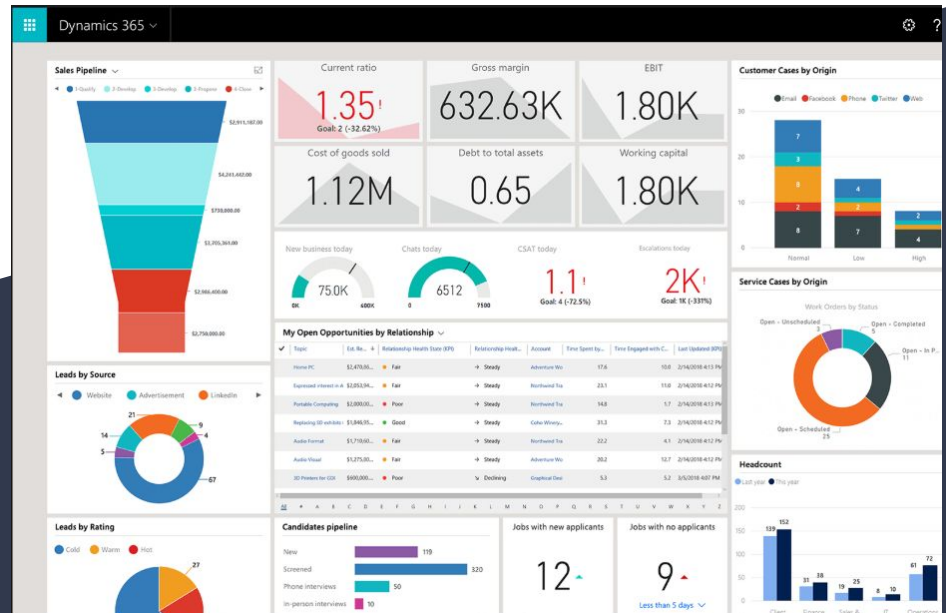


Dynamics Training for Super Users

Don't think it's magic. Just build the skills!



Training Overview

- 5 days of training, 7.5 hours per day + 30 minutes lunch time
- We will do introductions on the first day
- A shared Dynamics environment (trial instance) will be provided for the training
- New material will be delivered daily following the same model: 1 hour + 15 minutes Q&A/optional material + 10-15 minutes break
- With the exception of the first and last days, there will be at least 3 hours of lab work per day. Every participant will get lab work assignments from the instructor
- During the lab work, everyone will get rotational face-to-face time with the instructor
- There will be a dedicated Q & A session on the last day

Delivery Models

- Online (scheduled)
- Onsite (on demand)

Day 1 – Dynamics Overview

- The evolution of Dynamics: from CRM 4 to Power Platform
- Power Platform components: Applications, Flows, CDS, and more
- “Dynamics” family of applications
- Online & On-Premise - is it even the same product these days?
- Microsoft upgrade cadence
- Configuration vs Customization
- An introduction to the Security Model
- An introduction to the reporting
- Application lifecycle management & Dynamics

Day 2 - Configuration

- Solutions and solution components
- Setting up an entity
- Adding new fields
- Using the form designer
- Adding new entity to the application/sitemap
- Adding the business rules
- Relationships in Dynamics (1:N, N:1, N:N.. no 1:1)
- Creating the workflows

Day 2 Lab Work

- About 3 hours of lab work
- Everyone gets a chance to put what we learned to practice while working on the specially crafted configuration assignments
- The instructor is there to provide ad-hoc assistance to the trainees (rotational time allocation)

Day 3 – Advanced Configuration

- Search options
- Different UI controls
- Views, Charts, Dashboards
- System and Personal Settings
- Email integration
- Security Model

Day 3 Lab Work

- About 3 hours of lab work
- Everyone gets a chance to put what we learned to practice while working on the specially crafted configuration assignments
- The instructor is there to provide ad-hoc assistance to the trainees (rotational time allocation)

Day 4 – Out of the Configuration Box

- Customization techniques and examples
- Useful third-party solutions
- XrmToolBox
- Quick run through the main Dynamics applications
- A word on licensing

Day 4 Lab Work

- About 3 hours of lab work
- Everyone gets a chance to put what we learned in the last 4 days to practice while working on the specially crafted configuration assignments
- The instructor is there to provide ad-hoc assistance to the trainees (rotational time allocation)

Day 5 Q & A

- About 3 hours of Q & A
- Have your questions ready!

Day 5 – Wrapping Up

- Integration options: excel export/import, SSIS, SDK, Web API
- Portals overview
- Bulk Delete jobs
- Managed solutions vs unmanaged solutions
- Typical challenges (Business Analysis, Development, Required Skills, Project delivery model, Licensing, etc)