

MOC 55242 A: Microsoft Dynamics 365 Customization and Configuration

Course Summary

Description

This course provides students with a detailed hands-on experience of setting up, customizing, configuring, and maintaining the CRM components of Microsoft Dynamics 365.

Attendees of this course will gain an in-depth understanding of the Dynamics 365 security model, learn how to customize the Dynamics 365 framework, create, and maintain powerful workflows and business process flows and use solutions to package and deploy customizations across multiple Dynamics 365 environments.

The course applies to both Business and Enterprise Editions of Dynamics 365 as well as Online and On-premise deployments. The July 2017 V9 release of Dynamics 365 is considered and course objectives map directly to the MB2-716 certification exam.

Objectives

After taking this course, students will be able to:

- Understand the features and tools that exist in Microsoft Dynamics 365 for Customizers
- Be aware of integrating complimenting Microsoft products such as SharePoint, Skype for Business and Exchange
- Undertake and carry out the initial setup and configuration required in a Microsoft Dynamics 365 deployment
- Design and configure a comprehensive Security model using the inbuilt tools in Microsoft Dynamics 365
- Customize the Dynamics 365 schema by creating custom Entities, Fields, and Relationships
- Design custom Information Forms, Quick View Forms, Quick Create Forms, and System Views
- Create System Charts, Dashboards, and Interactive Experience Dashboards
- Create and manage Business Rules using the Business Rule Designer
- Plan, design, and implement best practice Workflow, Business Process Flows, and Custom Actions
- Be able to apply best practice methodology using Unmanaged and Managed Solutions to deploy Microsoft Dynamics 365 customizations and patches

Topics

- Introduction
- Initial Setup and Configuration
- Security
- Creating and Managing Entities
- Customizing Fields
- Customizing Relationships and Mappings
- Customizing Forms, Views, and Visualizations
- Processes: Workflows, Business Process Flows, and Custom Actions
- Solution Management

Audience

This course is intended for Information workers, IT Professionals and Developers. Students should have an existing working knowledge of either Microsoft Dynamics 365 or Microsoft Dynamics CRM.

Prerequisites

Before attending this course, students must have a working knowledge of Microsoft Dynamics 365 or Microsoft Dynamics CRM.

Duration

Three days

MOC 55242 A: Microsoft Dynamics 365 Customization and Configuration

Course Outline

I. Introduction

This module provides the attendee with an introduction to the concept of customizing and configuring the Dynamics 365 framework.

- A. Be familiar with the versions of Microsoft Dynamics CRM\365
- B. Get acquainted with the Dynamics 365 framework
- C. Review the Dynamics 365 interfaces, devices and apps
- D. Understand the tools for Dynamics 365 customizers
- E. A brief overview of Solutions
- F. Understand the differences between Dynamics 365 organizations and environments
- G. Review further reading and resources
- H. Set up the lab environment - Acme Enterprises Event Management Solution

Lab: Setting up your Lab environment

- Setup your Lab and install sample data

II. Initial Setup and Configuration

This module presents some of the most common features that require setup and configuration when Dynamics 365 is first installed.

- A. An introduction to Dynamics 365 online setup
- B. An introduction to Dynamics 365 on premise setup
- C. Review the System Settings area
- D. Understand how to configure Auto Save Settings
- E. Understand how to configure Format Settings
- F. Understand how to configure Email Settings
- G. Understand how to configure Skype Integration
- H. Understand how to configure SharePoint Integration

Lab: Configure Dynamics 365 System Settings

- Configure Auto Save Settings
- Configure Formatting Settings
- Configure Email Settings

Lab: Configure Dynamics 365 Audit Settings

- Enable Auditing in Dynamics 365
- Enable Auditing for an Entity
- Configure Auditing for a Field

III. Security

This module highlights the importance of maintaining a robust security model in Dynamics 365 by stepping through how to configure Business Units, Security Roles, Users and Teams. Access Teams and Hierarchy Security are also considered.

- A. Design and configure Business Units
- B. Configure Security Roles
- C. Manage Users and Teams
- D. Implement Access Teams
- E. Configure Hierarchy Security

Lab: Configure Users, Business Units, Security Roles, and Access Levels

- Add new Users in Dynamics 365
- Create new Business Units
- Copy a Security Role and Configure Access Levels
- Assign Users to Security Roles
- Login to Dynamics 365 as a different User to test permissions

Lab: Configure Access Teams

- Configure an Entity to be used in Access Teams
- Create an Access Team Template
- Configure a Sub-Grid to use an Access Team

Lab: Configure a Management Hierarchy

- Enable Hierarchy Security
- Configure a Manager Hierarchy

MOC 55242 A: Microsoft Dynamics 365 Customization and Configuration

Course Outline (cont'd)

IV. Creating and Managing Entities

In this module we will start to look at customizing the Dynamics 365 schema, including Entities, Relationships, Fields, and Forms which can be customized and extended using powerful inbuilt tools.

- A. Introduction to the Dynamics 365 schema
- B. Review the different Entity Types
- C. Create new Custom Entities
- D. Managing Entity Ownership
- E. Managing Entity Properties
- F. Custom Entity Security
- G. Review Entities and Solutions

Lab: Creating and Managing Entities

- Creating a new Solution
- Create Custom Entities and configure Entity properties
- Add existing System Entities to a Solution
- Configure permissions for Custom Entities

V. Customizing Fields

This module presents the different Field types that exist in Dynamics 365 including special Fields like Calculated and Rollup Fields. The Business Rule Designer is also introduced together with Field Level Security.

- A. Introduction to Field Customization
- B. Understand the different Field Types
- C. Review Field Formats
- D. Create a new Field
- E. Review Fields and Solutions
- F. Implement a Calculated Field
- G. Configure Field Level Security

Lab: Creating and Managing Fields

- Creating Fields
- Create a Global Option Set

Lab: Creating a Calculated Field

- Creating a Calculated Field
- Add Fields to an Entity Form

Lab: Configuring Field Level Security

- Enable a Field for Field Level Security
- Configure a Field Security Profile

VI. Customizing Relationships and Mappings

This module provides an overview of the different types of Relationships that can be created in Dynamics 365. Relationship Behaviors and Mappings are also considered.

- A. Introduction to Relationships
- B. Review the different Relationship Types
- C. Create a Relationship
- D. Review Relationships and Solutions
- E. Understand Relationship Behaviour
- F. Implement a Hierarchy Relationship
- G. Configure Field Mappings

Lab: Create Entity Relationships

- Create Entity Relationships
- Configure Relationship Behavior

Lab: Create a Hierarchical Relationship

- Configure a Hierarchical Relationship

Lab: Configure Field Mappings

- Configure Field Mappings

VII. Customizing Forms, Views, and Visualizations

This module steps through the process to create, customize and configure Forms, Views, Charts, and Dashboards in Dynamics 365.

- A. The process to create a new Form
- B. Review the different Form types
- C. Using the Form Designer
- D. Customizing the Main, Quick View and Quick Create Forms
- E. Configure Form Security
- F. Review the different View types
- G. Customizing System Views
- H. Customizing System Charts and Dashboards

MOC 55242 A: Microsoft Dynamics 365 Customization and Configuration

Course Outline (cont'd)

Lab: Customizing Forms

- Customizing Forms
- Create a Quick Create Form
- Create a Quick View Form

Lab: Configuring System Views

- Create Custom System Views

Lab: Configuring Charts and Dashboards

- Configure a System Chart
- Construct a System Dashboard

VIII. Processes: Workflows, Business Process Flows, and Custom Actions

In this module you will learn how to create and maintain Workflows, Business Process Flows and Custom Actions in Dynamics 365.

- A. Introduction to Processes
- B. Workflow
- C. Business Process Flows
- D. Custom Actions

Lab: Create a Workflow

- Create a Workflow
- Define when a Workflow Starts
- Adding Workflow Steps
- Activating a Workflow

Lab: Create a Business Process Flow

- Create a Business Process Flow
- Add Stages and Steps to a Business Process Flow
- Configure Branching Logic in a Business Process Flow

IX. Solution Management

In this module you will learn how to create and manage Solutions in Dynamics 365 across multiple environments.

- A. An introduction to Solution Management
- B. How to add and administer components in a Solution
- C. The differences between unmanaged and managed Solutions
- D. How to export and import a Solution
- E. How to set Managed Properties for a Solution
- F. What happens when you delete a Solution
- G. How to Clone a Solution Patch
- H. How to Clone a Solution

Lab: Solution Management

- Export an Unmanaged Solution
- Import an Unmanaged Solution
- Configuring Managed Properties
- Export and Import Managed Solutions
- Create a Solution Patch
- Clone a Solution