

KOENIG SOLUTIONS • COURSE OUTLINE

Project Management Accounting Microsoft Dynamics 365 Operations

Learn to manage projects, contracts, budgets and expenses
using Microsoft Dynamics 365 Project Operations.

3 Days

24 HOURS

7

MODULES

21

TOPICS

COURSE OVERVIEW

The Project Management Accounting Microsoft Dynamics 365 Operations course is designed to provide comprehensive training on project management within the Dynamics 365 for Finance and Operations environment. It is tailored for professionals who aim to master the project management and accounting features of Microsoft Dynamics 365. Starting with Module 1, learners are introduced to the basics of Project-based services and Managing projects across industries, setting the foundation for understanding the diverse applications of Dynamics 365 Project Operations. As they progress to Module 2, students explore the Project lifecycle, Quotations, and Contract capabilities, gaining insights into the initial stages of project management —module 3 delves into managing and implementing projects, covering Funding types and Project creation. Module 4 focuses on Project Planning and execution, including Work breakdown structures and Invoicing. Subsequent modules such as Module 5 and Module 6 cover the intricacies of Project expense management and Budget forecasting, respectively. As learners move through the course, they encounter advanced topics like Project tracking, Resource management, and Intercompany processes. Each module is designed to enhance learners' skillset, enabling them to efficiently manage and analyze projects, handle billing and payments, and understand the nuances of Project procurement, manufacturing, and Advanced accounting. By the end of the course, participants will have a thorough understanding of Dynamics 365's capabilities for project management and accounting, preparing them to optimize business operations and contribute to their organization's success.

Who Should Attend

Project Management Accounting with Microsoft Dynamics 365 Operations is designed to enhance the skills of professionals in managing finance and projects within the Dynamics 365 environment.

Project Managers integrating financial management into project workflows

Financial Analysts specializing in project-based financial analysis within Dynamics 365

Accountants leveraging Dynamics 365 for project accounting and budgeting

IT Professionals responsible for implementing and maintaining Dynamics 365 Project Operations

Operations Managers optimizing project planning, execution, and financial tracking

Business Analysts analyzing project data and financials for better decision-making

Project Controllers managing project budgeting, costing, and financial reporting

Dynamics 365 Consultants advising on best practices for finance and operations within the platform

ERP Specialists focusing on integrating project management and accounting systems

Finance Managers overseeing financial aspects of projects in Dynamics 365 Operations

Solution Architects designing Dynamics 365 solutions for project management and accounting

Project Coordinators assisting in the management of project financials and operations

Systems Accountants setting up and configuring financial systems within Dynamics 365

CFOs and Finance Directors managing project-based operations with Dynamics 365

Cross-functional Team Members involved in project execution and seeking to understand financial implications

Management Consultants providing strategic advice on project financial management within Dynamics 365

LEARNING OBJECTIVES

- Describe project-based services across different industries
- Explain the phases of the project lifecycle
- Compare project quotation and contract capabilities
- Identify funding types and methods for creating projects
- Apply work breakdown structures for project planning
- Configure expense management parameters and setup
- Analyse project budgets and fiscal year-end transfers
- Interpret cash flow, utilisation and project statements

7 Modules, 21 Topics

01

Introduction to Dynamics 365 Project Operations

TOPICS

Exploring Project-Based Services · Managing Projects Across Industries

02

Overview of Microsoft Dynamics 365 Projects

TOPICS

Understanding the Project Lifecycle Phases · Exploring Project Quotation Capabilities · Exploring Project Contract Capabilities

03

Managing and Implementing Projects in Finance and Operations

TOPICS

Introduction to Funding Types · Creating a Project · Understanding Types of Projects

04

Project Planning and Execution Capabilities

TOPICS

- Creating and Managing Work Breakdown Structures (WBS)
- Exploring Project Invoicing and Billing Rules Capabilities
- Understanding Project Resourcing Capabilities

05

Project Expense Management

TOPICS

Managing Expense Management Parameters · Configuration and Setup of Expense Management · Processing Expense Reports · Managing Intercompany Expenses

06

Project Budgeting and Forecasting

TOPICS

- Allocating Project Budgets
- Creating Forecast Models for Project Budgets
- Transferring Project Budgets at Fiscal Year-End

07

Managing Project Completion

TOPICS

Exploring Cash Flow Analysis · Conducting Utilization Analysis · Reviewing Project Statements

WHAT IS INCLUDED

Everything You Need to Succeed

- Koenig course material for every module
- Delivery by certified instructors and subject matter experts
- Hands-on exercises throughout the course
- Course completion certificate from Koenig

ABOUT KOENIG

Who We Are

Established in 1993, Koenig Solutions is a globally recognised training provider with 35+ technology partnerships, 5,000+ training programmes and a network of certified instructors and subject matter experts, supporting individuals and enterprise teams worldwide.

FLEXIBLE DELIVERY

Learn the Way That Suits You

Classroom Training

Live Online Classes (ILO)

Fly-Me-A-Trainer (FMAT)

Flexi (Self-Paced)

1-on-1 Training

Ready to Get Started?

Talk to a learning advisor about schedules, group training and customised delivery.

Visit koenig-solutions.com

✉ info@koenig-solutions.com