

MS-MB700T00: MICROSOFT DYNAMICS 365: FINANCE AND OPERATIONS APPS SOLUTION ARCHITECT (WITH APPLIED WORKSHOP)



DURATION	LEVEL	TECHNOLOGY	DELIVERY METHOD	TRAINING CREDITS
5 Days	Advanced	Dynamics 365	Instructor-led	NA

INTRODUCTION

The Dynamics 365 Finance and Operations solution architect is a trusted advisor who consults with organizations and implementation team members to refine business needs into a well-defined and cost-effective solution. The architect is accountable for the integrity and successful delivery of the complete solution design. The architect provides critical guidance and support from pre-sales throughout the remainder of the project lifecycle. They have great breadth of knowledge and experience designing solutions that meet business needs. The solution architect may have a technical, functional, or industry background. The solution architect must demonstrate knowledge of all Dynamics 365 apps and Power Platform. They must have deep understanding of Finance and Operations apps. In addition, they have extensive domain knowledge in one or more industry verticals. This course is designed to prepare those who are aspired to be solution architects and those who are new to this role to learn more about the technical information that solution architects will be dealing with during implantation.

AUDIENCE PROFILE

The audience for this course should have previous experience with a functional or technical focus in Dynamics 365: Finance and Operations Applications. Primarily for those who aspire to be and are new to the solution architect role.

PREREQUISITES

Before attending this course, delegates should have:

- Deep business acumen with Microsoft Dynamics 365 and Microsoft Power Platform.
- Functional consultant experience with Dynamics 365 and Power Platform.
- Familiarity with developer role activities for Dynamics 365 and Power Platform

COURSE OBJECTIVES

After completing this course, students will be able to:

- Define skill areas for solution architect role
- Explain instances & deployment models recommendations by Microsoft
- Understand cloud solution, CDM & CDS
- Get more info on Licensing, AppSource & Support for Dynamics 365
- Use Lifecycle services as solution architect
- Know the considerations for blueprinting Dynamics 365 solution
- Understand the concepts and tools used for data management
- Explain the Integration options & Business events on solutions
- Know the available options on solution localization, compliance & reporting
- Have architectural conversations on extensibility, security, & performance
- Know what is ALM application lifecycle management
- Identify opportunities for automated testing and using RSAT

COURSE CONTENT

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

The Solution Architect leads successful implementations and focuses on how solutions address the broader business and technical needs of organizations. This module covers what it takes to get started as a Solution Architect and

as key member of the overall project team.

Lessons

- Introduction to becoming a solution architect
- Existing product and platform skills
- Expectations of a solution architect

- Solution architect role during project phases
- Pillars of a great architecture
- Check your knowledge
- Summary

After completing this module, the students should be able to:

- What is expected of a solution architect.

- 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 how to ask customers questions about their business processes and feature requirements to create a viable solution.

Lessons

- Introduction and discovery overview
- Initial customer discovery
- Customer discovery meetings
- Customer communication strategy
- Check your knowledge
- Summary

After completing this module, the students should be able to:

- 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

Learn how to propose a solution.

Lessons

- Learn about initial customer discovery.
- Discover customer communication strategies.

After completing this module, the students should be able to

- Identify solution components
- Develop and validate a demo

Module 4: Work with requirements for Microsoft Power Platform and Dynamics 365

It's important to capture the customer's needs accurately. This module explains how to capture requirements and identify functional and non-functional items.

Lessons

- Introduction
- Lead requirement capture sessions
- Identify functional requirements
- Identify non-functional requirements
- Confirm and finalize requirements
- Check your knowledge
- Summary

After completing this module, the students should be able to:

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

Module 5: Perform fit gap analysis

A fit gap analysis identifies the difference between the known requirements and the proposed or current solution. This module covers performing a fit gap analysis.

Lessons

- Introduction to fit gap analysis
- Determine feasibility of requirements
- Refine requirements from proof of concept insights
- Categorize business requirements and perform gap fit analysis
- Evaluate Dynamics 365 and Microsoft Power Platform apps
- Check your knowledge
- Summary

After completing this module, the students should be able to:

- Determine 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

To install and maintain finance and operations apps in the Microsoft Azure cloud or on-premises, you must use Microsoft Dynamics Lifecycle Services to manage the process. Let's get started by looking at the overall functionality and tools.

Lessons

- Introduction
- Understand the functionality and tools of Lifecycle Services
- Determine licensing requirements
- Lifecycle Services security
- Reuse existing assets, copy, and share data
- Perform actions in the Asset library
- Work with the Task recorder
- Business process modeler (BPM)
- Support options
- Get product updates from Lifecycle Services
- Exercise - use the Task recorder to create and edit a recording
- Exercise - create a business process in the business process modeler
- Exercise - create a support incident
- Check your knowledge
- Summary

After completing this module, the students should be able to:

- Understand the functionality and tools of Lifecycle Services for finance and operations apps
- Determine licensing requirements
- 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 results

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

With proper planning, your finance and operations apps implementation will be a success. After a customer signs the agreements to purchase licenses for finance and operations apps, your job as a functional consultant starts by managing the application lifecycle and moving toward predictable, repeatable, high-quality implementation.

Lessons

- Introduction
- Use implementation methodologies for a successful implementation
- Cloud implementation - analysis
- Cloud implementation - design and develop
- Cloud implementation - test
- Cloud implementation - deploy and operate
- On-premises implementation - analysis
- On-premises implementation - design and develop
- On-premises implementation - test, deploy, and operate
- Gathering and analyzing the requirements
- Create functional design documents (FDD)
- Check your knowledge
- Summary

After completing this module, the students should be able to

- 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: Prepare data for migration to finance and operations apps

When it is time to migrate data, 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 finance and operations apps.

Lessons

- Introduction
- Select a data integration (import/export) strategy
- Common migration scenarios and tools
- Bring your own database (BYOD)
- Test a data migration and validate output
- Check your knowledge
- Summary

After completing this module, the students should be able to

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

Module 9: Work with data management in finance and operations apps

You can export or import data in finance and operations apps 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 apps database.

Lessons

- Introduction
- Select a data integration (import/export) strategy
- Common migration scenarios and tools
- Bring your own database (BYOD)
- Test a data migration and validate output
- Check your knowledge
- Summary

After completing this module, the students should be able to:

- 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.

Module 10: Perform user acceptance testing in finance and operations apps

After all customer requirements have been handled by either configuration, customization, and integration, you need to know how to perform user acceptance testing (UAT) in finance and operations apps to validate the solution. User acceptance testing is an important step in the go-live preparation. You can perform automated tests by using the Regression suite automation tool (RSAT).

Lessons

- Introduction
- Create user acceptance test libraries
- Record test cases and save to the business process modeler (BPM)
- Synchronize and configure your test plan in Azure DevOps
- Run user acceptance tests
- Data task automation
- Exercise - Build test scripts to test business functionality
- Check your knowledge
- Summary

After completing this module, the students should be able to:

- 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)

Module 11: Prepare to go-live with finance and operations apps

All your hard work becomes a success by moving the implemented solution in finance and operations apps 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 apps project by using Microsoft Dynamics Lifecycle Services.

Lessons

- Introduction
- Understand the go-live process
- Complete the Lifecycle Services methodology
- Perform user acceptance testing (UAT) for your solution
- FastTrack go-live assessment
- Request a production environment
- Check your knowledge
- Summary

After completing this module, the students should be able to:

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

The implementation lifecycle for finance and operations will help you to understand the best practices recommended to accomplishing a successful journey through a finance and operations implementation, the roles involved, and the tools available to support it.

- Introduction
- Implementation project overview
- Roles in a Dynamics 365 implementation
- Project phases
- Implementation planning and architecture
- Combining tools and solutions for impactful implementations
- Check your knowledge

- Summary

After completing this module, the students should be able to:

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

Module 13: Feature management in finance and operations apps

Features are added and updated in every release. The Feature management experience provides a workspace where you can view a list of features that have been delivered in each release. Then, you can use the workspace to view feature documentation and to enable or disable features.

Lessons

- Introduction
- Feature management workspace
- Feature states
- Enable a feature
- Reschedule a feature
- Disable a feature
- Features that must be enabled
- Enable all features
- Check for updates
- Assign roles
- Features that use configuration keys
- Data entities
- Check your knowledge
- Summary

After completing this module, the students should be able to:

- 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 14: Design and plan an implementation of finance and operations apps

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After a customer signs the agreements to purchase licenses for finance and operations apps, your job as a functional consultant starts by managing the application lifecycle and moving toward predictable, repeatable, high-quality implementation.

Lessons

- Introduction
- Use implementation methodologies for a successful implementation
- Cloud implementation - analysis

- Cloud implementation - design and develop
- Cloud implementation - test
- Cloud implementation - deploy and operate
- On-premises implementation - analysis
- On-premises implementation - design and develop
- On-premises implementation - test, deploy, and operate
- Gathering and analyzing the requirements
- Create functional design documents (FDD)
- Check your knowledge
- Summary

After completing this module, the students should be able to:

- 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 15: Implement application lifecycle management in finance and operations apps

Application Lifecycle Management (ALM) is the management of computer programs, which includes managing requirements, software architecture, software development, software maintenance, change management, continuous integration, project management, and released management. Learn about ALM to plan, create, test, and implement code for finance and operations apps.

Lessons

- ALM methodologies
- Design and create models
- Plan the build, test, and quality control processes
- Identify upgrade scenarios and appropriate tools
- Plan the release, change, and risk management processes
- Check your knowledge
- Summary

After completing this module, the students should be able to:

- Define ALM.

- Learn about the different ALM methodologies.
- Build models.
- Create a project plan for building and testing solutions.
- Identify upgrade scenarios and appropriate tools
- Create processes for release management, change management, and risk management.

Module 16: Plan and implement security in finance and operations apps

If you understand the security architecture of finance and operations apps, you can customize it to fit the requirements of your business. finance and operations apps, helps keep your sensitive data safe, and users focused on their roles.

Lessons

- Introduction
- Understand the security architecture
- Encryption in finance and operations apps
- Manage users and security
- Set up and apply segregation of duties
- Run security reports
- Stay compliant with user licensing requirements
- Security diagnostics for task recordings
- Extensible data security policies
- Exercise - Import a user and assign security role
- Lab - Work with security
- Module assessment
- Summary

In this module, you will:

- Understand 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

Module 17: Implement role-based security in finance and operations apps

Finance and operations apps use role-based security to assign access to components in the system. A user who is assigned to a security role has access to the set of privileges that is associated with that role.

Lessons

- Introduction
- Create and modify duties, privileges, and permissions

- Enforce permissions policy
- Extensible data security framework
- Apply security permissions
- Lab - Create a new security role and add duties
- Microsoft Entra ID and OAuth 2.0 authentication
- Check your knowledge
- Summary

In this module, you will learn how to:

- 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 security permissions.
- Stay compliant with user licensing requirements.

Module 18: Upgrade from AX 2012 to Dynamics 365 Finance

Upgrading from Microsoft Dynamics AX 2012 to Dynamics 365 Finance is a significant step towards modernizing business systems, involving thorough planning, data and code preparation, testing, and cutover. This module provides a comprehensive guide to ensure a smooth transition with minimal downtime, covering best practices, toolkits, and tips for a successful upgrade.

Lessons

- Introduction
- Upgrade analysis report
- Pre-upgrade checklist and estimation tools
- Data upgrade
- Cutover testing
- Functional testing
- Prepare for go live
- Go live
- Knowledge check
- Summary

In this module you:

- Learn how to assess the current AX environment, prepare data and code, and navigate each phase of the upgrade, ensuring a smooth transition with minimal downtime.
- Gain insights into best practices, toolkits, and tips for a successful upgrade, and understand the roles of technical and functional teams in the process.
- Develop the ability to perform thorough testing, including functional test passes and mock cutovers, to identify and resolve potential issues before the go-live event.
- Acquire knowledge on managing old versus new data

during testing and coordinating across different workstreams to ensure a successful upgrade.

Module 19: Updates and upgrades for finance and operations apps

The world of enterprise resource planning (ERP) is continuously evolving and helping customers scale up in productivity and streamline their operations. The evolution of finance and operations encourages customers to upgrade their earlier versions to the finance and operations cloud service.

Lessons

- Introduction
- Continuous updates (One Version)
- Service updates
- Upgrade your finance and operations version
- Apply updates to cloud environments
- Data upgrade
- Update development tools
- Check your knowledge
- Summary

In this module, you learn about:

- Continuous updates
- Service updates
- Upgrade finance and operations version
- Applying updates to cloud environments
- Data upgrade
- Development tools

Module 20: Work with performance and monitoring tools in finance and operations apps

Learn how to use performance tools and Lifecycle Services environment monitoring tools to enhance your validation and testing experience in finance and operations apps.

Lessons

- Introduction
- Diagnose performance issues by using Trace parser
- Load testing by using the Performance SDK
- Monitor performance by using SQL Insights
- Create a SQL trace by using the SQL Profiler
- Monitor server health metrics in Lifecycle Services
- Exercise - Use the Environment monitoring tool in Lifecycle Services
- Check your knowledge
- Summary

In this module, you will:

- Diagnose performance issues by using 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.

Module 21: Explore extensions and the extension framework in finance and operations apps

Finance and operations apps are customized by using extensions, which let you add functionality to model elements and source code in the Application Object Tree (AOT) by using Visual Studio.

Lessons

- Introduction
- Customization models
- Extension points for frameworks
- Develop code to extend a framework
- Create pre-event and post-event handler classes
- Implement the SysOperationSandbox framework
- Implement the workflow framework
- Lab - Extend an EDT
- Check your knowledge
- Summary

In this module, you will:

- 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.
- Create pre-event and post-event handler classes.
- Implement the SysOperationSandbox framework.
- Implement a workflow framework.

Module 22: Work with analytics and reporting in finance and operations apps

Business leaders can make important decisions in their company if they have accurate insight into the underlying financial and operational data. Without data visibility, business leaders are challenged with a nearly impossible task. By using analytics and reporting in finance and operations apps, you can empower every business user, depending on their security rights, to get the insights they need to make those important decisions.

Lessons

- Introduction
- Understand different types of reports and inquiries
- Financial reporting
- Find inquiries and reports

- Generate and consume inquiries and reports
- Configure finance and operations apps for Microsoft Power Platform
- Lab - Work with reports
- Check your knowledge
- Summary

In this module, you will learn about:

- 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

Module 23: Get started with Success by Design for Dynamics 365

Success by Design is the prescriptive guidance (approaches and best practices) for designing, building, and deploying a Dynamics 365 solution.

Lessons

- Introduction
- Overview of Success by Design
- Reasons to use Success by Design
- Success by Design phases
- Implement Success by Design
- Track Success by Design activities and progress
- Check your knowledge
- Summary

In this module, you will:

- Learn how to use FastTrack techniques on your own 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 24: Create a solution blueprint for Dynamics 365 solutions

The Solution blueprint workshop is part of Success by Design. This module focuses on creating the blueprint, and conducting the workshop to create it.

Lessons

- Introduction
- Solution blueprint review workshop overview
- Prepare for the Solution blueprint review
- Solution blueprint review participants
- Conduct the Solution blueprint review workshop
- Solution blueprint follow-up
- Check your knowledge
- Summary

In this module, you will:

- 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 25: Plan a testing strategy for your Dynamics 365 solution

Testing strategy, identifying gaps in testing plans, and potential risks are discussed in this module.

Lessons

- Introduction
- Overview of the Test strategy review workshop
- Prepare for the workshop
- Workshop implementation and follow-up
- Check your knowledge
- Summary

In this module, you will:

- 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 26: Design data models for Dynamics 365 solutions

A data model workshop is part of Success by Design. This module will provide a basic description of data modeling for Microsoft Dynamics 365 and insight into how you can conduct a data model workshop.

Lessons

- Introduction
- Data modeling overview
- Entity relationship diagram
- Out-of-the-box vs. custom tables
- Table configuration
- Check your knowledge
- Summary

In this module, you will:

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

Module 27: Business intelligence and analytics design for Dynamics 365 solutions

The Business intelligence and analytics design workshop allows you to spend time reviewing the overall business intelligence and analytics planning, fit-gap analysis, design blueprint to provide guidance on maximizing the use of

standard features, alignment to product roadmap, and general design guidance. This workshop isn't intended as a fit-gap review.

Lessons

- Introduction
- Business intelligence and analytics design workshop overview
- Prepare for the Business intelligence and analytics design workshop
- Conduct the Business intelligence and analytics design workshop
- Business intelligence and analytics design follow-up
- Check your knowledge
- Summary

In this module, you will:

- 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 28: Gap solution design for Dynamics 365 solutions

The Gap solution design workshop is designed for implementations that have critical requirements that the standard system doesn't support.

Lessons

- Introduction
- Gap solution design workshop overview
- Prepare for the Gap solution design workshop
- Conduct the Gap solution design workshop
- Gap solution design follow-up
- Check your knowledge
- Summary

In this module, you will:

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

Module 29: Create a data migration strategy for Dynamics 365 solutions

The overall goal of the Success by Design framework is to ensure a successful customer outcome for each implementation. The Data migration strategy workshop is designed to help ensure that the approach to data migration is heading for success.

Lessons

- Introduction
- Data migration strategy overview

- Prepare for the Data migration workshop
- Conduct the Data migration strategy workshop
- Check your knowledge
- Summary

In this module, you will:

- Learn about the best practices of 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 30: Review the security model for your Dynamics 365 solutions

A security strategy is key to solutions, and a Security model workshop will help verify that the customer's security model is comprehensive and that it will support their long-term security strategy. This module primarily focuses on customer engagement applications.

Lessons

- Introduction
- The importance of security in Dynamics 365
- Key considerations of a strong security model
- Security module overview
- Business units and teams
- Implemented-security-mechanisms
- Scalability, performance, and maintainability
- Security module overview
- Check your knowledge
- Summary

In this module, you will:

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

Module 31: Integration design for Dynamics 365 solutions

The Integration workshop is part of Success by Design. This module discusses integration strategy and how the Integration workshop will help verify that the project's integration plans are comprehensive and will support initial implementation and long-term needs.

Lessons

- Introduction
- Integration design review workshop overview
- Prepare for the Integration design review
- Conduct the Integration design review
- Integration design review workshop follow-up

- Check your knowledge
- Summary

In this module, you will:

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

Module 32: Dual-write implementation for Dynamics 365 solutions

Dual-write offers an out-of-the-box infrastructure that can provide customers near real-time interaction between Customer engagement apps and finance and operations apps. The Dual-write implementation workshop guides you through key points to help identify and resolve potential blockers to a successful dual-write implementation.

Lessons

- Introduction
- Dual-write implementation workshop overview
- Prepare for the workshop
- Workshop implementation and follow-up
- Check your knowledge
- Summary

In this module, you will:

- 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 33: Implement a performance strategy for Dynamics 365 solutions

The Solution performance workshop provides guidance and best practices for solution design in respect to performance. The workshop will increase awareness of the impact that certain types of configurations and/or customizations have on the overall performance and user experience.

Lessons

- Introduction
- Solution performance workshop topics
- Define performance benchmarks and success criteria
- Timing of the Solution performance review
- Prepare for the workshop
- Workshop implementation and follow-up
- Check your knowledge
- Summary

In this module, you will:

- 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 34: Cutover strategy for Dynamics 365 solutions

The goal of the Cutover strategy workshop is to help ensure that a good approach is in place for the planning, incremental readiness, testing, and implementation of the cutover. You need to consider many different areas when you discuss a cutover strategy, and this workshop provides the necessary framework to review those key topics.

Lessons

- Introduction
- Purpose of the Cutover strategy workshop
- Timing of the Cutover strategy review
- Cutover strategy workshop overview
- Prepare for the workshop
- Workshop implementation and follow-up
- Check your knowledge
- Summary

In this module, you will:

- 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 35: Post go-live strategy for Dynamics 365 solutions

The Post go-live workshop gives the implementation team the opportunity to confirm that the solution has delivered the objectives that were initially set.

Lessons

- Introduction
- Timing of the Post go-live workshop
- Post go-live workshop overview
- Prepare for the workshop
- Post go-live workshop implementation and follow up
- Check your knowledge
- Summary

In this module, you will:

- 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 36: Get started with configuration and personalization in finance and operations apps

In this module, learners are introduced to the idea of personalizing finance and operations applications to fit their business needs.

Lessons

- Introduction
- Set up your environment
- Explore personalization functionality
- Knowledge check
- Exercise - Customize your status bar
- Summary

After this module, you'll be able to:

- Log in to your environment
- List several ways the environment can be customized without coding
- Demonstrate how to favorite menu items for quick navigation

Module 37: Configure your user interface in finance and operations apps

In this module, learners were introduced to the idea of personalizing the finance and operations user interface to fit their business needs. They learned how to change menus, forms, and reports.

Lessons

- Introduction
- Manage menus: Favorites
- Manage menus: Dashboards by role
- Manage menus: Key performance indicators
- Manage forms: Fields
- Manage forms: Filters and ranges
- Configure reports
- Knowledge check
- Exercise - Create favorites
- Exercise - View role-based dashboards
- Exercise - Change form fields and queries
- Exercise - Change report output
- Summary

At the end of this module, learners will be able to:

- Add a menu item to 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

Module 38: Configure your data in finance and operations apps

We learn that there are different options in updating data. Dynamics is made to integrate seamlessly with Office products.

Lessons

- Introduction
- Create entities
- Manage security
- Integrate with Microsoft Office
- Knowledge check

- Exercise - Add a field to a data entity
- Exercise - Use Excel to view and update data
- Summary

At the end of this module, learners will be able to:

- Modify an entity
- Add security to a user
- Download data to Excel, update, and upload

Module 39: Challenge project - Architecting solutions for a new product line for customers

In this challenge project, your chosen company may or may not exactly fit the guidelines here, use creative license to evaluate and architect solutions for the new product line they're planning.

Lessons

- Introduction
- Prepare
- Exercise - Conceptualize the design
- Module assessment
- Summary

Learning objectives here:

- Choose a customer based on a provided industry.
- Get to know the customer.
- Evaluate the current state of technology at the customer.
- Compare this to the stated needs.
- Perform discovery and planning exercises.
- Complete the project workbook.

ASSOCIATED CERTIFICATIONS & EXAM

This course will prepare delegates to write the MB-700: Microsoft Dynamics 365: Finance and Operations Apps Solution Architect exam.