

BUDGETING INQUIRIES AND REPORTING

FOR MICROSOFT® DYNAMICS 365 FOR OPERATIONS

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Course Details

This eLearning course is designed to teach budget users about the various budget reports and inquiries available in Microsoft Dynamics 365 for Operations and Finance and how these reports can be utilized to provide valuable information for the user.

AUDIENCE

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

AT COURSE COMPLETION

At course completion, participants can expect to have learned about how to set up and analyze various budgeting-related workspaces, reports, and inquiries available in 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: BUDGETING WORKSPACES

This module looks at the workspaces in Dynamics 365 for Operations for budgeting. Workspaces allow users to break out processes and functions and allows users to access what they need from the home screen.

Lessons

- View budget planning workspace.
- View ledger budgets and forecasts workspace.

MODULE: BASIC BUDGETING INQUIRIES

This module will explain how to work with the basic budgeting inquiries and view various levels of detail about basic budgeting.

Lessons

- Discuss basic budgeting inquiries.
- Define actual verses budget inquiry calculations.
- Set and apply parameters for actual verses budget inquiry.
- Work with actual verses budget inquiry with parameters applied.

Practices

- Set and apply parameters for the actual verses budget inquiry.

MODULE: BASIC BUDGETING REPORTS

This module will explain how to choose options and print the actual verses budget report.

Lessons

- Discuss the actual verses budget report.
- Select actual verses budget report options.
- Print the actual verses budget report.

Practices

- Print the Actual verses budget report.

MODULE: BUDGET PLANNING INQUIRES

This module will explain how to work with the budget planning inquiries and view various levels of detail about budget planning.

Lessons

- Review the budget plans by dimension set inquiry.
- Review the budget plan lines inquiry.
- Set and apply parameters on budget plans by dimension sets inquiry.
- Work with the budget plan by dimension sets by budget plan lines.
- Work with the budget plan by dimension sets by supply forecast.
- Work with the budget plan by dimension sets by demand forecast.
- Work with the budget plan by dimension sets by project forecast.
- Set and apply parameters for budget plan lines.

MODULE: BUDGET PLANNING REPORTS

This module will explain how to choose options and print reports for budget planning.

Lessons

- Discuss forecast positions by budget plan report.
- Discuss budget plan audit report.
- Print the forecast positions by budget plan report.
- Print the budget plan audit report.

Practices

- Print the budget plan audit report.

MODULE: BUDGET CONTROL INQUIRIES

This module will explain how to work with the budget control inquiries and view various levels of detail about budget control.

Lessons

- Review the budget control statistics inquiry.
- Review the budget control statistics by period inquiry.
- Review the budget control statistics by period inquiry
- View the budget analysis inquiry.

Practices

- View the budget analysis inquiry.

MODULE: BUDGET CONTROL REPORTS

This module will explain how to choose options and print reports for budget control.

Lessons

- Review the budget control account detail history report.
- Review the budget control activity by project report.
- Print the budget control account detail history report.
- Print the budget control activity by project report.

MODULE: FINANCIAL REPORTS

This module will explain how to choose options and print the budget funds available.

Lessons

- Open the budget funds available report.
- Choose the budget funds available report options.
- Choose the budget funds available report print options.
- Print the budget funds available report.

Practices

- Print the budget funds available report.

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