DOCENTRIC

ER/CBD Nirvana or Just Fata Morgana - Enriching ER/CBD with Docentric AX



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Agenda

Goals & Expectations

ER/CDB Reporting Elements Overview

Demo: How Docentric AX can help

Customization Process Comparison

Resources

Fata morgana is … ?



Nirvana is …?

Fata morgana is … ?

… the illusion



Nirvana is …?

… the end of illusion

Marketing is …

… the illusion



Delivery is …

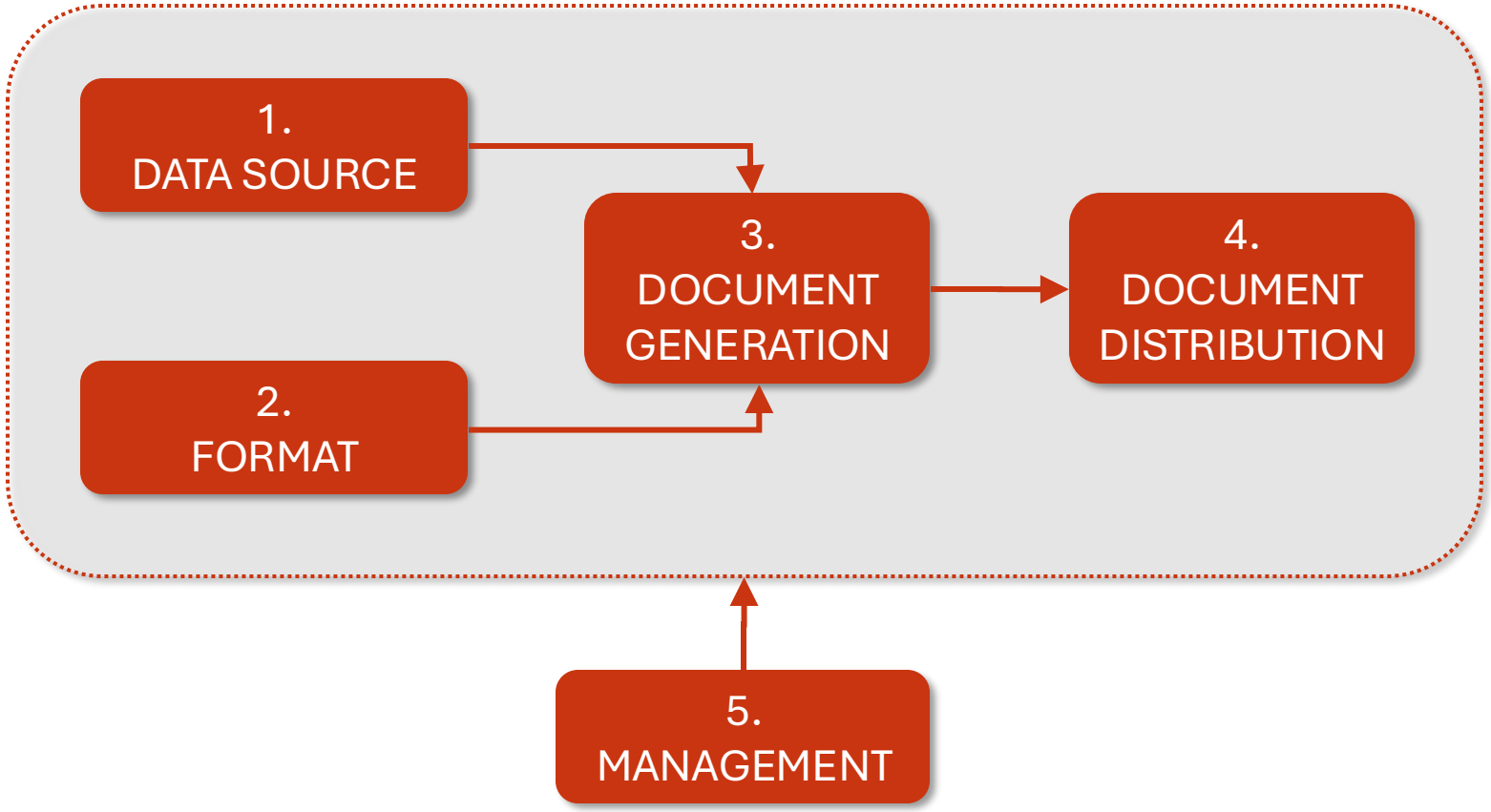
… the end of illusion

Goals & Expectations

- Understand the ER/CDB reporting elements
- Extend ER/CBD Data Source with Terms & Conditions and Product Images
- Insert these elements into Sales invoice design using Docentric Template Designer
- Use Docentric AX to email generated Sales invoice
- Describe how Docentric AX helps with ER / CBD

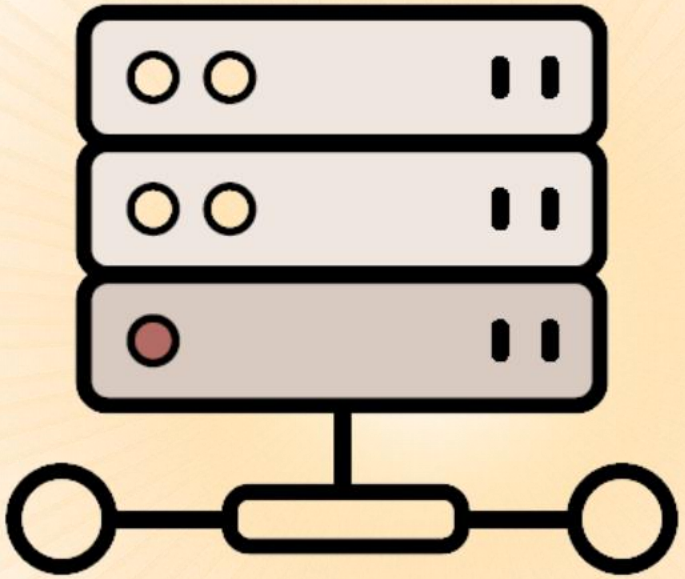
ER/CBD Reporting Elements Overview

D365FO Reporting Elements



HOW DOCENTRIC AX HELPS IN KEY REPORTING TASK WITH ER/CBD

DATA SOURCE



Data Source



FATA MORGANA	REALITY	NIRVANA with DOCENTRIC
No code configuration of Data Source	Complex requirements **need technical profile**	**Pick Data Source** of your choice (SSRS or ER)
Modify ER data source configurations to meet your needs	Complex requirements **easier to solve in code**	**Reuse or modify** either SSRS or ER data sources **using Docentric API**
Data Source **only ER based**		Use **ER** or **SSRS** based Data Source

HOW DOCENTRIC AX HELPS IN KEY REPORTING TASK WITH ER/CBD

FORMAT DESIGN



Format design



FATA MORGANA	REALITY	NIRVANA with DOCENTRIC
Excel and Word as design tools	Tools **without** specialized **templating features**	**Docentric AX Designer for Word/Excel**
Friction free design output preview	**Work across D365FO** and **design tool** to finalize design	Designer's **Live Preview**
Test while **designing** report	**Execute report to test it**	**Modify sample data and live preview within template designer**

HOW DOCENTRIC AX HELPS IN KEY REPORTING TASK WITH ER/CBD

DOCUMENT GENERATION



Document Generation

Fata morgana (marketing) = Reality		NIRVANA with DOCENTRIC
 **Privacy & Security** – no data leaves D365FO	→	Runs **within D365FO** context
 **Performance** – no unnecessary roundtrips to external services	→	Runs **within D365FO** context
 **Scalability** – reporting scales with your D365FO nodes	→	Runs **within D365FO** context
 **Extensibility** of pre and post processing of generated documents	→	**Docentric AX features** like digital signatures, encryption, PDF/A, document properties **use extensibility capabilities**

HOW DOCENTRIC AX HELPS IN KEY REPORTING TASK WITH ER/CBD

DOCUMENT DISTRIBUTION



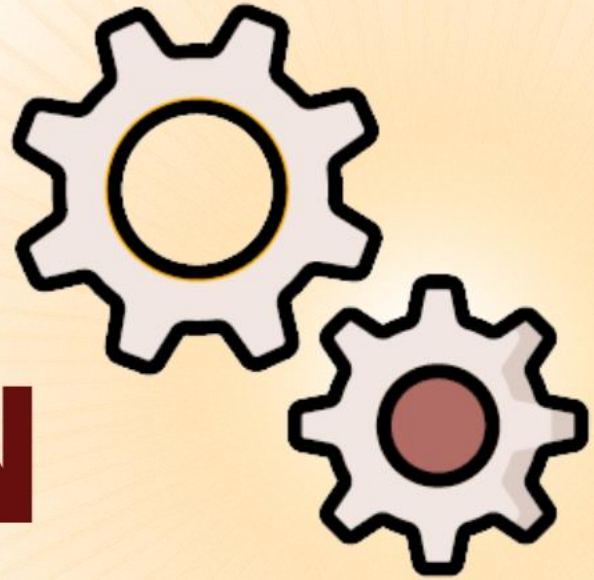
Document Distribution



FATA MORGANA	REALITY	NIRVANA with DOCENTRIC
Feature rich and easy to configure **email print destination**	Complex setup through expression editor, **limited features**	WYSIWYG **email body editor**; Dynamic content based on **placeholders**; batch email processing; **additional senders**
Improved ER file destination	**Missing support** for popular storage types	Docentric **File print destination** store files to e.g. **Azure Blob, Files, Attachments…**
Enabled **archiving**	Same as **OOTB SSRS Archive**	**Searchable archive** with report **metadata**; Archived document **preview**; **download multiple**…
ER Printer print destination	Same as **OOTB SSRS print destination**	**User default and favorite printer**, **restricted printers** per report

HOW DOCENTRIC AX HELPS IN KEY REPORTING TASK WITH ER/CBD

CONFIGURATION



Configuration



FATA MORGANA	REALITY	NIRVANA with DOCENTRIC
Configure ER format in Print Management	**Suboptimal integration with print management** (conditional settings and overrides are ignored in favor of ER destinations)	**Respects** print management **settings**
Run non print management reports based on ER from UI **without need of developer**	**Difficult** to run non print management reports; **Missing current record context**	Run **non print management reports with current record context**

DEMO

Praying to demo gods initiated...



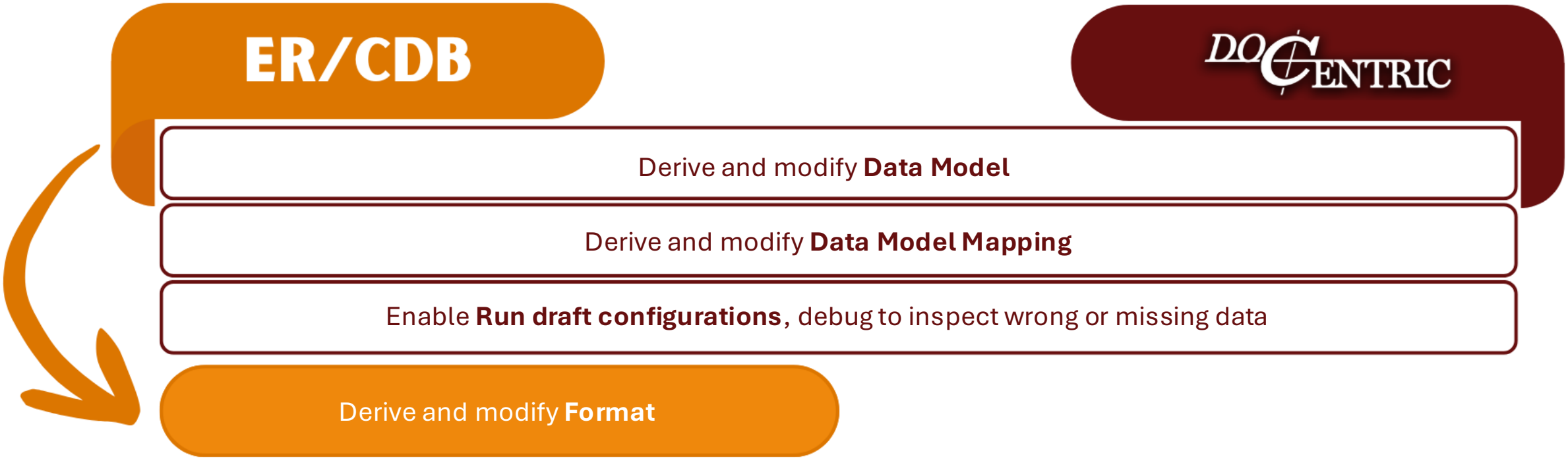
CUSTOMIZATION PROCESSES COMPARISON

ER/CDB	DOCENTRIC
Derive and modify **Data Model**	
Derive and modify **Data Model Mapping**	
Enable **Run draft configurations**, debug to inspect wrong or missing data	

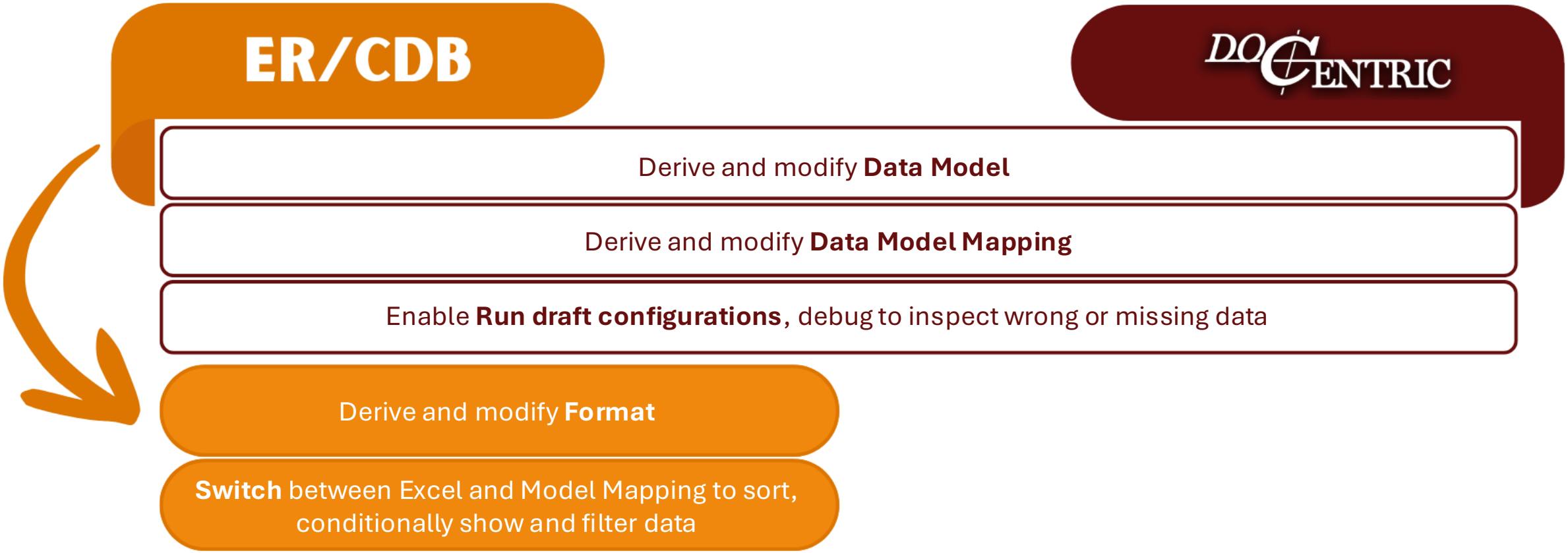
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CUSTOMIZATION PROCESSES COMPARISON

ER/CDB

DOCENTRIC

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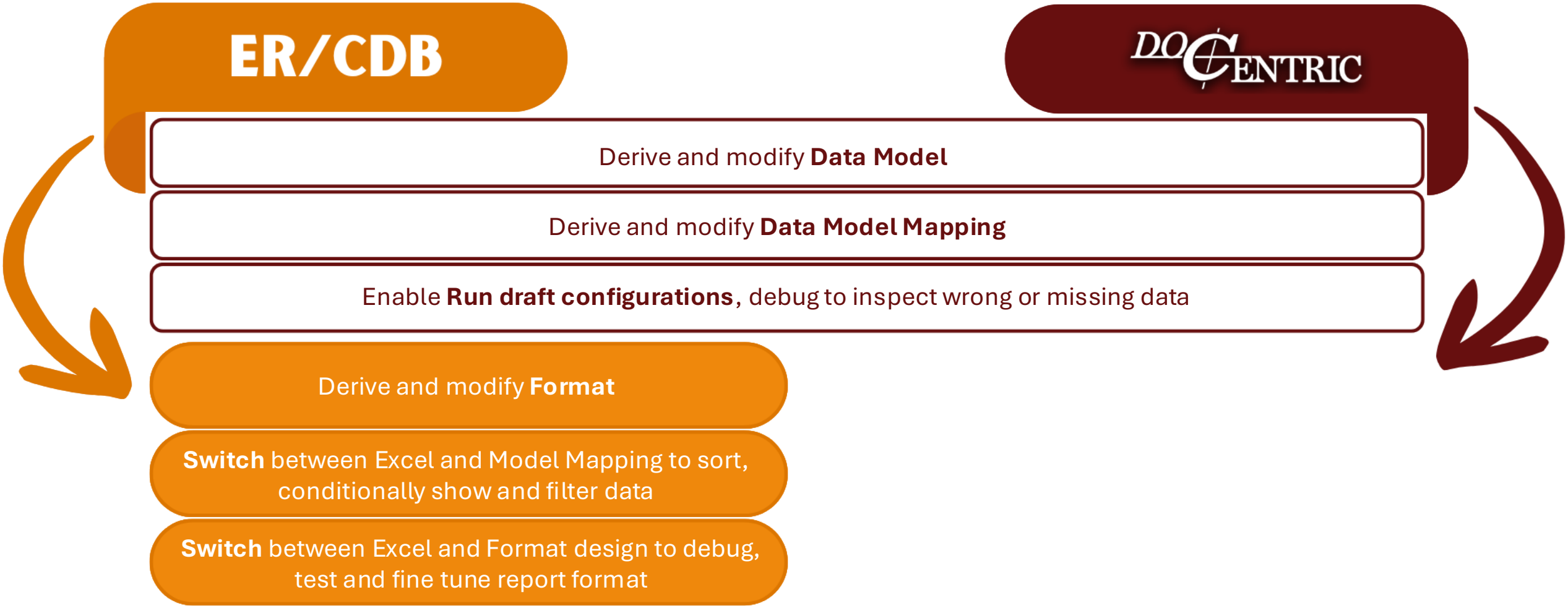
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Derive and modify **Format**

Switch between Excel and Model Mapping to sort, conditionally show and filter data

Switch between Excel and Format design to debug, test and fine tune report format

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DOCENTRIC

- **Design in Word**
- **Live Preview in all languages**
- **Edit sample data to test different scenarios**

Choose ER Data Model and Mapping, upload your design

USE DOCENTRIC DESIGNER TO

CUSTOMIZATION PROCESSES COMPARISON

ER/CDB

Derive and modify **Data Model**

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Configure **ER Destinations**

DOCENTRIC

- **Design in Word**
- **Live Preview in all languages**
- **Edit sample data to test different scenarios**

Choose ER Data Model and Mapping, upload your design

USE DOCENTRIC DESIGNER TO



Configure **Docentric Print destinations**

Resources & Call to Action



- Watch the webinars for demos and expert tips
  - Create Invoices with Product Images and Specs using ER
  - Create Invoices with T&C using ER
- Check out blog guides for detailed walkthroughs
  - Blog 1: Terms & Conditions in Invoices
  - Blog 2: Product Images and Specifications in Invoices
- Explore All Your Reporting Options in D365FO playlist
- Try **Docentric AX** and **Docentric Designer Word Addin** for yourself