Course duration

- 2 days

Course Benefits

- How to navigate and efficiently use search, filtering and queries
- How to use operational workspaces
- Work with Business Document Management
- Work with record templates
- Integrate Power BI with Dynamics 365 Finance and Operations apps
- How to personalize workspaces
- Identify when to use Power Platform in Dynamics 365 Finance and Operations app.
- How to apply security roles to users
- Run and analyze security reports
- Create and use workflow for approval
- Work with Organization Hierarchy and its purposes.
- How to use personalization feature
- Use Data Management workspace
- Create and use and entity templates
- Copy configuration data between legal entities
- Import and Export data and manage data by using Office Integration
- Use Regression Suite Automation Tool (RSAT)
- Create User acceptance Tests (UAT) and test plans
- Create and work with Business Process Modeler (BPM)
- Understand how to use Issue search

Available Delivery Methods

Public Class
Public expert-led online training from the convenience of your home, office or anywhere with an internet connection. Guaranteed to run .

Private Class
Private classes are delivered for groups at your offices or a location of your choice.

Microsoft Certified Partner

Webucator is a Microsoft Certified Partner for Learning Solutions (CPLS). This class uses official Microsoft courseware and will be delivered by a Microsoft Certified Trainer (MCT).

Course Outline

1. Get Started with Dynamics 365 for Finance and Operations
    1. Introduction
    2. Industry focus
    3. Introduction to financial management
    4. Introduction to employee management
    5. Introduction to supply chain management
    6. Module summary
2. Get Started with Lifecycle Services
    1. Understand the functionality and tools of Lifecycle Services
    2. Reuse existing assets, copy and share data
    3. Understand Task recorder functionality
    4. Create a business process model
    5. Run the LCS Issue Search tool and analyze results
    6. Learn how to use Regression Suite Automation Tool
    7. Practice Labs
    8. Module Summary
3. Use Lifecycle Services to Design and Plan
    1. Introduction
    2. Phases of a cloud implementation
    3. Phases of an on-premises implementation
    4. Create Functional Design Documents (FDD)
    5. Module Summary
4. Overview of Reporting and Analytics
    1. Understand reports and inquiries
    2. Learn about Financial reporting
    3. Configure PowerBI to your instance
    4. Practice Labs
    5. Module Summary
5. Build and Test Mobile Apps
    1. Overview of Unified Operations mobile app
    2. Build and use mobile apps
    3. Practice Lab
    4. Module Summary
6. Create, Maintain and Use Workflows
    1. Workflows for business processes
    2. Create and setup workflows
    3. Assign users to workflow touchpoints
    4. Use Work items
    5. Practice Lab
    6. Module Summary
7. Set Up and Configure Legal Entities
    1. Create a legal entity and generate number sequences

    2. Create a number sequence

    3. Create organization hierarchies

    4. Apply purposes and policies

    5. Configure calendars and date intervals

    6. Practice Labs

    7. Module summary

8. Manage Users and Security
    1. Understand the security architecture
    2. Manage users and security
    3. Setup and apply segregation of duties
    4. Run security reports
    5. Setup batch jobs and alerts
    6. Practice labs
    7. Module summary
9. Perform Personalization
    1. Describe and apply user options
    2. Create, export and import personalizations
    3. Create and maintain record templates
    4. Practice labs
    5. Module summary
10. Implement Common Integration Features
    1. Microsoft Office integration
    2. Configure email
    3. Create and maintain email templates
    4. Use Power BI
    5. Setup network printing
    6. Integrate data into Common Data Services for Apps
    7. Practice Labs
    8. Module summary
11. Prepare Data for Migration and Migrate Data
    1. Introduction
    2. Understand BYOD feature
    3. Perform a test migration and validate output
    4. Module summary
12. Use Data Management
    1. Introduction
    2. Understand data management and integration
    3. Data management workspace
    4. Templates in data management
    5. Import, export and copy data into a legal entity
    6. Practice Labs
    7. Module summary
13. Perform User Acceptance Testing
    1. Introduction
    2. Create and perform test cases for User Acceptance
    3. Practice Lab
    4. Module summary

14. Prepare to Go Live
    1. Introduction
    2. Get ready to go live
    3. Module summary
15. Course Conclusion
    1. Final assessment
    2. Course summary
    3. Post-course survey

Class Materials

Each student will receive a comprehensive set of materials, including course notes and all the class examples.

Class Prerequisites

Experience in the following *is required* for this Dynamics 365 class:

- Basic understanding of ERP, CRM concepts.