Course Outline

MB-300T01-A: Core Common Features of Dynamics 365 for Finance and Operations

Course Summary

Description

Organizations use Dynamics 365 for Finance and Operations to reduce operational costs and rapidly respond to changing business needs. This solution lets organizations achieve these goals.

This course discusses core components of Microsoft Dynamics 365 for Finance and Operations.

Topics

- Get Started with Dynamics 365 for Finance and Operations
- Get Started with Lifecycle Services
- Use Lifecycle Services to Design and Plan
- Overview of Reporting and Analytics
- Build and Test Mobile Apps
- Create, Maintain and Use Workflows
- Course Conclusion

Audience

A Dynamics 365 for Finance and Operations Functional Consultant is responsible for performing discovery, capturing requirements, engaging subject matter experts and stakeholders, translating requirements, and configuring the solution and applications. The Functional Consultant implements a solution using out of the box capabilities, codeless extensibility, application and service integrations.

Prerequisites

Basic understanding of ERP, CRM concepts.

Duration

One Day

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I. ***Get Started with Dynamics 365 for Finance and Operations***

This module provides an understanding of what Dynamics 365 for Finance and Operations is, and the industries that it supports. It describes the modules in Finance and Operations, and the purpose of the features in those modules and how they support the industry-specific areas.

   A. Introduction
   B. Industry focus
   C. Introduction to financial management
   D. Introduction to employee management
   E. Introduction to supply chain management
   F. Module summary

II. ***Get Started with Lifecycle Services***

Microsoft Dynamics Lifecycle Services (LCS) is a collaborative workspace that customers and their partners use to manage Dynamics 365 for Finance and Operations projects from pre-sales to implementation and finally to the production environment either on the cloud or on-premise. It provides checklists and tools that help you manage the project including methodologies that can help you manage your implementation process.

   A. Understand the functionality and tools of Lifecycle Services
   B. Reuse existing assets, copy and share data
   C. Understand Task recorder functionality
   D. Create a business process model
   E. Run the LCS Issue Search tool and analyze results

   F. Learn how to use Regression Suite Automation Tool
   G. Practice Labs
   H. Module Summary

III. ***Use Lifecycle Services to Design and Plan***

With proper planning, your Dynamics 365 for Finance and Operations implementation will be a success. After a customer signs the agreement to purchase licenses for Finance and Operations, your job as a functional consultant starts by managing the application lifecycle and moving toward a predictable, repeatable, high quality implementation.

   A. Introduction
   B. Phases of a cloud implementation
   C. Phases of an on-premises implementation
   D. Create Functional Design Documents (FDD)
   E. Module Summary

IV. ***Overview of Reporting and Analytics***

A report in Dynamics 365 for Finance and Operations can be defined simply as a structured presentation of data. Under ideal circumstances, reports materialize data in such a way that it allows the user to make informed decisions. Finance and Operations supports a broad spectrum of information access scenarios.

   A. Understand reports and inquiries
   B. Learn about Financial reporting
   C. Configure PowerBI to your instance
   D. Practice Labs
   E. Module Summary

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Course Outline (cont.)

V. *Build and Test Mobile Apps*
This module explains the guidelines and design patterns of a mobile app for Dynamics 365 for Finance and Operations. Additionally, it explains how to build and test mobile apps based on a use case scenario. The mobile platform makes it easy to change the forms and mobile app definitions to include customizations that are made to Finance and Operations. Mobile apps enable rich offline and mobile interactions and provide an easy-to-use designer experience. Developers can create simplified forms in Microsoft Visual Studio and then design mobile apps that expose this functionality.
A. Overview of Unified Operations mobile app
B. Build and use mobile apps
C. Practice Lab
D. Module Summary

VI. *Create, Maintain and Use Workflows*
A workflow represents a business process. It defines how a document flows, or moves, through the system by showing who must complete a task, make a decision, or approve a document. Some organizations require that specific processes are approved by a user other than the person who enters the record. These workflow processes might require manual approval, workflow approval, or no approval.
A. Workflows for business processes
B. Create and setup workflows
C. Assign users to workflow touchpoints
D. Use Work items
E. Practice Lab

F. Module Summary

VII. *Course Conclusion*
Final assessment and course summary, as well as a post-course survey for the course.
A. Final assessment
B. Course summary
C. Post-course survey