

Microsoft Dynamics AX2012 – Generic Key User Courses

Who is the course for?

This course provides a generic overview of Microsoft Dynamics AX2012, navigation and structure and the core elements within Microsoft Dynamics AX2012. Working through examples, the workshop is ideal for users who are considering implementing Dynamics AX2012 or are in the early stages of implementation.

The workshops are run as a demonstration of AX2012 using Microsoft's demonstration build and are designed to provoke discussion around possible implementation methods and possible solutions to an individual organisation's implementation requirements. Modules can be tailored or removed to suit particular audiences.

Requirements

In order to provoke meaningful discussion, delegates should have an understanding of the business processes used within their organisation and the broad goals of the implementation of AX2012.

Although there are no IT pre-requisites for this course, delegates should have a basic knowledge of Windows techniques such as opening and closing items, navigating and resizing windows.

What are the objectives of the workshops?

By the end of the workshop, you will be able to:

- Understand the components of AX2012 relevant to your business and explain how they interact
- Enter conversation with your implementation partner more knowledgeable about the product and its capabilities
- Explain the basic configuration necessary for each module
- Have an understanding of workflow and its importance to AX2012

What does the course cover?

Module 1 – AX2012 interface: Modules; navigation; favourites; places; forms; inquiries; reports; setup; periodic; filtering; the grid; sorting data; main table linking; role centre; cues.

Module 2 – AX2012 configuration: Number sequences; introduction to the chart of accounts; organisation hierarchy; financial dimensions; end of period adjustments; period control; workflow.

Module 3 – General ledger: Posting a general journal; reversing journals; periodic journals; time saving techniques.

Module 4 – Purchase to pay: Supplier creation; purchase order processing; workflow; goods receipting; invoice receipt; payment processing.

Module 5 – Order to cash: Customer and invoice creation; sales order processing; payment receipt; collections; write-off.

Module 6 – Fixed assets: Creation of an asset; asset acquisition; asset depreciation; asset disposal, value models.

Module 7 – Projects: Project hierarchy; projects; work breakdown structure; activities; project contracts; project journals; timesheets; expenses; project purchasing; project invoicing.

Module 8 – Supply Chain: Product setup, inventory management, purchase orders, sales orders, quality management, inventory journals stock control.

Module 9 – Distribution & Trade: Customer and Supplier agreements, item arrival and registration, quarantine management, supplier returns, sales quotes, item reservations, sales order picking, customer returns, transfer orders.

Module 10: Procurement: Product set up, suppliers, catalogues, request for quotes, purchase requisitions, purchase orders, vendor returns, purchase agreements.

Module 11 – Sales & marketing: CRM, prospects, contact activities, telemarketing, campaigns, leads and opportunities, case management.

Module 12 – Human resources: Organisation hierarchy; workers, employee and contractor setup, position setup personnel details; mass hire project; transfer workers; terminate workers; absence; payments and deductions; overtime handling; worker cost price; security considerations;

Module 13 – Payroll: Implementing payroll; payments and deductions; variable deductions; processing P11D, P45 and P60; processing payroll.

Module 14 – Discrete manufacturing: Set up and core concepts, BOMs, calendars and resources, operations and routes, parameters, production orders and life cycle, production scheduling, sub-contracting, control and end production, inquiries and reports.

Module 15 – Process manufacturing: formula management, batch orders, master planning, containerized packaging, catch weights, Lot and batch control, vendor information, commodity pricing, product compliance, integration with advanced warehousing.

Module 16 – Lean manufacturing: Kanban and pull based manufacturing.

Module 17 – Inventory management: Quality and quarantine management, goods receipt and putaway, stock control, movement journals.

How long does the course last?

Module	Indicative durations
1 – AX 2012 Interface	0.25 day
2 – AX2012 Configuration	0.25 day
3 – General Ledger	0.5 day
4 – Purchase to pay	1 day
5 – Order to cash	1 day
6 – Fixed assets	0.5 day
7 – Projects	1 day
8 – Supply chain	1 day
9 – Distribution and trade	1 day
10 – Procurement	1 day
11 – Sales & marketing	1 day
12 – Human resources	1 day
13 – Payroll	0.5 day
14 – Discrete manufacturing	1 day
15 – Process manufacturing	1 day
16 – Lean manufacturing	1 day
17 – Inventory management	0.5 day

Optimum’s quality assurance: All our trainers are employed directly by Optimum and we are accredited by the LPI. We want to ensure the training we provide offers long term value. Our class sizes are set at a maximum of eight delegates per class to ensure that you receive quality training on a more personal level. Optimum classroom sessions allow enough time for you to complete practice exercises and for trainers to answer any specific questions. This ensures that everyone fully engages with the course.