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Survival Guide for Customizing Electronic Reporting Configurations

Albin Lotric
Senior Technical Consultant
Docentric

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From a daily life of a functional consultant:

What did I do wrong? It doesn't work…

I hate Electronic Reporting!

I hate Electronic Reporting!!

I hate Electronic Reporting!!!

OH, HOW COOL! IT WORKS NOW!!!

I LOVE ELECTRONIC REPORTING!

Agenda

1. Basics of ER/CBD in 2 minutes
2. Promises of ER/CBD
3. Starting with ER
4. Raising the bar: Let's customize ER
5. Versioning
6. Final thoughts with tips & tricks
7. Q&A

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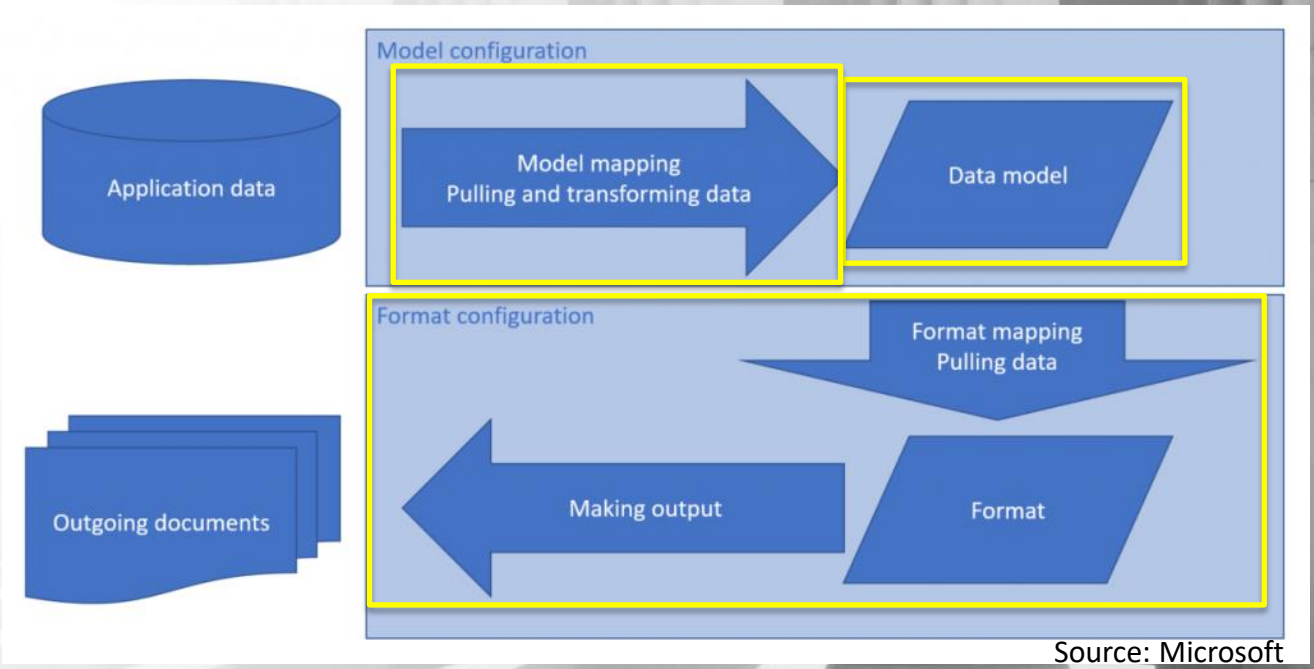
1. Basics of ER/CBD in 2 Minutes

- Data model configuration
- Model mapping configuration
- Format configuration



Source: Microsoft

2. Promises of ER/CBD

- Configuration instead of coding
- Templates in Excel and Word
- Easy upgrades by rebasing configurations
- Local regulatory compliance and localization
- Functional consultants are empowered to customize both report data and design

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3. Starting with ER/CBD

- Obtain ER configurations
- Setup ER destinations
- DEMO

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4. Raising the bar: Let's customize ER

The #1 reason for customizing ER/CBD reports is …

… adding additional data to the report.

<u>RECIPE:</u>

1. Choose a functional consultant, well-connected with developers
2. Add a custom Configuration provider
3. Prepare derived configurations with added data until they flow smoothly
4. Use a debugger to expedite the process, if needed
5. Serve to the user's selected ER destination

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5. Versioning

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We have two types of versioning:

1. Versioning of base Microsoft configurations
2. Versioning of our derived configurations

VERSIONING DEMO

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6. Final Thoughts & Suggestions

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1. When to use ER and when not
2. Start smart, not hard
3. Docentric blog has got quite a bit of ER-related documentation
4. Developers can integrate ER API in existing solutions

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Some useful links:

https://learn.microsoft.com/en-us/shows/dynamics-365-fasttrack-architecture-insights/dynamics-365-f-and-o-apps-configurable-business-document

https://dynamicsmanuals.com/category/dynamics-365-for-finance-and-operations/electronic-reporting/er-advanced/

https://ax.docentric.com/tag/electronic-reporting/

I will uplad the configurations I used, as well as this PowerPoint presentation to my session, so you can play with it on your own. You can also send an email to support@docentric.com and ask for these materials.

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Don’t know something?
Ask something!

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Thank you for attending!

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