

MANAGING METHODOLOGIES IN LCS

FOR MICROSOFT DYNAMICS® 365 FOR FINANCE AND
OPERATIONS



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Course Details

This eLearning course we will review the managing methodologies feature in Lifecycle Services. This feature allows users to plan and monitor progress of a project.

AUDIENCE

The intended audience includes partners and customers who want to learn the basic features Lifecycle Services and project management. It is targeted for corporate and IT personnel that are responsible for the setup and administration of environment deployment and management.

AT COURSE COMPLETION

At course completion, participants will have an understanding of how to:

- Manage methodologies
- Create new methodologies
- Work with phases and tasks
- Utilize resources and documents.

REGISTRATION AND PAYMENT

You can register for a course online at academy.rsmus.com by browsing the catalog and selecting courses to add to your cart. You can also email your request to academy@rsmus.com.

Payment must be received and verified before you can gain access to the course content. When purchasing through our website, all payments are made through PayPal. You can use an existing PayPal account to pay with your credit card or other method of payment configured in your PayPal account. If you do not have a PayPal account you can use the guest check out feature to use your credit card to pay. If you prefer to pay by using another method of payment, please contact us at academy@rsmus.com to make arrangements. We cannot guarantee all methods of payment will be accepted but we will try to accommodate your requests.

REFUND POLICY

Once an eLearning course has been purchased, no refunds will be provided. If you have any questions about this policy, you may contact us at by clicking the Support button on our site or email us at academy@rsmus.com. Formal complaints or errors found in the content should be reported in writing to academy@rsmus.com. Complaints will be reviewed to determine what action needs to be taken.

Prerequisites

PARTICIPANT REQUIREMENTS

Students attending this section of the course should have a basic understanding of:

- General knowledge of Microsoft® Windows®
- General knowledge of basic navigation within Dynamics 365 for Finance and Operations
- General understanding of basic accounting

TECHNOLOGY REQUIREMENTS

- The site has been optimized for Internet Explorer. Although other browsers may work, it is recommended that you use Internet Explorer for the best experience.
- Silverlight must be installed in order to use the practices.
- A screen resolution with a minimum of 1024x768 is recommended. You can use full screen icons within the eLearning to maximize your view. A smaller resolution may result in content being cut off from your screen.

Course Outline

MODULE 1: MANAGING METHODOLOGIES OVERVIEW

This module will provide a basic overview of the managing methodologies feature in Lifecycle Services.

Lessons

- Review managing methodologies feature

MODULE 2: CREATING NEW METHODOLOGIES

This module will demonstrate how to create and edit methodologies for an LCS project.

Lessons

- Create a new methodology
- Edit a methodology

Practices

- Create a new methodology

MODULE 3: WORKING WITH PHASES AND TASKS

Phases and tasks are involved when managing a project or implementation. These components are used when defining methodologies.

Lessons

- Create and edit phases
- Create and edit tasks

MODULE 4: UPLOADING DOCUMENTS AND RESOURCES

Documents and resources may be uploaded to support a specific phase, or provide additional information as it relates to a specific phase or task.

Lessons

- Review how to upload documents for certain phases

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