

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

### **Course Outline**

#### **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: Work with Requirements 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 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.
- 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**

- Prepare documentation for gathered requirements using methodologies in Lifecycle Services.
- Define use case scenarios.
- 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 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.

### **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 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 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.

### **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).

### **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**

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

### **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 an 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.

#### **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.

#### **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 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 in 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 Microsoft Power Platform**

- Examine the different Power Platform administrative options available.
- Describe security and governance in Power Platform.
- Explore Microsoft Dataverse and how to use it to build business solutions.
- Examine Power Platform connectors.

#### **Module 22: Set Up and Build Mobile Experiences for Finance and Operations Apps**

- How to implement the components necessary for building mobile experiences.
- How to connect to virtual entities to build mobile apps.

#### **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 7.0–8.0 to version 10.

#### **Module 24: Work with Performance and Monitoring Tools in Finance and Operations Apps**

- 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 25: Plan and Implement Security in Finance and Operations Apps**

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

#### **Module 28: 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 29: 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 30: Get Started with Success by Design for Dynamics 365**

- 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 31: Create a Solution Blueprint for Dynamics 365 Solutions**

- Learn how to create solution blueprints for Dynamics 365.
- Develop project plans and track milestones.
- Identify resources and teams necessary for a successful project.