RSM TECHNOLOGY ACADEMY

eLearning Syllabus and Agenda

BUDGET REGISTER ENTRIES

FOR MICROSOFT® DYNAMICS 365 FOR OPERATIONS AND FINANCE

RSM

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Course Details

This eLearning course is designed to teach budget users how to create registry entries and workflows for those entries in Microsoft Dynamics 365 for Operations and Finance.

AUDIENCE

- CFO
- Controller
- Accountant
- Budget Manager
- Budget Users

AT COURSE COMPLETION

At course completion, participants should have an understanding of budget register entries and how to create them in Microsoft Dynamics 365 for Operations and Finance. In addition, participants will learn about budget transfers and managing budgets using Microsoft Excel.

REGISTRATION AND PAYMENT

You can register for a course online at academy.rsmsus.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 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: BUDGET REGISTRY ENTRIES

This module teaches how to create and work with budget registry entries.

Lessons

- Create a Budget Register Entry
- View the Status of Budget Register Entries
- Create a Budget Transfer
- Create a Budget Transfer when Creating Another Entry

Practices

- Create a Budget Registry Entry
- Create a Budget Transfer

MODULE: ADVANCED BUDGET REGISTER ENTRY TASKS

This module discusses allocating budget register entries and replicating those entries.

Lessons

- Basic Budgeting Workflow Types
- Create a Budget Register Entry Workflow
- Allocate Budget Register Entries
- Create Recurring Budget Register Entries
- Managing Budgets using Microsoft Excel ®

Practices

- Allocate Budget Register Entries
- Create Recurring Budget Register Entries
- Export a Budget Entry to Excel, Make Changes, and Republish to Dynamics 365 for Operations

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