Exam MB-700: Microsoft Dynamics 365: Finance and Operations Apps Solution Architect – Skills Measured

The English language version of this exam will be updated on April 22, 2022.

Following the current exam guide, we have included a version of the exam guide with Track Changes set to "On," showing the changes that will be made to the exam on that date.

Audience Profile

Candidates for this exam are Microsoft Dynamics 365 professionals who advise stakeholders and translate business requirements into secure, scalable, and reliable solutions.

Candidates should have knowledge of all Dynamics 365 apps and Power Platform. They must have deep understanding of Finance and Operations apps. In addition, they have extensive domain knowledge in one or more industry verticals. This role requires understanding how decisions in each area affects the overall solution.

Skills Measured

NOTE: The bullets that follow each of the skills measured are intended to illustrate how we are assessing that skill. Related topics may be covered in the exam.

NOTE: Most questions cover features that are general availability (GA). The exam may contain questions on Preview features if those features are commonly used.

Architect solutions (25-30%)

Gather requirements

- identify operational and organizational challenges that may affect a business
- identify existing business processes and opportunities to optimize business processes
- gather information about expected transaction volume
- categorize business requirements and perform gap fit analyses
- review and validate business requirements throughout the solution lifecycle

Define the solution architecture

- map business requirements to functional components
- evaluate whether to build versus buy for selected business requirements
- identify opportunities to integrate other Microsoft technologies
- select solution design patterns
- select the appropriate tools to implementation tools
- describe the Success by Design process

Describe and document the solution blueprint

- define an organization and organization locations including intercompany information
- document the implementation timeline including roll-out strategies
- define the business process catalog and document solution gaps
- define instances, environments, and solution components
- develop a disaster recovery strategy
- identify required integration and interface details
- define required business intelligence and reporting components
- identify required security roles

Define solution strategies (25-30%)

Select a deployment strategy

- develop a change management and adoption process
- select a deployment model and identify instances and environments required for the selected deployment model
- describe the Dynamics 365 One Version strategy and the effects of One Version on solutions
- segment solution development and delivery into logical phases
- provide alternative methodologies and approaches for deploying modifications
- determine solution maintenance cadence and timelines
- identify upgrade scenarios and select appropriate tools

Define an application lifecycle management (ALM) strategy

- define a code management and data flow strategy
- define a Power Platform solution management strategy
- determine which build automation capabilities to implement
- define a roll-back strategy for Finance and Operations apps and Power Platform solutions

Determine a data management strategy

- differentiate between transactional and historical data
- define data quality and data validation process
- define data cleansing and transformation strategies
- define data dependencies
- develop a data migration strategy for master, transactional, reference, parameter, and document data entities
- develop data cut-over and data retention plans

Define the security architecture

- differentiate between Azure, Dynamics 365, and infrastructure security
- describe Azure and infrastructure security-related elements
- describe use cases for and capabilities of record-level and role-based security in Dynamics 365

Manage implementations (25-30%)

Describe Lifecycle Services (LCS) tools

- understand the use cases and capabilities of different LCS tools
- understand the use cases and capabilities Business Process Modeler (BPM)
- understand the use cases and capabilities LCS Methodologies
- create a usage profile to describe current or projected usage
- describe uses cases and capabilities for LCS downloadable tools

Manage interactions with FastTrack

- identify the value proposition for FastTrack
- identify FastTrack engagement types and personnel roles
- describe typical FastTrack workshop scoping and the inputs for each workshop
- describe go-live checklist elements

Determine support options

- develop a support plan and strategy
- define post-go-live support plans including response times and service-level agreements (SLAs)
- describe use cases and capabilities for the LCS Support tool

Determine licensing requirements

- determine the types of licenses required
- estimate the number of licenses required by using the License Sizing estimator
- describe the process for estimating ongoing software licensing costs

Manage testing (10-15%)

Define a testing strategy

- define a regression testing strategy
- identify opportunities for automated testing
- review use cases and test coverage for all scenarios
- determine when to use RSAT versus SysTest framework versus Postman versus ATL and other tools

Define a performance testing strategy

- define performance goals and requirements
- identify performance monitoring and testing tools
- define performance benchmarks and success criteria
- design a performance and load testing strategy
- troubleshoot performance issues

The following exam guide shows the changes that will be implemented on April 22, 2022 to the English language version of this exam.

Audience Profile

Candidates for this exam are Microsoft Dynamics 365 professionals who advise stakeholders and translate business requirements into secure, scalable, and reliable solutions.

Candidates should have knowledge of ~~all~~ the Dynamics 365 ~~apps~~ ecosystem and Microsoft Power Platform. They must have deep understanding of ~~Finance and Operations apps~~ Dynamics 365 Finance, Dynamic 365 Supply Chain Management, Dynamics 365 Commerce, and Dynamics 365 Project Operations. In addition, they have extensive domain knowledge in one or more industry verticals. This role requires understanding how decisions ~~in each area~~ affect~~s~~ the overall solution.

Skills Measured

NOTE: The bullets that follow each of the skills measured are intended to illustrate how we are assessing that skill. Related topics may be covered in the exam.

NOTE: Most questions cover features that are general availability (GA). The exam may contain questions on Preview features if those features are commonly used.

Architect solutions (25-3020-25%)

Gather requirements

- identify operational and organizational challenges that may affect a business
- identify existing business processes and opportunities to optimize business processes
- gather information about expected transaction volume
- categorize business requirements and perform gap fit analyses
- review and validate business requirements throughout the solution lifecycle

Define the solution architecture

- map business requirements to functional components
- evaluate whether to build versus buy for selected business requirements
- identify opportunities to integrate other Microsoft technologies
- Select solution design patterns
- select the appropriate tools to implementation tools including LCS and Azure DevOps
- describe the Success by Design process
- Create solution architecture diagrams

Describe and document the solution blueprint

- Define an organization and organization locations including intercompany information
- define an organization including company information, locations, and structure
- document the implementation timeline including roll-out strategies
- define the business process catalog and document solution gaps
- define instances, environments, and solution components
- develop a disaster recovery strategy
- identify required integration and interface details
- define required business intelligence and reporting components
- identify required security roles

Define solution strategies (25-3035-40%)

Select a deployment strategy

- develop a ~~change management and adoption process~~process to manage solution code and deployment
- select a deployment model and identify instances and environments required for the selected deployment model
- describe the One Version strategy for Dynamics 365 ~~One Version strategy~~ and the effects of One Version on solutions
- segment solution development and delivery into logical phases
- provide alternative methodologies and approaches for deploying modifications
- determine solution maintenance cadence and timelines
- identify upgrade scenarios and select appropriate tools

Define an application lifecycle management (ALM) strategy

- define a code management and data flow strategy
- define a Microsoft Power Platform solution management strategy
- determine which build automation capabilities to implement
- define a roll-back strategy for ~~Finance and Operations apps and Power Platform solutions~~solution code and data

Determine a data management strategy

- differentiate between transactional and historical data
- define data quality and data validation process
- define data cleansing and transformation strategies
- define data dependencies
- develop a data migration strategy for master, transactional, reference, parameter, and document data entities
- develop data cut-over and data retention plans

Define the security architecture

- differentiate between Azure, Dynamics 365, and infrastructure security
- describe Azure and infrastructure security-related elements
- describe use cases for and capabilities of record-level and role-based security in Dynamics 365

Define the integration architecture

- select an integration pattern including OData, Microsoft Power Platform, Batch Data API, Azure Data Lake, Business events, and Dual-write
- identify required integration and interface details
- design integrations

- define an integration testing strategy

Define the business intelligence and reporting architecture

- gather business intelligence and reporting requirements
- define data sources required to meet business intelligence and reporting requirements
- select appropriate business intelligence and reporting tools including Power BI, organizational workspaces, financial reports, SQL Server Reporting Services (SSRS), and the Electronic Reporting tool
- define printing requirements including Print management, Document Routing Agent (DRA), modern report design layout templates, check printing, and label printing

Manage implementations (~~25-30~~20-25%)

Describe Lifecycle Services (LCS) tools

- understand the use cases and capabilities of different LCS tools
- understand the use cases and capabilities Business Process Modeler (BPM)
- understand the use cases and capabilities LCS Methodologies
- create a usage profile to describe current or projected usage
- ~~Describe uses cases and capabilities for LCS downloadable tools~~

Manage interactions with FastTrack

- identify the value proposition for FastTrack
- identify FastTrack engagement types and personnel roles
- describe typical types of FastTrack workshops ~~scoping~~ and the inputs for each workshop
- describe go-live checklist elements

Determine support options

- develop a support plan and strategy
- define post-go-live support plans including response times and service-level agreements (SLAs)
- describe use cases and capabilities for the LCS Support tool

Determine licensing requirements

- determine the types of licenses required
- estimate the number of licenses required by using the License Sizing estimator
- describe the process for estimating ongoing software licensing costs

Manage testing (10-15%)

Define a testing strategy

- define a testing strategy that includes all required types of testing
- define a regression testing strategy
- identify opportunities for automated testing
- review use cases and test coverage for ~~all~~ business scenarios
- ~~Determine when to use RSAT versus SysTest framework versus Postman versus ATL and other tools~~Determine when to use RSAT, SysTest, Postman, ATL, Azure DevOps Test Plans, and other tools

Define a performance testing strategy

- define performance goals and requirements
- identify performance monitoring and testing tools
- define performance benchmarks and success criteria
- design a performance and load testing strategy
- troubleshoot performance issues