2 Days

Application Setup in Microsoft Dynamics NAV 2013

This two-day course provides participants with the tools to implement and maintain cross-application setup data after the system components are installed. The focus is on the application-oriented work involved in setting up and maintaining company-wide rules, data, and users.

Course Details

Course Outline

Module 1: Set Up a Company by Using RapidStart Services This module explains the RapidStart Services for the application setup. Lessons Manual Setup vs. RapidStart Services Rapid Start Services Process Flow Create and Export a Configuration Package Configure a New Company by Using RapidStart Services Data Migration by Using Rapid Start Services Transfer Opening Balances by Using RapidStart Services After completing this module, students will be able to: Explain the dependencies between RapidStart Services and manual setup work. Describe the different components and processes of RapidStart Services. Explain and demonstrate all tasks in a RapidStart Services process. Create a configuration worksheet. Create a configuration package. Create a configuration questionnaire. Create a configuration template. Initialize a new company with a configuration package. Migrate customer data. Transfer opening balances.

Module 2: Manage User Rights and Profiles This module explains the different level of security in Microsoft Dynamics NAV 2013. Lessons Authentication Set Up User Rights Create a New Permission Set Apply Security Filters User-Specific Setup User Profile Setup Best Practices Lab : Set Up New Users Susan Alicia Cassie After completing this module, students will be able to: Explain how authentication works in Microsoft Dynamics NAV. Manage security for Windows client users. Set up a new user. Explain the concepts of permission sets and permissions. Create a new permission set, and assign permissions to it. Apply security filters in Microsoft Dynamics NAV. Perform user-specific setup. Create, assign, and work with user profiles.

Module 3: Set Up Number Series This module explains the purpose of company-wide number series. Lessons Number Series Lab : Create a Number Series After completing this module, students will be able to: Explain the purpose of company-wide number series. Set up number series. Create number series relations.

Module 4: Set Up Trail Codes This module explains what trail codes are used for. Lessons Lessons 1 to 3: Source Code and Reason Codes Navigate the Audit Trail After completing this module, students will be able to: Explain and set up trail codes, source codes, and reason codes.

Module 5: Set Up General Journals Templates and Batches This module explains the purpose of journal templates and journal batches set up. Lessons Journal Templates, Batches, and Lines Create Journal Templates and Batches Lab : Create a Journal Batch After completing this module, students will be able to: Explain the purpose and organization of journal templates and journal batches. Create general journal templates and general journal batches.

Module 6: Set Up Posting Groups This module explains the purpose of posting groups. Lessons Specific Posting Groups General Posting Groups General Posting Setup VAT Posting Groups VAT Posting Setup Best Practices Post and Review a Sales Transaction Lab : Set Up and Assign a Vendor Posting Group Lab : Set Up and Assign a Product Posting Group Lab : Copy a General Posting Setup Line Lab : Create and Assign a VAT Product Posting Group Lab : Copy a VAT Posting Setup Lab : Post and Review a Purchase Transaction After completing this module, students will be able to: Explain and set up specific posting groups. Explain and set up general posting groups. Create a General posting setup. Create an Inventory posting setup. Explain and set up VAT posting groups. Create a VAT posting setup. Describe posting setups based on the chart of accounts. Demonstrate how posting groups direct a sales transaction.

Module 7: Set Up Dimensions This module explains the benefits and purposes in using dimensions. Lessons Dimensions and Dimension Values Setting Up Dimensions in General Ledger Setup Dimension Combinations Lessons 4 to 5: Default Dimensions and Account Type Default Dimensions Default Dimension Priority Conflicting Default Dimensions Lab : Set Up a Dimension with Dimension Values Lab : Set Up a Dimension Combination Lab : Assign Default Dimensions to a Single Account Lab : Assign Default Dimensions to Multiple Accounts Lab : Assign Vendor Account Type Default Dimensions After completing this module, students will be able to: Explain and set up dimensions and dimension values. Explain and set up global and shortcut dimensions. Explain and show how dimension combinations are set up. Explain and show how single and multiple default dimensions are set up. Explain and show how account type default dimensions are set up. Explain and show how default dimension priorities are set up. Explain the possibility and resolution of conflicting default dimensions. Show how to use dimension and dimension values in journals and documents under different dimension setup scenarios.

Module 8: Set Up and Manage Document Approvals This module explains the basic Document Approval set up tasks. Lessons Set Up Document Approvals Set Up the Notification System Set Up a Sales Document Approvals System Use the Document Approval System Lab : Set Up a Purchase Document Approvals System After completing this module, students will be able to: Set up the general features of the document approval system. Set up approval templates. Set up user logons for use with document approvals. Set up approval users in a hierarchy. Set up the notification system for approvals. Send an approval request. Approve a sales or purchase document. Maintain substitute approvers. Manage overdue notifications.

Who Should Attend

This course is intended to a partner that sells and implements the Finance module to customers. The typical partner has an ERP background and has a basic understanding of accounting principles.

Pre Requisite

Before attending this course, students must have: completed course 80439A: Introduction in Microsoft Dynamics NAV 2013 knowledge of basic accounting principles and ERP user roles

Exams

Microsoft Certified Professional (MCP) []

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