

## MB-700T00: Microsoft Dynamics 365 Finance and Operations Solution Architect

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### Course Summary

#### Description

This course is aimed at technology leaders, project managers solution architects, and consultants who are planning to implement, are in the process of implementing, or are currently upgrading to Dynamics 365 for Operations. Over the 5 days you will learn to master all the necessary tools and resources to evaluate Dynamics 365 for Operations, implement it, and proactively maintain it. Learn about architecture, deployment choices, integration, configuration and data migration, development, testing, reporting and BI, support, upgrading, and more.

#### Objectives

By the end of this course, students will:

- Learn about Microsoft Dynamics 365, its offerings, plans and details of Finance and Operations, Enterprise edition
- Understand the methodology and the tool, architecture, and deployment options
- Effectively plan and manage configurations and data migration, functional design, and technical design
- Understand integration frameworks, development concepts, best practices, and recommendations while developing new solutions
- Learn how to leverage intelligence and analytics through Power BI, machine learning, IOT, and Intelligence
- Master testing, training, going live, upgrading, and how to get support during and after the implementation

#### Topics

- Introduction to Microsoft Dynamics 365 FinOps
- Microsoft Dynamics 365 apps
- Dynamics 365 Methodology
- Architecture and Deployment
- Project Initiation and Kickoff
- Configuration and Data Management
- Functional and Technical Design
- Integration Planning and Design
- Building Customizations
- Analytics, Business Intelligence, and Reporting
- Testing and Training
- Go Live
- Update, Upgrade, and Migration

#### Prerequisite

This course is intended for Technical students, Administrators and Developers. Students should have an existing working knowledge of Microsoft .Net C# and Visual Studio.

Although not compulsory, it is recommended that students attend the prerequisite course 'Introduction to Microsoft Dynamics 365'

#### Duration

Three Days

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### Course Outline

#### I. *Introduction to Microsoft Dynamics 365 FinOps*

- A. What is Microsoft Dynamics 365?
- B. The benefits of Microsoft Dynamics 365
- C. Microsoft Dynamics 365 salient features

#### II. *Microsoft Dynamics 365 apps*

- A. Microsoft Dynamics 365 for Sales
- B. Microsoft Dynamics 365 for Customer Service
- C. Microsoft Dynamics 365 for Field Service
- D. Microsoft Dynamics 365 for Project Service Automation
- E. Microsoft Dynamics 365 for Finance and Operations, Enterprise edition (AX)
- F. Microsoft Dynamics 365 for Finance and Operations, Business edition (NAV)
- G. Microsoft Dynamics 365 for Retail
- H. Microsoft Dynamics 365 for Talent
- I. Human resources
- J. Onboard
- K. Microsoft Dynamics 365 for Marketing
- L. Microsoft Dynamics 365 for Customer insights
- M. Complimenting/supporting tools with Microsoft Dynamics 365
- N. Power BI
- O. PowerApps
- P. Microsoft Flow
- Q. Common Data Service (CDS)
- R. Microsoft AppSource
- S. Dynamics 365 for Finance and Operations, Enterprise edition (AX)
- T. What is Dynamics 365 for Finance and Operations, Enterprise edition?
- U. History of Dynamics 365 for Finance and Operations
- V. Highlights of Dynamics 365 for Finance and Operations
- W. Trial of Microsoft Dynamics 365
- X. Buying Microsoft Dynamics 365

- Y. Implementation Methodology and Tools

#### III. *Dynamics 365 Methodology*

- A. Methodologies relevant for embracing Dynamics 365
- B. The Conference Room Pilot (CRP) methodology
- C. Planning
- D. Execution
- E. Best practices in using CRP
- F. A CRP methodology example
- G. The agile methodology
- H. The waterfall methodology
- I. Comparative summary
- J. Lifecycle Services (LCS) -- implementation tools
- K. Foundation
- L. Methodologies
- M. Projects
- N. Project users
- O. Organization users
- P. SharePoint online library
- Q. Preview feature management
- R. Shared asset library
- S. Subscription estimator
- T. Asset library
- U. Ongoing
- V. Business process modeler
- W. Cloud-hosted environments
- X. Code upgrade
- Y. Configuration and data manager
- Z. Localization and translation
- AA. Support
- BB. Issue search
- CC. Support
- DD. Work items
- EE. System diagnostics
- FF. Updates
- GG. Resources

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### Course Outline (cont.)

#### IV. *Architecture and Deployment*

- A. Architecture
- B. Conceptual architecture
- C. Deployment architecture
- D. The cloud deployment architecture
- E. The on-premise deployment architecture
- F. Application components and architecture
- G. Identity
- H. Data layer
- I. Platform
- J. Application
- K. Client
- L. Browser client
- M. Mobile app
- N. Office 365
- O. Lifecycle Services
- P. Development architecture
- Q. Integration architecture
- R. Security architecture
- S. Deployment options
- T. Cloud
- U. Cloud and Edge or hybrid deployment
- V. Local business data or on-premises
- W. Comparing deployment options

#### V. *Project Initiation and Kickoff*

- A. The need for a strong project start
- B. Project team composition
- C. The backbone of a project
- D. Project charter
- E. Project plan
- F. FastTrack for Dynamics 365
- G. Ground rules for day-to-day operations
- H. Kickoff meeting
- I. Project initiation and LCS
- J. SharePoint online
- K. Project deliverables in the CRP methodology
- L. The planning phase
- M. The business requirement definition phase
- N. The solution analysis phase
- O. The solution design phase

- P. The configure/preview/prototype phase
- Q. The development phase
- R. The testing and acceptance phase
- S. The training phase
- T. The Go Live phase
- U. The support phase
- V. Best practices in project initiation
- W. Requirements, Business Process Analysis, and Traceability
- X. Requirements scoping
- Y. Hierarchy of business processes and subprocesses
- Z. Business goals
- AA. Business process
- BB. Sub-processes
- CC. Requirements
- DD. LCS Business process modeler and VSTS
- EE. Business process modeler
- FF. Visual Studio Team Services (VSTS)
- GG. BPM and VSTS sync
- HH. Continuous reporting and VSTS
- II. Requirement gathering techniques
- JJ. Listen
- KK. Lead
- LL. Negotiate
- MM. Requirements Traceability Matrix (RTM)
- NN. Requirement segmentation and ownership
- OO. Analysis of requirements
- PP. Solution blueprint
- QQ. Key decision log
- RR. Best practices in managing requirements

#### VI. *Configuration and Data Management*

- A. Strategies for managing configuration and data migration
- B. Configuration management
- C. Configuration planning
- D. The golden configuration environment
- E. Data migration management
- F. Scoping

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### Course Outline (cont.)

- G. Common data migration areas
  - H. Planning
  - I. Execution
  - J. Data management tools
  - K. The data management framework
  - L. Data management concepts
  - M. The data management workspace
  - N. Data entities
  - O. Configuration data templates
  - P. Default data templates
  - Q. Configuration data project
  - R. Data packages
  - S. LCS Project | Asset library | Data packages
  - T. Configuration data packages
  - U. LCS -- configuration and data manager
  - V. Process data packages
  - W. How these concepts come together
  - X. Database operations
  - Y. Cross-company data sharing
  - Z. Data management scenarios
  - AA. Initial configuration in a blank environment
  - BB. Data migration from legacy systems
  - CC. Copy the company configuration within an existing environment
  - DD. Copy data between environments
  - EE. Ad hoc data loading
  - FF. Best practices in managing configurations and data migration
- VII. Functional and Technical Design**
- A. Finding the right app for your business needs
  - B. Before choosing ISV solutions
  - C. After selecting the partner
  - D. Common pitfalls
  - E. Common features
  - F. Personalization
  - G. Office integration
  - H. Document management
  - I. Workspaces
  - J. Electronic reporting
  - K. Tax engine
  - L. Batch framework
  - M. Workflows
  - N. Database logging
  - O. Mobile application
  - P. Common Data Services, Microsoft Flow, and PowerApps
  - Q. The functional design document
  - R. The fit-gap review session
  - S. Why write FDD?
  - T. Project management aspects of design
  - U. Things to know before writing an FDD
  - V. Feasibility analysis
  - W. Dos and don'ts
  - X. The solution design document
  - Y. Overview and objectives
  - Z. Guidelines for solution design documents
  - AA. The technical design document
  - BB. Overview and objectives
  - CC. Guidelines for the technical design document
  - DD. Preparation
  - EE. Execution
  - FF. Outcome
- VIII. Integration Planning and Design**
- A. Integration architecture
  - B. Basic integration concepts
  - C. RESTful APIs
  - D. SOAP
  - E. SOAP versus REST
  - F. JSON
  - G. OData
  - H. OAuth
  - I. Integration concepts in Dynamics 365 for Finance and Operations, Enterprise edition
  - J. Data entities
  - K. What is a data entity?
  - L. OData services
  - M. Querying or browsing an OData endpoint
  - N. Consuming OData services
  - O. Client application registration and setup

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### Course Outline (cont.)

- P. Creating a project, adding libraries, and generating an OData service proxy
  - Q. Authentication and OData service call
  - R. Custom services
  - S. Recurring integrations
  - T. Integration tools, middleware, and scenarios
  - U. Dynamics 365 data integrator
  - V. Integration architecture
  - W. Setting up data integration
  - X. Connections
  - Y. Connection sets
  - Z. Integration keys
  - AA. Projects
  - BB. Schedules
  - CC. Integrating and monitoring
  - DD. Benefits of CDS data integration
  - EE. Scenarios focus
  - FF. Integration planning
  - GG. Integration scenarios
  - HH. Integration requirements
  - II. Synchronous or asynchronous
  - JJ. Integration design and development
  - KK. Developing a high-level conceptual design
  - LL. Selecting the right integration technology
  - MM. Defining field mapping
  - NN. Developing, configuring, and testing
  - OO. Best practices and recommendations
- IX. Building Customizations**
- A. Architecture and concepts
  - B. Programming language
  - C. Compile exclusively in .NET CIL
  - D. Language enhancements
  - E. Unit of compilation
  - F. Compiler and tooling
  - G. Integrated development environment (IDE)
  - H. Development IDE in Dynamics 365 for Finance and Operations,
  - I. Enterprise edition
  - J. Development IDE in Dynamics AX 2012
  - K. Development environment architecture
  - L. Programming concepts
  - M. Layer system
  - N. Models
  - O. Packages
  - P. Packages and models on the disk
  - Q. Models and packages in Visual Studio
  - R. Overlaying
  - S. Extensions
  - T. Model sealing and roadmap
  - U. Development environment
  - V. The version control
  - W. Branching strategies
  - X. The development machines
  - Y. Cloud development environment
  - Z. Local development environment
  - AA. Application explorer
  - BB. Application explorer views
  - CC. Filtering application explorer
  - DD. Working with elements
  - EE. Tools addins for Visual Studio
  - FF. Creating a new model to start customization
  - GG. Extension capabilities
  - HH. Project
  - II. Create a new project
  - JJ. Adding new or existing element in the project
  - KK. Import/export project
  - LL. Development planning
  - MM. Be agile
  - NN. Establishing the code review process
  - OO. Development process
  - PP. Conceptualization
  - QQ. Create or extends data model
  - RR. Create or extends business logic
  - SS. Create or extend user interface
  - TT. Navigation concepts
  - UU. Form patterns
  - VV. User interface extensibility
  - WW. Control extensibility
  - XX. Reporting and analytics
  - YY. SQL server reporting services

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### Course Outline (cont.)

- ZZ. Power BI
- AAA. Security
- BBB. Security for custom objects
- CCC. Author unit tests
- DDD. Learn and improve
- EEE. Build and continuous updates
- FFF. Automated build
- GGG. Continuous updates
- HHH. Guidelines and best practices

#### X. *Analytics, Business Intelligence, and Reporting*

- A. Information insights in Dynamics 365 for Finance and Operations, Enterprise edition
- B. Platform enablement for analytics
- C. Excel
- D. Power BI
- E. Power BI choices
- F. Pricing
- G. Data refresh
- H. Collaboration
- I. Cortana Intelligence Suite
- J. Data insights leveraging Azure
- K. Modern reports and SSRS
- L. Electronic reporting
- M. Mobile platform
- N. Offline and mobile apps
- O. Financial reporting / management reporter
- P. Best practices in analytics and information insights

#### XI. *Testing and Training*

- A. Importance of testing
- B. Types of testing
- C. Feature testing
- D. Testing of custom developed features
- E. Testing of standard and ISV solution features
- F. System integration testing
- G. Process/system testing
- H. Data migration testing
- I. Integration testing
- J. Performance/load testing
- K. User acceptance testing

- L. End-to-end testing
- M. Automated testing strategies
- N. Test automation features in Finance and Operations
- O. SysTest framework
- P. Task recorder-based (coded UI) testing
- Q. PerfSDK
- R. Integrating test with build process
- S. Test planning guidelines and recommendations
- T. Test planning and scenarios
- U. The UAT planning and execution
- V. Planning
- W. UAT kickoff
- X. Execution
- Y. Sign-off
- Z. End-to-end test planning and execution
- AA. Execution and real-life examples
- BB. Training
- CC. The training and help system in Finance and Operations
- DD. Modern clients and navigation concepts
- EE. In-product help
- FF. The business process modeler
- GG. The task recorder and task guides
- HH. Documentation website
- II. Planning and executing training
- JJ. Training plan
- KK. Training preparation
- LL. The training environment
- MM. Change management

#### XII. *Go Live*

- A. Production environment and responsibilities
- B. Cloud deployment
- C. Local business data
- D. Cloud and Edge deployment
- E. Go Live activities
- F. The organization's readiness to Go Live
- G. Sign offs
- H. The decision to Go Live
- I. Business contingency planning
- J. Go Live planning and execution



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### Course Outline (cont.)

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| <ul style="list-style-type: none"> <li>K. Planning</li> <li>L. Executing a release</li> <li>M. The importance of communication</li> <li>N. Post Go Live Support</li> <li>O. Resources for support</li> <li>P. Support tools and LCS</li> <li>Q. Issue/support lifecycle</li> <li>R. Issue discovered/encountered</li> <li>S. Issue tracking</li> <li>T. Root cause analysis</li> <li>U. Escalation to Microsoft</li> <li>V. Production environment support with Microsoft</li> <li>W. Support analytics using monitoring and diagnostics</li> <li>X. Monitoring</li> <li>Y. Diagnostics</li> <li>Z. Analytics</li> <li>AA. Best practices in post Go Live/support</li> </ul> | <ul style="list-style-type: none"> <li>W. Deployment options</li> <li>X. Upgrading from Dynamics AX 2012</li> <li>Y. Code upgrade</li> <li>Z. Data upgrade</li> <li>AA. Developing data upgrade script for custom schema changes</li> <li>BB. Running the data upgrade process</li> <li>CC. Validation and final cutover</li> <li>DD. Migrating from Dynamics AX 2009</li> <li>EE. Planning and code migration</li> <li>FF. Data migration</li> <li>GG. Best practices in upgrade and migration</li> </ul> |
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### **XIII. Update, Upgrade, and Migration**

- A. Understanding update, upgrade, and migration
- B. Updating to the latest Dynamics 365 for Finance and Operation version
- C. Updates to the latest platform
- D. Updates to the latest application
- E. Upgrading your code
- F. Upgrading your data
- G. Updates to a specific application hotfix
- H. Upgrading/migrating from Dynamics AX 2012 or AX 2009
- I. When to upgrade or migrate
- J. Upgrading/migration planning
- K. Operations
- L. Business benefit
- M. Business engagement
- N. System
- O. Upgrade versus reimplementation
- P. Managing the scope
- Q. Managing customization (fit-gap)
- R. ISV Solutions
- S. Managing the data
- T. Impact on integrations
- U. Impact on Power BI and reporting
- V. Cloud and digital