

# Dynamics 365 Finance Administration & Operations Management

## Course Overview

Dynamics 365 Finance Administration & Operations Management is designed for functional administrators, power users, and support teams responsible for managing, monitoring, and governing Dynamics 365 Finance environments. The course focuses on real-world administrative challenges, governance, reporting, workflows, integrations, automation, monitoring, and troubleshooting to ensure system stability and operational efficiency.

## Module 1: Common Challenges for Admins

- Security conflicts
- Data entity issues
- Workflow failures
- Batch job failures
- Reporting delays
- Environment sync challenges
- Document management issues

## Module 2: Best Practices & Governance

- Environment strategy (Dev / UAT / Prod)
- Release management governance
- Data governance and classification
- Audit trails and monitoring
- Customization vs. extension governance
- Batch job governance
- Data retention policies

## Module 3: Managing & Personalization of Workspaces

- Workspaces overview and customization
- Personalization vs. Saved Views
- Publishing views to users

- KPIs, tiles, and filters
- Workspace governance and best practices

## **Module 4: Managing Reporting**

- Financial Reporting (FR / Management Reporter)
- SSRS reports
- Electronic Reporting (ER)
- Embedded Power BI
- BYOD and data export options
- Admin responsibilities in reporting
- Scheduling and troubleshooting reports

## **Module 5: Managing Workflows**

- Workflow setup and parameters
- AP, AR, and GL workflows
- Workflow delegation and escalation
- Monitoring workflow history
- Workflow troubleshooting
- Integrating workflows with Power Automate

## **Module 6: Office & Excel Integration**

- Excel Add-in setup
- Using OData entities in Excel
- Data maintenance through Excel
- Common errors and connectivity troubleshooting
- Export and import limitations

## **Module 7: Document Management Integration**

- Document types and setup
- Attachments management
- SharePoint integration
- Versioning and permissions
- Document governance policies

## **Module 8: Power Automate in Dynamics 365 Finance**

- Business events overview
- Common automation scenarios
- Triggering flows from Dynamics 365 Finance
- Approvals automation
- Flow monitoring and governance
- Real-world examples: AP automation, alerts, notifications

## **Module 9: LCS Tools, Projects & Services**

- Understanding the LCS environment
- Asset library management
- Issue search and KB usage
- Monitoring and diagnostics tools
- Environment refresh, backup, and restore
- RSAT overview
- Update and hotfix lifecycle

## **Module 10: Monitoring & Support**

- Monitoring batch jobs
- Alerts and notifications
- System performance dashboards
- Integration monitoring (OData, DMF, Power Automate)
- Production support best practices
- Creating and managing support tickets

## **Module 11: Diagnostics & Troubleshooting**

- Interpreting error messages
- Data entity troubleshooting
- Workflow diagnostics
- Performance troubleshooting
- Database maintenance (high-level)

- LCS monitoring for diagnostics
- Real-world case studies

## **Module 12: Additional Admin Topics (Recommended)**

- Feature management
- Entity store refresh
- Dataverse integration basics
- Data migration sequencing
- Administrator SOP checklist