

(80435A) –Application Setup in Microsoft Dynamics NAV 2013

OBJECTIVE

This two-day course provides students with the tools to implement and maintain cross-application setup data after the system components are installed. The focus is on the application-oriented work involved in setting up and maintaining company-wide rules, data, and users.

COURSE TOPICS

Module 1: Set Up a Company by Using Rapid Start Services

- Manual Setup vs. Rapid Start Services
- Rapid Start Services Process Flow
- Create and Export a Configuration Package
- Configure a New Company by Using Rapid Start Services
- Data Migration by Using Rapid Start Services
- Transfer Opening Balances by Using Rapid Start Services

Module 2: Manage User Rights and Profiles

- Authentication
- Set Up User Rights
- Create a New Permission Set
- Apply Security Filters
- User-Specific Setup
- User Profile Setup
- Best Practices

Module 3: Set Up Number Series

- Number Series

Module 4: Set Up Trail Codes

- Lessons 1 to 3: Source Code and Reason Codes
- Navigate the Audit Trail

Module 5: Set Up General Journals Templates and Batches

- Journal Templates, Batches, and Lines
- Create Journal Templates and Batches

Module 6: Set Up Posting Groups

- Specific Posting Groups

- General Posting Groups
- General Posting Setup
- VAT Posting Groups
- VAT Posting Setup
- Best Practices
- Post and Review a Sales Transaction

Module 7: Set Up Dimensions

- Dimensions and Dimension Values
- Setting Up Dimensions in General Ledger Setup
- Dimension Combinations
- Lessons 4 to 5: Default Dimensions and Account Type Default Dimensions
- Default Dimension Priority
- Conflicting Default Dimensions

Module 8: Set Up and Manage Document Approvals

- Set Up Document Approvals
- Set Up the Notification System
- Set Up a Sales Document Approvals System
- Use the Document Approval System

After completing this course, students will be able to:

- Explain the dependencies between Rapid Start Services and manual setup work.
- Describe the different components and processes of Rapid Start Services.
- Explain and demonstrate all tasks in a Rapid Start Services process.
- Create a configuration worksheet.
- Create a configuration package.
- Create a configuration questionnaire.
- Create a configuration template.
- Initialize a new company with a configuration package.
- Migrate customer data.
- Transfer opening balances.
- Explain how authentication works in Microsoft Dynamics NAV.
- Manage security for Windows client users.
- Set up a new user.
- Explain the concepts of permission sets and permissions.

- Create a new permission set, and assign permissions to it.
- Apply security filters in Microsoft Dynamics NAV.
- Perform user-specific setup.
- Create, assign, and work with user profiles.
- Explain the purpose of company-wide number series.
- Set up number series.
- Create number series relations.
- Explain and set up trail codes, source codes, and reason codes.
- Explain the purpose and organization of journal templates and journal batches.
- Create general journal templates and general journal batches.
- Explain and set up specific posting groups.
- Explain and set up general posting groups.
- Create a General posting setup.
- Create an Inventory posting setup.
- Explain and set up VAT posting groups.
- Create a VAT posting setup.
- Describe posting setups based on the chart of accounts.
- Demonstrate how posting groups direct a sales transaction.
- Explain and set up dimensions and dimension values.
- Explain and set up global and shortcut dimensions.
- Explain and show how dimension combinations are set up.
- Explain and show how single and multiple default dimensions are set up.
- Explain and show how account type default dimensions are set up.
- Explain and show how default dimension priorities are set up.
- Explain the possibility and resolution of conflicting default dimensions.
- Show how to use dimension and dimension values in journals and documents under different dimension setup scenarios.
- Set up the general features of the document approval system.
- Set up approval templates.
- Set up user logons for use with document approvals.
- Set up approval users in a hierarchy.
- Set up the notification system for approvals.
- Send an approval request.
- Approve a sales or purchase document.

- Maintain substitute approvers.
- Manage overdue notifications.

PREREQUISITES

Before attending this course, students must have:

- complete course 80439A: Introduction in Microsoft Dynamics NAV 2013
- knowledge of basic accounting principles and ERP user roles

TRAINING APPROACH

This course includes lectures, course notes, exercises and hands-on practice.

COURSE DURATION

12 Hours (in 2 days)

CERTIFICATION COMPLETION

A certificate of completion is provided for all trainees attending the course