



Key Data

Course Number: 8402A

Number of Days: 3

Available: October, 2004

Languages:

- US English

Format:

- Instructor-Led Training (lecture and labs)

Student Materials:

- Student Courseware

Certification Exams:

- Microsoft Axapta - Project

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:

Microsoft Business Solutions – Axapta Project II, 8403A

Course Syllabus

Microsoft Axapta Project Series I

Elements of this syllabus are subject to change.

Introduction

The three-day Microsoft® Business Solutions–Axapta® Project Series I course helps you understand the projects module, and work with the functionality in the Projects module related to the job tasks involved in planning and running internal, Fixed price and time & material projects. The course comprehensively explores the project management functionality. The course covers topics including setup, configuration, and transaction processing.

A thorough understanding of these topics allows you to manage projects by keeping information consistent and accurate. You will learn to use comprehensive reporting features to preview data in different ways. This course also creates invoices for customers based on project transactions.

Audience

People wanting to learn the basic features and to develop a working knowledge of the typical day-to-day procedures required to effectively use Microsoft Axapta Project.

Project I training is recommended for anyone who plans to implement, use, maintain, consult, or support Microsoft Axapta Project. The class is targeted toward data entry clerks, administrators, office managers, CEOs, and consultants who need to understand the technical aspects of Project and gain foundational knowledge of the application functionality.

At Course Completion

After completing this course, students should be able to:

- Setup and configure projects to fit their business needs
- Perform all Project related data entry functions including bank transactions, bank deposits, and bank transfers
- Print standard reports and inquiries to verify data entry
- Enter project related transactions
- Troubleshoot and correct input errors including incorrect posting date or incorrect document amounts
- Invoice projects

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

Prerequisites

Before attending this course, students must have:

- General knowledge of Microsoft® Windows®
- Basic knowledge of project accounting principles

Student Materials

The student materials include a comprehensive training manual and other necessary items for this class.

Introduction to Project Series I

This chapter gives students a general overview of the features and benefits of using the Project module in an integrated environment. It also focuses on project management concepts and descriptions of the five Microsoft Axapta Project types.

Main Topics
<ul style="list-style-type: none">• Project Features and Benefits• Project management lifecycle• Project Types• Project Structures• Invoice concepts

After completing this chapter, students should be able to:

- Identify the features and benefits available when using Project.
- Understand the relationship between parent and child projects.
- Identify the proper project type to use in specific business situations.

Chapter 1: Project Setup

This chapter focuses on project setup procedures. In this chapter we configure project groups, set parameters, and configure project groups. You should learn how to set up both internal projects and invoicing projects for external customers. We also discuss how to define ledger posting accounts for projects. We discuss pricing setup for invoice projects. You will also learn how to set up and use posting journals to maintain records.

Main Topics
<ul style="list-style-type: none">• Project Parameter Setup• Configure Project groups• Define ledger posting accounts• Pricing Setup• Line Property Setup• Posting Journals• Invoice projects
Labs
<ul style="list-style-type: none">• Create an Internal Project Group• Create an Invoice Project

After completing this chapter, students should be able to:

- Set up project parameters
- Create internal and invoice projects
- Create posting journals
- Set up category groups and categories

Chapter 2: Project Setup Options

In this chapter we'll define project hierarchies and discuss the project copy wizard. You should learn how to sort project information and set up project periods. You get the chance to explore project activities and other project setup options. During the exercises you will get to establish a project hierarchy and reporting periods.

Main Topics
<ul style="list-style-type: none">• Project Hierarchies• Project Copy Wizard• Sorting• Activities• Journal Approval & Texts• Project Periods
Labs
<ul style="list-style-type: none">• Project Hierarchy• Activities• Hour Journal Approval• Project Reporting Periods

After completing this chapter, students should be able to:

- Define Project Hierarchies
- Use the copy wizard
- Set up activities for projects
- Set up project periods

Chapter 3: Registering and Adjusting Project Transactions

This chapter introduces you to the transactions in the project module. Entering and adjusting transactions in an important part to project tracking. In this chapter you should learn about all necessary aspects of transaction processing.

Main Topics
<ul style="list-style-type: none">• Transaction Types• Hours transactions• Cost Transactions• Revenue Transactions• Registering transaction Items• Transaction Adjustments
Lab
<ul style="list-style-type: none">• Hour consumption registration• Costs registration• Adjusting transactions

After completing this chapter, students should be able to:

- Enter Project transactions from a journal or the web
- Enter and adjust project transactions
- Enter revenue transactions for time & material projects

Chapter 4: Invoicing Projects

This lesson familiarizes you with the ideas behind invoicing projects and the process thereof. In this chapter you learn everything you need to invoice a project. Also, you learn how to post an on-account invoice and set up invoicing for customers.

Main Topics
<ul style="list-style-type: none">• Invoicing Setup• Invoice Proposal Procedure• On-account invoicing• Sales tax
Lab
<ul style="list-style-type: none">• Set up a fixed rate agreement• Create on-accounts• Invoice a customer

After completing this chapter, students should be able to:

- Set up project invoicing
- Create, adjust and post invoices
- Invoice on-account invoices
- Create invoice proposals for time & material projects
- Invoice projects

Chapter 5: Budgets, Forecasts, and Estimates

This lesson introduces the concepts of budgeting, forecasting and estimating in the Project module. The ability to establish and track against forecasts is a critical business success factor. In this chapter you learn how to estimate, forecast, and budget for projects.

Main Topics
<ul style="list-style-type: none">• Budgets• Hours and cost forecasts• Estimating• Sales tax
Lab
<ul style="list-style-type: none">• Set up a forecast• Set up and Item forecast

After completing this chapter, students should be able to:

- Set up forecast models
- Enter forecasts and transfer these to sales, item or purchase forecasts
- Allocate on forecasts

Chapter 6 Project Inquiries and Reports

This chapter takes you through the available inquiries and reports in Microsoft project module. Your ability to access valuable information from your accounting system is critical to project analysis. In this chapter you learn the various ways of accessing project information through reports, inquiring, OLAP and other features.

Main Topics
<ul style="list-style-type: none">• View project transactions• Reports• Statistics• Excel integration• OLAP Integration
Lab
<ul style="list-style-type: none">• Hour inquiry• Reporting on time & material projects• On-account reporting

After completing this chapter, students should be able to:

- View and report on registered transactions
- Report on forecasts and revenue
- Use the Microsoft Excel integration
- Describe the Microsoft OLAP integration

Chapter 7 Time Scheduling

This chapter introduces you to the concepts and functionality of the time scheduling routine in the Microsoft Axapta Project module. The ability to schedule labor is key to project management. In this chapter you learn how to create a time schedule, forecast hours and display reserved capacity.

Main Topics
<ul style="list-style-type: none">• Hour scheduling• Forecasting hours• The scheduling routine• Display of reserved capacity• Re-scheduling
Lab
<ul style="list-style-type: none">• Create a work center group• Enter and schedule hour forecasts• View scheduling results

After completing this chapter, students should be able to:

- Set up work centers
- Work with activities
- Understand the Gantt chart
- Manage scheduling options
- Re-schedule hours

Chapter 8: Internal Cost Projects

This chapter illustrates the accounting principles behind running simple internal cost projects in Axapta Project. Since at least periodically projects will not involve invoicing a customer, we must use internal projects. In this chapter you learn the aspects of the internal cost project.

Main Topics
<ul style="list-style-type: none">• Characteristics of an internal cost project• Processing• Hour consumption
Lab
<ul style="list-style-type: none">• Create an internal cost project• Enter forecasts• Enter hours

After completing this chapter, students should be able to:

- Describe and set up an internal project.

Chapter 9: Basic Time & Material Project

This chapter illustrates the accounting principles behind a simple time and material project in Axapta project. Time and Material projects are a common project type, in this chapter we will explore the use of this project type.

Main Topics
<ul style="list-style-type: none">• Characteristics of a time and material project• Processing• Hour consumption• Invoicing

Lab
<ul style="list-style-type: none">• Create a time and material project• Enter transactions• Invoice update and statistics

After completing this chapter, students should be able to:

- Describe and set up a time and material project.

Chapter 10: Basic Fixed Price Project

This chapter illustrates the accounting principles behind running simple fixed price projects in Axapta project.

Main Topics
<ul style="list-style-type: none">• Characteristics of a fixed price project• Processing• Hour consumption• Invoicing
Lab
<ul style="list-style-type: none">• Create a fixed price project• Create an on account schedule• Enter forecasts• Enter transactions• Invoice update and statistics

After completing this chapter, students should be able to:

- Describe and set up a fixed price project.

Appendix A: Microsoft Axapta Project Demo Data

This appendix includes information about demo data that best supports Microsoft Axapta Project. This appendix provides some advice for using the demo data.

Main Topics
<ul style="list-style-type: none">• Company Profile• Active summary projects• Active internal cost, time and material, and fixed price projects

After completing this chapter, students should be able to:

- Use the Microsoft Axapta Project demo data

Appendix B: Lab Solutions

This appendix includes the solutions for the labs that appeared at the end of most chapters. This appendix serves as the answers to the labs.

Main Topics
<ul style="list-style-type: none">• Lab solutions for all labs• Some advise on the labs and set up

After completing this chapter, students should be able to:

- Solve all the labs from the chapters.