

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

## Content

### **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

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

### **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

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

### **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

- Prepare documentation for gathered requirements by using a methodology in Lifecycle Services (LCS)
- 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)

### **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

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

### **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

- You will have learned how to create a mobile app and publish it
- You will also have learned that you need to download the apps
- How to 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

- You can apply automation using workflows
- You learned about defining type of workflow
- You know workflows can allow for approvals for several journal types
- You learned you can define multiple versions of a workflow
- You learned you can modify an existing workflow without deleting the original

- You learned how to set up, configure, and add workflows and their tasks
- You learned to configure an approval process

## **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

- You've learned how to create a legal entity and generate number sequences
- You also configured calendars and date intervals.
- You learned how to create organization hierarchies, apply purposes, and set up policies

## **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

- Understood the security architecture of Finance and Operations
- Managed users
- Managed security
- Applied segregation of duties
- Run security reports

### **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

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

### **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

- You will have learned how to use Microsoft Office integration
- You can use corporate network printers remotely
- How to integrate data from multiple sources into Common Data Service

### **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

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

### **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

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

### **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

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

### **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

- 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