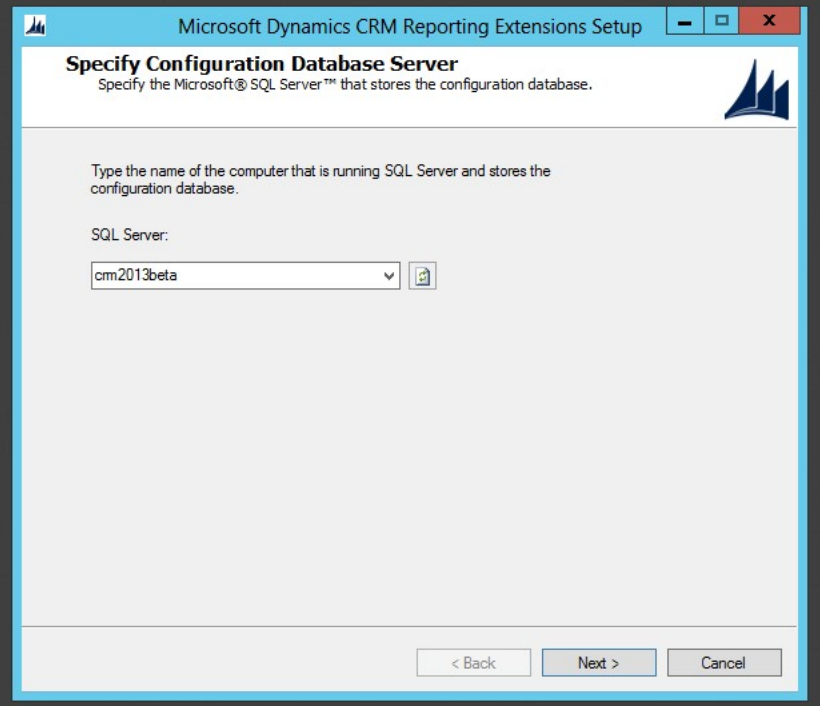
If everything went according to plan, you'll see the "setup completed" screen in some 10 minutes. Restart the server.

Windows Server 2012



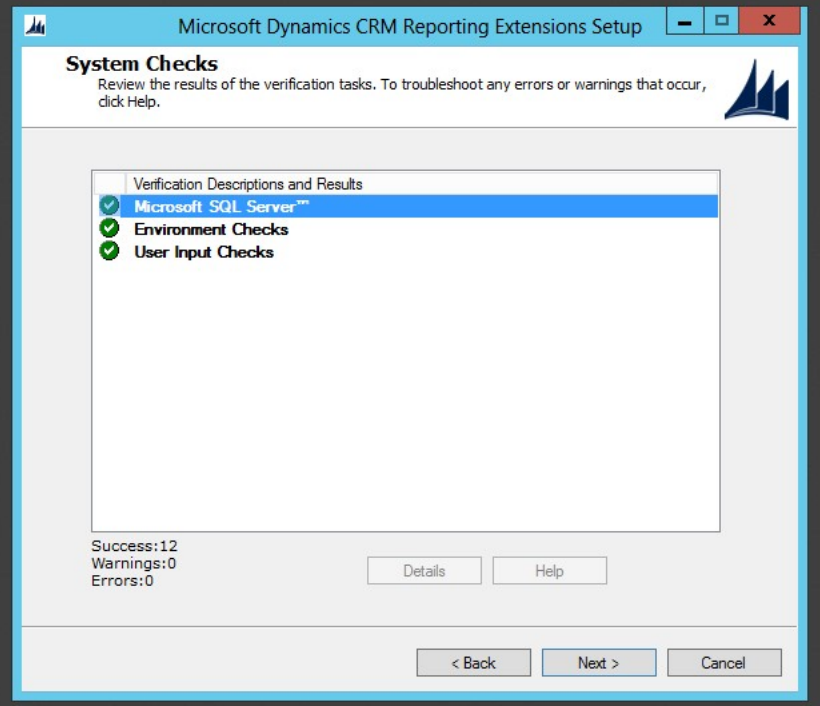
Run the setup for CRM Reporting Extensions. As before, allow the setup to retrieve latest updates from the web.

Windows Server 2012



Enter the server name as the SQL Server instance to which the reports will be deployed on.

Windows Server 2012



System checks should give you all green at this point. Start the installation.

Windows Server 2012

After some minutes of deploying the default reports onto the first CRM organization the setup will complete.

Windows Server 2012

http://crm2013beta:5555/Org1/main.aspx#368692650

Dashboards: Sales Activity S...

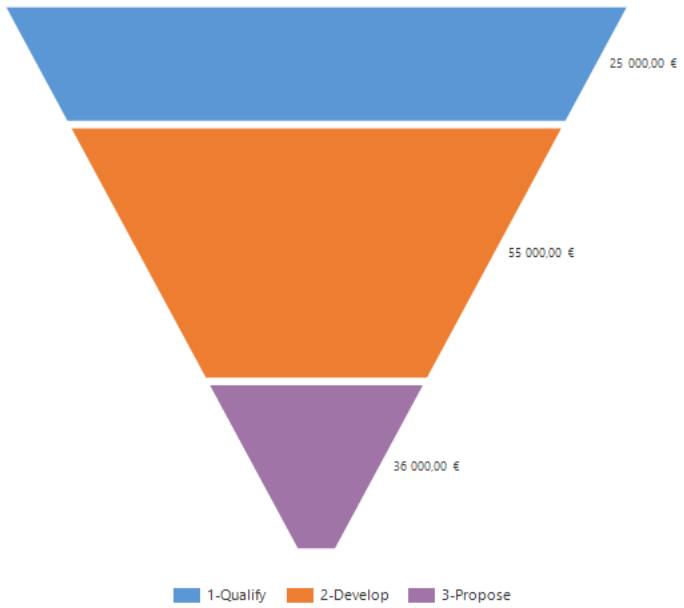
Microsoft Dynamics CRM | SALES | Dashboards | Create | First name Last n... Org1

SAVE AS | NEW | SET AS DEFAULT | REFRESH ALL | ADVANCED FIND

Sales Activity Social Dashboard

Sales Pipeline

My Open Opportunities



what's new

POST

All records | Both | Auto posts | User posts

Delivery never arrived (sample)
Case: Closed by First name Last name for Account Alpine Ski House (sample).
On Delivery never arrived (sample)'s wall
Today 24.8.2013 16:20

Operating manual required (sample)
Case: Closed by First name Last name for Account A. Datum Corporation (sample).
On Operating manual required (sample)'s wall
Today 24.8.2013 16:20

Product catalog requested (sample)
Case: Closed by First name Last name for Account Fourth Coffee (sample).
On Product catalog requested (sample)'s wall
Today 24.8.2013 16:20

Product damaged (sample)
Case: Closed by First name Last name for Account Litware, Inc. (sample).
On Product damaged (sample)'s wall
Today 24.8.2013 16:20

Product information required (sample)
Case: Closed by First name Last name for Account Coho Winery (sample).
On Product information required (sample)'s wall
Today 24.8.2013 16:20

Product question (sample)
Case: Closed by First name Last name for Contact Jim Glynn (sample).
On Product question (sample)'s wall
Today 24.8.2013 16:20

Product service time (sample)
Case: Closed by First name Last name for Account Fabrikam, Inc. (sample).

Edit

0 followers

Open the CRM website to verify everything is working. Go to Settings – Data Management – Sample Data to populate the views, charts and feeds with test data.

Leads by Source

My Open Leads

Top Opportunities

My Open Opportunities

6 orders of Product SKU JJ202...

Top Customers

My Closed Opportunities in Current Fiscal Year

Litware, Inc. (sample)

FIN 6:37 PM 8/24/2013