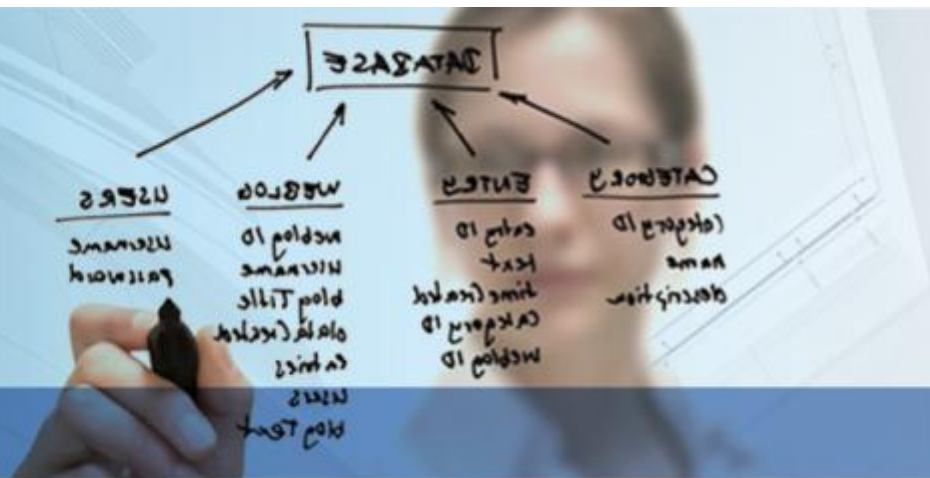


# CRM 2011 Setup and Install

STRATEGY ■ CONSULTING ■ SUPPORT



# Setup & Install

- Install considerations
- Install and Setup
- Deployment Manager demo
- Upgrade
- Multi-Language Packs
- Licensing

# Install Considerations

STRATEGY ■ CONSULTING ■ SUPPORT

# System Requirements

## • Hardware

Component	Minimum	Recommended
Processor	x64 architecture or compatible dual-core 1.5 GHz processor	Quad-core x64 architecture 2 GHz CPU or higher such as AMD Opteron or Intel Xeon systems
Memory	2 GB RAM	8 GB RAM or more
Hard disk	10 GB of available hard disk space	40 GB or more of available hard disk space

## • Software

- Windows Server 2008 (also R2) Standard (x64) SP2 or later version
  - Windows Server 2008 (also R2) Enterprise (x64) SP2 or later version
  - Windows Server 2008 (also R2) Datacenter (x64) SP2 or later version
  - Windows Web Server 2008 (also R2) (x64) SP2 or later version
  - Windows Small Business Server 2008 (also R2) Premium x64 or later version
  - Windows Small Business Server 2008 (also R2) Standard x64 or later version
- IIS 7.x Native Mode (Kernel Mode recommended)

# System Requirements

## ● SQL Server

- Microsoft SQL Server 2008, Standard Edition, x64 SP1 or later version
- Microsoft SQL Server 2008, Enterprise Edition, x64 SP1 or later version
- Microsoft SQL Server 2008 Datacenter x64 SP1 or later version
- Microsoft SQL Server 2008 Developer x64 SP1 or later version (for non-production environments only)

# Language Support

- CRM 2011 supports multi-lingual CRM deployments
- Multi-lingual Configuration Rules
  - CRM Rule
    - Base language of CRM server and CRM client has to match
  - Server Rule
    - Server Stack has to be all in the same language\*1
    - Server Stack has to either match the CRM Server base language, or be English
  - Client Rule
    - Client Stack does not have to match the CRM Client base language
    - Client Stack can be in different languages in a single deployment

[\*1 note - unless needed components are not available in your own language]

# Language Support

<ul style="list-style-type: none"> <li>Microsoft Dynamics CRM Server and Microsoft Dynamics CRM for Outlook</li> </ul>	<p>It is recommended that the language version of the Dynamics CRM for Outlook matches your Microsoft Outlook version, as well as your language preferences on the Dynamics CRM server.</p> <p>For the languages that Dynamics CRM for Outlook is not available as a full installation, users should install the corresponding MUI pack</p>	<p>All available Microsoft Dynamics CRM languages versions</p>
--	---	--

**New Organization Wizard**

**Specify the Organization Settings**  
Specify the name of your organization. After the name, base currency, base language, and SQL collation are set, they cannot be changed.

Display name:  
German MUI

Unique Database Name:  
de

Base Currency

ISO currency code: USD  Currency name: US Dollar

Currency symbol: \$ Currency precision: 2

Base Language:  
English (United States)  
German  
English (United States)

SQL Collation:  
Latin1\_General\_CI\_AI

# Level of localization

- Microsoft Dynamics CRM Online

- All 41 languages (including English) are supported 25 organization base languages and 41 language packs.
- These languages are:
  - Arabic, Basque, Bulgarian, Catalan, Chinese (Hong Kong), Chinese (PRC), Chinese (Taiwan), Croatian, Czech, Danish, Dutch, English, Estonian, Finnish, French, Galician, German, Greek, Hebrew, Hindi, Hungarian, Italian, Japanese, Kazakh, Korean, Latvian, Lithuanian, Norwegian (Bokmal), Polish, Portuguese (Brazil), Portuguese (Portugal), Romanian, Russian, Serbian (Latin), Slovak, Slovenian, Spanish (International), Swedish, Thai, Turkish, Ukrainian



# Level of localization

- Microsoft Dynamics CRM 2011 On-Premise
  - 25 language-specific CRM DVDs
  - 13 of those 25 languages are fully localized, and the other 12 are partially localized. Partially localized means that some server components are shipped in English in those languages' DVDs.
  - The additional 16 languages are released only as Language Packs

# Level of Localization (Distribution)

- The 13 fully localized languages are:
  - Chinese (Hong Kong), Chinese (PRC), Chinese (Taiwan), Danish, Dutch, English, French, German, Italian, Japanese, Korean, Portuguese (Brazil) and Spanish (International)
- The 12 partially localized languages are:
  - Arabic, Czech, Finnish, Greek, Hebrew, Hungarian, Norwegian (Bokmal), Polish, Portuguese (Portugal), Russian, Swedish and Turkish
- The additional 16 languages are released only as Language Packs:
  - Basque, Bulgarian, Catalan, Croatian, Estonian, Galician, Hindi, Kazakh, Latvian, Lithuanian, Romanian, Serbian (Latin), Slovak, Slovenian, Thai and Ukrainian.

# Level of Localization

The components shipping in English for the 12 partial languages are:

- Administrator's Guide Deployment Manager
- E-mail Router
- Implementation Guide
- Planning Tools
- Server Tools
- Article Templates
- KB Templates
- Sample Data
- Workflows
- EDW Help
- Help Visor Videos (Voice Over)
- CRM Online for Outlook Installation Guide
- Server Setup
- SDK(The SDK conceptual are localized into Japanese and Chinese (PRC) only.)
- Help Visor Videos (Visuals)

# Level of Localization (Outlook client)

- The complete Outlook client is only released for 25 languages:
  - Arabic, Chinese (Hong Kong), Chinese (PRC), Chinese (Taiwan), Czech, Danish, Dutch, English, Finnish, French, German, Greek, Hebrew, Hungarian, Italian, Japanese, Korean, Norwegian (Bokmal), Polish, Portuguese (Brazil), Portuguese (Portugal), Russian, Spanish (International), Swedish and Turkish
- The additional 16 languages for the Outlook client are only released as Language Packs that can be installed on top of any of the 25 languages:
  - Basque, Bulgarian, Catalan, Croatian, Estonian, Galician, Hindi, Kazakh, Latvian, Lithuanian, Romanian, Serbian (Latin), Slovak, Slovenian, Thai and Ukrainian

# Install and Setup

STRATEGY ■ CONSULTING ■ **SUPPORT**

# What is installed (Web Components)

Component	Name	Description
Application Pool	CRMAppPool	Microsoft Dynamics CRM Server Setup creates a separate application pool for the Microsoft Dynamics CRM application.
Application Pool	CRMDeploymentServiceAppPool	Microsoft Dynamics CRM Server Setup creates a separate application pool for the Deployment Web Service.
Site	Microsoft Dynamics CRM	Web site for Microsoft Dynamics CRM.
Applications	XRMDeployment	Facilitates the implementation of xRM deployments.
Applications	Help	Services the Microsoft Dynamics CRM Help system for the application.

# What is installed (Services)

Service	Description
<b>Microsoft Dynamics CRM Asynchronous Processing Service</b>	Services asynchronous processes such as bulk e-mail and workflow.
<b>Microsoft Dynamics CRM Asynchronous Processing Service (maintenance)</b>	Services asynchronous maintenance: <ul style="list-style-type: none"><li>1. Index (Defrag)</li><li>2. Reindex</li><li>3. Cleanup Workflow</li><li>4. Add partitions for audit</li></ul>
<b>Microsoft Dynamics CRM Unzip Service</b>	Handles the uncompressing of zipped files for data import. This service is installed as part of the Web Application Server role.
<b>Microsoft Dynamics CRM Sandbox Processing service</b>	The Sandbox Processing Service server role enables an isolated environment to allow for the execution of custom code, such as plug-ins. This isolation reduces the possibility of custom code affecting the operation of the organizations in the Microsoft Dynamics CRM deployment.

# What is installed (SQL Components)

Component	Name	Description
<b>Databases</b>	MSCRM_CONFIG OrganizationName_MSCRM	Microsoft SQL Server Setup creates the SystemDrive:\Program Files\Microsoft SQL Server\MSSQL<ver>\MSSQL\Data\ folder and Microsoft Dynamics CRM Server Setup installs the Microsoft Dynamics CRM configuration database and organization databases in it.
<b>SQL Server Jobs</b>	OrganizationName_MSCRM.CreateAuditPart ition MSCRM_CONFIG.HardDelete MSCRM_CONFIG.SiteWideCleanup	Microsoft Dynamics CRM Server Setup creates three SQL Server jobs that are used for maintenance.
<b>Logins</b>	PrivReportingGroup ReportingGroup SQLAccessGroup	Microsoft Dynamics CRM Server Setup creates several SQL Server logins for the Active Directory groups that are created.
<b>SQL Login</b>	MSCRMSqlLogin	This login is used for timezone conversions when running Dashboards, Charts and Advanced find. It is running a two line CLR function which uses TimeZoneInfo to do the conversion. When using the SQL CLR, our tests show a significant improvement in performance.



# What is installed (additional components)

- Microsoft SQL Reporting Service Report Viewer Control
- Microsoft SQL Server Native Client
- Microsoft Application Error Reporting Tool
- Microsoft Visual C++ Runtime Library
- Windows Identity Foundation (WIF) Framework
- Windows Server 2008 Web Server Role
- Indexing Service
- Microsoft Chart Controls for Microsoft .NET Framework
- Windows Azure platform AppFabric SDK
- Windows PowerShell

# What is installed (additional components)

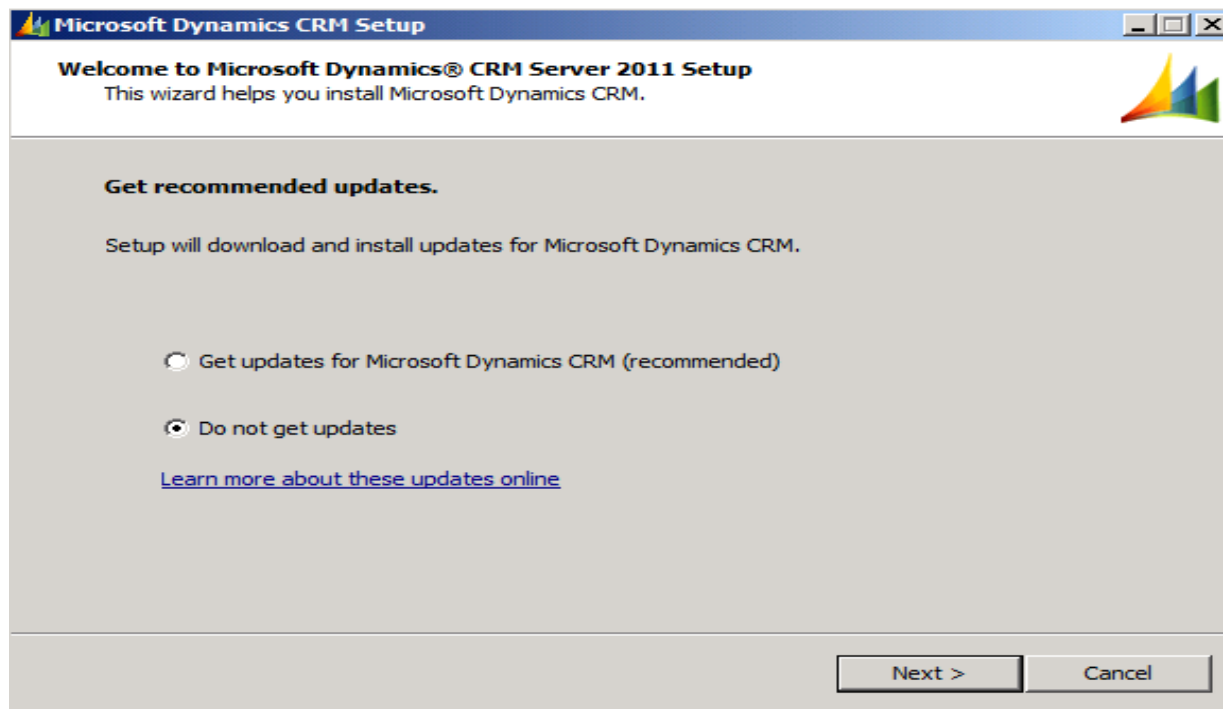
- Microsoft .NET Framework 4.0, which includes the following components:
  - Microsoft .NET Framework (required by Microsoft Dynamics CRM Server)
  - Windows Workflow Foundation (required by Microsoft Dynamics CRM Server)
  - Windows Presentation Foundation
  - Windows Communication Foundation (required by Microsoft Dynamics CRM Server)
- Microsoft URL Rewrite Module for IIS
- File Server Resource Manager

# Install Walkthrough

- Installing user must be in the same domain as the Microsoft Dynamics CRM Deployment
  - The installing user should not be used to run any services (Microsoft Dynamics CRM users should never run Microsoft Dynamics CRM services as this causes a number of permission related issues)
- Keep the "Redist folder at the same level as the "Server" folder so the install doesn't have to download redist items on install.
- Download "Recommended Updates"
- Reboot needed if Microsoft .Net 4.0 is installed by Microsoft Dynamics CRM setup (Run windows update prior to install)

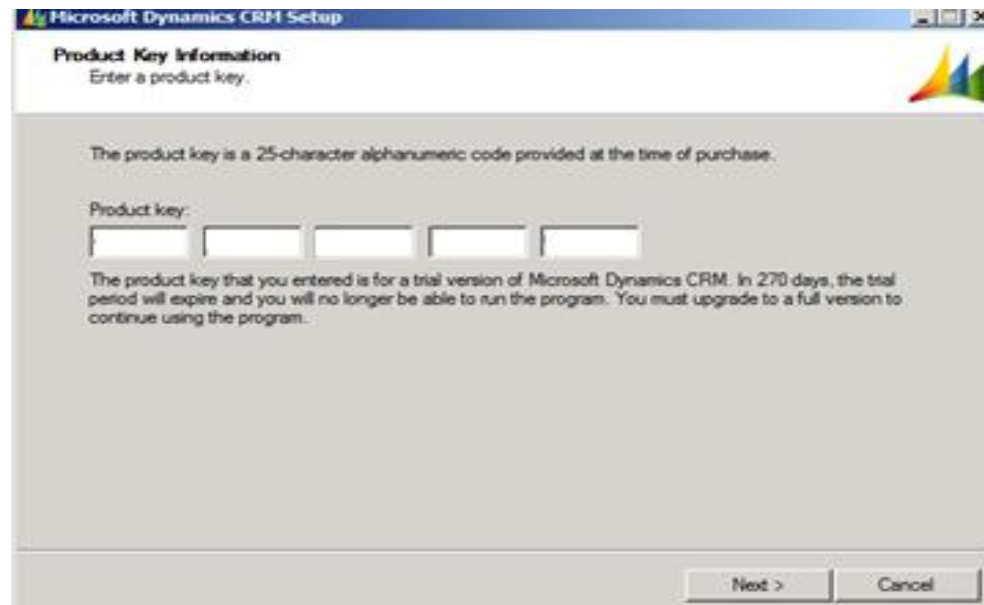
# Install Walkthrough

- Launch SetupServer.exe from Install media
- Check for updates



# Install Walkthrough

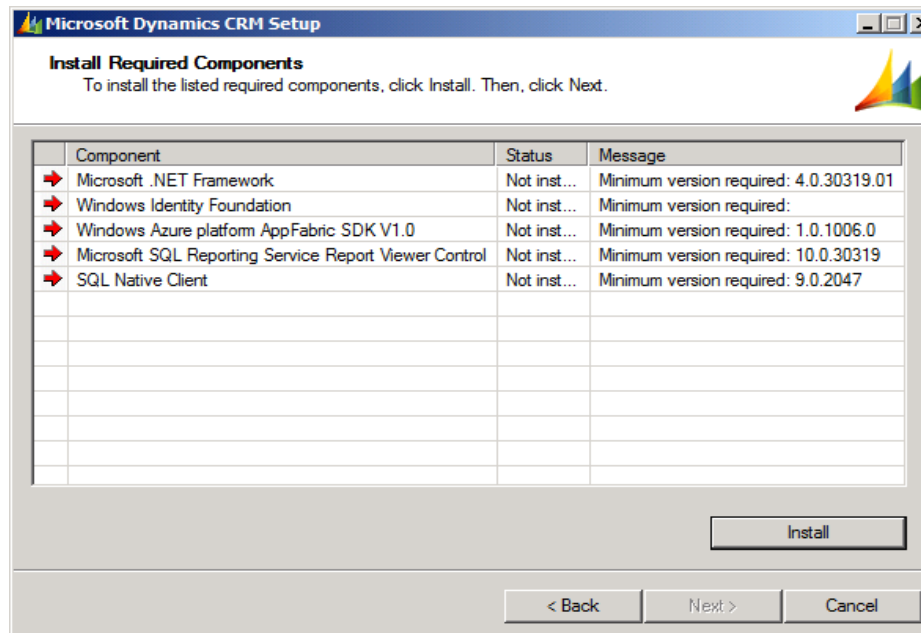
- On the Product Key Information page, type your product key, and then click **Next**.



- On the License Agreement page, click **I accept this license agreement**, then click **Next**

# Install Walkthrough

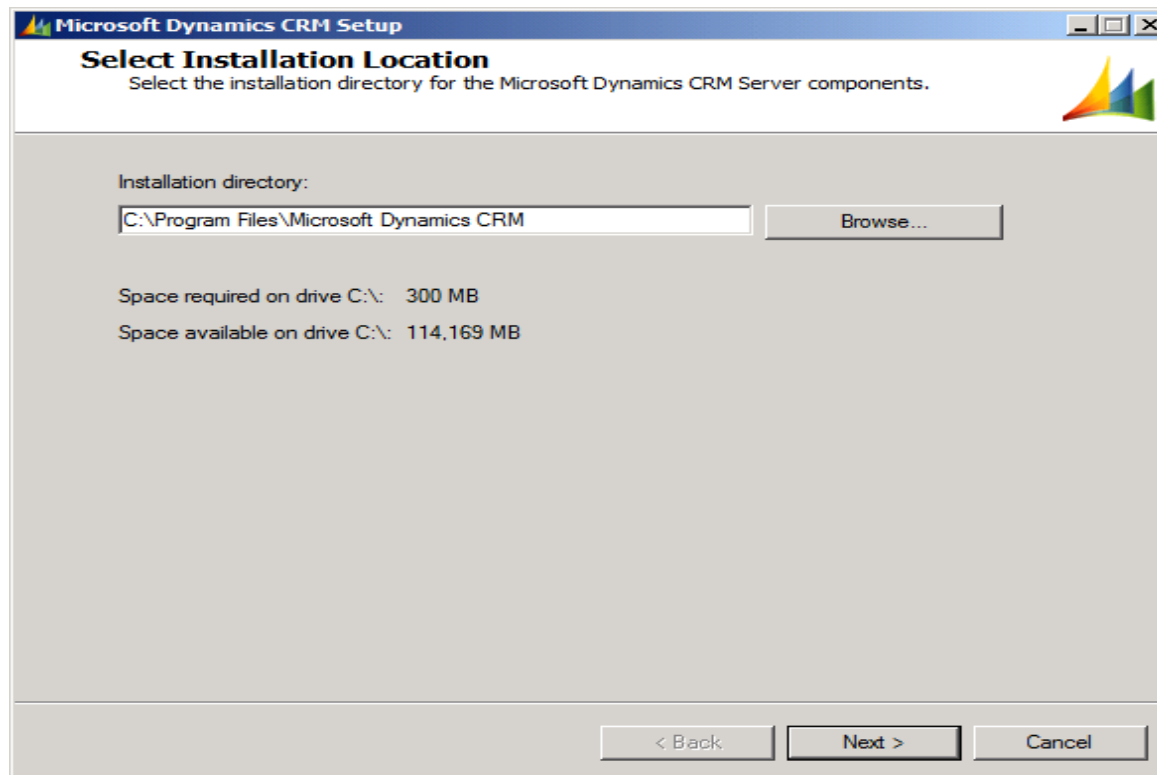
- If Setup detects that components are missing, the Install Required Components page appears.



- If you already have the required components installed, this page will not appear.

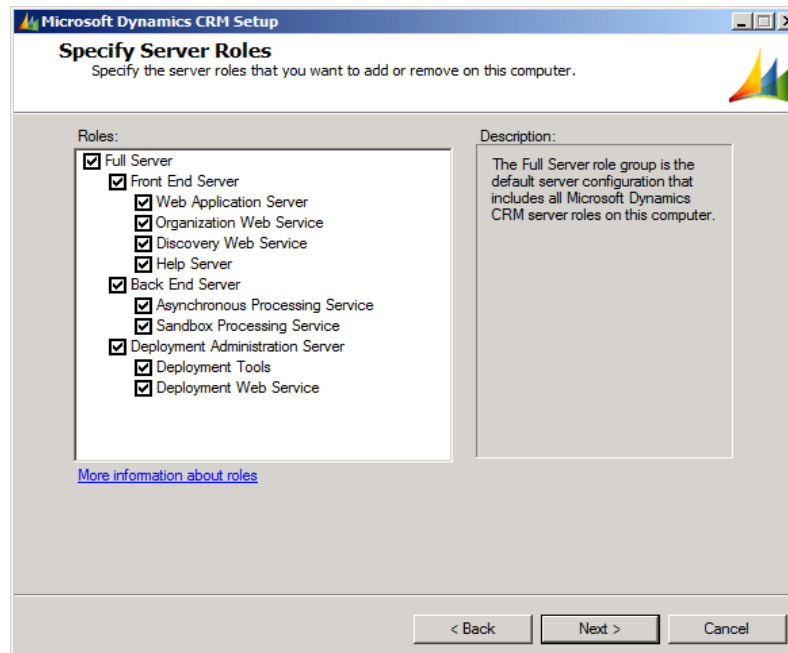
# Install Walkthrough

- On the Select Installation Location page, accept the default location or enter a different file installation location, and then click **Next**.



# Install Walkthrough

- If you install the Microsoft Dynamics CRM 2011 Server SKU the Specify Server Roles page appears



- If you install the Microsoft Dynamics CRM 2011 Workgroup SKU, the Specify Server Roles page will not appear and a Full Server installation will be performed.



# Server Roles (Grouped)

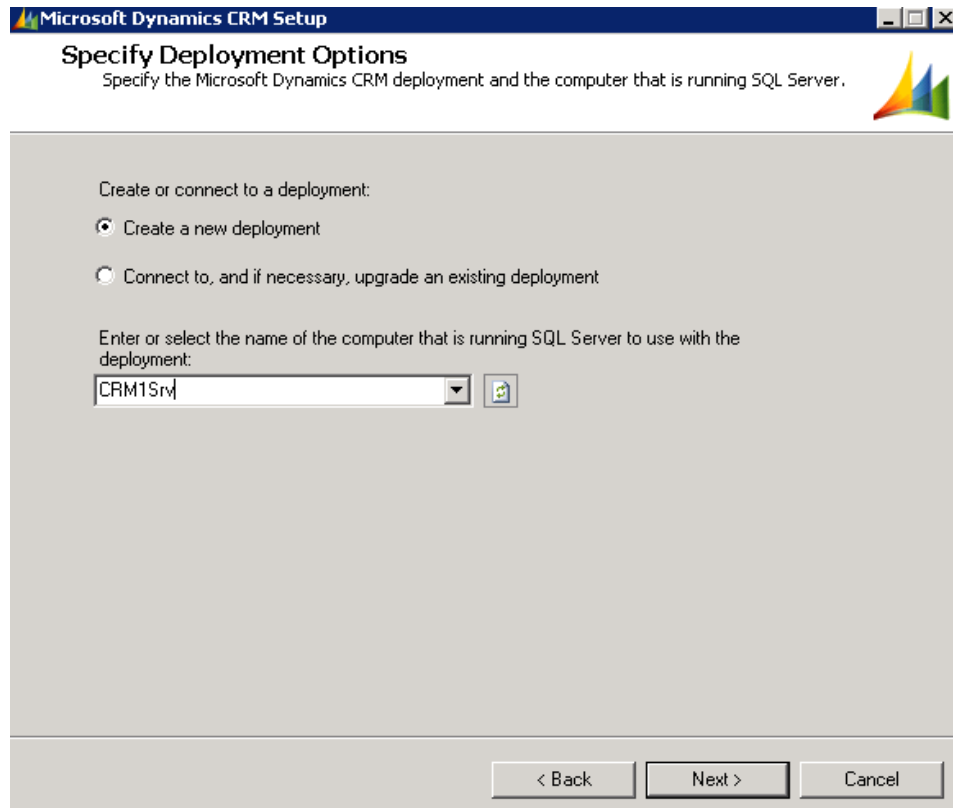
Server Role Group	Description	Installation Method
<b>Full Server</b>	This group of server roles contain all roles from Front End Server, Back End Server, and Deployment Administration Server roles. By default, Microsoft Dynamics CRM Server Setup deploys the system as Full Server.	Full
<b>Front End Server</b>	The Front End Server role group enables the server roles for running client applications and applications developed with the Microsoft Dynamics CRM Software Development Kit.	Group or Full
<b>Back End Server</b>	The Back End Server role group includes the server roles that handle processing asynchronous events such as workflows, custom plug-ins and Microsoft SharePoint integration. These roles are usually not exposed to the Internet.	Group or Full
<b>Deployment Administration Server</b>	The Deployment Administration Server role group enables the server roles for components that are used to manage the Microsoft Dynamics CRM deployment either by using the methods described in the Microsoft Dynamics CRM 2011 Deployment Software Development Kit or the deployment tools.	Group or Full

# Server Roles (Individual)

Server Role	Description	Server Group	Installation Method
<b>Discovery Web Service</b>	Finds the organization that a user belongs to in a multi-tenant deployment.	Front End Server	Individual, Group, or Full
<b>Organization Web Service</b>	Supports running applications that use the methods described in the Microsoft Dynamics CRM Software Development Kit.	Front End Server	Individual, Group, or Full
<b>Web Application Server</b>	Runs the Web Application Server that is used to connect users to Microsoft Dynamics CRM data. The Web Application Server role requires the Organization Web Service role.	Front End Server	Individual, Group, or Full
<b>Help Server</b>	Makes Microsoft Dynamics CRM Help available to users.	Front End Server	Individual, Group, or Full
<b>Asynchronous Service</b>	Processes queued asynchronous events, such as bulk email or data import.	Back End Server	Individual, Group, or Full
<b>Sandbox Processing Service</b>	The Sandbox Processing Service server role enables an isolated environment to allow for the execution of custom code, such as plug-ins. This isolated environment reduces the possibility of custom code affecting the operation of the organizations in the Microsoft Dynamics CRM deployment.	Back End Server	Individual, Group, or Full
<b>Deployment Web Service</b>	Manages the deployment by using the methods described in the Microsoft Dynamics CRM 2011 Deployment Software Development Kit, such as create an organization or remove a Deployment Administrator role from a user.	Deployment Administration Server	Individual, Group, or Full
<b>Deployment Tools</b>	<p>The Deployment Tools server role consists of the Deployment Manager and Windows PowerShell cmdlets. Microsoft Dynamics CRM administrators can use the Windows PowerShell cmdlets to automate Deployment Manager tasks.</p> <p>Deployment Manager is a Microsoft Management Console (MMC) snap-in that system administrators can use to manage organizations, servers, and licenses for deployments of Microsoft Dynamics CRM.</p>	Deployment Administration Server	Individual, Group, or Full

# Install Walkthrough

- Enter or select the name of the computer that is running SQL Server to use with the deployment



The screenshot shows the 'Microsoft Dynamics CRM Setup' window with the title 'Specify Deployment Options'. Below the title is a subtitle: 'Specify the Microsoft Dynamics CRM deployment and the computer that is running SQL Server.' The main area contains two radio buttons under the heading 'Create or connect to a deployment:'. The first option, 'Create a new deployment', is selected. The second option is 'Connect to, and if necessary, upgrade an existing deployment'. Below these options is a text prompt: 'Enter or select the name of the computer that is running SQL Server to use with the deployment:'. This is followed by a text box containing 'CRM1Srv' and a dropdown arrow. To the right of the text box is a small icon of a computer. At the bottom of the window are three buttons: '< Back', 'Next >', and 'Cancel'.

Microsoft Dynamics CRM Setup

**Specify Deployment Options**  
Specify the Microsoft Dynamics CRM deployment and the computer that is running SQL Server.

Create or connect to a deployment:

☒ Create a new deployment

☐ Connect to, and if necessary, upgrade an existing deployment

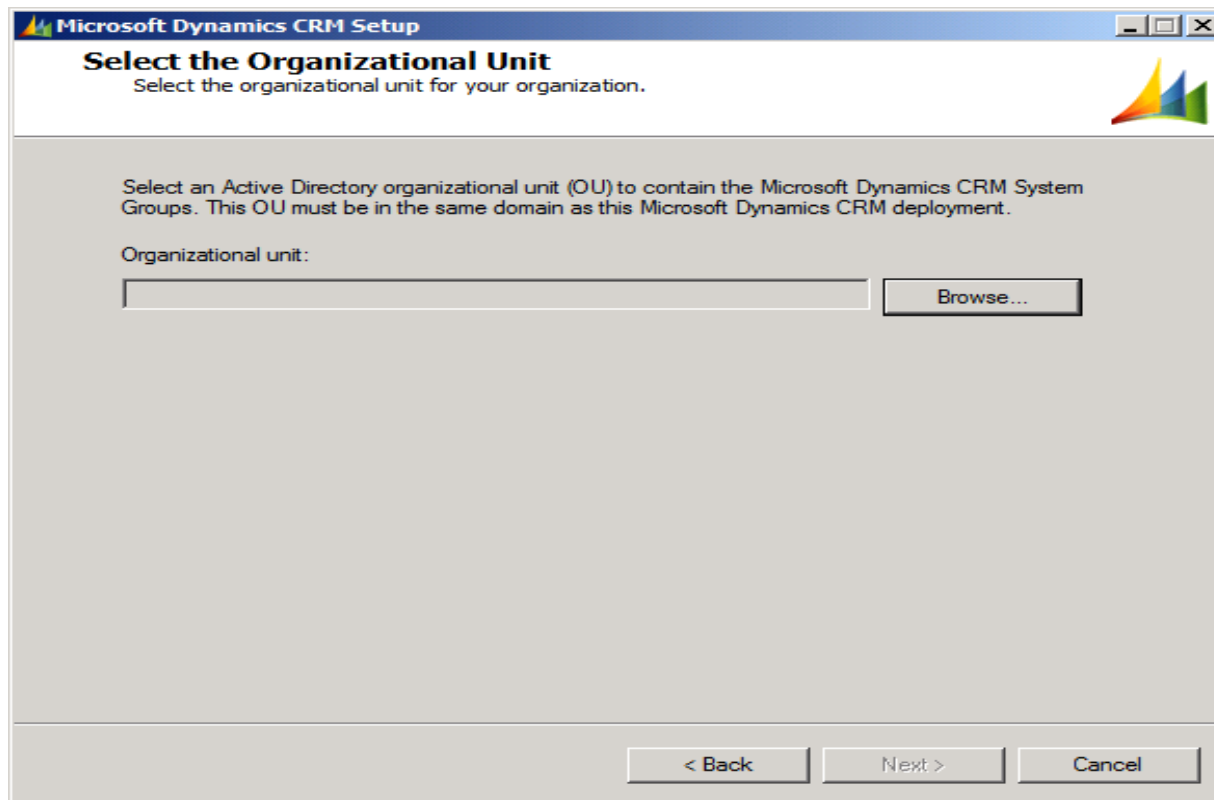
Enter or select the name of the computer that is running SQL Server to use with the deployment:

CRM1Srv

< Back   Next >   Cancel

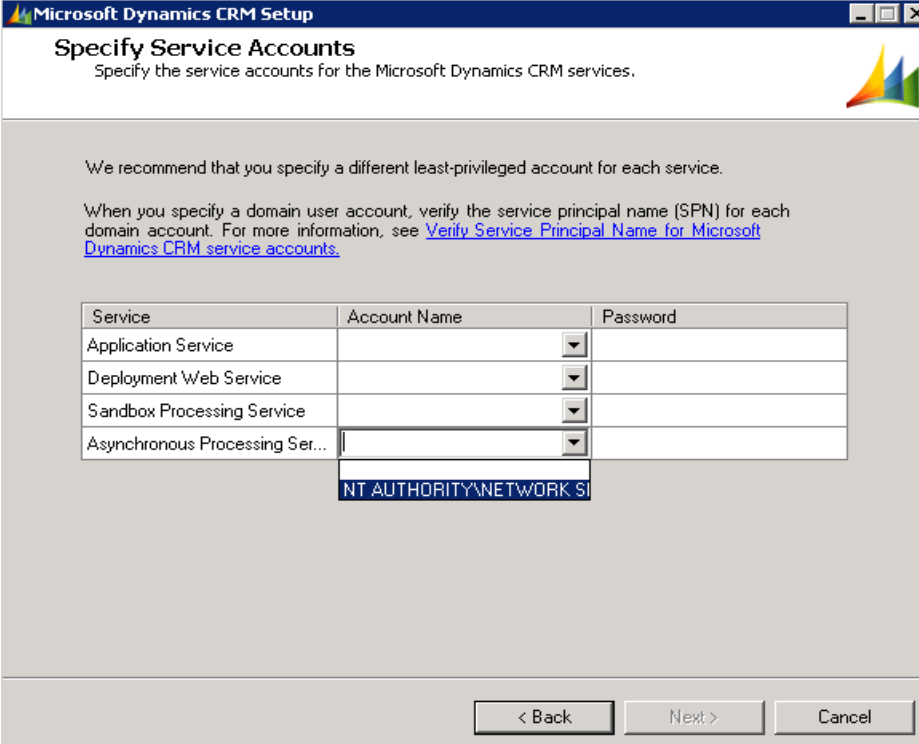
# Install Walkthrough

- Select the location for the Microsoft Dynamics CRM organizational unit



# Install Walkthrough

- On the Specify Security Account page, select the security account for the Microsoft Dynamics CRM services and ASP.NET component



The screenshot shows the 'Microsoft Dynamics CRM Setup' window with the 'Specify Service Accounts' page. The page title is 'Specify Service Accounts' with the subtitle 'Specify the service accounts for the Microsoft Dynamics CRM services.' Below this, there is a recommendation to use least-privileged accounts and a link to 'Verify Service Principal Name for Microsoft Dynamics CRM service accounts.' A table with three columns: 'Service', 'Account Name', and 'Password' is displayed. The 'Service' column lists 'Application Service', 'Deployment Web Service', 'Sandbox Processing Service', and 'Asynchronous Processing Ser...'. The 'Account Name' column has dropdown menus, and the 'Password' column has text input fields. A dropdown menu is open for the 'Asynchronous Processing Ser...' service, showing 'NT AUTHORITY\NETWORK SI'. At the bottom, there are '< Back', 'Next >', and 'Cancel' buttons.

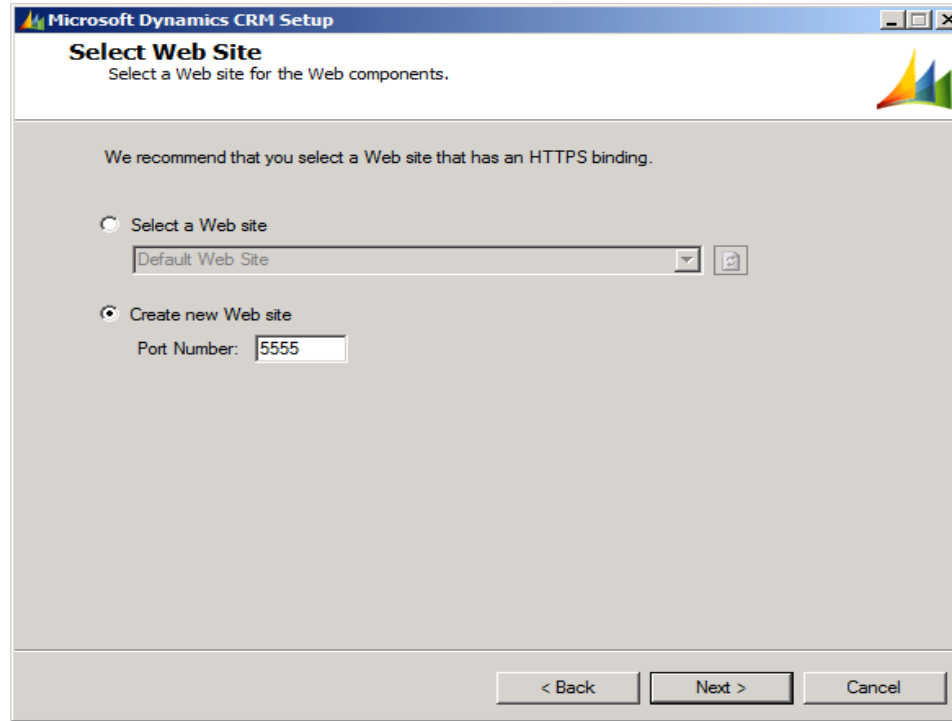
Service	Account Name	Password
Application Service		
Deployment Web Service		
Sandbox Processing Service		
Asynchronous Processing Ser...		

NT AUTHORITY\NETWORK SI

< Back   Next >   Cancel

# Install Walkthrough

- On the Select Web Site page, mark **Create new Web site** or mark **Select a Web Site** and select a Web site from the list. By default, Setup will use the default Web site.



The screenshot shows the 'Microsoft Dynamics CRM Setup' window with the 'Select Web Site' tab selected. The window title bar includes the Microsoft Dynamics CRM logo and standard window controls. The main content area has a light gray background. At the top, it says 'Select a Web site for the Web components.' followed by a recommendation: 'We recommend that you select a Web site that has an HTTPS binding.' Below this, there are two radio button options. The first is 'Select a Web site', which is currently unselected; it has a text box containing 'Default Web Site' and a dropdown arrow. The second is 'Create new Web site', which is selected with a radio button. Below this option is a 'Port Number' label and a text box containing '5555'. At the bottom of the window, there are three buttons: '< Back', 'Next >', and 'Cancel'.

Microsoft Dynamics CRM Setup

**Select Web Site**  
Select a Web site for the Web components.

We recommend that you select a Web site that has an HTTPS binding.

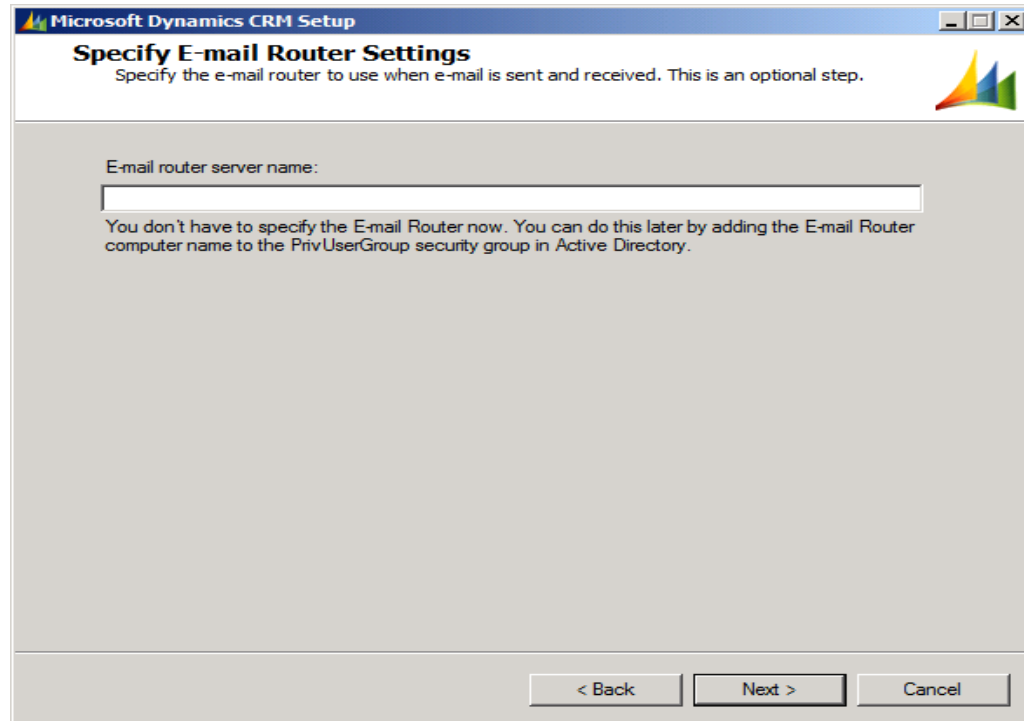
☐ Select a Web site  
Default Web Site

☒ Create new Web site  
Port Number: 5555

< Back   Next >   Cancel

# Install Walkthrough

- On the Specify E-mail Router Settings page, in the **E-mail router server name box**, type the name of the computer where the E-mail Router will be installed



The screenshot shows a Windows-style dialog box titled "Microsoft Dynamics CRM Setup". The main heading is "Specify E-mail Router Settings", followed by a subtitle: "Specify the e-mail router to use when e-mail is sent and received. This is an optional step." Below this, there is a label "E-mail router server name:" and an empty text input field. A note below the input field states: "You don't have to specify the E-mail Router now. You can do this later by adding the E-mail Router computer name to the PrivUserGroup security group in Active Directory." At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel".

# Install Walkthrough

- Specify the Organization Name page

**Microsoft Dynamics CRM Setup**

**Specify the Organization Settings**  
Specify settings for your organization for this deployment of Microsoft Dynamics CRM.

Display name:  
AdventureWorksCycle

Unique Database Name:  
AdventureWorksCycle

Select the base currency for this organization. The base currency is used for financial data, such as reporting, profit and loss statements, and balance sheets. After the base currency is set, it cannot be changed.

ISO currency code: USD Browse... Currency name: US Dollar

Currency symbol: \$ Currency precision: 2

Select the SQL collation for this organization. The collation defines comparison and sort-ordering for items. After the collation is set, it cannot be changed.

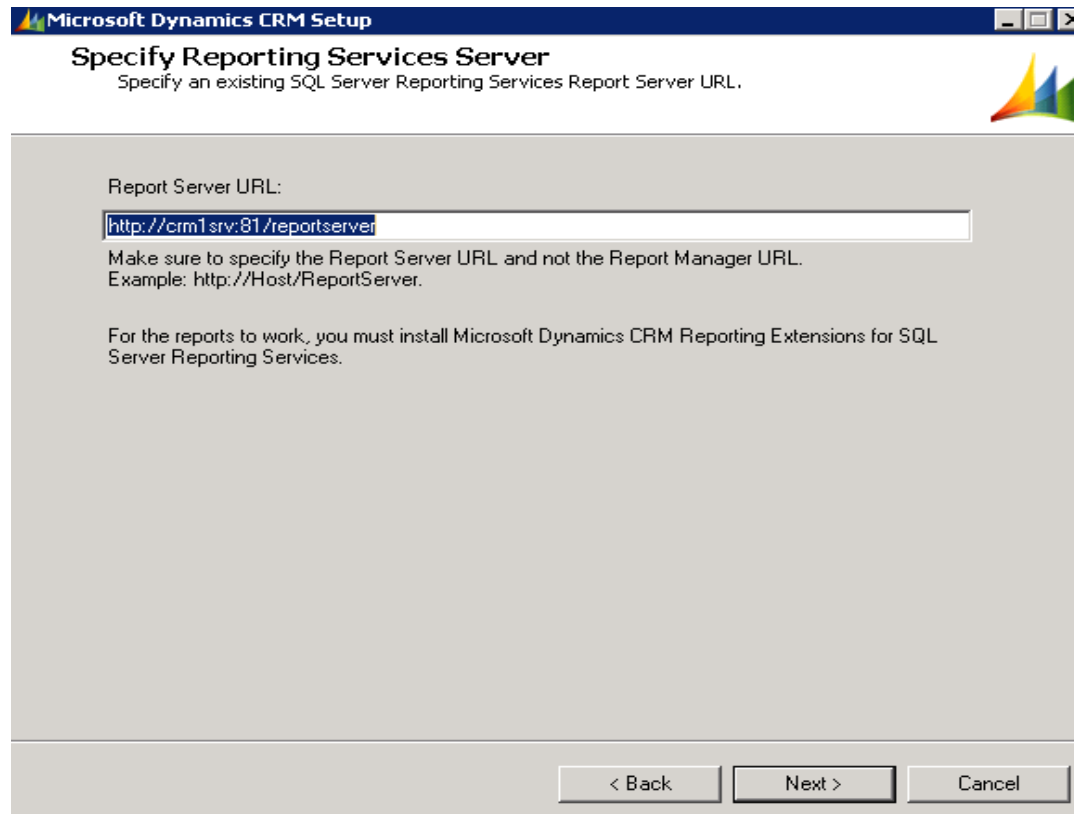
SQL Collation: Latin1\_General\_CI\_AI

< Back Next > Cancel



# Install Walkthrough

- On the Specify Reporting Services Server page, type the **Report Server URL**



The screenshot shows a Windows-style dialog box titled "Microsoft Dynamics CRM Setup". The main heading is "Specify Reporting Services Server", with a subtitle "Specify an existing SQL Server Reporting Services Report Server URL." in the top right corner. The central area contains a text input field labeled "Report Server URL:" with the text "http://crm1.srv:81/reportserver" entered. Below the field, there is instructional text: "Make sure to specify the Report Server URL and not the Report Manager URL. Example: http://Host/ReportServer." and a note: "For the reports to work, you must install Microsoft Dynamics CRM Reporting Extensions for SQL Server Reporting Services." At the bottom, there are three buttons: "< Back", "Next >", and "Cancel".

Microsoft Dynamics CRM Setup

**Specify Reporting Services Server**  
Specify an existing SQL Server Reporting Services Report Server URL.

Report Server URL:

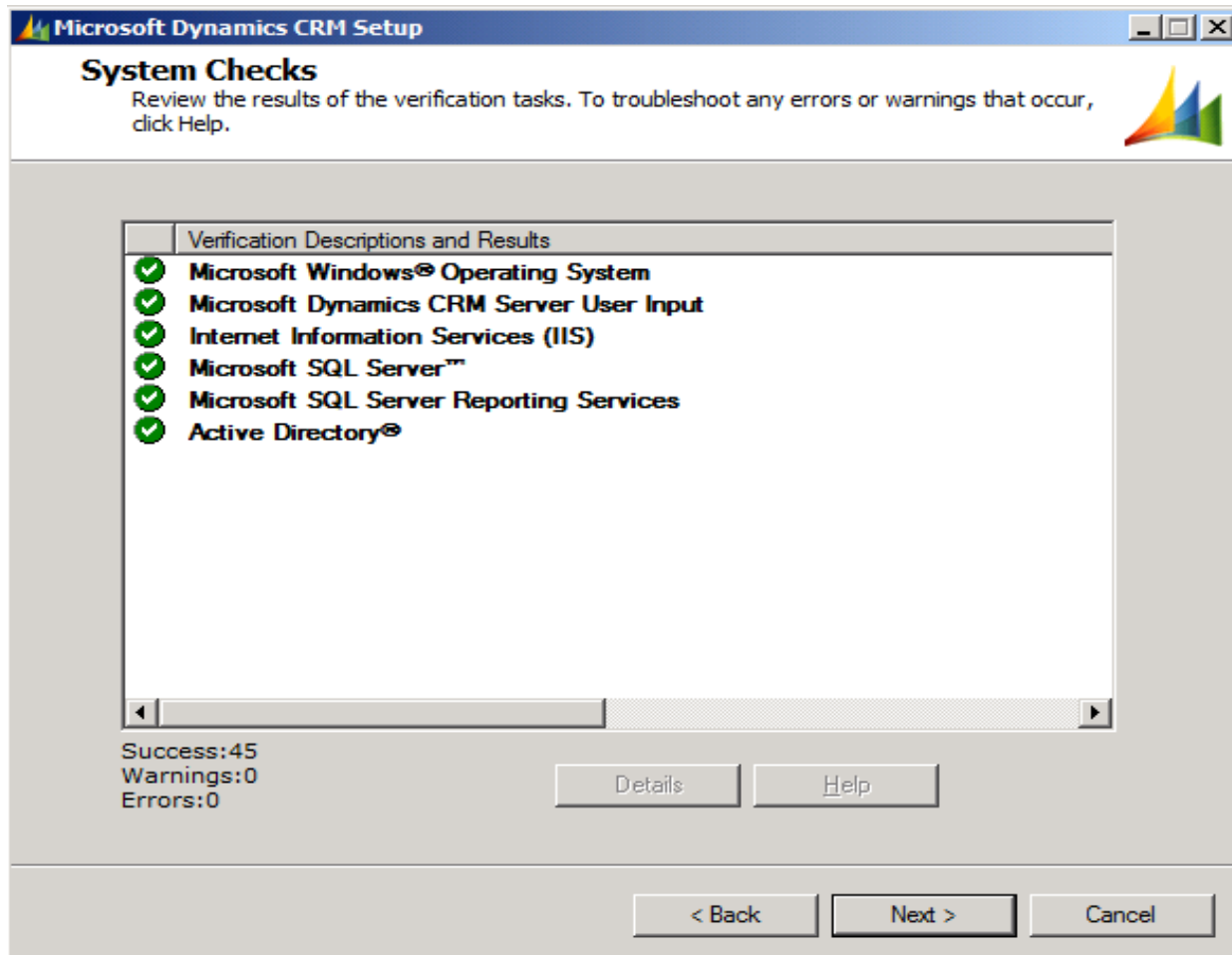
Make sure to specify the Report Server URL and not the Report Manager URL.  
Example: http://Host/ReportServer.

For the reports to work, you must install Microsoft Dynamics CRM Reporting Extensions for SQL Server Reporting Services.

< Back    Next >    Cancel

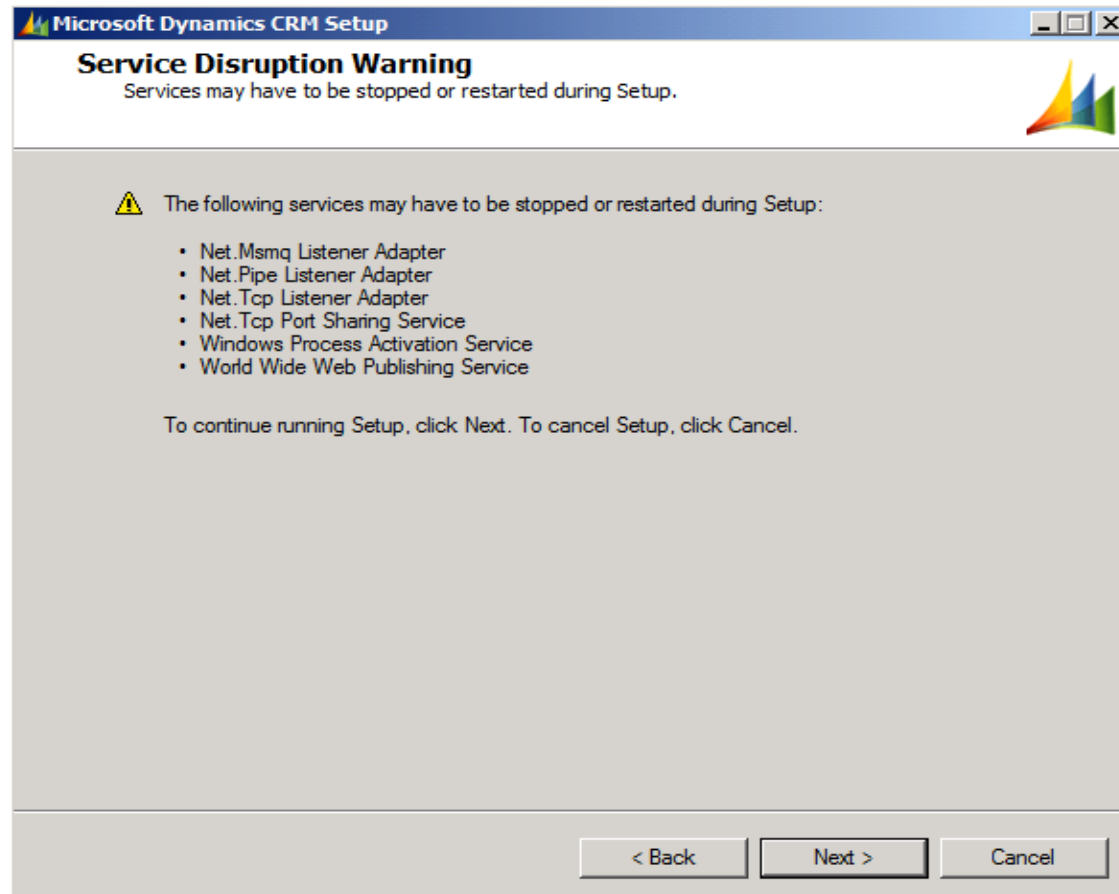
# Install Walkthrough

- System Checks page



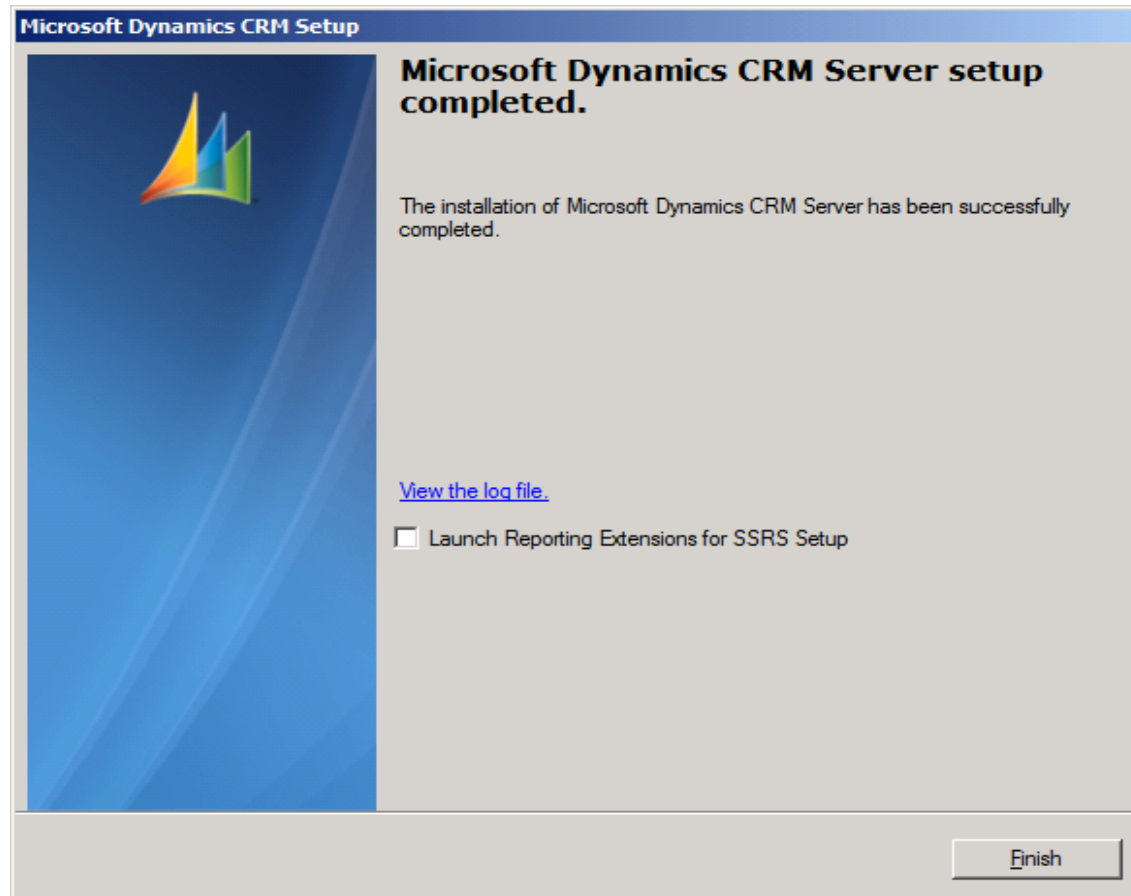
# Install Walkthrough

- Service Disruption Warning page



# Install Walkthrough

- Setup Complete



# Lesson 4: Upgrade

- This lesson explains the supported methods that can be used to upgrade from previous Microsoft Dynamics CRM versions to Microsoft Dynamics CRM 2011.

# Upgrade paths

- Migration (Restore DBs into a new SQL instance and Import them into a Microsoft Dynamics CRM 2011 Deployment)
- In-Place (Upgrade the Microsoft Dynamics CRM 4.0 Installation to Microsoft Dynamics CRM 2011)
- Connect to existing (Connect the Microsoft Dynamics CRM 2011 install to existing MSCRM\_Config and upgrade Config DB / Default Org DB)

Does CRM Server Meet System requirements	Does SQL Server meet System requirements	Available Upgrade paths
Yes	Yes	<ul style="list-style-type: none"><li>• Connect to existing</li><li>• In-place</li><li>• Migration</li></ul>
No	Yes	<ul style="list-style-type: none"><li>• Connect to existing</li><li>• Migration</li></ul>
No	No	<ul style="list-style-type: none"><li>• Migration</li></ul>

# Migration (Import v4 Org)

- Benefits:

- Smooth transfer from 32 bit to 64 bit Microsoft Dynamics CRM Servers.
- You will be able to test Microsoft Dynamics CRM 2011 and implement IFD/Claims before having production data dependent on it. Several Test Imports can be performed if necessary.
- The Microsoft Dynamics CRM 4.0 production server can continue running all the way up to the point of when the “final” backup has been taken.
  - The downtime will only include Org Upgrade (traditionally a large part of an upgrade would consist of binary upgrades).
  - Should an org Import fail It will be easy to turn the Microsoft Dynamics CRM 4.0 system back on again with no need to restore DB's or reinstall Microsoft Dynamics CRM
- If the Microsoft Dynamics CRM 4.0 deployment is hosting multiple organizations the migration method will allow a controlled transition of Microsoft Dynamics CRM 4.0 orgs into Microsoft Dynamics CRM 2011
- It will be easy to gauge how long time the import of a production DB will take if test imports has been performed.
- Upgrade troubleshooting will be easier as binaries aren't upgraded

# Migration (Import v4 Org)

## Continued

- Considerations:

- Additional hardware may be required
  - If the current Microsoft Dynamics CRM 4.0 server is 32 bit you will need a new 64 bit server for Microsoft Dynamics CRM 2011 in that event the migration method allows greater flexibility
- SQL Server will require a new named instance or a new SQL server. This consideration is connected with the MSCRM\_Config DB being named the same in all Microsoft Dynamics CRM Deployments (Including Microsoft Dynamics CRM 4.0 and Microsoft Dynamics CRM 2011)
- Microsoft Dynamics CRM 4.0 for Microsoft Office Outlook will need to be on UR7 or higher in order successfully connect to a Microsoft Dynamics CRM 2011 system
- Clients may need to be re-configured if the URL used for the new deployment is different from the old deployment.



# Migration (Import v4 Org)

## Continued

- Migration path:

- Install Microsoft Dynamics CRM 2011 on the new 64 bit server.
  - You will also need to install the CRM SSRS data connector regardless of if you plan to use it or not. It is a prerequisite if you are importing or creating orgs in Microsoft Dynamics CRM 2011
- If IFD is needed, now is a great time to get it figured out – if you plan on using bindings from the Microsoft Dynamics CRM 4.0 server you can change them when ready. It is encouraged to take time to figure IFD/Claims out in Microsoft Dynamics CRM 2011 prior to attempting any Production upgrades
- Backup a copy of your Microsoft Dynamics CRM 4.0 Org and restore it to the SQL server or SQL instance hosting the Microsoft Dynamics CRM 2011 Deployment (or any other SQL server in your domain that has capacity. Preferably restore the DB on a SQL server on the same network or Switch as the Microsoft Dynamics CRM server).
- Use the Microsoft Dynamics CRM 2011 Deployment manager to Import the Organization or use Deployment Webservices or Powershell
- If the Microsoft Dynamics CRM 4.0 deployment had any custom ASPX pages or plugins saved in the GAC or file directory they should be implemented and registered
- Test and invite users in for acceptance testing.

# In place upgrade

(Upgrade Existing 4.0 deployment)

- Benefits:

- No need to rebuild Microsoft Dynamics CRM servers or purchase additional servers

- Considerations:

- The existing Microsoft Dynamics CRM Server and SQL server must meet the Microsoft Dynamics CRM 2011 hardware and software requirements.
- Upgrade is more complex – failures can occur both in Binaries and in DB
- During the Upgrade Microsoft Dynamics CRM will be offline for a longer time than if you only migrated a single DB

- In Place Upgrade Path:

- Run Windows updates and ensure that you have Microsoft .Net 4.0 installed prior to beginning the update (This will cut 20-40 minutes out of the upgrade time).
- If the Microsoft Dynamics CRM reporting connector is installed on the SQL server you will need to uninstall it prior to running an upgrade.
- Backup CRM org DB's MSCRM\_Config and Reporting DB's
- Run Setup and step through the Wizard for an install/upgrade (similar to Microsoft Dynamics CRM 4.0).
- After a successful upgrade ensure that all Microsoft Dynamics CRM and any custom code / custom ASPX pages load successfully
- Seek user acceptance.

# Connect to Existing deployment and upgrade

- Benefits:

- If the Microsoft Dynamics CRM 4.0 server is disabled during the Microsoft Dynamics CRM 2011 install to existing, it will be easy to rollback Backups and start the Microsoft Dynamics CRM 4.0 server again should an upgrade fail

- Considerations:

- Additional hardware may be needed.

- Connect to existing deployment path:

- Run Windows updates on your new Microsoft Dynamics CRM 2011 server and ensure that you have Microsoft .Net 4.0 installed prior to beginning the update (This will cut 20-40 minutes out of the upgrade time).
- Backup CRM org DB's MSCRM\_Config and Reporting DB's
- Run Setup and step through the Wizard choosing the Install to existing deployment for an install/upgrade (similar to Microsoft Dynamics CRM 4.0).
- After a successful upgrade ensure that all Microsoft Dynamics CRM and any custom code / custom ASPX pages load successfully
- Seek user acceptance.

# Considerations needed for all Upgrade methods

- Setup a test system prior to attempting a production system upgrade. And run through a few test upgrades of the Organization.
- Consider moving Microsoft Dynamics CRM 4.0 plugins to the database for easy / rapid deployment when upgrading orgs to Microsoft Dynamics CRM 2011
- Research 3rd party ISV solutions for compatibility with Microsoft Dynamics CRM 2011
- Get user acceptance testing
- If IFD is used – configure it in a test system with a similar setup to what you are planning on implementing in production.
- Uninstall Microsoft Dynamics CRM 4.0 Connector for SQL Server Reporting Services through “Programs and Features”.

# CRM 4.0 to CRM 2011

## Claims Important Points

- SSL will be required both for external and internal access
  - If using SSL Offloading and or NLB this must be set in the Microsoft Dynamics CRM 2011 Deployment.
  - Deploy STS in advance (Microsoft Dynamics CRM 2011 has been tested against ADFS 2)
  - Deploy Certificates in advance and ensure that certificates are trusted
    - Consider Wildcard certs or Subject alternative name San certs for multi-org deployments
  - Configure claims prior to IFD (Must be done after Microsoft Dynamics CRM 2011 install)
  - Create two relying parties
    - One for internal claims and one for external IFD

# Multi-Language Packs

STRATEGY ■ CONSULTING ■ **SUPPORT**

# Upgrade Notes

- Local settings (date, time, number, currency) are maintained in upgrade.
- Base Currency remains the same during upgrade.
- You will not be able to change the base language during an upgrade.
- Once MUI pack is installed, the administrator will need to enable the language(s) so that end users see all new strings.
- If the MUI pack is not re-provisioned after an upgrade, the language will still be available but will be incomplete.
  - It IS STRONGLY recommended that the MUI packs are applied and re-provisioned after upgrade!

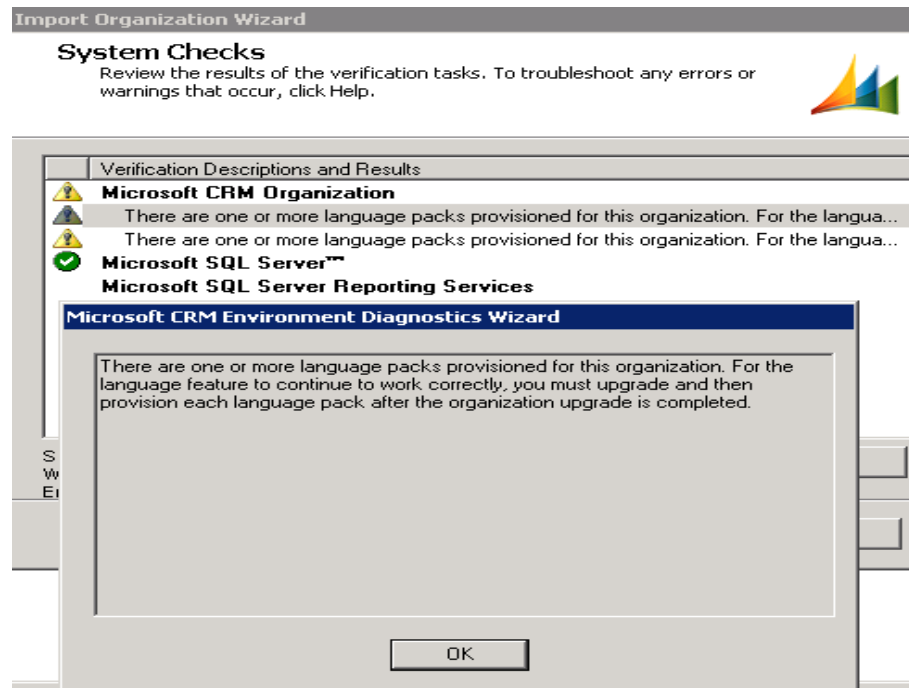
# In place upgrade of a Microsoft Dynamics CRM 4.0 deployment with MUI packs installed

- This scenario also applies to “Connect to existing” upgrades.
- Upgrade deployment and default organization to Microsoft Dynamics CRM 2011.
- Install MUI packs.
- Re-provision the default org that was upgraded with the deployment.
- Upgrade additional organizations (language packs already installed, therefore automatically re-provisioned).
- Note:
  - The “Migration” method is the recommended method for upgrading Microsoft Dynamics CRM 2011 (Create a new Microsoft Dynamics CRM 2011 deployment and Import the Microsoft Dynamics CRM 4.0 Orgs)



# “Migration upgrade” of orgs with MUI packs installed

- Create Microsoft Dynamics CRM 2011 deployment
- Install all needed MUI packs
- If a MUI pack is missing the EDW will show a warning similar to the screenshot below.
- Import orgs



# MUI Re-Provisioning after Update to a MUI

- Asynchronous job re-provisioning
  - Advanced Deployment manager options
    - PowerShell
    - Deployment Web Services
- Manual re-provisioning

# MUI Known Issues and Limitations

- Customer facing transaction data not available for translation, for example:
  - A product is named "Car" in Product Catalog
  - Should be "Automóvil" in Spanish
  - A Spanish-speaking customer gets the quote in Spanish for the "Car" product.
- Admin tools are not MUI enabled:
  - Deployment Manager, User Manager, Customize Entities
- Microsoft Dynamics CRM for Microsoft Office Outlook UI language based on Microsoft Dynamics CRM Language Setting
  - Not Office MUI setting
- "System Data" remains in base language
  - Examples: Role names, Offline filters



# Licensing

# SKUs available for Microsoft Dynamics CRM 2011

- Microsoft Dynamics CRM has the following SKUs available:
  - Microsoft Dynamics CRM Workgroup Server 2011
    - Similar to Workgroup edition in Microsoft Dynamics CRM 4.0
  - Microsoft Dynamics CRM Server 2011
    - Similar to Enterprise edition in Microsoft Dynamics CRM 4.0 (Pro SKU's are now upgraded to Enterprise – called Server in Microsoft Dynamics CRM 2011)
- Microsoft Dynamics CRM ISV/SPLA has the following SKUs available:
  - ISV Royalty SKU
  - SPLA SKU

# Client Access Licenses (CAL)

Microsoft Dynamics CRM 2011 has two settings under the CAL Information section for each user:

- Access Mode
  - Can be "Read", "Administrative", or "Read-Write"
- License Type
  - Can be "Full", "Limited", "Device Full", "Device Limited", "Administrative"
  - Certain license types are restricted based on the selected Access Mode.

Client Access License (CAL) Information	
Access Mode *	Read-Write ▼
License Type *	Full ▼

# Client Access Licenses

## (CAL) cont.

- Microsoft Dynamics CRM 2011 has the following CAL License types:
- Full
  - This CAL allows users to read and write both custom and out of box entities
  - Technically a Full User consumes both a Limited CAL and a Full Use Additive CAL
  - No change from v4.0 to 2011
- Limited
  - This CAL allows users to write to the UserQuery entity, write dashboards, and write visualizations
- Device Limited
  - Has the same security role privilege as Limited CAL
- Device Full
  - Has the same security role privilege as Full Use Additive CAL
- Administrative User
  - Can make changes to the system but can see records

# Trial keys

- Trial Expiration Reminder Notices
  - Warnings 60, 30, 15, 10, 5, 4, 3, 2, 1 prior to expiration
  - Final message:
    - Your trial period has expired. An error will also be logged to the event log once in a given day when someone attempts to log on. No event will be logged in a day if no one attempts to log on.
- Microsoft Dynamics CRM 2011 allows upgrade / downgrade of product keys



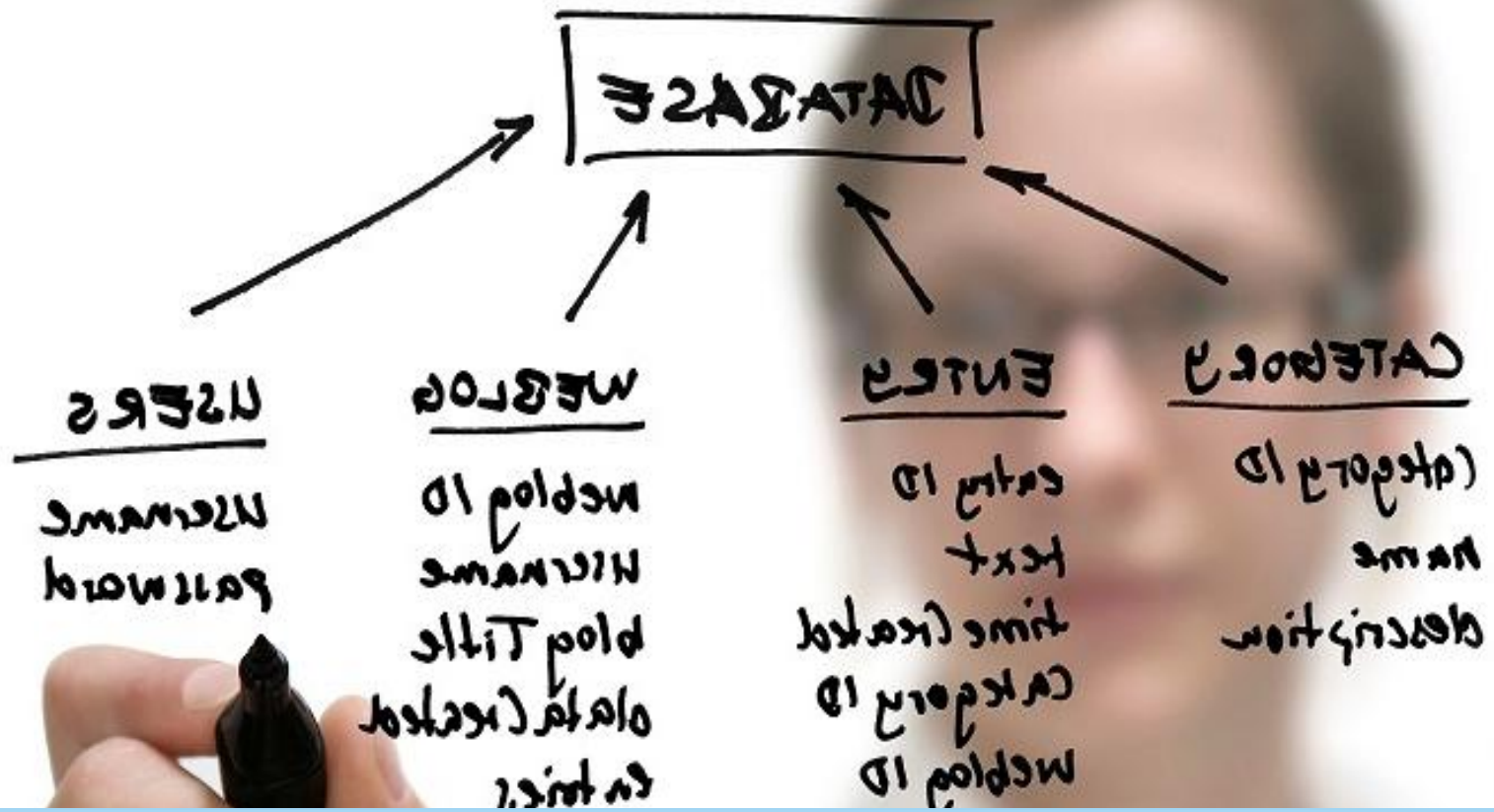
# Registration

- Microsoft Dynamics CRM 2011 does not require registration like Microsoft Dynamics CRM 4.0 did.

# Summary

- In this module you learned...
  - Install considerations
  - Install and Setup
  - Deployment Manager demo
  - Upgrade
  - Multi-Language Packs
  - Licensing





# Questions?