



## Key Data

**Course #:** 80003

**Number of Days:** 1

**Format:** Instructor-Led

**Certification Exams:** None

**Certification Track:** None

This course syllabus should be used to determine whether the course is appropriate for the students, based on their current skills and technical training needs.

Course content, prices, and availability are subject to change without notice.

## Course Syllabus

### **Workflow in Microsoft Dynamics CRM 4.0**

*Elements of this syllabus are subject to change.*

This one-day instructor-led course describes how to create, run, and monitor workflows to automate business processes. The course emphasizes out-of-box workflow functionality.

The course includes the following topics:

- Basic concepts
- Creating a basic workflow
- Design process
- Update triggers
- Conditional branching
- Advanced workflows
- Multi-stage workflows
- Monitoring workflows
- Workflow security

The course also focuses on using workflows in Microsoft Dynamics® CRM 4.0 to automate the following business processes:

- Sales process
- Lead promotion
- Probable revenue

The following topics are not covered in detail in this course, but are introduced to provide students with insight into potential advanced workflow topics:

- Extending workflows with custom assemblies
- Upgrading workflows
- Data migration and workflows

### **Audience**

This course is intended for Microsoft Dynamics CRM System Administrators and Customizers, as well as business managers who want to find out how to automate business processes

### **At Course Completion**

After completing this course, students will be able to:

- Describe the primary benefits and scenarios for using workflow in Microsoft Dynamics CRM.
- Describe how Microsoft Dynamics CRM 4.0 workflows function.
- Design, create, and manage basic workflows

### **Prerequisites**

Before attending this course, students must have:

- Experience using Microsoft Dynamics® CRM 3.0 or 4.0.

In addition, it is recommended, but not required, that students have completed:

- Course 8913, Applications in Microsoft Dynamics® CRM 4.0.

## Student Materials

The student kit includes a comprehensive workbook and other necessary materials for this class.

### Chapter 1: Basic Workflows

This chapter explains workflow concepts and how to create a basic workflow

<b>Lessons</b>
<ul style="list-style-type: none"> <li>▪ Introducing Workflows</li> <li>▪ Workflow Types and Triggers</li> <li>▪ Actions, Conditions, and Dynamic Values</li> <li>▪ Three Basic Workflows</li> </ul>
<b>Lab 1: Create an On-Demand Workflow</b>
<ul style="list-style-type: none"> <li>▪ Create a workflow</li> <li>▪ Add an e-mail activity</li> <li>▪ Publish a workflow</li> </ul>

After completing this chapter, students will be able to:

- Describe what a workflow is and where they appear.
- Describe the basic concepts of workflow in Microsoft® Dynamics® CRM.
- Describe actions and conditions.
- Describe how basic workflows are created.

### Chapter 2: Design Process

This chapter presents a high-level overview of a typical design process for Microsoft Dynamics CRM workflows.

<b>Lessons</b>
<ul style="list-style-type: none"> <li>▪ Design Considerations</li> <li>▪ Business Process Analysis</li> </ul>
<b>Lab 2: Identify and Chart Actions and Conditions</b>
<ul style="list-style-type: none"> <li>▪ Identify Actions and Conditions</li> <li>▪ Create a Flow Chart</li> </ul>

After completing this chapter, students will be able to:

- Describe factors relevant to workflow planning and design.
- Describe how business process analysis relates to workflow design.

### Chapter 3: Advanced Workflows

This chapter explains how to create more advanced workflows, which can address the specific needs of businesses.

<b>Lessons</b>
<ul style="list-style-type: none"> <li>▪ Update and Delete Triggers</li> <li>▪ Conditional Branching</li> <li>▪ An Advanced Workflow</li> </ul>
<b>Lab 3: Create an Audit Trail</b>
<ul style="list-style-type: none"> <li>▪ Create a Workflow</li> <li>▪ Add a Condition</li> <li>▪ Create an Audit Trail with Dynamic Values</li> </ul>

After completing this chapter, students will be able to:

- Examine how update and delete triggers are used.
- Use conditional branching to specify multiple paths in a workflow.
- Create a workflow that uses advanced workflow features.

## **Chapter 4: Multi-Stage Workflows**

This module describes how to create multi-stage workflows. The concepts of stages and child workflows are introduced. In addition, the business benefits of staged and child workflows and how to plan them are presented.

<b>Lessons</b>
<ul style="list-style-type: none"><li>▪ Stages</li><li>▪ A Set of Sales Process Workflows</li><li>▪ Testing the Sales Process Workflows</li></ul>
<b>Lab 4: Case Escalation</b>
<ul style="list-style-type: none"><li>▪ Create a Child Workflow</li><li>▪ Create the Parent Workflow</li><li>▪ Create Stages</li><li>▪ Add Steps</li></ul>

After completing this chapter, students will be able to:

- Describe and use stages.
- Create multi-stage and child workflows for a sales process.
- Describe considerations for testing a workflow.

## **Chapter 5: Managing Workflows**

This chapter describes how to manage workflows.

<b>Lessons</b>
<ul style="list-style-type: none"><li>▪ Monitoring Workflows</li><li>▪ Importing and Exporting Workflows</li><li>▪ Workflow Security</li><li>▪ Data Migration and Workflows</li></ul>
<b>Lab 5: Export and Import a Workflow</b>
<ul style="list-style-type: none"><li>▪ Export a Workflow</li><li>▪ Delete the Workflow</li><li>▪ Import the Workflow</li></ul>

After completing this chapter, students will be able to:

- Describe how to monitor workflows.
- Describe how to import and export workflows.
- Describe how security settings affect workflows.
- Consider the effects of data migration on workflows.

## Chapter 6: Additional Topics

This chapter describes additional scenarios for using workflows in Microsoft Dynamics CRM. It also provides information for developers who are interested in writing custom code to extend Microsoft Dynamics CRM to meet specific business needs.

Lessons
<ul style="list-style-type: none"><li>▪ More Scenarios</li><li>▪ Workflows and the Sales Pipeline Report</li><li>▪ Extending Workflows</li></ul>



After completing this chapter, students will be able to:

- Examine more ideas for using workflows.
- Describe how the Sales Pipeline report relates to workflows.
- Consider information about using custom assemblies to extend workflow functionality.