

## The Sikich IEM Configuration Solution Trial - Getting Started

### PURPOSE

This Getting Started document helps a new user to do a 'test drive' of the **Sikich IEM Configuration** powered by **Microsoft Dynamics 365, Enterprise edition**. This document is designed to help the user to access, login and navigate through the Trial experience.

### PROCESS OVERVIEW

Once a user, or a company, has requested a Trial of the IEM Configuration Solution, and that request has been approved, a secure and unique environment will be created for the Trial. Sikich has experience in a variety of production and manufacturing environments, but is especially deep in discrete, complex and Industrial Equipment manufacturing (IEM). Sikich has provided an environment that includes; a Lifecycle Services framework, Task Guides for business processes that are common to these environments, and a database with sample data. The LCS library (IEM Demo/Trial Business Process Library) and Task Guides that are provided are a subset of the complete IEM Business Process library, and are appropriate for a trial and exploration of the Dynamics 365 for Operations application. If there are any issues encountered, or questions about the application, please contact Sikich support for the IEM Trial at [DynamicsIEMSolution@sikich.com](mailto:DynamicsIEMSolution@sikich.com)

### ACCESS & LOGIN

Microsoft Dynamics 365 for Operations, Enterprise edition is a cloud based application. Recommended browsers are Internet Explorer 9 or 10, or Edge. Chrome can also be used, or Safari can be used for smaller handheld devices. You will be receiving an introductory email with the URL and User Credentials.

### LOOK & FEEL

The Dynamics 365 for Operations business application opens on a **Home Page** or Dashboard. The Home Page includes the following features;

1. A ribbon across the top of the page that is typically a picture and/or company logo
2. Just above the ribbon is an information bar that includes 'Search for a page,' other reference information, the company entity, and the user name which includes the logout option.
3. A reference calendar on the left margin of the page identifies the date used for all transactions (usually the current day is used).
4. Workspace Tiles fill the middle of the page. Clicking or touching a Workspace Tile will navigate to a new form (or window) that includes data and transactions related to that process. See below for more information on Workspaces.
5. Below the reference calendar is a section titled 'Work Items assigned to me.' This area alerts the user to any system, user or workflow messages that require attention.

### NAVIGATION

A **Workspace** is where Dynamics 365 for Operations users do their work. Each Workspace is a separate form (or window) that includes summary and detail information, supports searches for specific

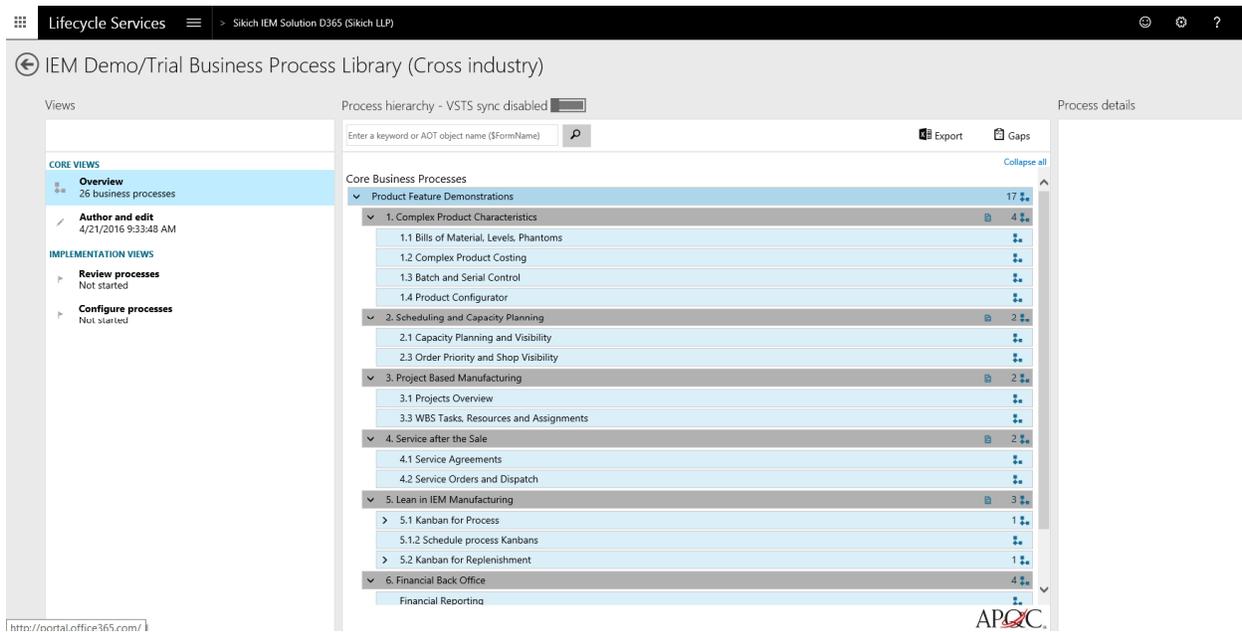
information, and supports the processing of related transactions. The Workspace is designed to be a '360 degree view of a specific user role' within the business entity. Workspaces will also include links to other forms for related information and transactions. A user will typically have multiple Workspace tiles on their homepage based on user permissions, which can then be further customized by the user.

A user can navigate back to the **Home Page** at any time by clicking on **Operations** in the upper left hand corner of any form.

Just below the Office365  icon in the top left is a small icon  that indicates a **Menu**. Sometimes this is referred to as the 'hamburger logo.' For users that prefer to navigate through the entire Operations menu structure, this provides that access. That menu is structured by main process area, then to subsets of processes related to that main area. Within each subset, there are several forms or pages that can be accessed to do tasks such as maintain records, inquire, setup, etc. Most users will utilize the workspace tiles for the majority of their work, and use the larger Operations menu only for exceptions. To enable quick access to those exceptions, Operations provides a **Favorites** list at the top of the Menu that allows the user to add specific forms to Favorites, and a **Recent** list that shows all recent forms used (so the user can click or touch to return).

## LIFECYCLE SERVICES AND TASK GUIDES

**Lifecycle Services** is an application and library that informs and guides the implementation and usage of Microsoft Dynamics 365, Enterprise edition. Sikich and Microsoft provide a significant library of Business Process Models and Flowcharts that are applicable to a wide range of business environments. The primary goal of Lifecycle Services is to enable the quick and effective implementation of Dynamics 365 and to support ongoing usage of the system. The Business Process Models include the Task Guides that walk a user through that specific process within the application, including each step and the action required. When accessed from the Lifecycle Services application, these appear as BPM. When accessed through the Dynamics for Operations application, they appear as Task Guides. For the purpose of the Trial, users will be working primarily within the Dynamics 365 for Operations application and will probably not access Lifecycle Services. This Dynamics 365 Trial library is a limited subset of the total library, with examples that illustrate the Dynamics 365 for Operations business application features that are important to Industrial Equipment and Discrete manufacturers. That library is pictured below. For best results, it is suggested that the Trial user proceed to walk through this process library from top to bottom. When opening the Task Guides under the Help menu, as described below, the Task Guides will not always appear in the same order as shown in this library (partially due to the 'context sensitive' nature of the Help search). The user is encouraged to search for the Task Guides, and start each, in the order they appear in this picture below.



The **Task Guides** that step a user through typical Dynamics 365 for Operations application business processes are accessed from the Home page, under the Operations **Help** menu, which is found in the top right of the information bar, and is the '?' (question mark) logo. To start a Task Guide;

1. Start from the Operations home page, and click on the Help icon.
2. When the Help opens on the right side of the form, there are two tabs; Task Guides and Wiki. More on Wiki below. The Task Guide tab is selected by default.
3. From the Task Guide tab, search for and select (click or touch) the Task Guide that you want.
4. The Task Guide will open and you will see the steps that are defined.
5. To start the Task Guide, click or touch the 'Start Task Guide' button at bottom of the list.

The Task Guide experience is a combination of prompts from the system, and entry or selection of information by the user. For each step, the user is prompted to perform a task in Operations. There may be additional information available by clicking on the 'Show more' at the bottom of the prompt. Once the prompt is expanded, the user will also see the option to go back, or skip forward, a step. However, in many cases, a skip forward might violate the business logic of the system, and you will have to complete the step before moving forward. For example, you must select a Customer before you can enter Sales Order line details.

The user can stop a Task Guide at any time by clicking on the 'Stop Task Guide' at the bottom of the Task Guide list.

## WIKI

Microsoft is a leader in the sharing of help, tips, knowledgebase articles and whitepapers on the functional and technical aspects of the Dynamics applications. This transparency is readily apparent through any browser search. This library is enhanced and expanded with the introduction of the Dynamics 365 for Operations Wiki, which has both Microsoft and independently authored content. The Dynamics 365 for Operations application user can access from their home page or workspaces through the Help Wiki menu.

## OTHER NOTES

To reduce the complexity of the Trial, several features of Dynamics 365 for Operations application are enabled with limited functionality. Examples are below:

1. Workflow submission and approval processes are normally forwarded through the review and approval process defined in the workflow, and require other users to interact with the alerts or emails. In the Trial, some levels will auto-approve and the user can expect to receive an approval notification within a couple minutes. Any workflow that would require higher-level approval will show that the user has a task and has been notified, but that user will never review and approve.
2. Email sending and notifications from within the application are not enabled for this Trial.

## LOGOUT

The user can logout of the system by clicking on their name in the top right of the information bar. A pull down menu will show the Sign Out option.