Core User Boot Camp for Finance and Operations

Course Level: 100

This instructor-led course provides a key step for Microsoft Dynamics 365 for Finance and Operations administrators and customizers who are beginning or advancing their knowledge of Finance and Operations. This course will focus on the core out-of-the-box capabilities while driving understanding surrounding the competencies needed for attendees to be impactful for their organization. This fast-paced course covers the latest and greatest in Microsoft new feature releases to ensure that attendees are empowered to leverage the full capabilities of their organization's Dynamics 365 environment.

DYNAMICS 365 UNIVERSITY

At A Glance:
Core User Boot Camp for Finance and Operations

Why Enroll?

Empower ERP Admins to make enhancements & gain a wholistic understanding of the Finance & Operations backend features & functionality.

Who to Enroll?

System Administrators -
Application Administrators -
ERP Customizers -
"Back of House" Personnel -

Key Takeaways

Basics (Security, Form/Reporting, Power BI), LCS Overview
System Topography, Azure DevOps (formerly VSTS), Office Add-In, Mobile App, Org Admin, Workflows, System Maintenance, ULCs

Register

Register for an ERP Boot Camp today!

Click to Register.

About this
Training

Intended Audience

This course is designed to support individuals who will be administering or configuring Microsoft Dynamics 365 for Finance and Operations. This course provides attendees who have limited or no exposure to Finance and Operations a breadth understanding of the solution. Those who are migrating from a previous version of Microsoft Dynamics AX, ERP, or database solution will find value in learning new features and functionality of the most recent release. This course is not recommended for end users.

Recommended Prerequisites

Prerequisites are recommendations, and while not required, they are *highly* advised to ensure a successful learning experience:
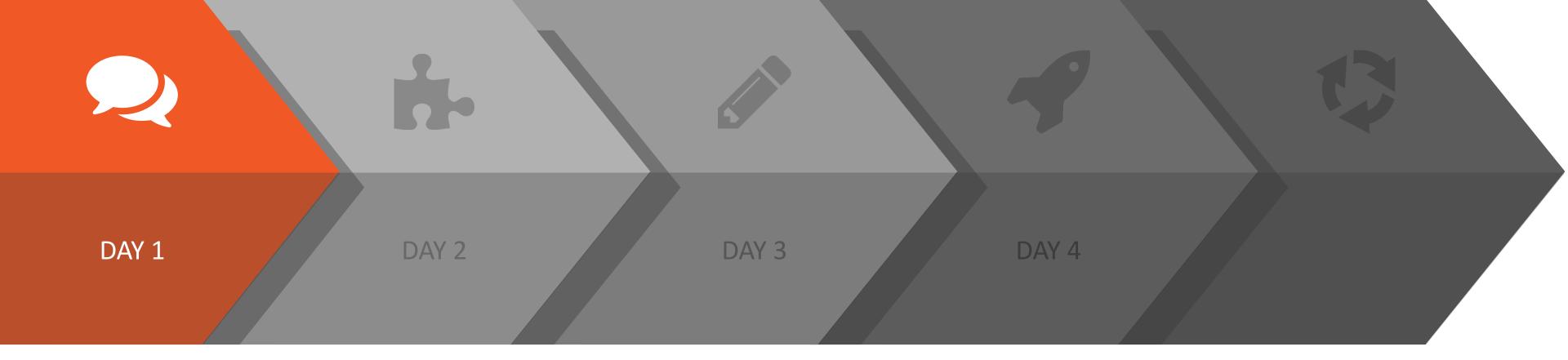•Understanding of data or relational databases is helpful
•Exposure to Microsoft Dynamics 365 for Finance and Operations is helpful, but not necessary

Key
Takeaways

This Training Will Allow You To:

- Gain an understanding of an ERP system, including navigation, workspaces, various functional areas, and various solutions included in Finance and Operations
- Gain knowledge of report options available in Dynamics 365, including Native Charts, SSRS reports, Power BI dashboards/reports, and Financial reports
- Understand Lifecycle Services (LCS) available to enable administrators to effectively monitor, fix, and manage their environment
- Understand various deployment options available, as well as how different system topologies may impact the flow of data and code
- Configure Azure DevOps (formerly VSTS) and learn how to utilize it within a Dynamics 365 implementation, including managing work items and queries from a non-developer perspective
- Create and assign custom user roles
- Understand the reporting landscape, which includes generating basic SSRS reports and financial reports
- Become familiar with the basic ways Power BI can be used within Finance and Operations for reporting and analytics
- Understand functionality of the Office Add-In for Finance and Operations
- Become familiar with using and customizing the mobile app for users
- Understand essentials of org administration including organizational hierarchy, use of legal entities, operating units, the global address book, and fundamentals of system maintenance
- Create and work with workflows
- Understand the importance of and create user level customizations

DAY 1 DAY 2 DAY 3 DAY 4

BASICS & NAVIGATION

- Introduction to ERP
- Navigation of Dynamics 365 for Finance and Operations
- Functional areas
- Industry solutions
- Reporting in Dynamics 365 for Finance and Operations

SYSTEM TOPOGRAPHY

- Overview of deployment options
- Review project lifecycle, subscriptions, and topologies available in a cloud deployment
- Discuss build process & environments required
- Outline the production cloud deployment features
- Review on-prem considerations
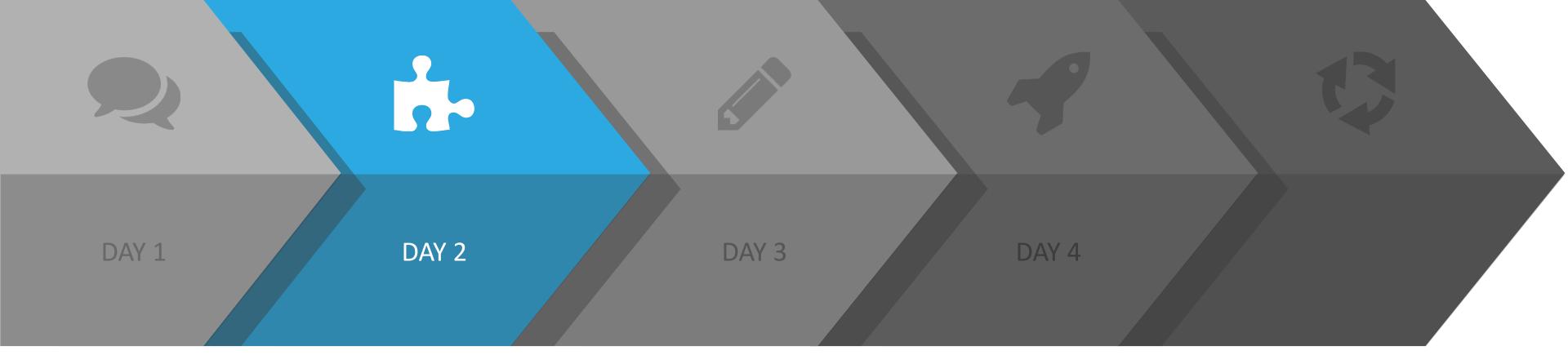- Cloud disaster recovery overview

LCS OVERVIEW

- Understand purpose of LCS for Finance and Operations
- Review how LCS can be used as a management overview point
- Review how LCS can be used for project management
- Review the role LCS plays in environment deployment
- Review the use of LCS for managing service requests

- Review the diagnostic functions within LCS
- Review issue tracking capabilities of LCS
- Review how to use LCS for managing support tickets
- Review how LCS can be used to manage deployed environments

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DAY 1 DAY 2 DAY 3 DAY 4

SYSTEM MAINTENANCE

- Overview of support vs. system maintenance
- Required Azure DevOps (formerly VSTS) configuration to enable technical support
- Review creating a support ticket
- Submitting a service request
- Review planned maintenance windows
- Deploying a code package

AZURE DEVOPS (FORMERLY VSTS) OVERVIEW

- ALM and DevOps (formerly VSTS)Overview
- Azure DevOps (formerly VSTS) link to Dynamics 365 & LCS
- Brief Process Overview -Agile, CMMI, Scrum
- View and add work items
- Review work items and features
- Manage bugs, issues, impediments
- Backlog/board, filtering, and column options
- View, modify, add queries
- Charts, dashboards and widgets

BASIC REPORTING

- Overview of reporting and analytics
- SSRS Reports
- Financial report designer

BASIC POWER BI

- Overview of Power BI
- Configuring Finance and Operations environment to Power BI service
- Connecting Power BI desktop to Finance and Operations oDatafeed
- Basic Power Query
- Intro to Visualizations
- Publishing Reports
- Creating Dashboards
- Sharing Content

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DAY 1 **DAY 2** **DAY 3** **DAY 4**

BASIC SECURITY

OFFICE ADD-IN/INTEGRATION

ORG ADMINISTRATION

- Security structure
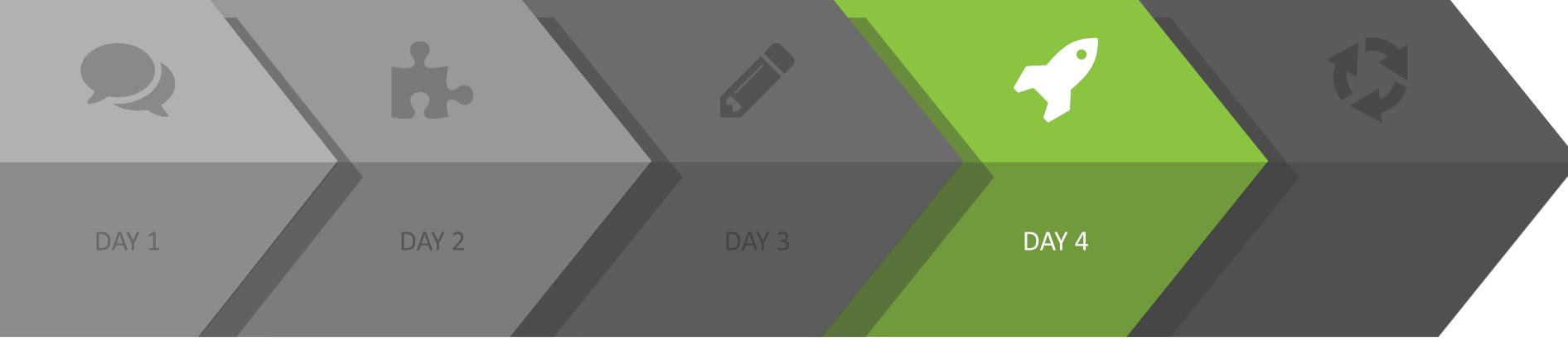- Customizing roles
- Assigning roles to users

- General overview of the Microsoft Office Add-In
- Demonstrations of how the Office Add-in can be used
- Exporting views and information
- Learn how to use Office Add-In to upload attachments and update information in Finance and Operations

- Organizational hierarchy
- Understand the components and uses of a hierarchy
- Number sequences
- Review how to create and configure number sequences
- Legal entity setup and configuration
- Operating units
- Review the different types of operating units
- Global address book

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DAY 1 DAY 2 DAY 3 DAY 4

WORKFLOWS

- General overview of what workflows do in Finance and Operations
- Instructions on how to:
  - Create a workflow
  - Update a workflow
  - Activate/deactivate a workflow
  - Remove a workflow

MOBILE APP

- Mobile platform overview
  - General overview
  - Mobile app elements
  - Implementation process/available out-of-box workspaces.
  - Deploying a mobile workspace
- Creating mobile workspaces
  - Prerequisites
  - Create a mobile workspace
  - Add Pages
  - Add actions and lookups

USER LEVEL CUSTOMIZATIONS

- Systemwide options
- Implicit vs. explicit Personalization
- Adding a custom dashboard banner
- Personalize default dashboard
- Pin tile to dashboard
- Add tile, list, or link to Workspace

- Favorites
- Personalizations
- Edit grid
- Add fields
- Custom fields –creating, sharing, managing
- Export personalizations
- Work in multiple windows

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Dynamics 365 University is designed to be foundational training for those responsible for implementing and supporting Dynamics 365 within your organization. Dynamics 365 University focuses on out-of-the-box features and functionality training for your core team. Participants get an understanding of how the Dynamics 365 processes and architecture can be leveraged and customized to support your unique organizational processes.

GET STARTED