Advanced-Forms® solution overview

Advanced-Forms® is a unique solution in the Output Management market, because of its unique and modern user interfacing and modern and high quality level technology for high performance document processing.

In this document we would like to outline the advantages of Advanced-Forms® in the Output Management market, based on the modern user interfacing and technology.

Studio

The heart of Advanced-Forms® is the Studio. In the Studio we develop, or even better, model the total document creation and distribution processes from input to output.
We can model this process from any ERP application to any end point simply by dragging design objects (bowls) into the design studio screen. This design studio is very intuitive and easy to manage. The modelling of the document design and distribution process is graphical and easy by filling out configuration fields, without the need for any programming. Therefore there's no need for knowledge of scripting and programming to set-up a full document output process in Advanced-Forms®, which makes the learning curve very short. Advanced-Forms® can be used by any employee with IT knowledge.

Workflow

The Advanced-Forms® Studio offers a full preview and validation of both both the designed and processed documents as well as the accompanying e-mail messages. The validation module, which is a standard feature of Advanced-Forms®, also offers a full approval workflow for any document that needs to be approved before distribution. The authorization in the workflow process can be set-up per user or per group of users. **It is even possible to enhance and personalize the processed documents with additional text before they will be distributed.** This workflow with validation and digital forms is a unique feature in the world of Output Management.

Mail Validation

Any mail message can be previewed and a user can add personal text to the mailbody (including the subject field) before it will be send to the receiver.

Document validation workflow

With the Validation workflow the authorised users can approve the documents that need to be printed or electronically distributed, and include notes to the following user in the approval line and add text and attachments. This all can be done wihtout any scripting or programming.

Portal Features

Users can log-in to the Advanced-Forms® portal which can be started and managed through a web browser or a mobile APP. The approval process can be authorized per user or group of users. The portal offers various features of Advanced-Forms®, such as:

- Run the **Advanced-Forms® Digital Archive**, manage it add and retrieve documents (also related documents outside of Advanced-Forms® and the ERP solution). The Archive module is an add-on to Advanced-Forms®
- Run the **Mail Validation**. (preview the message and attached documents and possibly add personal text to the mailbody)
- Run the **Validation** (approve documents and add personal notes to the approval step)
- **Digital-Forms** for the creation and automation of own designed forms and workflow outside of the ERP solution
- **Pull-printing for** actually starting the printing process from a web browser or a smart phone next to any printer. Use the Advanced-Forms® App to preview and validate the documents before starting the printing of that particulair document at that moment.

Document archiving

The Advanced-Forms® Digital Archive Module enables one to automatically archive the documents that have been processed by Advanced-Forms®. You can simply determine the attributes that you want to use for saving your documents. These attributes can again be used to easily retrieve the documents through an intuitive web browser interface. These documents can of course be secured on user or group level. Further documents can be distributed (mail or print) directly from the Archive to ensure that a copy of the original document (for instance the invoice) will be send.

Designer

The designer is unique and very intuïtive, developed to give the users the ease of use and visibility of Microsoft Word and Excel in designing the documents. In this Designer it is very easy to design documents by using different data sources from different applications. Enriching documents with additional data is also very easy to do. In the Designer one can determine wether to print or distribute the document electronically, such as in PDF format or other formats such as Word, Excel and RTF.

High performance

Advanced-Forms® offers Multi Threading, which means that thousands of documents can be processed and distributed within the hour, where we only use normal and standard Windows server technology.

Advanced-Forms® for Microsoft Dynamics AX and Microsoft Dynamics 365 for Operations

We have developed a fully integrated Connector for both Dynamics AX and Dynamics 365 For Operations application environments. This Advanced-Forms® Interface offers the following important advantages and features:

Preview Documents

Standard Dynamics AX and 365 for Operations
Previews are shown in the same window and there is a need to close the top-document to "see" the previous document. It's complicated. The preview of a document will not look like the final document.

Added Value Advanced-Forms®
With Advanced-Forms® all documents are opened in the standard Dynamics AX and 365 for Operations object to preview documents, making navigation familiar. The preview of the document is viewed as the final format.

Distribution - Setting output distribution rules

Standard Dynamics AX and 365 for Operations
There are limited options for defining the destination (printer, pdf etc.), and no "flow" can be configured. Importantly, there are no standard or failover destinations.

Added Value Advanced-Forms®
Advanced-Forms® uses the standard Dynamics AX and 365 for Operations print management object. Users are familiar to the interface. Advanced-Forms® adds flexibility to the distribution rules. Users can simply configure these rules without the need for code. Setting conditions in these distribution rules help users ensure that documents are delivered flawlessly.

Archive - Saving document copies

Standard Dynamics AX and 365 for Operations
Users can only save in the "print archive". This is not a real archive and does not allow for re-print. Altering the format of a template in Dynamics AX and 365 for Operations will have a direct effect on the layout of previous documents. This makes reprints of documents, which have been created befóre the template was altered, legally invalid.

Added Value Advanced-Forms®
The Advanced-Forms® Archive is flexible. Documents can be archived with additional metadata like destination address and date sent. The archived documents can be displayed on the Dynamics AX and 365 for Operations customer card, so users can quickly find the relevant document and view an exact copy that was created at that point in time.

Emailing - Configuring filename, Subject & Body

Standard Dynamics AX and 365 for Operations
The Email dialog within standard Dynamics AX and 365 for Operations is very simple and limited.
No options to automatically pre-define the attachment name, subject line or email body are available as standard.

Added Value Advanced-Forms®
Advanced-Forms® enables the user to design an Email body with the same flexibility as when designing another document. Besides adding images to the body, it is possible to use the data to generate a chart in the email body. To maintain consistency the data can be used to ensure naming conventions of the names of the attached files and Email subject lines.

Document design - Adding data

Standard Dynamics AX and 365 for Operations
In order to update a report, changes to the Dynamics AX or 365 for Operations applications need to be made – which requires programming effort by a specialist.

Added Value Advanced-Forms®
The data provided by Dynamics AX and 365 for Operations is used to generate the dynamic reports. Advanced-Forms® can connect to a wide variety of data sources and use that data to enrich documents or as conditions for distribution. Even when these data sources are no part of the Dynamics AX and 365 for Operations environment.

SSRS

SSRS and Visual Studio are the standard tools which are provided in AX to develop and process documents and reports. It is not suitable to offer the ability to create and offer a well structured XML file from AX. There are possibilities to export a sort of XML file, but this file is only available for just a few documents.
SSRS en Visual studio can also be slow and need lots of performance to run and process documents. Our Advanced-Forms® AX Connector offers a direct and integrated interface with AX and does not need Visual studio and only some basic parts of SSRS. This means that the peformance of pre-viewing and processing documents is much higher, sometimes up to 15 times faster.

This interface is unique in the world of Output Management and offers many advantages, such as:
General Advantages:
- SSRS and Visual Studio (very complex development tools) are no longer necessary
- Extensive performance profit → previewing and processing documents can be done in seconds instead of in minutes
- No more heavy document generating and processing tasks for the AX servers
- The Connector offers structured XML files as input for the Advanced-Forms® Designer

Advanced-Forms® is Microsoft CfMD certified for Microsoft Dynamics AX

Advanced-Forms® has been tested and approved by Microsoft's certification institute called Lionbridge and therefore our AX Connector is a trusted integration between Advanced-Forms® and AX. The AX Connector has been designed based on a strategy that future migrations to new AX versions should be as easy as possible when it comes to all outgoing documents.

Certified for

Microsoft Dynamics

AX