

Pivotal CRM 6.0 Administration Course (60310)

- Audience:** Pivotal CRM Administrators
- Location:** CDC Software training locations or on Customer's premises
- Duration:** 5 days
- Price:** \$3,000 per person for public classes and \$15,000 for onsite customer classes
- Prerequisite:** Pivotal Technology Foundations for Customizers and Administrators, Hands-on experience with MS SQL 2005 Administration Solid knowledge of IIS, Microsoft Networking and Active Directory, MS Outlook and MS Sharpoint Services 3.x.

Course Overview

The Pivotal CRM 6.0 Administration course is an instructor-led class for Pivotal CRM administrators who are interested in learning how to install, configure and maintain Pivotal CRM Environments. Participants will gain skills through listening to interactive presentations, followed by hands-on exercises designed to simulate real-world environments and apply technical concepts. Participants will work individually or in teams of two to deploy a distributed Production Environment with satellite and mobile systems, using Pivotal CRM core platform products and Customer Management System, on a Microsoft 2003 Server, Exchange 2003 and SQL Server 2005 in an Active Directory environment. Participants will be provided with a workbook that includes presentations slides and literature.

Course Agenda

In the Pivotal CRM 6.0 – Administration class, students will learn:

- The details of the three-tier architecture of Pivotal CRM 6.0
- The functions of each components in a Pivotal CRM deployment
- What is a Pivotal system and what is a Pivotal environment
 - Types and functionality of different Pivotal systems (Master, Offline Customization, Satellite and Mobile)
 - Types and functionality of different Pivotal environments (Production, Testing and Development)
 - Moving data between Pivotal Environments
- About different deployment scenarios
 - Hardware and software recommendations
 - Pivotal component placement best practices
- How to install Pivotal License Management components
 - How to obtain demo and production license files
 - How to install configure the License Server
 - How to Provide License Server redundancy
 - How to assign licenses to users and Pivotal security groups
- How to troubleshoot Pivotal licensing issues

- How to install, configure, tune and maintain availability of the Pivotal CRM core components:
 - Pivotal Customer Management System (CMS)
 - Pivotal Business Server
 - Customization Toolkit
 - Pivotal Deployment Server
 - Pivotal Client
- How to build a Pivotal Production Environment with core components and:
 - An Administration Workstation
 - LAN Pivotal Clients
 - A satellite system
 - A mobile system
- What is the Pivotal CRM security model, including:
 - Custom and Out-of-the-box Pivotal security groups
 - Pivotal users management
 - Active Directory and MS SQL required privileges
 - View Filters that control the set of enterprise database records a LAN Pivotal user can access
 - Sync Filters that control database replication to satellite and mobile systems
- How to implement Portal Pages in a Pivotal CRM deployment
 - Install necessary components to prepare Microsoft SharePoint Services 3.x to integrate with Pivotal CRM
 - Create Web Applications and Site Collections to host Pivotal Portal Pages
 - Deploying Portal Pages to mobile systems
 - Backup and Restore Portal Pages
- How to deploy Pivotal SyncStream
 - Install the Software components (DSM and HTTP Message Server)
 - Prepare a production to deploy replica systems (satellite/mobile)
 - Setup a satellite and mobile system and populate each with enterprise data
 - Monitor database changes replicate between parent and child systems
 - Migrate an HTTP Message Server to Direct Access
- How to detect and resolve Pivotal SyncStream issues
 - Use the Pivotal Administration Console (PAC) to monitor the health of Pivotal SyncStream systems
 - Use the Data Synchronization Configuration Check tool
 - Interpret PAC details pane data for troubleshooting SyncStream
 - Use Repair Synchronization function
 - Use Audit SyncStream and Resynchronize Databases functions to avoid data loss
- How to Administer your Pivotal Deployment:
 - Plan for disasters
 - Perform Pivotal system Backup, Restore and Replicate
 - Perform an Upgrade from Offline System process
 - Perform an Apply Customization Changes process
 - Set Pivotal SyncStream parameter thresholds
 - Use the different Pivotal CRM product logs to troubleshoot the system

- How to install and configure Pivotal Integration for MS Outlook
 - Architecture and component functionality
 - Outlook Integration on Mobile systems
 - OWA (Outlook Web Access) and Pivotal Outlook Integration (Pivotal Synchronization Service 6.0 for Microsoft Exchange)
 - Troubleshooting