

Core common features of Dynamics 365 for Finance and Operations

Module 1: 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, 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 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 manage the project, including methodologies that can help manage the 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 3: Use Lifecycle Services to Design and Plan

With proper planning, the Dynamics 365 for Finance and Operations implementation will be a success. After a customer signs the agreement to purchase licenses for Finance and Operations, the 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 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 the instance
- Practice Labs

Module 5: 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.

Lessons

- Overview of Unified Operations mobile app
- Build and use mobile apps
- Practice Lab

Module 6: 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.

Lessons

- Workflows for business processes
- Create and setup workflows
- Assign users to workflow touchpoints
- Use Work items
- Practice Lab

Module 7: Course Conclusion

Final assessment and course summary, as well as a post-course survey for the course.

Lessons

- Final assessment
- Course summary
- Post-course survey