

## Dynamics 365 University Citizen Developer: Detailed Agenda

### Course Level: 200

As Microsoft Dynamics 365 has evolved so has the business needs of an organization. With this evolution, the Dynamics 365 administrator skillset needs to evolve but, to learn a coding language or hire a developer isn't always an option to create, modify and configure new business applications. This fast pace course is designed to bridge that gap while getting you up to speed quickly, on not only what is new with Dynamics 365, but also a deep dive into advanced configuration, low code development and runtime environments.

### Audience

This training is intended for administrators and configurators who have completed Dynamics 365 University Boot Camp training, or equivalent experience, and desires to continue their technical education with Microsoft Dynamics 365 without extending. This course assumes working knowledge of skills outlined in the Boot Camp course. This course is designed to provide a deeper understanding of the advance processes and low code platform options an attendee can leverage in Microsoft Dynamics 365.

### Prerequisites

This course requires that students meet the following prerequisites:

- Dynamics 365 University - Boot Camp or equivalent application experience

### Dynamics 365 User Experience

#### Clients

- Web
- Unified Client Interface
- Unified Service Desk
- Mobile
- App for Outlook

#### Editions

- Business
- Enterprise

#### Configuration Essentials

- Solutions overview
- Customization best practices

Relationships

## Building a Good User Experience

Forms

Evolution

Types

Best practices

Multiple forms

Performance

Sub-grids and Charts

Knowledge Management Integration

Form navigation

Form presentations and architecture

UCI Forms

Views

Best practices

Read-only Grids

Editable Grids

Features, functionality and configuration

Extending editable grids

Mobile

Architecture

Navigation

Form best practices

Custom controls

Optimizing

Limitations

Offline configuration and Administration

App Modules

Understanding the site map

Multiple Site maps

Dependencies

Role/Task driven modules

Security and access

Properties for Dynamics 365 - Custom app

Themes

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- Ribbon/Command Bar
  - Ribbon Workbench

## Platform

- Field Configuration
  - Calculated fields
  - Rollup fields
  - Date fields
  - Multi-select
  - Timeline control
- Alternate keys
- Hierarchy configuration
  - Rollup
  - Security

## Processes

- Business Rules
  - Design
  - Best Practices
  - When to extend to JavaScript
- Workflows
  - Workflow Capabilities
  - Background Workflows
  - Workflow Structure
  - Real-time Workflows
  - Workflow Security
  - Workflow Templates
  - Workflow Best Practices
- Process Actions
  - Built-in Command Actions
  - Create Simple Custom Actions
  - Create Custom Actions with Arguments
- Dialogs
  - Purpose
  - Basic Dialog
  - Query CRM Data
  - Child

- Custom Workflow Activities
  - Using Custom Workflow Activities
  - Registering Custom Workflow Activities
- Process Management
  - Security for Processes
  - Manage Processes

## Business Process Flows

- Capabilities
- Design
- Business Process Flow Entities
- Enhance with Workflows
- Concurrency, Status and Duration
- Analytics
- Task Flows

## Search Configuration

- Categorized Search
- Relevance Search
- Impact on View Design
- Performance Considerations

## Solution and Environment Management

- Managed vs. Unmanaged
- Development Cycle
  - Merging Changes
  - Unmanaged solutions interact
  - Patching and Cloning
- Processes and Solutions
- Plug-ins and Solutions
- Solution Structure
  - Removing Entities or Attributes
  - Changing Attribute Type
  - Dependency Tracking and its impact
  - Sharing of publishers
- Managing the Environment
  - Solution Movement
  - Data movement

Configuration Migration Tool

## Business Application Platform Overview

### PowerApps

No code - Build web and mobile business applications  
 Visual designer to compose pages  
 Good choice for task focused internal applications  
 Connectors for building cross-system apps  
 Shared with internal users or organization wide  
 Connect to services to access data  
 Simple publish, runtime player hosts application

### Microsoft Flow

Build process automation that spans systems  
 Visual designer to compose automations  
 Connect to services to access data  
 Dynamics 365 Workflows vs. Microsoft Flow

### Power BI Integration

### Common Data Service

Scalable cloud data store  
 Standard schema through a set of standardized entities  
 Model is extending with custom entities and attributes  
 Connectors for PowerApps and Microsoft Flow  
 Built-in synchronization with Dynamics 365 and Office 365 in the near future

## At Training Material Completion

After completing this course, you will be able to:

- Understand Microsoft Dynamics365 and what it offers
- Design and configure a smooth and efficient user experience
- Use Dynamics 365 App Designer for common scenarios
- Understand, use and configure the new Business Process Flows using the new Visual process designer
- Use the Editable Grid feature to replace the existing read only grids as needed
- Optimize your configuration for the mobile Apps
- Plan your solution management strategy
- Understand how and when to leverage PowerApps, Flow and the Common Data Model