

BUDGET CONTROL

FOR MICROSOFT® DYNAMICS 365 FOR OPERATIONS
AND FINANCE

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Course Details

This course introduces budget control. Budget control is a mechanism for enforcing your budget amount during transactions throughout the system by providing errors are warnings when the budget is being exceeded.

AUDIENCE

- CFO
- Controller
- Accountant
- Budget Manager
- Budget users

AT COURSE COMPLETION

At course completion, participants will have learned how budget control, budget cycles, budget control parameters and workflows work within Microsoft Dynamics 365 for Operations and Finance.

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: INTRODUCTION TO BUDGET CONTROL

This module explains how to setup Budget Control as a method of enforcing that available budget funds can be verified when source documents and accounting journals are entered. It also describes how Budget control can be integrated with different modules.

Lessons

- Review budget control overview.
- Define budget control terminology.
- Discuss budget control options.
- Define budget control integrations.

MODULE: BASIC SETUP FOR BUDGET CONTROL

Before you can enable budget control, you will need to complete some basic configuration. This lesson will focus on the setup and configuration required.

Lessons

- Discuss the budget cycles.
- Create budget cycles.

Practices

- Create a budget cycle.

MODULE: BUDGET CONTROL CONFIGURATION

This module explains how to configure Budget control and define the necessary parameters needed to use Budget control.

Lessons

- Discuss the budget control configuration form.
- Define budget control parameters.
- Set up over budget permissions.
- Define the budget funds available calculation.
- Discuss source documents for budget control.
- Discuss accounting journals for budget control.
- Assign a budget model to a budget cycle.

- Select main accounts for budget control.
- Define message levels.

Practices

- Assign a budget model to a budget cycle.
- Set up budget permissions.

MODULE: BUDGET CONTROL RULES AND GROUPS

This module explains how to define Budget control rules and groups modules.

Lessons

- Define budget control rules.
- Set up budget permissions.
- Define budget control groups.

Practices

- Define budget control rules.

MODULE: ACTIVATING AND USING BUDGET CONTROL

This module explains how to activate Budget Control and use Budget control in Purchase orders and in a journal.

Lessons

- Activate budget control.
- Using budget control on a purchase order.
- Using budget control in a journal.

Practices

- Activate budget control.
- Using budget control on a purchase order.

MODULE: WORKFLOWS

This module explains how to setup workflows for Budget control. Budgeting documents, such as budget register entries and general budget reservations, can be approved by a user other than the person who entered them. To set up an approval process, you can create a Budgeting workflow.

Lessons

- Discuss benefits of budgeting workflows.
- Describe budget plan workflows.
- Discuss budget account entry workflows.
- Discuss budget register entry workflow.
- Describe calculated fields and expressions in workflows.
- Define types of participants in workflows.

Practices

- Design and configure a Budget plan workflow.
- Design and configure a Budget account entry workflow.
- Design and configure a Budget register entry workflow.

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