



Key Data

Course #: 80020

Number of Days: 2

Format: Instructor-Led

Certification Exams: None

Certification Track: None

This course syllabus should be used to determine whether the course is appropriate for the students, based on their current skills and technical training needs.

Course content, prices, and availability are subject to change without notice.

Course Syllabus

Introduction to Microsoft Dynamics AX 2009

Elements of this syllabus are subject to change.

This two-day instructor-led course provides students with the knowledge and skills to maneuver within Microsoft Dynamics® AX 2009. The course focuses on basic modules and functionality, user interfaces, number sequences, tools and command menus, basic installation, and differentiating features.

This is the first course in the Microsoft Dynamics AX 2009 curriculum and will serve as the entry point for other Microsoft Dynamics AX 2009 courses.

Audience

This course is intended for novice users of Microsoft Dynamics AX. Students must have basic Microsoft® Windows® navigation skills.

At Course Completion

After completing this course, students will be able to:

- Explain the benefits of Microsoft Dynamics AX 2009 architecture.
- Describe the module integration and key features of Microsoft Dynamics AX 2009.
- Log on and maneuver within Microsoft Dynamics AX 2009 windows and help system, and use keyboard shortcuts.
- Create users and user groups.
- Define parameters for the user log.
- Monitor client and server activity in Microsoft Dynamics AX 2009.
- Validate user input for fields, controls, and forms.
- Create number sequences and define parameters on number sequences.
- View references and history.
- Create company accounts and set up company information.
- Create domains.
- Create table collections and enable table data sharing across companies.
- Export and import data from and to Microsoft Dynamics AX 2009.
- Use the Tools menu to access data and customize views.
- Use the Command menu to access system features including hide and show, restore, setup, alert rules, and delete and edit records.
- Perform a single computer installation of Microsoft Dynamics AX 2009.
- Modify a list using MorphX®.
- Use Enterprise Portal to enter a sales order.
- Access SQL data tables.
- Describe Microsoft Dynamics AX 2009 integration to other Microsoft applications including Microsoft® Outlook®.

Prerequisites

Before attending this course, students must have basic familiarity with Microsoft Windows.

Student Materials

The student kit includes a comprehensive workbook and other necessary materials for this class.

The following software is provided in the student kit: Evaluation copy of Windows® XP Professional for classroom use only.

Module 1: Introduction to Microsoft Dynamics AX 2009

This module introduces the Microsoft Dynamics AX 2009 Enterprise Resource Planning (ERP) solution, its architecture and the technologies used. In addition, key features and benefits of the various modules are described.

| Lessons |
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| <ul style="list-style-type: none">▪ Microsoft Dynamics AX 2009 Technology▪ Financials▪ Supply Chain Management▪ Project Accounting▪ Customer Relationship Management |

After completing this module, students will be able to:

- Present the benefits of the unique Microsoft Dynamics AX 2009 architecture
- Identify the key features of Microsoft Dynamics AX 2009

Module 2: Functionality Demonstrations

This module provides a demonstration of the basic functionality of Microsoft Dynamics AX 2009.

| Lessons |
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| <ul style="list-style-type: none">▪ Enter a Sales Quote▪ Customize the Order with Product Builder▪ Check the Item Availability▪ Convert the Quotation to the Sales Order▪ Run Master Scheduling▪ Produce the Custom Item▪ Purchase Needed Parts▪ Ship the Order▪ Send an Invoice for the Order▪ Check the Amount Invoiced▪ Post Payment▪ Apply Payment▪ Check the Account to Verify Posting |

After completing this module, students will be able to:

- View sales quotation order creation
- View order customization with Product Builder functionality
- View on-hand inventory for the sales quotation
- View the process of the quotation confirmation
- View the procedure of scheduling an order
- View the producing of the custom item process
- View the process of checking, packing, and loading order
- View the invoicing process
- View customer transactions
- View the process of payment posting
- View how transactions are updated with the payment
- Check the connection between sales and purchase orders and general ledger accounts

Module 3: Navigate User Interface

This module introduces the user interface of Microsoft Dynamics AX 2009.

| Lessons |
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| <ul style="list-style-type: none"> ▪ Navigate Microsoft Dynamics AX 2009 ▪ Configure Menus ▪ Exploring the Help System ▪ Role Center Use in Microsoft Dynamics AX 2009 |
| Lab 3.1: Explore the Application Window |
| <ul style="list-style-type: none"> ▪ Open the Vendor form. ▪ Access balance and balance details for Fabrikam Supplier. ▪ Close the forms. |
| Lab 3.2: Configure Your Workspace |
| <ul style="list-style-type: none"> ▪ Hide and re-sort the menus. ▪ Add links to the Sales Order Details and Purchase Order Details forms to the My Favorites pane. ▪ Rename the My Favorites group. |

After completing this module, students will be able to:

- Explore the Microsoft Dynamics AX 2009 navigation
- Configure the Microsoft Dynamics AX menus
- Use the Microsoft Dynamics AX 2009 Help system
- Explain the use of Role Centers in Microsoft Dynamics AX 2009

Module 4: Set up Users

This module focuses on the user setup in Microsoft Dynamics AX 2009.

| Lessons |
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| <ul style="list-style-type: none"> ▪ Set up Users ▪ Install User Role Center ▪ Set Password Parameters ▪ Monitor Client and Server Activity |
| Lab 4.1: Create a User |
| <ul style="list-style-type: none"> ▪ Create a user account in Active Directory. ▪ Set the history limit in the User log form to "45 days". ▪ Set user log batch processing. ▪ Set the Recurrence field to today's date without an ending date. ▪ Run the cleanup batch job. |

After completing this module, students will be able to:

- Create users and assign them to user groups
- Install Role Centers and assign users
- Get basic knowledge on setting passwords for Dynamics AX 2009 users
- Monitor client and server activity in the Microsoft Dynamics AX 2009

Module 5: Set Up Number Sequences

This module demonstrates how to create number sequences in Microsoft Dynamics AX 2009 using both a wizard and a manual process.

| Lessons |
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| <ul style="list-style-type: none"> ▪ Create Number Sequences ▪ Set Individual Parameters ▪ View Number Sequence References ▪ View Number Sequence History |
| Lab 5.1: Create Number Sequences |
| <ul style="list-style-type: none"> ▪ Open the Set up number sequences wizard. ▪ Follow the prompts. |
| Lab 5.2: Set Number Sequence Parameters |
| <ul style="list-style-type: none"> ▪ Open the Number sequences form for the Inve_90 serial numbers. ▪ Modify the parameters. |

After completing this module, students will be able to:

- Define number sequences
- Create number sequences using the wizard
- Create number sequences manually
- Define number sequence parameters
- View number sequence references
- View number sequence history

Module 6: Set up Company Accounts

This module explains the steps of setting up a company in Microsoft Dynamics AX 2009.

| Lessons |
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| <ul style="list-style-type: none"> ▪ Create Domains ▪ Create Table Collections ▪ Create Company Accounts ▪ Create Virtual Company Accounts ▪ Set up Company Information ▪ Enter Company Information ▪ Import and Export Data |
| Lab 6.1: Create a Domain |
| <ul style="list-style-type: none"> ▪ Create the new intercompany domain. ▪ Add the three intercompany company accounts. |
| Lab 6.2: Create a Table Collection |
| <ul style="list-style-type: none"> ▪ Create a new table collection. ▪ Open another instance of the AOT. ▪ Add the two tables to the new table collection. |

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| <p>Lab 6.3: Create a Company Account</p> <ul style="list-style-type: none"> ▪ Create the new company account. ▪ Verify the domain. ▪ Open the new company from the form. |
| <p>Lab 6.4: Create a Virtual Company Account</p> <ul style="list-style-type: none"> ▪ Create a new virtual company account. ▪ Add only the three intercompanies. ▪ Add all the table collections. ▪ Close the form and restart Microsoft Dynamics AX 2009. |
| <p>Lab 6.5: Set up Company Information</p> <ul style="list-style-type: none"> ▪ Open the company created. ▪ Open the Address format form and use the Create address format wizard to create the US (North America) address format. ▪ Open the County/region form and add the new state information. ▪ Open the County form and add the new county. ▪ Open the ZIP/postal Codes form. ▪ Add the new zip/postal code information. ▪ Fill the Country/region, State, and County fields. |
| <p>Lab 6.6: Enter Company Information for the New Company</p> <ul style="list-style-type: none"> ▪ Open the company created. ▪ Open the Company information form. ▪ Import a logo for the company. |
| <p>Lab 6.7: Export and Import Cost Categories</p> <ul style="list-style-type: none"> ▪ Open the CEU company, open the Data export/import form. ▪ Create a new definition group. ▪ Export the cost categories to a location on drive C. ▪ Open the company created and verify that cost categories do not exist. ▪ Open the Import options form. ▪ Keep all defaults and import the file. ▪ Verify that the Cost categories form is filled with data. |

After completing this module, students will be able to:

- Create domains for security
- Create table collections
- Create company accounts
- Create a virtual company to enable table data sharing across companies
- Set up company information
- Enter company information
- Export data from Microsoft Dynamics AX 2009
- Import data into Microsoft Dynamics AX 2009

Module 7: Work with Tools Menu

This module introduces the **Tools** menu which provides access to many of the auxiliary tools available in Microsoft Dynamics AX 2009.

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| Lessons |
| <ul style="list-style-type: none"> ▪ Tools Menu Overview ▪ Set User Options |
| Lab 7.1: Create a Unit Conversion |
| <ul style="list-style-type: none"> ▪ Open the Calculator for units form. ▪ Convert feet into square feet for the Hardwood veneer - 8" X item. |

After completing this module, students will be able to:

- Access the employee telephone list
- Change the session date
- Display and use the Calculator
- Use the Unit Calculator to convert between different units
- View the print jobs stored in the print archive
- Switch between company accounts
- Set up and use reporting services
- Customize toolbars
- Configure user settings

Module 8: Work with Command Menu

This module introduces the **Command** menu which provides display and action options for Microsoft Dynamics AX 2009.

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| Lessons |
| <ul style="list-style-type: none"> ▪ Command Menu Overview ▪ Use Setup Feature ▪ Use Hide/Show Features ▪ Create Alert Rules ▪ View Record Information ▪ Mark Records ▪ Use Document Handling Feature ▪ Delete Records |
| Lab 8.1: Modify a Form |
| <ul style="list-style-type: none"> ▪ Open the Set up number sequences wizard. ▪ Make the modifications. |
| Lab 8.2: Hide/Show a Form |
| <ul style="list-style-type: none"> ▪ On the Command menu or using the right-click menu, use the Hide, Show, and Show all tools. |
| Lab 8.3: Create an Alert |
| <ul style="list-style-type: none"> ▪ Create an alert rule for purchase price fluctuations on the 8003 item. ▪ Set the end date. |

Lab 8.4: Attach a Document to a Record

- Create a note regarding purchase price fluctuations on the item 8003.
- Open the note using the toolbar.

After completing this module, students will be able to:

- Examine the Go to the Main Table Form option
- Introduce the Restore option
- Review the form setup options
- Use the Hide and Show features
- Create alert rules
- View record information
- Update multiple records
- Examine the document handling options
- Delete records

Module 9: Understand Cross-Over Features

This module demonstrates some of the features of Microsoft Dynamics AX 2009 that set this product apart from other applications such as Microsoft MorphX, Enterprise Portal, Business Connectors, Integration with other Microsoft applications and Workflows.

Lessons

- Microsoft MorphX
- Using Enterprise Portal
- Access SQL Data Tables
- Integration with Other Microsoft Applications
- Using Workflows

Lab 9.1: Modify a Lookup List

- Access the Application Object Tree.
- Add the fields to the **AutoLookup** field group.

Lab 9.2: Take an Order Using Enterprise Portal

- Open Enterprise Portal.
- Create a sales order for Sparrow Wholesales, for 10 High End Speakers - ash/12 inches.
- Complete the sales order.

Lab 9.3: Change Name in Data Table

- Access the **User setup** form for the customer table.
- Use the Table browser to find the data and make changes.

After completing this module, students will be able to:

- Modify a list using Microsoft MorphX
- Use Enterprise Portal
- Access data tables from Microsoft Dynamics AX 2009
- Integrate with other Microsoft applications
- Understand the use of workflows in Microsoft Dynamics AX 2009

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