

MB-300T03-A: Data Migration and Preparing for Go-Live with 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 data migration and go-live preparation for Microsoft Dynamics 365 for Finance and Operations.

Topics

- Prepare Data for Migration and Migrate Data
- Use Data Management
- Perform User Acceptance Testing
- Prepare to Go Live
- 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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Course Outline

I. *Prepare Data for Migration and Migrate Data*

This unit explores integration patterns, scenarios, and solutions for Finance and Operations. Although this unit does not include technical details about how to use or set up every integration pattern or how to work with sample code, it is always wise to be aware of available integration tools.

- A. Introduction
- B. Understand BYOD feature
- C. Perform a test migration and validate output
- D. Module summary

When it's time for data migration, the more you know, the easier it is to control operational complexity and reduce costs. Your customer's business continuity must be your priority. In this module, you will learn how to prepare data for a successful migration by identifying important factors such as legacy systems, and static and common data.

II. *Use Data Management*

In this module, you will get an overview of the basic concepts of the Data management platform. You will also learn how to import and export data in Dynamics 365 for Finance and Operations by using the Data management workspace. Finally, you'll learn how to use the asynchronous recurring integration features of the Data management platform. You can use the data management framework to manage data entities and data entity packages in Finance and Operations.

- A. Introduction
- B. Understand data management and integration
- C. Data management workspace
- D. Templates in data management
- E. Import, export and copy data into a legal entity
- F. Practice Labs
- G. Module summary

III. *Perform User Acceptance Testing*

In order to test and evaluate the customer solution prior to the go-live, you need to have an environment of Dynamics 365 for Finance and Operations, that has all the configurations, possible customization via extensions. It is always beneficial to have a methodology to ensure the creation and testing is organized and planned properly for a short, efficient, and role focused test case scenarios.

- A. Introduction
- B. Create and perform test cases for User Acceptance
- C. Practice Lab
- D. Module summary

IV. *Prepare to Go Live*

All your hard work becomes a success by moving the implemented solution in Dynamics 365 for Finance and Operations to the production environment. This is a crucial and final stage of your exciting experience of completing an implementation. You want a happy customer, a quality solution, and peace of mind during this important phase, which is known as go live. You cannot guarantee your success without knowing how to prepare for Finance and Operations go live and the final stage of implementation.

- A. Introduction
- B. Get ready to go live
- C. Module summary

V. *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