Microsoft Dynamics 365 for Unified operations Core

Overview

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.

Duration

5 Days

Course Topics

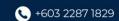|	Get Started with Dynamics 365 for Finance and Operations
Module 1	This module provides an understanding of what Dynamics 365 for Finance and Operations is, and the industries that it supports. It describes the modules in Finance and Operations, and the purpose of the features in those modules and how they support the industry-specific areas. Lessons • Introduction • Industry focus • Introduction to financial management • Introduction to employee management • Introduction to supply chain management • Module summary You will have an understanding of what Finance and Operations is, and the industries that it supports. You will be familiar with the modules in Finance and Operations, and the purpose of the features in those modules and how they support the industry-specific areas.

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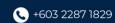| Module 2	**Get Started with Lifecycle Services**
	Microsoft Dynamics Lifecycle Services (LCS) is a collaborative workspace that customers and their partners use to manage Dynamics 365 for Finance and Operations projects from pre-sales to implementation and finally to the production environment either 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. Lessons • Understand the functionality and tools of Lifecycle Services • Reuse existing assets, copy and share data • Understand Task recorder functionality • Create a business process model • Run the LCS Issue Search tool and analyze results • Learn how to use Regression Suite Automation Tool • Practice Labs • Module Summary You will be able to: Understand the functionality and tools of Lifecycle services (LCS) for Finance and Operations. Reuse existing assets, copy, and share data. Understand Task recorder functionality. Create a business process model. Identify and analyze gaps using the Business process modeler (BPM). Run the LCS Issue Search tool and analyze results

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Module 3	**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. Lessons • Introduction • Phases of a cloud implementation • Phases of an on-premises implementation • Create Functional Design Documents (FDD) • Module Summary You will be able to: Prepare documentation for gathered requirements by using a methodology in Lifecycle Services (LCS). Define use case scenarios. Participate in the creation of functional requirements documents (FRD). Understand the importance of creating and maintaining documented processes. Participate in phase-based planning processes and solution design. Describe the future state business processes based on a proposed solution. Determine when to build versus buy. Create functional design documents (FDD)

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Module 4	**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. Lessons • Understand reports and inquiries • Learn about Financial reporting • Configure PowerBI to your instance • Practice Labs • Module Summary You will have learned about: Different types of reports and inquiries in Finance and Operations Financial reporting Configuring Finance and Operations for Microsoft Power Platform
Module 5	**Configuring Wireless Connectivity** 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. Lessons • Understand reports and inquiries • Learn about Financial reporting • Configure PowerBI to your instance • Practice Labs • Module Summary You will have learned about: Different types of reports and inquiries in Finance and Operations Financial reporting Configuring Finance and Operations for Microsoft Power Platform

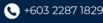|	Create, Maintain and Use Workflows
Module 6	A workflow represents a business process. It defines how a document flows, or moves, through the system by showing who must complete a task, make a decision, or approve a document. Some organizations require that specific processes are approved by a user other than the person who enters the record. These workflow processes might require manual approval, workflow approval, or no approval. Lessons • Workflows for business processes • Create and setup workflows • Assign users to workflow touchpoints • Use Work items • Practice Lab • Module Summary In this module, you learned how to apply automation by using workflows, and discovered that defining a specific type allows a business to control each step in a critical process. You also learned that workflows can be used as procedural steps that use approvals for several journal types. Additionally, you learned that you can define several versions for each workflow and modify an existing workflow without deleting the original. These workflow processes can require manual approval, workflow approval, or no approval. After gaining an understanding of the workflow architecture, elements, and actions, you then learned how to set up workflows, configure workflow properties, and add a manual or automated task in a workflow. Finally, you learned how to configure an approval process in a workflow, assign users to workflow touchpoints, configure an approval step in a workflow, and use the Work items functionality to process a workflow.

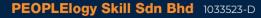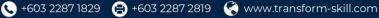|	**Set Up and Configure Legal Entities**
Module 7	This module explains the setup and configuration of legal entities and number sequences in Dynamics 365 for Finance and Operations. Lessons • Create a legal entity and generate number sequences • Create a number sequence • Create organization hierarchies • Apply purposes and policies • Configure calendars and date intervals • Practice Labs • Module summary You've learned how to create a legal entity and generate number sequences, manually or by using a wizard. You also configured calendars and date intervals. You also learned how to create organization hierarchies, apply purposes, and set up policies in order to streamline business policies and reporting structures.

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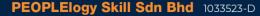|	
Module 8	**Manage users and security** Microsoft Dynamics 365 for Finance and Operations has an array of security and configuration options to help keep your sensitive data safe. This all means that your users can remain focused on their roles, while the system remains as streamlined as possible. Knowing how to implement different security options will help companies cover their security requirements. When you understand the security architecture of Finance and Operations, you can more easily customize security to fit the requirements of your business. Lessons • Understand the security architecture • Manage users and security • Setup and apply segregation of duties • Run security reports • Setup batch jobs and alerts • Practice labs • Module summary In this module, you will have: Understood the security architecture of Finance and Operations. Managed users. Managed security. Applied segregation of duties. Run security reports.
Module 9	**Perform Personalization** Personalization saves time and effort when using the system. Lessons • Describe and apply user options • Create, export and import personalization's • Create and maintain record templates • Practice labs • Module summary You have now learned how to use and apply user options, create personalization, and export personalization to be used by other users, using the personalization feature of Finance and Operations. You also learned the difference between customization and personalization. How personalization helps you save time personalizing often used field values, and allows you to create and maintain record templates

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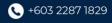|	
Module 10	**Implement Common Integration Features** Microsoft Dynamics 365 integrates with many other common programs; for example email, Microsoft Office, and Power BI. Lessons • Microsoft Office integration • Configure email • Create and maintain email templates • Use Power BI • Setup network printing • Integrate data into Common Data Services for Apps • Practice Labs • Module summary In this module, you will have learned how to use Microsoft Office integration in Dynamics 365 for Finance and Operations, configure email (SMTP/Exchange), and to create and maintain email templates to standardize the messages when sending emails to customers. By setting up network printing features, you can use corporate network printers remotely. Finally, this module provided an overview of how to integrate data from multiple sources into Common Data Service for Apps and integrate the data to Dynamics 365 for Finance and Operations using the Data Management workspace

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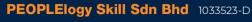|	
	Prepare Data for Migration and Migrate Data
Module 11	This unit explores integration patterns, scenarios, and solutions for Finance and Operations. Although this unit does not include technical details about how to use or set up every integration pattern or how to work with sample code, it is always wise to be aware of available integration tools. Lessons • Introduction • Understand BYOD feature • Perform a test migration and validate output • 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. In this module, you learned how to: Choose a data integration (import/export) strategy. Identify common migration scenarios and tools in Finance and Operations. Understand the bring your own database (BYOD) feature. Identify relevant (legacy) systems. Identify and import static data that is common between industries. Create and review test plans for data migration. Identify and extract source data. Identify relevant data entities and elements. Generate field mapping between source and target data structures. Perform a test migration and validate output. Support the transition between the existing and migrated systems

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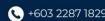|	
Module 12	**Use Data Management** In this module, you will get an overview of the basic concepts of the Data management platform. You will also learn how to import and export data in Dynamics 365 for Finance and Operations by using the Data management workspace. Finally, you'll learn how to use the 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 Financeand Operations. Lessons • Introduction • Understand data management and integration • Data management workspace • Templates in data management • Import, export and copy data into a legal entity • Practice Labs • Module summary In this module, you learned how to: Identify the correct pattern for a given scenario to use the Data management platform for integration by using data entities. Work with the Data management workspace. Export data from a legal entity. Import data into a legal entity. Work with data import and export jobs. Clean up the staging tables.

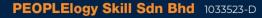| Module 13	**Perform User Acceptance Testing**
	In order to test and evaluate the customer solution prior to the go-live, you need to have an environment of Dynamics 365 for Finance and Operations, that has all the configurations, possible customization via extensions. It is always beneficial to have a methodology to ensure the creation and testing is organized and planned properly for a short, efficient, and role focused test case scenarios.
	Lessons
	• Introduction
	• Create and perform test cases for User Acceptance
	• Practice Lab
	• Module summary
	In this module you learned about:
	How to understand the correlation between test cases and business requirements
	Best practices for recording test cases
	Task recorder
	How to create a Scenario Acceptance Testing BPM library
	How to synchronize and configure your test plan in Azure DevOps
	How to execute your tests

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Module 14	**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. Lessons • Introduction • Get ready to go live • Module summary In this module, you will have learned how to: Prepare for go live. Complete the Lifecycle Services (LCS) methodology. Perform User acceptance testing (UAT) for your solution. Understand the FastTrack Go-live assessment. Request the production environment