

Dynamics 365 for Finance and Operations: Financial Reporting 1 Day

WorkshopPLUS

Duration: 1 Day | **Focus Area:** Business/IT Alignment **Level:** 300

The Dynamics 365 for Finance & Operations – Financial Reporting WorkshopPLUS is a one-day course geared toward Finance professionals who are responsible for designing and maintaining internal/external financial reports from data residing in the Finance and Operations General ledger tables.

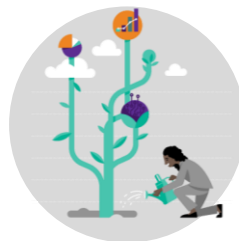
In this course, you will learn how to get started with generating and viewing existing financial reports in the Dynamics 365 for Finance and Operations General ledger module. You will also learn how to design new financial reports using the Financial Report Designer tool.

OUTCOMES



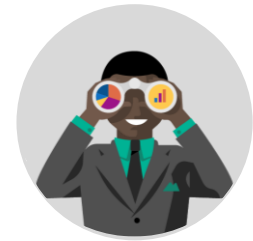
Skills

Gain a deeper awareness of how to generate, view, maintain and design financial reports in the Finance and Operations General ledger module.



Best Practices

Learn about report design best practices and how they can be applied to fit your financial reporting business requirements.



Way Forward

Use what you've learned to start managing and designing financial reports in the Finance and Operations General ledger.

PREREQUISITES



Recommended Qualifications

- Knowledge of general accounting principles and procedures.
- Previous experience with Dynamics 365 for Finance and Operations is beneficial but not required.
- Previous experience designing and maintaining financial reports (ie. Balance sheet, Profit & Loss and Cashflow) is a plus but not required.
- Prior working knowledge of Management Reporter 2012 is a plus but not required.



Hardware Requirements

- An Intel Core-i5-based PC
- 4 GB RAM
- 128 GB HDD
- Windows 7 SP1 or later
- Internet access with at least 1 Mbps bandwidth per student

AGENDA

Duration: 1 day

START

Morning Session

Afternoon Session

End

-
- Report Designer navigation
 - Report generation and viewing
 - User security and Report Designer roles
 - Report Designer Report Building Blocks
 - Report Designer Report Definitions

SYLLABUS

Module 1: Report Designer Navigation:

- Menu bar
- Tool bars
- Navigation pane
- Viewing pane

Module 2: Report Generation and Viewing:

- Financial reports generation while in Report Designer
- Financial reports generation and viewing in the General ledger module
- Review pre-built Default financial reports in the General ledger module

Module 3: User Security and Report Designer Roles

- Manage security for Financial reporting
- Review user security roles for Financial reporting
- Financial reporting user roles
- Financial reporting user groups

Module 4: Report Designer Report Building Blocks:

- Row definitions
- Column definitions
- Reporting Tree definitions
- Advanced formatting

Module 5: Dynamics Report Definitions:

- Report definitions summary
- Report tab
- Output and distribution tab
- Headers and footers tab
- Settings tab
- Report groups
- Scheduled reports
- Building block groups

NEXT STEPS: If you are interested in learning more about how financials work in Dynamics 365 for Finance and Operations, please contact your Microsoft Account Representative. You may also be interested in our General ledger workshop, WorkshopPLUS - Dynamics 365 for Finance and Operations: General Ledger 1 Day.