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## MS Dynamics SL

### Course description

Microsoft Dynamics SL (formerly Solomon) is an ERP software solution developed to meet the needs of project-based businesses. It incorporates the accounting and project management tools you need to manage customer demands, stay up to date with compliance regulations, and deliver services on time and within budget. MIG & Co. offers online Microsoft Dynamics SL training classes that teach you the skills you will need to utilize those tools to their maximum benefit for your organization

### Student Take away

- Study Material
- Learning stuff
- Sample project for practice

## MS Dynamics SL Online Training Curriculum

### Module 1

Introducing the Microsoft Dynamics SL 2011 System. This module introduces the features, purpose, and characteristics of Microsoft Dynamics SL 2011 covering specific items within Microsoft Dynamics SL and how the system is set up.

### Topics

- Microsoft Dynamics SL
- Licensing Microsoft Dynamics SL
- Microsoft SQL Server licensing
- Microsoft Dynamics SL - SQL Server relationship

### Lab: Introducing the Microsoft Dynamics SL System

- Determining Editions Needed

### After completing this module, students will be able to:

- Identify the unique position of Microsoft Dynamics SL 2011 in the accounting software marketplace
- Describe features, design foundations, and system level support
- Interpret Microsoft Dynamics SL licensing issues and the relationship with Microsoft SQL Server licensing
- Describe the working relationship between Microsoft SQL Server and Microsoft Dynamics SL 2011

## **Module 2**

Preparing to Install Microsoft Dynamics SL 2011 This module discusses the importance of planning prior to an installation. Topics include what to do in pre-planning and referencing technical bulletins. Implementation plans are discussed as well as the hardware and software requirements for Microsoft Dynamics SL 2011

### **Topics**

- Pre-installation
- Protecting current accounting data
- Defining the implementation plan
- Setting up the appropriate computer system
- Microsoft Dynamics SL 2011 hardware and software requirements and recommendations

**Lab:** Preparing to Install Microsoft Dynamics SL 2011

- Locate a Specific Install Guide

**After completing this module, students will be able to:**

- Identify the elements of Microsoft Dynamics SL pre-installation
- Gather resources needed to prepare for Microsoft Dynamics SL 2011 installation
- Identify the basics of developing a Microsoft Dynamics SL 2011 implementation plan
- Prepare the computer operating system for Microsoft Dynamics SL 2011 installation

## **Module 3**

Installing Microsoft Dynamics SL This module describes a complete installation of Microsoft Dynamics SL 2011. The process is reviewed, followed by a screen-by-screen install which discusses the importance of each option and selection during the installation

### **Topics**

- Installation process
- Installing Microsoft SQL Server
- Installing Microsoft Dynamics SL 2011

**After completing this module, students will be able to:**

- Identify the main elements of Microsoft Dynamics SL 2011 installation
- Install Microsoft Dynamics SL 2011

## **Module 4**

Preparing Microsoft Dynamics SL Databases for Use This module describes how to set up and configure Microsoft Dynamics SL 2011 databases. It also discusses the creation of system, application and demo databases. Registration of Microsoft Dynamics SL 2011 is also discussed

### **Topics**

- Creating databases
- Logging into Microsoft Dynamics SL 2011
- Preparing databases for operation
- Registering Microsoft Dynamics SL 2011

**Module 4** continues...

**Lab:** Preparing Microsoft Dynamics SL Databases for Use

- Create a demo database

**After completing this module, students will be able to:**

- Set up new Microsoft Dynamics SL 2011 databases
- Set up Microsoft Dynamics SL 2011 demo databases
- Login to Microsoft Dynamics SL 2011
- Register Microsoft Dynamics SL 2011
- Prepare databases for operation

### **Module 5**

Microsoft Dynamics SL Client Installation This module covers installing a Microsoft Dynamics SL 2011 client. It discusses the creation of a shared directory on the server to distribute the install files for a client

#### **Topics**

- Setting up Dynamics SL clients

**After completing this module, students will be able to:**

- Set up Microsoft Dynamics SL 2011 clients

### **Module 6**

Directory Structure and components. This module focuses on the important files installed with Microsoft Dynamics SL 2011. Features of each file are covered with an explanation of the parameters.

#### **Topics**

- Microsoft Dynamics SL 2011 directory structure
- Microsoft Dynamics SL 2011 components

**After completing this module, students will be able to:**

- Identify the Microsoft Dynamics SL directory structure.
- Identify Microsoft Dynamics SL components.

### **Module 7**

Learning the Basics of Microsoft Dynamics SL 2011 This module covers how to use Microsoft Dynamics SL 2011 including navigation, menus, and creating standard or extended reports. Also covered are entering and managing data records and the set up of printer services for Microsoft Dynamics SL 2011.

#### **Topics**

- Navigating through Microsoft Dynamics SL 2011
- Running Microsoft Dynamics SL 2011 Applications
- Entering and managing data records

**Module 7** continues...

- Setting up printer services
- Setting up a default Microsoft Dynamics SL 2011 printer
- Using online help
- Initializing data in Microsoft Dynamics SL 2011

**Lab:** Learning the Basics of Microsoft Dynamics SL 2011

- Navigating Microsoft Dynamics SL, working with fields
- Print a report to a file

**After completing this module, students will be able to:**

- Identify the basics of all Microsoft Dynamics SL 2011 menu functions.
- Run Microsoft Dynamics SL 2011 modules in open Microsoft Dynamics SL 2011 windows.
- Navigate through the system and manage database records.
- Set up Microsoft Dynamics SL 2011 printer services.
- Use Microsoft Dynamics SL 2011 standard and extended report options.
- Use Microsoft Dynamics SL 2011 online help system.

**Module 8**

Establishing Microsoft Dynamics SL Security. This module covers the security model of Microsoft Dynamics SL 2011. Learn about the various security levels for Microsoft Dynamics SL 2011 and how these integrate with Windows and SQL Server. It also describes the creation of users and user groups as well as assigning access rights

**Topics**

- Protecting Microsoft Dynamics SL 2011
- Understanding the levels of system security
- Establishing internal Dynamics SL security

**Lab:** Establishing Microsoft Dynamics SL Security

- Defining users
- Defining groups
- Changing user passwords

**After completing this module, students will be able to:**

- Identify the different levels of system security used with Microsoft Dynamics SL 2011
- Define Microsoft Dynamics SL 2011 users and groups
- Set up user a user group access rights
- Change passwords

**Module 9**

Learning Microsoft Dynamics SL Power User Features. This module provides an overview of the special features available in Microsoft Dynamics SL 2011. Learn about copy functions for copying information in one field/form to another as well as using templates and attaching notes to data items.

**Module 9** continues...

**Topics**

- Extending Microsoft Dynamics SL 2011 usage
- Using inquiry and entity inquiry windows
- Using Menu Maintenance
- Copying and pasting data
- Entering data using templates
- Using recurring transactions
- Attaching notes to data items
- Using Document Attachments
- Using the Role Centre

**Lab:** Learning Microsoft Dynamics SL 2011 Power User Features

- Printing a report using a template
- Attaching and viewing notes

**After completing this module, students will be able to:**

- Use inquiry and entity inquiry windows in Microsoft Dynamics SL 2011
- Use Microsoft Dynamics SL's copy and paste functions
- Set up and use Microsoft Dynamics SL templates
- Identify the basics of using recurring transactions in Microsoft Dynamics SL
- Attach notes to data items

**Module 10**

Monitoring and Maintaining Microsoft Dynamics SL 2011 This module covers the activities to perform to maintain Microsoft Dynamics SL 2011. Also discussed are the event log, system maintenance, integrity checks, database backups and the creation of a database maintenance plan.

**Topics**

- Monitoring active Microsoft Dynamics SL 2011 users
- Reviewing the Microsoft Dynamics SL 2011 event log
- Perform system maintenance
- Backing up Microsoft Dynamics SL 2011
- Using the database maintenance wizard
- Other installation considerations

**Lab:** Monitoring and Maintaining Microsoft Dynamics SL 2011

- Checking module logical integrity

**After completing this module, students will be able to:**

- Track current Microsoft Dynamics SL 2011 user activity
- Use the Microsoft Dynamics SL event log
- Download and install Microsoft Dynamics SL 2011 update files
- Identify the basics of ongoing system maintenance

**Module 10** continues...

- Backup the Microsoft Dynamics SL 2011 database and system
- Use the Database Maintenance Plan in SQL Server

### **Module 11**

Optimizing Performance, this module provides a brief overview of tools to use when evaluating the performance of Microsoft Dynamics SL 2011. System settings are covered as well as a look into identifying bottlenecks using the System Monitor.

#### **Topics**

- Optimizing performance
- Windows OS bottleneck analysis
- Strategies for testing and tuning servers
- SQL Server configuration
- Methods of optimizing a SQL relational database
- Analyzing and troubleshooting less than optimal performance
- Monitoring SQL Server with performance monitor
- Optimization summary

**After completing this module, students will be able to:**

- Configure Windows Servers
- Recommend SQL Server Settings
- Identify bottlenecks
- Utilize Windows Performance Monitor
- Describe the basics of RAID arrays
- Use Windows Performance Monitor for SQL

### **Module 12**

Using Microsoft Dynamics SL Application Server, this module covers the Microsoft Dynamics SL 2011 Application Server. Included in this chapter is an overview of the purpose and benefits of using Application Server, how to set up Application Server, and the administration of an Application Server.

#### **Topics**

- Application Server overview
- Setting up Application Server
- Pausing, restarting and shutting down Application Servers
- Submitting Application Server requests
- Checking the Application Server queue
- Viewing Application Server logs

**After completing this module, students will be able to:**

- Set up an Application Server
- Submit requests to an Application Server
- Monitor requests made to an Application Server

### **Module 13**

Installing Additional Products, this module discusses the additional products used with Microsoft Dynamics SL 2011.

#### **Topics**

- Install additional products
- Management reporter connector introduction
- Crystal Reports
- Installing Crystal Reports
- Installing the Data Provider
- Migrating from FRx 6.7
- Configuring the Data Provider
- Changing the default company

#### **After completing this module, students will be able to:**

- Identify Microsoft Dynamics SL 2011 Supporting Products
- Set up ODBC Data Sources
- Install Crystal Reports
- Install Dynamics SL Data Provider for Management Reporter
- Configure the Dynamics SL 2011 Data Provider for Management Reporter.

### **Module14**

Transaction Import, this module provides a brief overview of the Transaction Import utility. The different types of imports, as well as an example of an import are covered.

#### **Topics**

- Transaction import process
- Control macro generator
- Transaction import

#### **Lab: Transaction Import**

- Import budget information into the Budget Maintenance screen

#### **After completing this module, students will be able to:**

- Describe the transaction importing process
- Use Transaction Import

### **Module 15**

Troubleshooting, this module covers some of the tools and resources to utilize to troubleshoot Microsoft Dynamics SL 2011. It presents a brief introduction of the methodology to follow when diagnosing problems followed by a look at how SQL Server Profiler can help with troubleshooting. It concludes with the presentation of troubleshooting scenarios.

#### **Topics**

- Troubleshooting
- Identifying the problem and finding its source
- Tools and sources

**Module 15** continues...

- Microsoft Dynamics SL 2011 online documentation
- Microsoft Knowledgebase
- Problem solving using SQL Server Profiler
- Troubleshooting scenarios

**Lab:** Troubleshooting

- Three scenarios on troubleshooting Microsoft Dynamics SL 2011

**After completing this module, students will be able to:**

- Identify problems and find sources of problems.
- Use tools and sources in Microsoft Dynamics SL to correct issues.
- Use SQL Server Profiler.
- Troubleshoot Microsoft Dynamics SL 2011 and SQL Server issues.

## What's New in Microsoft Dynamics SL 2011?

### Course Outline

#### Module 1

Installation, Tools and System Updates, this module explains many of the new features in Microsoft Dynamics SL 2011 and Business Portal. It focuses on installation and the underlying technology for Dynamics SL 2011

#### Topics

- Menu and Screen Interface Enhancements
- What's New in Installation and Configuration?
- Web Services
- Doc share Software Development Kit (SDK)
- Quick Queries
- Document Attachments
- Role Centres

**After completing this module, students will be able to:**

- Discuss the new menu interface and screen enhancements.
- Explain the new features for Installation and Configuration.
- Discuss the new Web Services module.
- Discuss the Doc Share Software Development Kit (SDK).
- Describe the new and updated reporting options, including Quick Query and Role Centers.

#### Module 2

Applications, this module explains many of the new features in Microsoft Dynamics SL 2011. It focuses on features most software users would encounter in Dynamics SL 2011.

#### Topics

- Financial Series Enhancements
- Distribution and Project Integration



- Project Series Enhancements

**Module 2** continues...

- Field Service Enhancements
- Doc Share Enhancements
- Quick Send Enhancements

**Lab:** Applications

- Link a Voucher with a Un-voucher Purchase Order
- Create a Project on-the-fly in Order Management Sales Orders
- Moving Project Costs with the Project Transaction Transfer Screen
- Quick Send

**After completing this module, students will be able to:**

- Identify new screens and functionality in the area of Project series and Inventory series integration in Microsoft Dynamics SL 2011
- Explain new features in Project series and Business Portal in Microsoft Dynamics SL 2011
- Describe new features in Service Series for Microsoft Dynamics SL 2011
- Discuss the new Document Attachments feature in Microsoft Dynamics SL 2011
- Describe enhancements to Quick Send and DocShare and explain how to implement these new features