

Course Outline

80221-Installation and Configuration for Microsoft Dynamics AX 2012

Duration: 3 days (18 hours)

Target Audience:

This course is intended for customers who want to learn how to install and configure Microsoft Dynamics AX 2012.

This class is intended for IT managers, system administrators, network engineers, database administrators, and other people in organizations responsible for the setup and configuration of Microsoft Dynamics AX 2012.

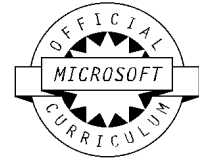
Prerequisites:

Before attending this course, students must have:

- The ability to use Microsoft Dynamics AX 2012 for basic processing
- Experience using:
 - Windows Server
 - Active Directory
 - Networking
- Understanding of:
 - Understanding of SQL Server
 - Domain Controllers
 - Web Service

Topics Covered:

- Module 1: Overview and Planning
 - Overview
 - Server Setup
 - Domain Accounts
 - Planning
 - Architecture
 - Planning Hardware and Software
 - RAID Subsystem
 - Disaster Recovery
 - Staff Skills Review
 - Naming Convention
 - Components
 - Lab : No Labs in this chapter.



After completing this module, students will be able to:

- Discuss the features and benefits of Microsoft Dynamics AX 2012.
- List the servers in a Microsoft Dynamics AX installation.
- Review the requirements for domain accounts.
- Discuss the steps for planning a Microsoft Dynamics AX installation.
- Review the architecture for Microsoft Dynamics AX.
- Discuss the hardware and software requirements for Microsoft Dynamics AX.
- Explain how RAID disk subsystems can help customers achieve the best performance possible and how they can be protected from a devastating loss of data.
- Describe considerations for in planning and disaster recovery.
- Examine the skills that are needed by staff members to successfully install Microsoft Dynamics AX 2012.
- Describe how to use the naming convention to keep installations organized.
- Review the components in a Microsoft Dynamics AX installation.

➤ Module 2: Installation

- Setup Utility
- Install an Environment
- Perform a Single-Computer Installation
- Configuration Utilities
- Install Microsoft Dynamics AX in Silent Mode
- Office Add-Ins
- Initialization Checklist
- Lab : Install a test environment including a database with a model, and an AOS.
After completing this module, students will be able to:

- Review the features of the setup utility.
- Install the database, application object server, application files, and the client.
- Perform a single computer installation.
- Use the client and server configuration utilities.
- Run setup in silent mode.
- Install and configure Microsoft Office Add-ins.
- Process the Microsoft Dynamics AX 2012 Initialization checklist.

➤ Module 3: Managing Users and Security

- Security Overview
- Authentication
- Adding Users
- Adding Active Directory Groups

- Role Based Security
- Extensible Data Security Framework
- Customizing Security
 - Lab : Add a User
 - Add a user to Microsoft Dynamics AX 2012
 - Lab : Grant a User Access to Microsoft Dynamics AX 2012
 - Add roles to users
 - Add users to roles
 - Lab : Add a Role
 - Add a role to Microsoft Dynamics AX 2012

After completing this module, students will be able to:

- Review the architecture and components of security in Microsoft Dynamics AX 2012.
- Discuss the various types of user authentication available in Microsoft Dynamics AX 2012.
- Manually create a user.
- Import users from Active Directory.
- Manually add Active Directory groups.
- Import Active Directory groups.
- Discuss the components of role based security.
- Assign users to roles.
- Discuss the use of the extensible data security policy framework.
- Customize security to meet your needs.

➤ **Module 4: Services**

- Services Overview
- Administration
- Integration and Planning
- Infrastructure and Deployment
- Troubleshoot and Monitor Services
- Security
 - Lab : Set Up an Enhanced Inbound Port
 - Set up an enhanced inbound port using services.
 - Lab : Install Web Services on IIS
 - Install web services on IIS rather than on the AOS

After completing this module, students will be able to:

- Review how documents are exchanged with the Application Integration Framework and discuss the system services.
- Explain how to set up and administer services.
- Describe the integration features and how to plan for the integration.

- Install web services on Internet Information Services (IIS).
- Review tools for troubleshooting and monitoring services.
- Discuss how services rely on the Windows Communication Foundation for security

➤ **Module 5: Workflow**

- General Features
- Architecture
- Create a Workflow
- Graphical Workflow Editor
- Configure an Approval Element
- Configure Decisions
- Configure a Parallel Activity
- Configure a Sub Workflow
- Configure Line-Item Workflows
- Configure Tasks
- Completing a Workflow Configuration
- Workflow Types
- Administration
- Inquiries and Reports
 - Lab : Configure an Approval on a Workflow
 - Create a new user workflow and add an approval element
 - Lab : Create a Work Item Queue
 - Create a work item queue
 - Open the workflow editor
 - Modify a workflow to use the work item queue

After completing this module, students will be able to:

- Explain some of the general features of workflow in Microsoft Dynamics AX 2012.
- Discuss the architecture of workflow.
- Create a workflow and configure basic settings.
- Describe the features and use of the workflow editor.
- Configure an approval element.
- Configure manual and conditional decisions.
- Configure parallel activities.
- Configure a sub-workflow.
- Configure a line-item workflow.
- Configure tasks for a workflow.

- Complete a workflow including, reviewing errors, activating and viewing versions, and associating a workflow to organizations.
- Review the various workflow types available in Microsoft Dynamics AX 2012.
- Set up workflow batch jobs.
- Set up workflow notifications.
- Create work item queues.
- Review user performance on workflows.

➤ Module 6: Analytics

- Cube Overview
- Installation and Deployment
- Configuration
- Security
 - Lab : Deploying Default Cubes
 - Deploy the default cubes
 - Lab : Configuring Default Cubes
 - Configure the default cubes

After completing this module, students will be able to:

- Describe the cubes and cube features that are provided with Microsoft Dynamics AX 2012.
- Install Business Intelligence components.
- Use the SQL Server Analysis Services Project wizard to deploy the default cubes.
- Configure default cubes.
- Set up security for OLAP data.

➤ Module 7: Reporting

- Overview
- Planning Considerations for Reporting
- Batch Support
- Installation and Deployment
- Configure Report Servers
- Security Considerations
 - Lab : Setup a Report as Batch
 - Set up a report to run in batch
 - Lab : Deploy Reports
 - Use PowerShell cmdlets to deploy reports

After completing this module, students will be able to:

- Review the reporting architecture in Microsoft Dynamics AX 2012.
- Review planning considerations for implementing the reporting features of Microsoft Dynamics AX.

- Discuss how to run a report in batch.
- Install and deploy SSRS reports.
- Configure a report server.
- Discuss the security considerations for Reporting Services.

➤ Module 8: Enterprise Portal

- About Enterprise Portal
- Installation
- Security and Authentication
- Deployment
- Configuration and Administration
- Lab : No Labs in this chapter.

After completing this module, students will be able to:

- Discuss the components that make up Enterprise Portal.
- Review the steps for installing Enterprise Portal.
- Discuss security and authentication for access to Enterprise Portal.
- Deploy Enterprise Portal.
- Configure the components of Enterprise Portal.

➤ Module 9: Administration

- Model Management
- System Monitoring
- System Administration
- Set Up and Manage Emails
- Set Up and Manage Batch Processing
- Set Up and Manage Alerts
- Lab : Manage Models
 - Create, list and delete a model
- Lab : Set Up a Batch Job
 - Set up a batch job
- Lab : Set up an Alert Rule
 - Create an alert rule

After completing this module, students will be able to:

- Review the steps for creating, exporting, listing and deleting models.
- Discuss the monitoring tools available for Microsoft Dynamics AX 2012.
- Review the steps for basic administration set up.
- Set up and manage email settings and parameters.
- Describe the use of batch processing.
- Create batch groups, jobs, and tasks.

- Set up alerts.

➤ Module 10: Organization Model

- About Organizations and Organizational Hierarchies
- Plan the Organizational Hierarchy
- Working with Legal Entities
- Working with Operational Units
- Working with Organizational Hierarchies
- Organization Hierarchy Examples
- Lab : Organizational Hierarchies
 - Create new operating units and modify the organizational hierarchy

After completing this module, students will be able to:

- Describe organizations and organizational hierarchies.
- Review the process for planning an organizational hierarchy.
- Create or modify a legal entity.
- Create and modify operating units.
- Create and modify an organization hierarchy.
- Discuss examples of how to use organization hierarchies.