

Microsoft Dynamics 365 : Finance and operations core

Référence : MSMB300

Durée : 3 jours

Certification : Non

CONNAISSANCES PREALABLES

- Basic understanding of ERP, CRM concepts.

PROFIL DES STAGIAIRES

- 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.

OBJECTIFS

- This course discusses core components of Microsoft Dynamics 365 for Finance and Operations.

CERTIFICATION PREPAREE

- Aucune

METHODES PEDAGOGIQUES

- Mise à disposition d'un poste de travail par stagiaire
- Remise d'une documentation pédagogique papier ou numérique pendant le stage
- La formation est constituée d'apports théoriques, d'exercices pratiques, de réflexions et de retours d'expérience
- Le suivi de cette formation donne lieu à la signature d'une feuille d'émargement

FORMATEUR

Consultant-Formateur expert Microsoft CRM

METHODE D'EVALUATION DES ACQUIS

- Auto-évaluation des acquis par le stagiaire via un questionnaire
- Attestation de fin de stage adressée avec la facture

CONTENU DU COURS

Get Started with Dynamics 365 for Finance and Operations

- Introduction
- Industry focus
- Introduction to financial management
- Introduction to employee management
- Introduction to supply chain management
- Module Summary

Get Started with Lifecycle Services

- 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

Use Lifecycle Services to Design and Plan

- Introduction
- Phases of a cloud implementation
- Phases of an on-premises implementation
- Create Functional Design Documents (FDD)
- Module Summary

Overview of Reporting and Analytics

- Understand reports and inquiries
- Learn about Financial reporting
- Configure PowerBI to your instance
- Practice Labs
- Module Summary

Build and Test Mobile Apps

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

- Practice Lab
- Module Summary

Create, Maintain and Use Workflows

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

Course Conclusion

- Final assessment
- Course summary
- Post-course survey

Set Up and Configure Legal Entities

- 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

Manage users and security

- 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

Perform Personalization

- Describe and apply user options
- Create, export and import personalizations
- Create and maintain record templates
- Practice labs
- Module summary

Implement Common Integration Features

- 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

Course Conclusion

- Final assessment
- Course summary
- Post-course survey

Prepare Data for Migration and Migrate Data

- Introduction
- Understand BYOD feature
- Perform a test migration and validate output
- Module summary

Use Data Management

- 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

Perform User Acceptance Testing

- Introduction
- Create and perform test cases for User Acceptance
- Practice Lab
- Module summary

Prepare to Go Live

- Introduction
- Get ready to go live
- Module summary

Course Conclusion

- Final assessment
- Course summary
- Post-course survey