Transform® for Microsoft Dynamics®

PrecisionForms Extended

PrecisionForms Extended bridges the gap between Microsoft Dynamics native reporting and customer expectations for document design and management. It replaces SSRS coding with an intuitive GUI based tool which reduces report and form creation times from days to hours. It also removes the barriers to delivering brand quality documents for all your organizations externally facing communication needs.

When initial demands for externally facing communication needs are met, PrecisionForms Extended can then be put to work transforming the way your organization manages documents, automates regulated document legal requirements, extracts maximum business value previously locked up in documents, and enhances document workflows – the life blood of many business processes.

- Fast, low cost, high quality business document creation and production

- First class customer and supplier communication experience

- Extend digitized workflows beyond Dynamics AX and Dynamics 365 Operations boundaries

- Automate document compliance and auditability to meet legal requirements

- Enhanced security and control for robust processes and information leak prevention

- Flexible deployment in Azure, public cloud or on premise

Fast

Low cost

Compliance
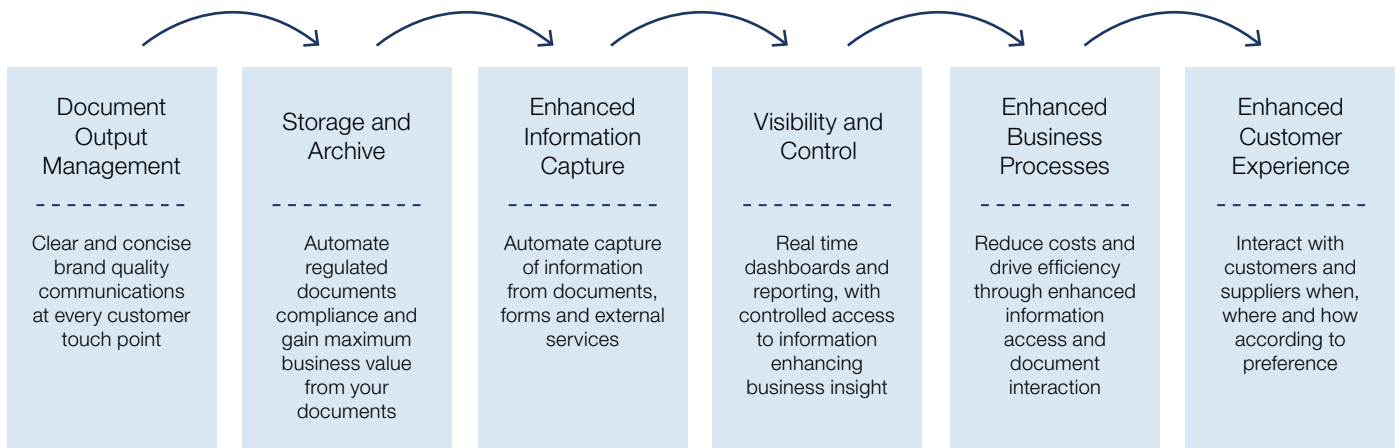
Secure

PrecisionForms Common Usage

Most installations of PrecisionForms start with generating common customer facing business documents including: invoices, order agreements, labels on product items, statements, picking notes, delivery notes and purchase orders etc.

Many organizations select PrecisionForms Extended because it provides a much more efficient way to deliver output requirements to support any Dynamics AX or 365 Operations implementation project than native coding. Without any programming skills, PrecisionForms Extended allows you to:

- Reformat and repaginate your documents for maximum impact.

- Distribute printed and electronic documents to point of usage.

- Merge and synchronize information between systems.

- Localize document layouts for different use cases and languages.

- Add barcodes for simple receipt tracking or labeling.

- Automate the delivery of all outgoing correspondence.

- Publish using print, PDF, fax, email, repositories and XML,CSV, flat text data files.

As implementations mature beyond initial output presentation and delivery requirements, organizations usually maximize the ROI they realize from PrecisionForms Extended by using it to automate document related processes, and unlock maximum business value from their documents. Typical priorities include:

- Reducing compliance exceptions and operational overhead by automating regulated document storage and retrieval

- Ensuring process continuity, with document tracking beyond boarders of your organization

- Maximizing business insight through controlled sharing of information and documents

- Increase business response times through automated document and form data capture

- Promote viability and control with real-time dashboards and reporting

- Enhancing communications to gain customer and supplier preference

Document Output Management	Storage and Archive	Enhanced Information Capture	Visibility and Control	Enhanced Business Processes	Enhanced Customer Experience
Clear and concise brand quality communications at every customer touch point	Automate regulated documents compliance and gain maximum business value from your documents	Automate capture of information from documents, forms and external services	Real time dashboards and reporting, with controlled access to information enhancing business insight	Reduce costs and drive efficiency through enhanced information access and document interaction	Interact with customers and suppliers when, where and how according to preference

PrecisionForms Extended Technical Capabilities:

PrecisionForms Extended has extensive but easy to use capabilities which allow you to maximize efficiency of your document processed and extract maximum value from the date your documents contain including:

- Using any Application Object Tree Report to trigger launch of a document process, any MorphX or SSRS report.

- Passing Report Data to PrecisionForms for MorphX reports including all native Microsoft Dynamics AX, labels and calculated fields, without changing business logic.

- Automatically using recipient languages for MorphX and SSRS reports.

- Specifying delivery destinations appropriate for each individual report including ad-hoc destinations such as: screen, print, HTML, email, fax, and archive.

- Rule-based delivery destinations aligned to business processes, document content or users or groups of users

- Define an unlimited number of Delivery Destinations.

- Batch documents reports into one print stream or PDF attachment.

- Automate archiving of the original rendered document so that Microsoft Dynamics AX and 365 Operations users can view copies of documents without leaving Microsoft Dynamics.

Microsoft Dynamics Compatibility

PrecisionForms Extended is compatible with a broad range of Microsoft Dynamics AX and 365 Operations versions both on premise and based in Azure. Its flexible architecture reduces the risks and costs of migrating Forms and Reports as you upgrade and evolve your systems; allowing you to reuse most of your existing documents as you move systems.

How you deploy PrecisionForms is completely up to you, as it has been designed so that you can deploy:

- Hosted on Premise or in Azure cloud

- Connected to on Premise, Azure or hybrid Dynamics deployments

- Printing either directly or via Microsoft Document Routing Agent

PrecisionForms Architecture

For the simplest of implementations, all major components of the software can be installed on a single server. PrecisionForms is frequently deployed in a multiple server environment to accelerate system throughput, reduce latency and manage disaster recovery.

It is also common for administrators to separate their live and test/development environments, whereby Output-Projects are first developed and deployed into a development environment, then promoted into a UAT environment for user testing, before finally being promoted into a "live" multi-server production environment. Precision Forms Extended comes with administration tools which ease moving projects between environments, and carry out checks to ensure all required resources, fonts etc are in place to ensure a smooth transition.

PrecisionForms may also be implemented in Disaster Recovery and Virtual Disaster Recovery environments.

PrecisionForms User Personas

PrecisionForms gives organizations the option to decentralize document management away from the IT department to take advantage of specialist design skills and knowledge to deliver effective communication with maximum efficiency. Separating responsibility for activities also builds in a level of security and control, to eliminate the possibility of a single user either accidentally or maliciously exporting proprietary or sensitive information without authorization. There are three roles required which can be managed by your IT, departmental stakeholder or collaboratively as required.

Administrator

The Administrator will mostly use the AX Connector to configure PrecisionForms, and manage Output-User-Privileges and Output-Devices. They will also use the Synchronizer to move Output-Projects between the Designer and the Deployment Server which is used to manage test/production environments and manage system performance issues.

Designer

The Designer is used to set-up output content and layout and select available Output-Devices. This can be carried out either individually or collaboratively by technical staff, specialist design teams or individuals with specific organizational function knowledge.

User

The user will run pre-defined batch or adhoc reports from within Microsoft Dynamics as required to produce their required output. This is transparent to Microsoft Dynamics users and feels identical to running a standard Microsoft report.

Core Components

There are several components for PrecisionForms Extended

- AX Connector

- Synchronizer

- Deployment Server

- Runtime Server

- Designer

- Precision Forms API Service

AX Connector

Bottomline's AX connectors seamlessly link Microsoft Dynamics AX and Microsoft Dynamics 365 Operations to the PrecisionForms Document Management suite. Users will be unaware that the connectors intercept Dynamics reports to creating the XML data feeds that PrecisionForms Extended uses for downstream processing of forms and reports. From a designer or administrator's perspective this simplifies specification of data required for reports by using a graphical interface; it also manages the relationships and links across multiple data tables.

Synchronizer

Bottomline's Synchronizer joins the Output-Project design process to the Output-Production process, allowing collaboration throughout the Document Output Management process between design, technical and user functions. The Synchronizer is used by the Administrator or Designer to create a repository and package structure and deploy projects to Runtime Servers. It can be accessed from within Bottomline's Designer or as a standalone program.

Deployment Server

The PrecisionForms Deployment Server is at the heart of PrecisionForms. It contains the master copy of all projects and files that are installed on Runtime Servers. The Deployment Server holds and manages the license keys for each component of the software and serves as the management interface for each Runtime Server registered to it.

The Deployment Server requires user authentication in order to connect a 'client' session, and in doing so, it allows for the enforcement of access rights to ensure full control of project changes.

Deployment of projects can be scheduled to suit specific operational windows to minimize disruption to the production system.

Detailed logging information for each project that makes up the solution is available via the Deployment Server's Administrator Interface. This allows the status of each process to be monitored and any issues to be addressed.

Deployment Server functions

- View the status of the Runtime Servers associated with the Deployment Server, start and stop the servers and view branch log files.

- View and search all server log files and events, and export the log information to text or XML data files.

- Add and remove Runtime Servers, start and stop servers, manage the Package Watch List, view currently running processes and configure the server.

- Configure the Deployment Server, backup and restore the Deployment Server's repository, configure server and process groups, and set timed deployment.

- Upload and remove license keys.

- Configure which users can access packages within the Deployment Server's repository on a per-package and per-user basis.

- Display users, add and remove users, and set user permissions.

- Search Requests.

Runtime Server

Bottomline's Runtime Server resides on the application servers used to execute the projects deployed via the Deployment Server. The Runtime server generates and distributes output to target output devices in the desired output format.

PrecisionForms can be made highly scalable by deploying multiple Runtime Servers on multiple devices for large-scale, enterprise wide implementations. In a multi-Runtime Server setup, each server can be configured to execute a specific set of projects in order to achieve segregation of duties, or else projects may be shared between multiple servers to give load balancing capabilities.

Runtime Server allows you to:

- List the processes on a Runtime Server and start or stop processes.

- List packages that have been uploaded to the Deployment Server, and add them to a Runtime Server's Package Watch List.

- Add a Runtime Server to the Deployment Server's list of registered Runtime Servers, to bring it under the control of the Deployment Server.

- View the deployment status of registered Runtime Servers.

- Configure server contact settings. If your Runtime Server license allows, specify whether the Runtime Server is permitted to run while disconnected from the Deployment Server, and if so, for how long.

- Locate branch files that can function as Web services, and view the information that can be used to call them as Web services from external applications.

Designer Features

Bottomline's Designer enables the rapid creation of document Projects that address the whole document lifecycle. Once created and tested, projects are passed to the Deployment Server for document output management. The Designer has been developed with 45 years of market experience and the feedback from our 9000+ customers. The result is a solution full of productivity tools that help you turn documents into your competitive advantage.

The Designer has a familiar Windows style interface that facilitates document design, creation of delivery logic, user interface design and the construction of process flows. Using assistants and wizards to guide the user through otherwise complex tasks, reducing development time.

Process workflows and user interfaces are created in the same graphical environment. With only one design tool to learn, users can also build solutions for mobile devices and improve your business communications without costly changes to other applications.

How Designer enhances report design within Microsoft Dynamics AX

- The Designer facilitates quick mock-ups, reducing the need for formal specifications by providing better quality feedback on your design.

- Document layout is augmented with real data so you see what each page will look like as you are designing it.

- Using the same tool to build both presentation and delivery logic allows the content and document structure to be easily changed depending on the delivery destination.

Designer features

- Microsoft XPS import enables rapid document creation from templates of other windows compatible form-generating software eq. other ERP systems, word, excel etc.

- Expression Editor enables fast rule-based logic creation for targeted communications.

- Delivery assistants and other productivity aids, speed-up development.

- Projects can be deployed across the globe.

- Complete image, font, and barcode support for documents.

- Object orientated process flow tool that makes complex tasks simple.

- Rich text boxes for true personalization of correspondence.

- Dockable windows for multi-screen cross application development.

- Automatic support for international output.

- International spell check to remove errors and reduce sign-off times.

- ASCII and Unicode support for global projects.

- Grids, alignment and other layout aids to speed up repetitive tasks.

- Comments and debugging tools to enable modular development.

- Real time pagination tools to reduce document sizes.

- XPS generator for preview and sign-off.

- Deliver collated or un-collated documents to multiple locations using a single process.

- Configurable OCR tools to create inbound solutions.

PrecisionForms Output Features

PrecisionForms adds a whole new dimension to Dynamics AX and 365 Operations output capabilities, making it simple to manage a vast array of output devices and destinations without SSRS Programming skills. PrecisionForms Extended allows you to:

- Deliver output to any number of printers or users.

- Support all printer types with Windows drivers, including full color devices.

- Support of special usage devices such as label and impact printers.

- Email documents as PDF's, HTML, MHTML (email) or in their native form.

- Create rich content.

- Integration with most Windows Fax servers.

- Output data in a wide variety of formats including (i.e. ASCII, CSV, XML, HTML, etc.)

- PDF Options:

  - PDF/a generation for archiving or PDF/x for production printing.

  - Accessible PDF creation.

  - Encryption and password applied to PDF files for added protection.

  - Advanced Digital Signing of PDF documents for authenticity of origin.

  - Create Hotlinks to help navigate within PDF files and to external content.

  - Compliance with WGAG and ADA legislation.

  - Embed data into PDF files

  - Create interactive PDF forms for improved data capture

- Call web services to deliver or receive document data.

PrecisionForms Data Manipulation Features

PrecisionForms Extended has powerful data manipulation tools which allow you to transcode data from a wide variety of data services, and enrich the content of reports for enhanced output or rule processing without the need for SSRS programming. This powerful capability is particularly useful in complex distributed IS infrastructures that call on a variety of data services from multiple suppliers.

- Split Microsoft Dynamics report files into multiple Projects according to pre-specified rules or variables such as Invoice Number or location.

- Split or copy documents for delivery based on conditions within the data.

- Sort and reorganize documents within a job by customer or vendor, for more efficient distribution.

- Enhance report content using database lookups, or insert/ update database records via ODBC connections using variable data from your Microsoft Dynamics report.

Optional Components

As implementations develop beyond basic output management there are a multitude of opportunities available to enhance your overall implementation performance and extract more value from your business documents – these include:

- PT-X Connect

- PDF Forms Packs

- Transform Content Center

- Transform Connect

PT-X Connect

PT-X Connect is a collaborative, cloud-based service which allows you to track document communications outside of your organization to ensure continuity of business processes.

It also securely manages the delivery, storage and presentation of your financial documents with intelligent analytics which give visibility into undelivered and un-actioned invoices that can negatively affect your cash flow; and provides insights, data and trends that can help drive real time decision making. PT-X Connect can be configured within minutes and will instantly transform your customer communications and unlock the value in your financial documents, helping you create innovative solutions, with the following features and benefits:

- Provides an audit trail of every action and interaction made with each document

- Intelligent analytics provide real-time insight of all documents

- Highlights cash at risk and encourages a proactive approach to cash collection

- Reduces your Day Sales Outstanding (DSO) by getting paid quicker

- Saves time, reduces costs and optimizes working capital

- Provides an easy, electronic way to keep track of your invoices and other documents

- Works with other Bottomline products easily, with no upgrades required

- Complies with HMRC guidelines for the distribution and storage of electronic invoices

- Modular and scalable

PDF Forms Packs

Forms are one of the most common ways to capture information from customers and suppliers, but despite their simplicity and accessibility, until now they have failed to deliver the customer experience demanded by modern users. Bottomline's Transform PDF Center allows you to customize forms for individuals, removing irrelevant questions or prefilling data you believe you already know to improve the customer experience. You can then electronically capture information, eliminating the need to key and scan completed forms when received, so you can deliver a better, more responsive customer experience and streamline your back office processes.

- Personalized digital Forms for a better customer experience

- Enhanced organizational workflows

- Enhanced security, visibility and control

Transform Content Center

Transform Content Center document repository, is a powerful extension to the Transform platform. It's fully scalable, and permits automated filing, sharing and communications of financial documents with enterprise class access control. Revolutionize how you manage your financial documents, maximizing the value you draw from them and delivering a first class user experience for employees, suppliers and customers with:

- Transparent document compliance

- Data sharing and collaboration

- Enhanced customer and supplier communications

- Visibility, insight and control

Transform Connect

Big data promises new customers, better experiences and new revenue streams. With pervasive compute and connectivity everything and everyone creates a digital footprint. Transform Connect removes the barriers of bringing your information together, to harness its full value and provide great insight when it's needed. Transform Connect standardizes how you automate movement of digitalized information between on premise, web-services, machinery and data feeds; with the agility and security your business needs.

Transform Connect will change the way you think about delivering digital information throughout your organization, enabling you to respond faster, to more requirements, with less resources:

- Standardize data integration

- Easy-to-use

- Secure enterprise class performance

- Agile data transformation and manipulation

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