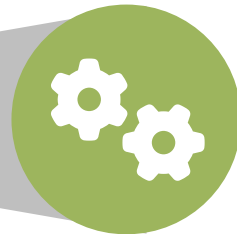


DOCENTRIC AX Learning Path

Onboarding process

Only 8 hours
of your time



1. Basic Functional Training

The course is conducted as a walkthrough presentation by our trainer and covers **Docentric Designer** concepts and usage examples as well as the **related basic setup** in D365FO.

🕒 3 hours 👤 Functional consultants, Developers and End-Users.

2. Advanced Functional Training

The course is conducted as a walkthrough presentation by our trainer and covers Docentric AX setup and improvements to D365FO standard functionalities for **document generation, digital signing, distribution, emailing, printing and archiving**.

🕒 3 hours 👤 Functional consultants, Developers and End-Users.

3. Technical Training

The course covers **Docentric AX programming**: extending data sources, adding custom placeholders, advanced print destination scenarios, etc.

🕒 2.5 hours 👤 Developers.

1. Basic Functional Training

Docentric template designer & related configuration



3 hours



Functional consultants, Developers and End-Users.

This training covers the following topics:

- **Basic concepts and basic Designer elements**
 - Data source file (DDSP file)
 - Panes
 - Tagging elements
 - The Preview functionality
 - Sample data, data sections
- **Training:**
 - Create a fully functional report template starting from a mock-up MS Word document
 - Report configuration
 - Docentric data source file generation (DDSP)
 - Docentric execution pipeline details
 - Multiple templates per report
- **Uploading the newly designed template to D365FO and printing the report**
- **Basic template modification cycle**
 - Download, modify and upload the template from D365FO
- **Advanced formatting**
 - Grouping, listing, and filtering report data
 - Conditional content
 - Visual overrides

2. Advanced Functional Training

Docentric document generation, distribution and archiving

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3 hours



Functional consultants, Developers and End-Users.

The course covers the following topics:

- **Docentric setup in D365FO**
 - Docentric parameters
 - Docentric ready-made templates (SSRS replicas)
 - Report configuration
 - Docentric execution pipeline details
 - Multiple templates per report
 - Docentric data source file generation (DDSP)
- **Improved print destinations** (overview of **Printer, File, Email, Print Archive** and **Screen** print destinations)
- **Emailing capabilities**
- **User-defined labels**
- **User-defined placeholders**
- **Improved Print archive**
- **SharePoint improvements** (structured metadata, fine-grained security, on-premises support)
- **PDF security** (encryption & electronic signature)

3. Technical Training

Docentric AX programming

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 **2.5 hours**  **Developers.**

The course covers the following:

- **Docentric Data Source Provider (DSP)** class overview, main methods to be overridden/extended
- **Walk-through: add custom data source data**
 - How to add additional data to a Docentric SSRS report
 - How to add additional data to a Docentric SSRS report, step-by-step
 - How to extend data sections of DDSP
 - Create a new custom report in D365FO using Docentric
- **Adding custom placeholders** (brief description)
 - How to use placeholders in the print destination settings
 - How to use custom placeholders
- **Additional scenarios:** Change the print destination settings
 - How to dynamically change print destination settings
 - How to dynamically change the selected template