Document Management for Microsoft Dynamics AX and Dynamics 365 Operations

Documents are the lifeblood of any business, they are a highly effective way of storing and communicating information which both key business and regulatory processes rely upon.

As a Microsoft Dynamics 365 Operations or Microsoft Dynamics AX customer you've invested in world class technology, but has your Document Management kept pace?

Bottomline Technologies takes Microsoft customers on a journey starting with helping them increase agility and cutting document creation time and costs; then implementing robust document processes to meet modern business and compliance needs; and finally maximising business efficiency and customer preference benefits from documents and related processes.

This document explains the options and choices which are available to you from starting out, to using documents for competitive advantage.

The Importance of Documents

Despite announcements heralding the arrival of the paperless office for over two decades; paper and electronic documents are here to stay. The format is simply too useful – almost any type of information can be communicated and stored in the document format, and you can have a high degree of confidence that a recipient can read either paper or PDF documents with ease.

Recent surveys reflect this with over 76% of line of business managers saying that they are reliant on paper documents at work, and 50% believing they will still be reliant on paper in 5 years' time.

Although there are also warning on the horizon – with 83% of business professionals claiming that outdated ways of working with documents is inhibiting productivity; and 76% of line-of-business leaders claiming that disconnected document processes adversely impact revenue recognition.

"75% had reporting issues due to poor data migration or not enough reporting focus early on in the project"

– PWC

Getting Started

Document Production and management planning is frequently delayed to the end of Microsoft Dynamics projects despite warnings from experts like PWC that "75% had reporting issues due to poor data migration or not enough reporting focus early on in the project". Whilst it is difficult to create reports and forms until the underlying internal and external data models are in place, much of the information flowing in, out and through organisations is document based, and most organisations would agree that planning system document inputs and outputs at an early stage will significantly increase the probability of a successful implementation.

The Importance of Document Quality

In a world of standardised processes and best working practice, how we present ourselves has a major impact on generating preferential status amongst suppliers and customers – our documents are an important part of this.

Whilst Microsoft provides a series of standard reports and forms with Microsoft Dynamics 365 Operations, their intention is purely functional – and so one of the important tasks associated with any Dynamics 365 Operations project is to create customer facing documents which reflect how we want our organisations brand to be presented.

If you choose to create brand quality documents with standard tools – this involves using a programmer to write scripts for each document and can be a long and arduous task – frequently consuming 15% or more of the entire deployment costs of the project.
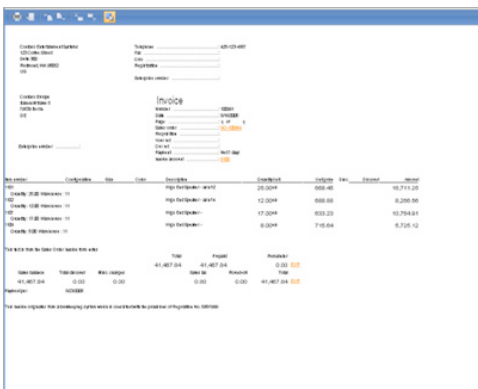
Standard Microsoft Dynamics Invoice

Save Time and Money with Basic Implementation

Bottomline Technologies are leading global suppliers of Document Management systems, and part of what we do is to simplify how you can create brand quality output from your Microsoft Dynamics 365 Operations system.

We do this with custom based designer tools, which we have refined with thousands of live customers. We remove the technology barriers stopping you achieve the brand quality you need, and reduce the time to create simple forms from days to hours – simply by giving you the right tools for the job.

Key to this is a simple user interface which eliminates the need for programming skills and automating many common tasks like: creating data feeds; drawing common objects; logo and image insertion; managing multi-page documents; text appearance; barcodes; tables; in form calculations; etc.

Document Management Essentials

Once the basic need of creating brand quality customer facing documents has been met – organisations often turn their minds to some of the other demands placed on documents in the modern business environment.

Bottomline Technologies has produced pure SaaS offering which sets out to meet these essential demands on document processes.

Compliance

First and often foremost on these demands is Document Compliance. As businesses have become much more regulated they are under enormous pressure to comply with a growing number, range and complexity of regulatory requirements, which are often document centric.

Compliance Applies to Almost Every Organisation

FISMA
Federal Information Security Management

Good Clinical Practice
(GCP)

ISO 27001
Information Security

Good Agricultural Practice
(GAP)

HIPAA
Health Insurance Portability and Accountability

Good Laboratory Practice
(GLP)

GLBA
The Gram-Leach-Billey Act

PCI DSS
Payment Card Industry Data Security

SOX
The Sarbanes-Oxley Act

Good Regulatory Practice
(GRP)

Good Regulatory Practice
(GDP)

This now means that organisations must be able to provide accurate and timely information to:

- Authorities

- Partners

- Stakeholders

- Shareholders

Penalties for non-compliance can be severe and not only impact business relationships, but can also lead to punitive fines, and in extreme cases imprisonment. To quote Deputy Attorney General Paul McNulty – "If you think compliance is expensive, try non-compliance."

The operational and systems overhead of meeting document compliance regulations can be significant – but Bottomline's PT-X Connect simplifies this by allowing you to create copies of every document sent through PT-X Connect without any additional manual tasks or additional Microsoft Dynamics 365 system loads.

Assured Document Delivery

Another essential capability of modern document processes is to have visibility of document interactions after they have left your organisation. For many organisations this is a challenge as traditional paper mail can be unreliable – even with signed delivery, and most email systems make it very simple for users to turn off delivery receipts.

Proof of delivery is an important part of some regulated processes, whilst visibility of delivery and downstream interactions can be vital to prevent process breakdown – for example if an invoice has been sent and not viewed for 5 days it is 25% more likely that it will not be paid on time.

PT-X Connect delivers documents via a repository – a link to the document is sent to the recipient which they can click to view or download the document. You can see if this has not occurred, and just as importantly when it has – with proof.

Self-Help Portals

Another significant development in modern business is how our customers and suppliers want to interact with us. Modern expectations are no longer just that relevant information should be supplied, but it should be available from wherever and whenever it is needed.

PT-X Connect allows your customers to view all of the documents you have sent them, when and where they want. This is not only a significant improvement in customer experience whilst not placing any additional load on your staff or Dynamics 365 Operations system; it allows you to service a lot more customers at a significantly reduced cost.

Enhanced Document Services

Once organisations have implemented their Essential Document Processes – they often start to embrace more advanced ways of using document processes to provide a better user experience, make processes more efficient and unlock the maximum value of their business documents.

Bottomline's PrecisionForms Extended is a world class Document Management System that is tightly integrated with PT-X Connect. It enhances document capabilities in ways which can truly transform business processes and deliver a competitive edge.

Augmenting Your Document

Microsoft Dynamics 365 Operations is a world class ERP, but most organisations hold and consume large amounts of information which quite rightly reside outside of an ERP environment. These systems could include: engineering, health and safety, architect, supplier portals, news feeds, marketing, expenses, currency, payments, project management, help desk, quality control, training etc.

PrecisionForms Extended allows you to make look-ups based on almost any information available from external data sources and add the content to your communication for completeness. This could be as simple as adding standard terms and conditions to a document, or perhaps specific product images, warranty information, installation instructions or links to training materials.

Personalising Formats

PrecisionForms Extended allows you to select alternative output formats based on any of the contents of your data feed or look-ups. If you have a customer which has expressed a preference for consuming information on a mobile phone, a PDF file or paper document, you may want to format the information very differently for a better user experience.

It may also be the case that particular customers or suppliers require information to be presented in very specific ways – once again PrecisionForms Extended can personalise this data on an individualised basis, without having to make any manual task exceptions or impact your Dynamics 365 Operations System.

Intelligently Routing Documents

PrecisionForms Extended can allow you to select delivery channels based upon any information in the data feed or look-ups. Examples of this could be because a customer has expressed a preference for paper over electronic invoices, or perhaps you need to produce a shipping note at the correct warehouse location based on a part number.

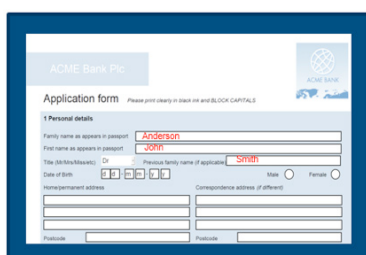### Produce Multiple Documents From a Single Dynamics Report

PrecisionForms Extended is not restricted to producing a single output document from a Dynamics 365 Operations report. A common example of this capability is to automate storage or regulated documents into a document repository. However this capability can also be used to great affect by using the data from an invoice to simultaneously produce picking notes, shipping notes, supporting documentation, advanced shipping notification etc. eliminating many manual tasks and offloading workload form Microsoft Dynamics.

Adding Data Files to Your Communications

PrecisionForms Extended can also take your data feeds and any available look-ups and create data files to compliment any documents you create. This can help your suppliers and customers with their downstream processes and help build preference for them to choose to work with you in the future.

This is particularly useful when large quantities of data are involved – for instance if you place an order on a supplier for 10 items, it will help them process your order faster and with more accuracy.

Data files can be automatically added to repositories, emails or even embedded into PDF documents automatically.
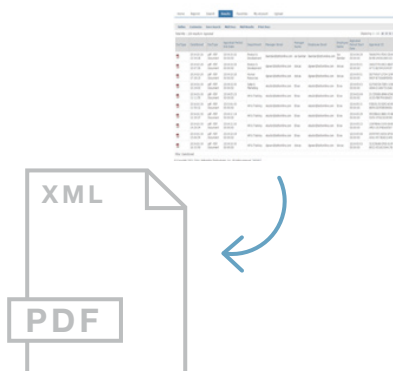

Interactive PDF Forms

It is also possible to create interactive PDF forms individualised for each intended recipient – these forms can provide a better user experience by prefilling information you already know and allowing the filler to return the form at a click of a button.

This gives you opportunities for significant business efficiencies, no longer having to scan or re-key returned forms – but many companies find the greatest advantages are being able to immediately process incoming forms for a faster customer response and prioritising documents of greatest business interest.

Embedding eSignatures in PDF Files

Most countries in Europe now give eSignatures the same legal status as traditional wet signatures. PrecisionForms allows you to capture electronic signatures in your PDF document, and display them as required.
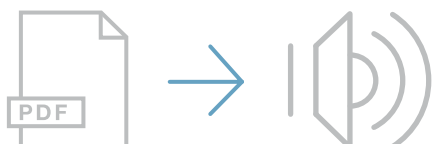
Tagging PDF Documents for Audio Readers

In some countries Disability legislation obliges business to facilitate access to their documents for visually impaired users.

PrecisionForms Extended allows you to Tag PDFs so that commonly available free PDF audio readers can read the document out for your users.

Not only important to meet your regulatory obligations, but also as simple way to deliver an excellent user experience.

Keeping Your Information Safe and Your Systems Robust

Document Management systems are powerful utilities for Dynamics 365 operations organisations. It may also be apparent that such powerful tools are capable of punching holes through a business's security measures if they are not controlled properly.

Not all document management systems are equal – like any diligent IS Manager Bottomline is not only concerned about the functional capabilities of our document management solutions, we also spend a great resource ensuring that your systems can be made safe and secure.

We have developed a robust production, test, development and DR environment so that you can implement a robust change and deployment process. This is supported by intelligent administration tools, creating a very different environment to simply setting up the same software on multiple servers with different intended usage. As well as separating environments, checks are carried out as projects are moved between systems to ensure all required resources are available on the target server.

We also segregate duties between users, administrators and designers. If you give any individual the ability to enable data access, create reports and route information delivery, and finally run those reports on live data – you would be very exposed to that person accidently creating a massive data leek with potentially embarrassing or severe legal and commercial implications.

Designed to Fit in with Your Dynamics Deployment Decisions

PrecisionForms and PT-X Connect are 100% Microsoft LifeCycle Services compliant to both fully compliment your Dynamics 365 investment however you choose to deploy it, and protect your investment in Bottomline document solutions for the long term.

Microsoft
Dynamics 365

Essential
Document
Services

Enhanced
Document
Services

PT-X
CONNECT

PrecisionForms

Hosted Cloud

Microsoft
Azure

On Premise

Bottomline's time and cost saving design tools are available no matter which Bottomline document management solutions you choose to deploy.

The essential document capabilities we referred to earlier are available through our hosted cloud based PT-X Connect system to deliver a truly federated cloud experience.

The Enhanced document capabilities are available through our industry leading PrecisionForms solution which can be deployed in either Azure or on Premise.

And of course PT-X Connect and PrecisionForms have been designed to work alongside each other for complete document end to end capabilities.

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About Bottomline Technologies

Bottomline Technologies (NASDAQ: EPAY) helps businesses pay and get paid. Businesses and banks rely on Bottomline for domestic and international payments, effective cash management tools, automated workflows for payment processing and bill review and state-of-the-art fraud detection, behavioral analytics and regulatory compliance. More than 10,000 corporations, financial institutions, and banks benefit from Bottomline solutions. Headquartered in Portsmouth, New Hampshire, we delight our customers through offices across the United States, Europe, and Asia-Pacific.

For more information, visit www.bottomline.com/uk.