



Course Syllabus

Course 8420, Microsoft Axapta Administration

Elements of this syllabus are subject to change.

Key Data

Course #: 8420

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.

Introduction

This two day course introduces the student to Microsoft® Business Solutions – Axapta® Administration Module. This course begins with the basic setup for a company. The student then is exposed to more advanced functionality within the Administration Module. A brief introduction to ASP administration is included. This course is intended to be an advanced course for the Administration module.

Audience

This course is intended for individuals who will be utilizing the administrative functionality of Microsoft Axapta. This audience typically includes application consultants who are tasked with installing, configuring, and customizing the application for a customer. Additionally, consultants who are responsible for training or supporting the customer will benefit from the course.

At Course Completion

After completing this course, students will be able to:

- Perform a basic setup and manage security for a company in Microsoft Axapta
- Utilize the label, help system, batch job, and number sequence functionality
- Create and manage configurations in the Configuration Utility
- Have a general understanding of ASP administration

Prerequisites

It is required that students have completed:

- Microsoft Axapta Introduction

Student Materials

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

Chapter 1: Case Study Introduction

This chapter gives a brief introduction to the case study exercises that will be utilized throughout the chapters.

Sections
Case Study Scenario
Exercises
None

After completing this chapter, students should be able to:

- Define the tasks presented in the case company

Chapter 2: Basic Setup

This chapter focuses on the basic setup of company information. Configuring a company account, setting up addresses, and configuring new units will be explored in this chapter.

Sections
<ul style="list-style-type: none"> • Base Company Information • Units
Exercises
<ul style="list-style-type: none"> • Exercise 2.1 Create a new company • Exercise 2.2 Using the Address Wizard • Exercise 2.3 Using the Address Form • Exercise 2.4 Modifying company information • Exercise 2.5 Contact Information • Exercise 2.6 Units and conversion

After completing this chapter, students should be able to:

- Configure your company account
- Set up addresses using the Address Wizard
- Configure new units and conversions

Chapter 3: Managing Security

This chapter deals with security issues in Microsoft Axapta. The students learn about the different types of security and how they protect and affect access to the data and functionality in Microsoft Axapta.

Sections
<ul style="list-style-type: none"> • License Codes • Configuration Keys • Domains • User Groups/ Permissions • Security Keys • Virtual Company Accounts • Password/ E-Mail • Users • Record Level Security
Exercises
<ul style="list-style-type: none"> • Exercise 3.1 Importing a new configuration • Exercise 3.2 Creating a new domain • Exercise 3.3 Creating a new User Group • Exercise 3.4 Creating a virtual company account • Exercise 3.5 Setting Password parameters • Exercise 3.6 Create new Users • Exercise 3.7 Creating a new user manually • Exercise 3.8 Creating the record level security system • Exercise 3.9 Practice with Security

After completing this chapter, students should be able to:

- Understand how to load license codes
- Import Microsoft Axapta configurations
- Create new user groups and assign permissions
- Create a domain
- Create a virtual company account
- Create a new user and setup passwords and email
- Utilize record level security

Chapter 4: Personalization of Microsoft Axapta

This chapter focuses on the customization of forms and menus for each user. Building record templates is also examined.

Sections
<ul style="list-style-type: none">• User Setup on Forms• Managing User setup• User Menus• Record Templates
Exercises
<ul style="list-style-type: none">• Exercise 4.1 Creating a User setup

After completing this chapter, students should be able to:

- Personalize forms for each user
- Manage the setting up of forms for users
- Create user menus
- Build record templates

Chapter 5: Labels

This chapter explores labels and their use within Microsoft Axapta. The students learn about the purpose of labels and the resources available to create and maintain labels.

Sections
<ul style="list-style-type: none">• Understand the Purpose of Labels• Create your own Label Files• The Microsoft Axapta Label Editor• Labels for different Languages• The Microsoft Axapta Label Log• Label intervals
Exercises
<ul style="list-style-type: none">• Exercise 5.1 Using the Label File Wizard

After completing this chapter, students should be able to:

- Learn how labels function in Microsoft Axapta
- Create your own label files
- Use the label editor
- Learn about labels in different languages
- Learn to use the label log
- Learn how label intervals function within Microsoft Axapta

Chapter 6: Help System

This chapter focuses on the help system in Microsoft Axapta. The students learn how to modify existing help texts and create help texts for new objects.

Sections
<ul style="list-style-type: none">• Edit and Add Texts to Existing Help Texts• Create Help Texts for New Objects• Import/Export Help Texts
Exercises
<ul style="list-style-type: none">• Exercise 6.1 Editing a help file• Exercise 6.2 Creating a help file for a new object• Exercise 6.3 Exporting the help system

After completing this chapter, students should be able to:

- Edit and add texts to existing online help texts
- Know the creation of 'links' in help text
- Create help texts for new objects, for example, a form
- Know about importing and exporting help texts

Chapter 7: Manage Data in Microsoft Axapta

This chapter explores both the importing and exporting of data using various methods. Custom definition groups are used for importing from other types of systems. The student will also employ document management.

Sections
<ul style="list-style-type: none">• Import/Export with Definition Groups• Document Management

Exercises
<ul style="list-style-type: none">• Exercise 7.1 Standard Export and Import• Exercise 7.2 Custom Import• Exercise 7.3 Using Document Handling to attach a file• Exercise 7.4 Creating Documents

After completing this chapter, students should be able to:

- Import files from systems other than Microsoft Axapta, using custom definition groups
- Set up custom definition groups
- Import and export default data
- Create letters and notes using the document management functionality
- Create a Word template that can be used with Microsoft Axapta
- Create new document types

Chapter 8: Batch Jobs

This chapter explains the purpose of batch jobs and their usefulness with time- and resource-demanding jobs. Batch job set up and execution is discussed as well as batch journals.

Sections
<ul style="list-style-type: none">• Purpose of Batch Jobs• Individual Jobs and Reports• Batch Journals
Exercises
<ul style="list-style-type: none">• Exercise 8.1 Setting up a Batch Job• Exercise 8.2 Batch Journals

After completing this chapter, students should be able to:

- Create batch groups and jobs
- Execute batch jobs
- Understand how to read the Batch list form

Chapter 9: Number Sequences

This chapter focuses on number sequences and their uses within Microsoft Axapta. The students create number sequences and learn how number sequence references are used.

Sections
<ul style="list-style-type: none">• What are Number Sequences• Creating Number Sequences• Number Sequence References
Exercises
<ul style="list-style-type: none">• Exercise 9.1 Editing Number Sequences• Exercise 9.2 Referencing a New Number Sequence

After completing this chapter, students should be able to:

- Create number sequences manually and using a wizard
- Assign number sequences to references
- Create number sequence groups

Chapter 10: Microsoft Axapta Configuration Utility

This chapter explains the parameters within the Microsoft Axapta Configuration Utility. The students learn how to create and manage a configuration.

Sections
<ul style="list-style-type: none">• Understanding the Parameters of a Configuration• Create a Standard Configuration• Manage Configurations
Exercises
<ul style="list-style-type: none">• Exercise 10.1 Create a two tier configuration• Exercise 10.2 Modify a configuration file• Exercise 10.3 Export your configuration• Exercise 10.4 Import a configuration

Appendix A: Solutions to Exercises

This appendix contains all the answers to the chapter exercises.

Appendix B: Tools in Microsoft Axapta

This appendix contains an overview of the Code Profiler and Code Explorer. This appendix serve as reference when troubleshooting.

Appendix C: ASP Module

This appendix contains an overview of the ASP module along with several exercises.