



Course Syllabus

Microsoft® Business Solutions – Axapta® Introduction

Elements of this syllabus are subject to change.

Key Data

Course number: 8329A

Number of Days: 2

Available: July 2004

Languages:

- US English

Format:

- Instructor-Led Training (lecture and labs)

Student Materials:

- Student Courseware

Certification Exam: 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.

Key Related Courses: None

Introduction

This 2 day course is an introduction to Microsoft® Business Solutions – Axapta®. All professionals working with the Microsoft Axapta solution are strongly encouraged to attend. Students are shown the complete flow through the basic Microsoft Axapta modules and the inter-relationships of the modules, and leave with a solid understanding of Microsoft Axapta capabilities, and well prepared to begin in-depth learning in the product. The course also covers navigation and set up processes such as company accounts setup that provides students with a base for installing and utilizing Microsoft Axapta on their personal machine. The All in One Install chapter is meant only as a resource to install Microsoft Axapta on one machine for demo purposes and is not considered a full reference for Microsoft Axapta Installation and Configuration.

Audience

This course is intended for any individuals who are just starting their learning process with Microsoft Axapta. This includes individuals working directly on installations as well as people tasked with demonstrating the product. Topics range from very basic navigation to a demonstration of difference makers. We recommend that anyone working with Microsoft Axapta attend this course.

At Course Completion

After completing this course, students should understand:

- Basic functionality and general usage of the application.
- Benefits and features of core modules such as GL, AP, AR, Sales Order, Purchase Orders, and Inventory as well as the CRM module, Projects, Warehouse Management, Human Resources, and others.
- How customers place sales orders, how these orders generate production and purchase orders, how inventory is updated when the orders are processed, and how the goods are shipped to the Customer by walking through an instructor led case study.
- How to install and set up Microsoft® SQL Server®, ODBC connections, and Microsoft Axapta in a one user training or testing environment.
- Some of the features that set Microsoft Axapta apart from its competition in the upper mid-market space.

Prerequisites

Before attending this course, students must have:

- Some working knowledge of Microsoft® Windows® 2000 or Microsoft® Windows® XP.
- A general understanding of the purpose of Enterprise Resource Planning (ERP) solutions.

For a referral to a Microsoft Certified Partner Learning Solution in your area, see the Microsoft Training and Certification Web site at <http://www.microsoft.com/traincert>. Call your local Microsoft Certified Technical Education Center for more information and to register for classes.

Chapter 1: Overview

This chapter takes the student on a walk through the Microsoft Axapta application. The student is introduced to the various modules of the application as well as the interrelations between the various modules. The chapter also includes an introduction to the key features and benefits of each module.

Lessons
<ul style="list-style-type: none"> ▪ Full Integration ▪ Financial Management and Business Analysis ▪ Supply Chain Management ▪ Tools of the Supply Chain ▪ Human Resource Management ▪ Customer Relationship Management ▪ Questionnaire ▪ Project Accounting ▪ Technology

After completing this module, students should be able to:

- Understand the capabilities and benefits of the Microsoft Axapta application
- Understand how Microsoft Axapta modules are related to each other.
- Understand the underlying technology of Microsoft Axapta.

Chapter 2: Case Study

The purpose of this chapter is to take the student through an order in Microsoft Axapta. The life cycle of the business flow is tracked from the sales order through production all the way to the General Ledger. Upon completion of this chapter, students should have had some exposure to the different types of forms and processes available in Microsoft Axapta.

Lessons
<ul style="list-style-type: none"> ▪ Entering a Sales Order ▪ Customize the Lamp ▪ Calculate Price ▪ Calculate Delivery Date ▪ On Hand Inventory ▪ Master Scheduling ▪ Master Planning ▪ Purchase Order ▪ Completing the order ▪ Shipping the product. ▪ Delivering the product. ▪ Collecting the cash. ▪ Accounts Receivable inquiry. ▪ Posting the cash receipt. ▪ Applying the receipt. ▪ General Ledger inquiry. ▪ Summary

After completing this module, students should be able to:

- Understand the flow through the basic Microsoft Axapta modules.
- Understand the integrated nature of the Microsoft Axapta modules.

Chapter 3: User Interface

This chapter is intended to give students an introduction to the user interface within the Microsoft Axapta system. Students are shown the base window of the system as well as learning how to maneuver around in Microsoft Axapta.

Lessons
<ul style="list-style-type: none">▪ Login▪ Basic Navigation▪ Creating New Menus▪ Help

After completing this module, students should be able to:

- Login to Microsoft Axapta.
- Navigate the main forms and menus.
- Find and use keyboard shortcuts.
- Create main menus.
- Use the Help system.

Chapter 4: User Setup

The purpose of this chapter is to show students the steps in setting up users within Microsoft Axapta. It also covers how to change a user's permissions and how to work with users logged into Microsoft Axapta.

Lessons
<ul style="list-style-type: none">▪ User Group Setup▪ Password Parameters▪ User Setup▪ Online Users

After completing this module, students should be able to:

- Create user groups
- Grant of deny permissions to user groups.
- Set up the parameters of a user's password
- Create users both manually and through the use of a wizard.
- Monitor which users are signed on to Microsoft Axapta.

Chapter 5: Number Sequences

This chapter focuses on one of the most important setup topics in Microsoft Axapta: Number Sequences. Number sequences handle automatic allocation of voucher numbers, invoice numbers and journal numbers for all modules in Microsoft Axapta.

Lessons
<ul style="list-style-type: none">▪ Number Sequences▪ Clean up button▪ Performance tab▪ Creation using a wizard

After completing this module, students should:

- Understand the procedures to follow when setting up number sequences in Microsoft Axapta.

- Understand how to use the setup windows to “personalized” number sequences for a business.
- Understand how to set up number sequences so that transactions can be tracked based on the number sequences used.

Chapter 6: Company Accounts Setup

This chapter walks students through the steps of setting up a company account within Microsoft Axapta. A single Microsoft Axapta database is capable of holding many individual companies. Once company accounts are created virtual companies can be set up that share tables from the main Microsoft Axapta database. The steps for creating virtual companies are detailed. This chapter also shows how to do a basic data import into a new company.

Lessons
<ul style="list-style-type: none">▪ Company Account Setup▪ Creating Virtual Company Accounts▪ Creating Table Collections▪ Company Information▪ Data Import/Export

After completing this module, students should be able to:

- Set up a company account
- Set up domains for security purposes
- Create virtual companies so companies can share data in tables.
- Input basic company information.
- Import data into your new company.

Chapter 7: Tools Menu

This chapter introduces you to the tools menu in Microsoft Axapta. This menu provides many of the auxiliary tools available in Microsoft Axapta. Each of these tools are discussed in detail.

Lessons
<ul style="list-style-type: none">▪ Telephone List▪ System Date▪ Calculator▪ Calculator for Units▪ Print Archive▪ Select Company Accounts▪ Customize▪ Options

After completing this module, students should be able to:

- Build a telephone list
- Change the system date
- Display and use the calculator
- Use the unit calculator to convert between different units
- Archive print jobs
- Quickly switch between company accounts
- Customize tool bars
- Configure your desktop

Chapter 8: Command Menu

This chapter introduces the Command Menu. This menu provides many of the display and action options for Microsoft Axapta. Each topic is discussed in detail later.

Lessons
<ul style="list-style-type: none">▪ Go to the Main Table▪ Filter Records▪ Setup▪ Hide/Show All/Show▪ Record Information▪ Document Handling▪ Delete Record▪ Edit

After completing this module, students should be able to:

- Easily access the source table where the data in a dropdown list originates.
- Filter record lists in forms
- Sort records in forms
- Hide and show fields
- Quickly display information about records
- Attach notes to records in forms
- Delete and edit records

Chapter 9: All in One Install

This chapter covers the complete installation of Microsoft Axapta in a stand alone, one machine training or testing environment. This includes the installation of Microsoft SQL Server, setting up an ODBC connection, and installing the Microsoft Axapta application and client. This chapter does not cover setting up the Microsoft Axapta application. That is covered in other Microsoft Axapta courses.

Lessons
<ul style="list-style-type: none">▪ Overview of Microsoft SQL Server installation▪ Microsoft Axapta Application Install▪ Creating an ODBC data source▪ Microsoft Axapta Client Install▪ Configuration Utility▪ Installation Checklist▪ Installing Demo Data▪ Summary

After completing this module, students should be able to:

- Install Microsoft SQL Server in preparation for a Microsoft Axapta installation.
- Create and ODBC connection for Microsoft Axapta to Microsoft SQL Server.
- Install the Microsoft Axapta application
- Install the Microsoft Axapta client
- Complete other installation chores to prepare Microsoft Axapta for use.

Chapter 10: Difference Makers

This chapter shows a few of the outstanding features of Microsoft Axapta that set it apart from other applications. These are features that customers want, like, and can make a difference in how they operate their business. This chapter is meant to expose the students to these topics and does not replace the separate training options available.

Lessons
<ul style="list-style-type: none">▪ Microsoft® Axapta MorphX®▪ Enterprise Portal▪ Easy table access

After completing this module, students will be able to:

- Know some of the things that set Microsoft Axapta apart from other applications.
- Have a basic understanding of what these difference making features can do for customers.