Universal Resource Scheduling for Dynamics 365 for Field Service (MB-240.3)

Modality: On Demand

Duration: 16 Hours

This course is only for the preparation of the MB 240 Exam, which is consequently followed by the MB 240 certification. An official exam voucher is not inclusive of the course although you can purchase it separately.

About this course:

Scheduling resources based on needs or requirements can be an issue. To make sure you are scheduling resources in the most efficient way possible you need the Dynamics 365's Universal Resource Scheduling. It ensures that students have the sufficient knowledge about tools that will enable them to manage organizational resources.

The main points in this course include knowing the factors such as the organizational considers you need to take into account that will lead to subsequent resource scheduling decisions. The course will primarily revolve around using tools in the best way possible which will help in tasks like the schedule board, schedule assistant and how to manage situations like cancelations and rebooking scenarios. Furthermore, some situations regarding customization will be looked at such as how to enable items for scheduling, working with more than one schedule boards, defining schedule board options and extending the core scheduling functionality.

This course will give students an in depth understanding of what is vital to organizations when scheduling resources. Another main focus will be on how to make solutions that are more customer or organizational friendly.

Aims of the course:

- Things are essential for scheduling items.
- Configure the application in a way that the scheduling features are used in the most efficient way
- Use of the scheduling features to find and schedule resources for work.
- Customize the application to best reflect the organizational needs.
- Create solutions that can enable scheduling of single or multiple resources.
- Finding any possible options that can be used for extension as part of Universal Resource Scheduling.

Target Audience:

- Individuals, who create, manage, share, receive and use information in the course of their daily work, including those who act and react to information.
- People working in the field of IT or developers

Prerequisites:

- Some knowledge regarding the Dynamics 365 features. Mainly about how it functions and how to navigate it.
- Knowing a little about Dynamics 365 configuration

Course Outline:

Universal Resource Scheduling

- URS Overview and configuration

- Enabling entities for URS

- Customize entities for URS

- Practice Lab

- Module summary

Managing Scheduling Options

- Using the schedule board

- Schedule items

- Rescheduling and substituting resources

- Crew and pool scheduling

- Practice Lab
- Module summary

Customizing the Schedule Board

- Configure the board

- Create additional schedule boards

- Use views to enhance the schedule board

- Configuring schedule board queries and filters

- Working with requirements groups

- Practice Lab
- Module summary

Advanced Scheduling Options

- Working with requirement groups

- Defining optimization goals

- Defining optimization scopes

- Defining optimization profiles

- Single resource scheduling

- Module summary