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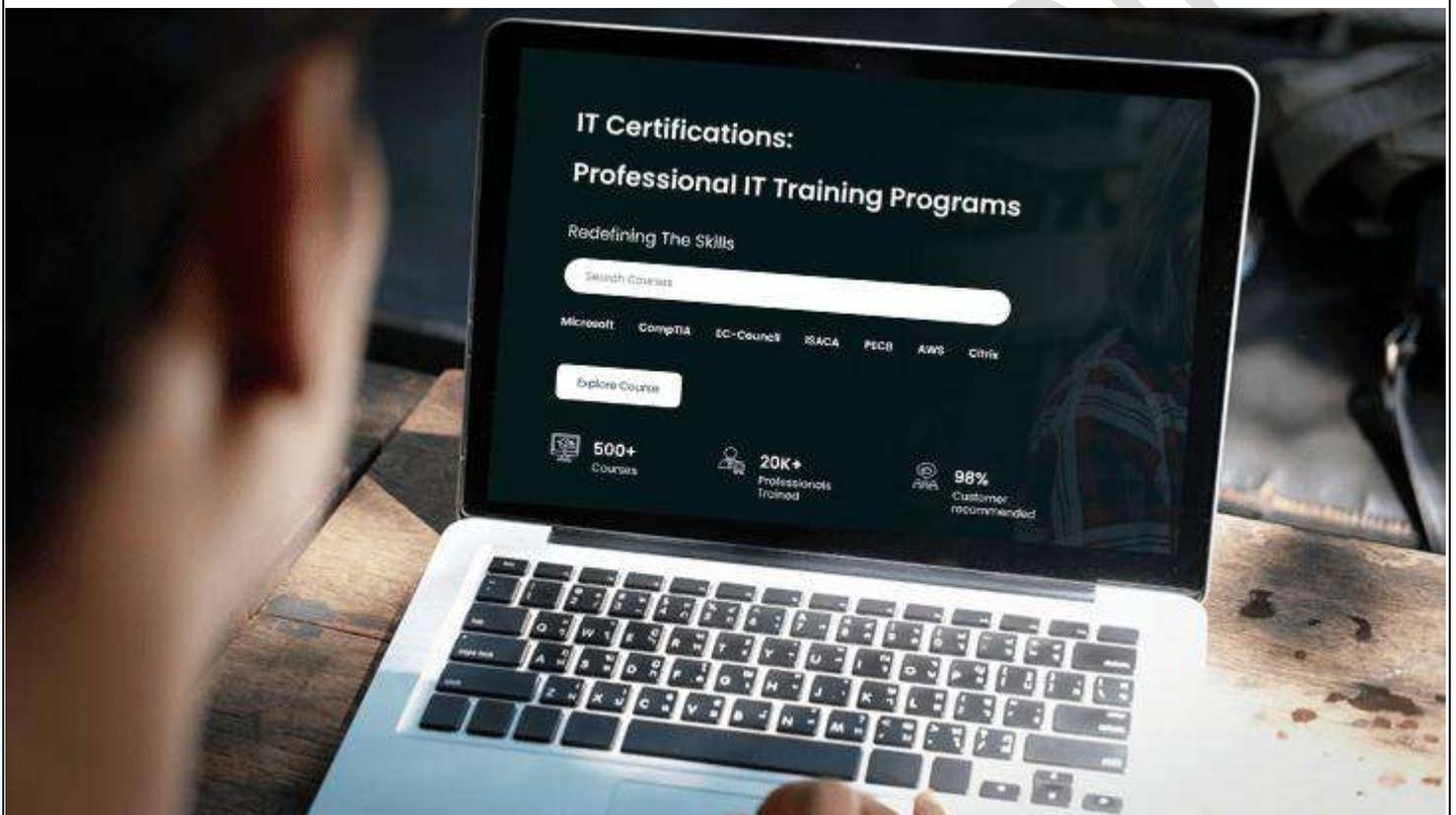Courses

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MB-700T00: MICROSOFT DYNAMICS 365: FINANCE AND OPERATIONS APPS SOLUTION ARCHITECT TRAINING

Duration: 4 Days

Course Description

MB 700T00: Microsoft Dynamics 365: Finance and Operations Apps Solution Architect Training is a comprehensive program for developing an understanding of Dynamics 365.

This technical course deals with teaching deployment choices, architecture, data migration, reporting, and integration configuration. By completing this course learners enhance their knowledge about cloud solutions and utilization of lifecycle services as a solution architects.

This training is designed based on the objectives of the course variant MB 700T00 A.

Who should attend this course?

- Candidates pursuing this course shall have previous experience with a technical or functional focus in Dynamics 365: Finance and Operations Applications.
- This course is primarily focused on candidates willing to become solution architects.
- Given below are professionals who can use Microsoft Dynamics 365: Finance and Operations Apps Solution Architect Training to upskill their current positions:
    - ERP Specialists
    - Business Analyst
    - System Analyst
    - Project Managers
    - Functional Consultants
    - Technical Consultant
    - Solution Architects

What you will learn

- Complete the solution blueprint artifacts
- Know where to find technical information to address their customer's questions
- Understand the tasks expected to be completed by the solution architect for Dynamics implementation
- Translate Dynamics 365 apps and documentation with Dynamics 365 Translation Service
- Learn about finance and operations implementation projects
- Perform user acceptance testing in finance and operations apps
- Design an implementation of finance and operations apps
- Get started with Lifecycle Services for Finance and Operations Apps
- Perform fit gap analysis
- Planning testing strategy for your Dynamics 365 solutions
- Creating a data migration strategy for Dynamics 365 solutions
- Feature management in Finance and Operations Apps
- Configure user interface in Finance and Operations Apps
- Integration design for Dynamics 365 Solutions

Prerequisites

- Candidates pursuing this course should have an introductory knowledge of the Dynamics 365 ecosystem and Microsoft Power Platform.

Recommended

- PL-600T00: Microsoft Power Platform Solution Architect

Curriculum

Module 1: Becoming a solution architect for Dynamics 365 and Microsoft Power Platform

- Learn about what is expected of a solution architect
- Learn about the role of a solution architect during the project phases

Module 2: Discover customer needs as a Solution Architect for Dynamics 365 and Microsoft Power Platform

- Learn about initial customer discovery
- Discover customer communication strategies

Module 3: Propose a solution as a Solution Architect for Microsoft Power Platform and Dynamics 365

- Identify solution components
- Develop and validate a demo

Module 4: Worked with requirements as a solution architect for Microsoft Power Platform and Dynamics 365

- Learn about leading requirement capture sessions
- Learn about functional and non-functional requirements

Module 5: Perform fit gap analysis

- Determine the feasibility of requirements
- Refine requirements from proof of concept insights
- Categorize business requirements and perform a fit-gap analysis
- Evaluate Dynamics 365 and Microsoft Power Platform apps

Module 6: Get started with Lifecycle Services for finance and operations apps

- Understand the functionality and tools of Lifecycle Services for finance and operations apps
- Reuse existing assets, copy and share data
- Understand Task recorder functionality
- Create a business process model
- Identify and analyze gaps using the Business Process Modeler
- Run the Issue Search tool and analyze the results
- Lab: Use the Task recorder to create and edit a recording
- Lab: Create a business process in the business process modeler
- Lab: Create a support incident

Module 7: Design and plan the implementation of finance and operations apps

- Prepare documentation for gathered requirements by using methodologies in Lifecycle Services
- Define use case scenarios
- Learn how to participate in the creation of Business requirement documents (BRD)
- Understand the importance of creating and maintaining documented processes
- Participate in phase-based planning processes and solution design
- Describe the future state business processes based on a proposed solution
- Determine when to build versus buy
- Create Functional Design Documents (FDD)

Module 8: Translate Dynamics 365 apps and documentation with Dynamics 365 Translation Service

- Learn about the functionality and features of Dynamics 365 Translation Service
- Submit translation requests for user interface and documentation files of supported Dynamics 365 products

- Review and edit a translation request's output to regenerate new translations
- Use the Align tool to create translation memory for future translation requests
- Lab: Create, review, and regenerate a user interface translation request
- Lab: Create, review, and regenerate a documentation translation request
- Lab: Create a translation memory file

Module 9: Prepare data for migration to finance and operations apps

- Choose a data integration (import/export) strategy
- Identify common migration scenarios and tools in finance and operations apps
- Understand the Bring your 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
- Test a data migration and validate the output
- Support the transition between the existing and migrated systems

Module 10: Work with data management in finance and operations apps

- Identify the correct pattern for a given scenario to use the Data management platform for integration by using data entities
- Work with the Data management workspace
- Export data from a legal entity
- Import data into a legal entity
- Work with data import and export jobs
- Clean up the staging tables
- Work with database movement operations
- Work with the data-sharing framework
- Lab: Explore the Data management workspace
- Lab: Export data using the Data management workspace

Module 11: Perform user acceptance testing in finance and operations apps

- Test cases and business requirements
- Best practices for recording test cases
- Task recorder
- How to create a BPM library
- How to synchronize and configure your test plan in Azure DevOps
- How to run test cases manually and automatically
- The Regression suite automation tool (RSAT)
- Lab: Build test scripts to test business functionality

Module 12: Get started with a finance and operations implementation project

- Learn about the implementation journey for a successful finance and operations project
- Identify the different phases of a finance and operations implementation

Module 13: FastTrack Customer Success Program for finance and operations

- Learn the benefits of being part of the FastTrack program for the success of your implementation
- Discover the engagement level from the Microsoft FastTrack team with your project
- Define the roles that are needed for a finance and operations implementation
- Learn about the resources that will support your project
- Learn how to become a FastTrack-recognized solution architect

Module 14: Implement application lifecycle management in finance and operations apps

- Define ALM
- Learn about the different ALM methodologies
- Build models
- Create a project plan for building and testing solutions
- Create processes for release management, change management, and risk management

Module 15: Explore extensions and the extension framework in finance and operations apps

- Learn about the reasons for creating extensions
- Determine when to use the extensibility request form
- Learn about the risk of intrusive customizations
- Develop code that will extend the functionality of finance and operations apps
- Implement the SysOperationSandbox framework
- Lab: Extend an EDT

Module 16: Consume business events in finance and operations apps

- Learn about the business events framework
- Implement new business events through class extension
- Consume business events
- Extend and existing business event
- Business events in Microsoft Power Automate
- Role based security for business events

Module 17: Identify data integration patterns and scenarios in finance and operations apps

- Identify integration web application programming interfaces
- Explore available data integration scenarios
- Identify the key differences between synchronous and asynchronous integrations

Module 18: Data integrations with finance and operations apps

- Set up a data project
- Set up a recurring data job
- Define authorization for integrations by using OAuth
- Monitor the status and availability of entities
- Develop data transformations
- Use Microsoft Dataverse to synchronize entities between Dynamics 365 applications
- Use composite data entities
- Integrate composite data entities
- Export composite data entities
- Learn about Azure Data Lake and Entity Store and how to change data in Azure Data Lake
- Learn about Microsoft Power Platform convergence
- Lab: Create a data project and recurring data job

Module 19: Work with analytics and reporting in finance and operations apps

- Different types of reports and inquiries in finance and operations apps
- Financial reporting
- Configuring finance and operations apps for Microsoft Power Platform
- Generating and consuming inquiries and reports
- Lab: Work with reports

Module 20: Describe the business value of the Microsoft Power Platform

- Examine Microsoft Power Platform

- Describe the business value of the Power Platform
- Explore connectors in the Power Platform
- Review using Microsoft Dataverse to organize business data
- Examine how Power Platform works together with Microsoft 365 apps and services
- Explore solutions using Power Platform Microsoft Teams
- Describe how Power Platform works with Dynamics 365
- Describe how Power Platform solutions can consume Azure Services
- Explore how Power Platform apps work together to create solutions

Module 21: Identify foundational components of the Microsoft Power Platform.

- Examine the different Power Platform administrative options available
- Describe security and governance in the Power Platform
- Explore Microsoft Dataverse and how to use it to build business solutions
- Examine Power Platform connectors
- Lab: Build a basic Dataverse data model

Module 22: Design and build mobile apps for finance and operations apps

- The Microsoft Dynamics 365 Unified Operations mobile app
- Use cases for mobile apps
- How to build and work with workspaces

Module 23: Updates and upgrades for finance and operations apps

- How to upgrade from Dynamics AX legacy (AX 2012 and AX 2009)
- How to update from earlier finance and operations versions 7.0, 7.1, 7.2, 7.3, and 8.0 to version 10

Module 24: Work with performance and monitoring tools in finance and operations apps

- Diagnose performance issues by using the Trace parser
- Explore load testing by using the Performance SDK
- Monitor performance by using the SQL Insights dashboard
- Monitor server Health metrics in Microsoft Dynamics Lifecycle Services
- Lab: Use the Environment monitoring tool in Lifecycle Services

Module 25: Plan and implement security in finance and operations apps

- Understand the security architecture of finance and operations apps
- Learn about encryption in finance and operations apps
- Manage users
- Manage security
- Apply segregation of duties
- Run security reports
- Stay compliant with user licensing requirements
- Lab: Import a user and assign a security role
- Lab: Work with security

Module 26: Implement role-based security in finance and operations apps

- Create and modify roles, duties, privileges, and permissions.
- Review the role-based security hierarchy
- Use and enforce permissions policies
- Define the extensible data security framework (XDS)
- Apply for security permissions
- Stay compliant with user licensing requirements
- Lab: Create a new security role and add duties

Module 27: Prepare to go live with finance and operations apps

- Prepare for go-live
- Complete the Microsoft Dynamics Lifecycle Services Methodology
- Perform User acceptance testing (UAT) for your solution
- Understand the FastTrack Go-live assessment
- Request the production environment

Module 28: Feature management in finance and operations apps

- Learn about the Feature management workspace in finance and operations apps
- Discover when and how to enable features, including how to disable and reschedule features
- Learn how to check for feature updates and assign roles

Module 29: Get started with Success by Design for Dynamics 365

- Learn how to use FastTrack techniques on your project
- Review the Success by Design processes and workshops
- Identify the different phases of a project
- Discover the available tools for tracking project progress

Module 30: Create a solution blueprint for Dynamics 365 solutions

- Learn how to identify project goals
- Learn about the project's tenant strategy
- Consider any non-functional requirements
- Learn how to prepare, and conduct the Solution blueprint workshop

Module 31: Plan a testing strategy for your Dynamics 365 solution

- Identify measurable and non-measurable testing goals and results
- Plan the entire testing strategy for an engagement
- Learn how to prepare and conduct the Test strategy review workshop

Module 32: Design data models for Dynamics 365 solutions

- Learn about data modeling in Dynamics 365
- Review data modeling best practices and learn how they are related to a Dynamics 365 project

Module 33: Business intelligence and analytics design for Dynamics 365 solutions

- Learn about the Business intelligence and analytics design workshop
- Prepare for the Business intelligence and analytics design workshop
- Learn how to conduct the Business intelligence and analytics design workshop

Module 34: Gap solution design for Dynamics 365 solutions

- Learn about the Gap solution design workshop
- Prepare for the Gap solution design workshop
- Learn how to conduct the Gap solution design workshop

Module 35: Create a data migration strategy for Dynamics 365 solutions

- Learn about the best practices for data migration
- Discover how data migration relates to and can affect a project
- Learn how to prepare and conduct the Data migration strategy workshop

Module 36: Review the security model for your Dynamics 365 solutions

- Evaluate the proposed security model
- Provide feedback and recommendations that highlight technical risks and issues

Module 37: Integration design for Dynamics 365 solutions

- Learn about connecting one or more components to create a unified experience
- Discover the process of integrating existing services without migrating or rebuilding

Module 38: Dual-write implementation for Dynamics 365 solutions

- Learn about the Dual-write implementation workshop
- Prepare for the Dual-write implementation workshop
- Learn how to conduct the Dual-write implementation workshop
- Follow up after the Dual-write implementation workshop

Module 39: Implement a performance strategy for Dynamics 365 solutions

- Learn about the Solution performance review
- Prepare for the Solution performance workshop
- Define performance benchmarks and success criteria
- Learn how to conduct the Solution performance workshop

Module 40: Cutover strategy for Dynamics 365 solutions

- Learn about the Cutover strategy workshop
- Prepare for the Cutover strategy workshop
- Learn how to conduct the Cutover strategy workshop
- Follow up after the Cutover strategy workshop

Module 41: Post-go-live strategy for Dynamics 365 solutions

- Learn about the Post go-live workshop
- Prepare for the Post go-live workshop
- Implement the Post-go-live workshop
- Follow up after the Post go-live workshop

Module 42: Get started with configuration and personalization in Finance and Operations apps

- Log into your environment
- List several ways the environment can be customized without coding
- Demonstrate how to favorite menu items for quick navigation
- Lab: Customize your status bar

Module 43: Configure your user interface in Finance and Operations apps

- Add a menu item to the favorites
- Explain how different roles see different dashboards
- Add a KPI to a dashboard workspace
- Modify the fields in a form
- Modify the fields in a report
- Lab: Create favorites
- Lab: View role-based dashboards
- Lab: Change form fields and queries
- Lab: Change report output

Module 44: Configure your data in Finance and Operations apps

- Modify an entity
- Add security to a user
- Download data to Excel, update, and upload
- Lab: Add a field to a data entity
- Lab: Use Excel to view and update data