

MB-300T00-A | Microsoft Finance and Operations Core

About this course This course discusses: - Core common features of Dynamics 365 for Finance and Operations - Core configuration in Dynamics 365 for Finance and Operations - Data migration and preparing for go-live with Dynamics 365 for Finance and Operations 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 and configuration of Microsoft Dynamics 365 for Finance and Operations, and data migration and preparing for go-live.

Audience profile 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. The Functional Consultant implements a solution using out of the box capabilities, codeless extensibility, application and service integrations.

Prerequisites Before attending this course, students must have:

- General knowledge of Microsoft Windows
- The ability to use Dynamics 365 for Finance and Operations for basic processing
- General knowledge of basic mobile device features and navigation

At course completion After completing this course, students will be able to:

- Get started with Lifecycle Services for Dynamics 365 for Finance and Operations
- Use Lifecycle Services to design and plan implementation for Dynamics 365 for Finance and Operations
- Have an overview of reporting and analytics in Dynamics 365 for Finance and Operations
- Build and test mobile apps for Dynamics 365 for Finance and Operations
- Create, maintain, and use workflows in Dynamics 365 for Finance and Operations
- Set up and configure legal entities in Dynamics 365 for Finance and Operations
- Manage users and security in Dynamics 365 for Finance and Operations
- Perform personalization in Dynamics 365 for Finance and Operations
- Implement common integration features in Dynamics 365 for Finance and Operations
- Prepare data for migration and migrate data to Dynamics 365 for Finance and Operations
- Use data management in Dynamics 365 for Finance and Operations
- Perform user acceptance testing for Dynamics 365 for Finance and Operations
- Prepare for go-live

COURSE OUTLINE

Module 1: Get Started with Dynamics 365 for Finance and Operations

Learn how Microsoft Dynamics 365 for Finance and Operations supports businesses to manage their global financial systems, operational business processes, and streamlined supply chains to empower people to make fast, informed decisions. As the first step in your career of working with Finance and Operations, you must familiarize yourself with its features and functionality, regardless of your desired role.

Lessons

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

After completing this module, students will:

- Understand the industries that it supports
- Be familiar with the modules in Finance and Operations
- Be familiar with the purpose of the features in those modules
- Be familiar with how they support industry-specific areas
- Understand what Finance and Operations is

Module 2: Get Started with Lifecycle Services

To install and maintain Microsoft Dynamics 365 for Finance and Operations in the Microsoft Azure cloud or on-premises, you need to use Microsoft Dynamics Lifecycle Services (LCS) to manage the process. Let's get started by looking at the overall functionality and tools available within LCS. 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

After completing this module, students will be able to:

- Reuse existing assets, copy, and share data
- Understand Task recorder functionality
- Create a business process model
- Understand the functionality and tools of Lifecycle services (LCS) for Finance and Operations

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 agreements to purchase licenses for Finance and Operations, your job as a functional consultant starts by managing the application lifecycle and moving toward 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

After completing this module, students will be able to:

- 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
- Design the future state business processes based on a proposed solution
- Determine when to build versus buy
- Create functional design documents (FDDs)
- Prepare documentation for gathered requirements by using a methodology in Lifecycle Services (LCS)

Module 4: Overview of Reporting and Analytics

Business leaders make important decisions in their company with accurate insights of the underlying financial and operational data. With no visibility to that data, it would be impossible! By using analytics and reporting in Dynamics 365 for Finance and Operations, you can empower every business user, depending on their security rights to get the insights they need.

Lessons

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

After completing this module, students will be able to:

- Financial reporting
- Configuring Finance and Operations for Microsoft Power Platform
- Different types of reports and inquiries in Finance and Operations

Module 5: Build and Test Mobile Apps

We live in a digital age. Now, it's difficult to imagine a day without smart devices. You use mobile applications almost every day for your social engagements, online banking, and for booking hotels, air, and rental cars. It seems only natural that you can use Dynamics 365 for Finance and Operations on your smart device.

Lessons

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

After completing this module, students will be able to:

- Create a mobile app and publish it
- Download the app
- Run the Dynamics 365 Apps to connect to Finance and Operations

Module 6: Create, Maintain and Use Workflows

Some organizations require that specific processes be 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

After completing this module, students will be able to:

- Define type of workflow
- Know workflows can allow for approvals for several journal types
- Define multiple versions of a workflow
- Modify an existing workflow without deleting the original
- Set up, configure, and add workflows and their tasks
- Configure an approval process
- Apply automation using workflows

Module 7: Set Up and Configure Legal Entities

A legal entity is an organization that is identified through registration with a legal authority. Legal entities can enter into contracts and are required to prepare statements that report on their performance. You must plan and configure your organization and create legal entities as one of the first steps of implementing Dynamics 365 for Finance and Operations. 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

After completing this module, students will be able to:

- Configure calendars and date intervals.
- Create organization hierarchies, apply purposes, and set up policies
- Create a legal entity and generate number sequences

Module 8: Manage Users and Security

If you understand the security architecture of Dynamics 365 for Finance and Operations, you can customize it to fit the requirements of your business. Using Finance and Operations, you can keep your sensitive data safe and ensure that users remain focused on their roles. 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

After completing this module, students will understand:

- Managed users
- Managed security
- Applied segregation of duties
- How to run security reports
- Security architecture of Finance and Operations

Module 9: Perform Personalization

By personalizing the user interface in Dynamics 365 for Finance and Operations, you can empower employees of an organization to work more efficiently. Personalization helps department managers to enforce a specific user interface for their staff without a need for customization.

Lessons

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

After completing this module, students will understand:

- The difference between customization and personalization
- How personalization helps you save time
- How personalization helps you create and maintain record templates
- How to use and apply user options, create personalization, and export personalization

Module 10: Implement Common Integration Features

This module provides information about how to implement Common integration features in Finance and Operations. Microsoft Office Excel has been integrated with Dynamics 365 for Finance and Operations by default. This allows you to pull the data right from Finance and Operations, manipulate the data in Excel, and save it back to Finance and Operations. You can also send emails directly via Finance and Operations or by using Microsoft Outlook. You can print documents from anywhere from your browser to your company's network printer, so the printing experience could not be easier.

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

After completing this module, students will be able to:

- Use corporate network printers remotely
- Integrate data from multiple sources into Common Data Service
- Use Microsoft Office integration

Module 11: Prepare Data for Migration and Migrate Data

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. Learn how to prepare data for migration by using the data management framework to manage data entities and data entity packages in Dynamics 365 for Finance and Operations.

Lessons

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

After completing this module, students will be able to:

- 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
- Choose a data integration (import/export) strategy

Module 12: Use Data Management

You can export or import data in Dynamics 365 for Finance and Operations by using the Data management workspace. Validate the data by staging the source data, and then move it to the target tables in the Finance and Operations database. 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.

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

After completing this module, students will be able to:

- Work with the Data management workspace
- Export data from a legal entity
- Import data into a legal entity
- Identify the correct pattern for a given scenario

Module 13: Perform User Acceptance Testing

After all the customer requirements have been addressed by either configuration, customization, and integration with possible third-party, you need to know how to perform user acceptance testing (UAT) in Microsoft Dynamics 365 for Finance and Operations to validate the solution. This is a crucial step as part of the go-live preparation. 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

After completing this module, students will understand:

- 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
- How to understand the correlation between test cases and business requirements

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. You want a happy customer, a quality solution, and peace of mind during this important phase, which is known as go live. Learn how to prepare to go live with a Finance and Operations project by using Microsoft Dynamics Lifecycle Services (LCS).

Lessons

- Introduction
- Get ready to go live
- Module summary

After completing this module, students will be able 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

Module 15: 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