

resco

Document generation on Power Platform

Comparison of the tools

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Prüfprotokoll gemäss § 11 AM-VO

über wiederkehrende Prüfung für selbstfahrende Arbeitsmittel (§ 8 Abs. 1 Y 14 AM-VO)


Gerätetyp: Tragraupe 04

COMPANY LOGO

Werkstattwagen Nr	MUN-6520-87001	Gerätedaten	Ausrüstung
Fahrer - Monteur	CRM Admin	Inv.-Nr	INV-684005-2001
Baustellennummer	45-6231	Serie Nr	SN-98711541-1002685
Baustellenort	Nurnberg	Betr.-Std	5600
		Geräteführer	Hans
			Beta

Ergebnisaufzeichnung ● = gut/vorhanden/gültig ■ = schlecht/fehlt/ungültig ▼ = UVV - Überprüft

00 Allgemeine Kontrollen	20 Fahrwerk	110 Hydr. Anlage	160 Elektrische Anlage
01 Letzte Wartung 14. 5. 2015	21 Fahrschiff R. ○ ■ ▼	111 Hauptpumpen ○ □	161 Motoranzeige ○ □
02 Betriebsanleitung ○ ■	22 Fahrschiff L. ● □ ▼	112 Hilfspumpen ○ □	162 Tankanzeige ○ □ ▼
03 Ersatzteilverzeichnis ● □ ▼	23 Fahrketten Zustand R. ● □	113 Steuerölpumpe ○ □	163 Hydr. Öltemperatur ○ □ ▼
04 Firmenschilder ● □	24 Fahrketten Zustand L. ○ ■	114 Hydr. -Ventile 8er Blo. ○ □	164 Motortemperatur ○ □ ▼
05 Sicherheitsschilder ● □ ▼	25 Kettenspannung ● □ ▼	115 3er Block ○ □	165 Betriebsstundenzähler ○ □
06 Farbanstrich ● □	26 Kettentführung ○ ■ ▼	116 Ventil für Oberwagen ○ □ ▼	166 Keilriemen-Rissanzeige ○ □ ▼

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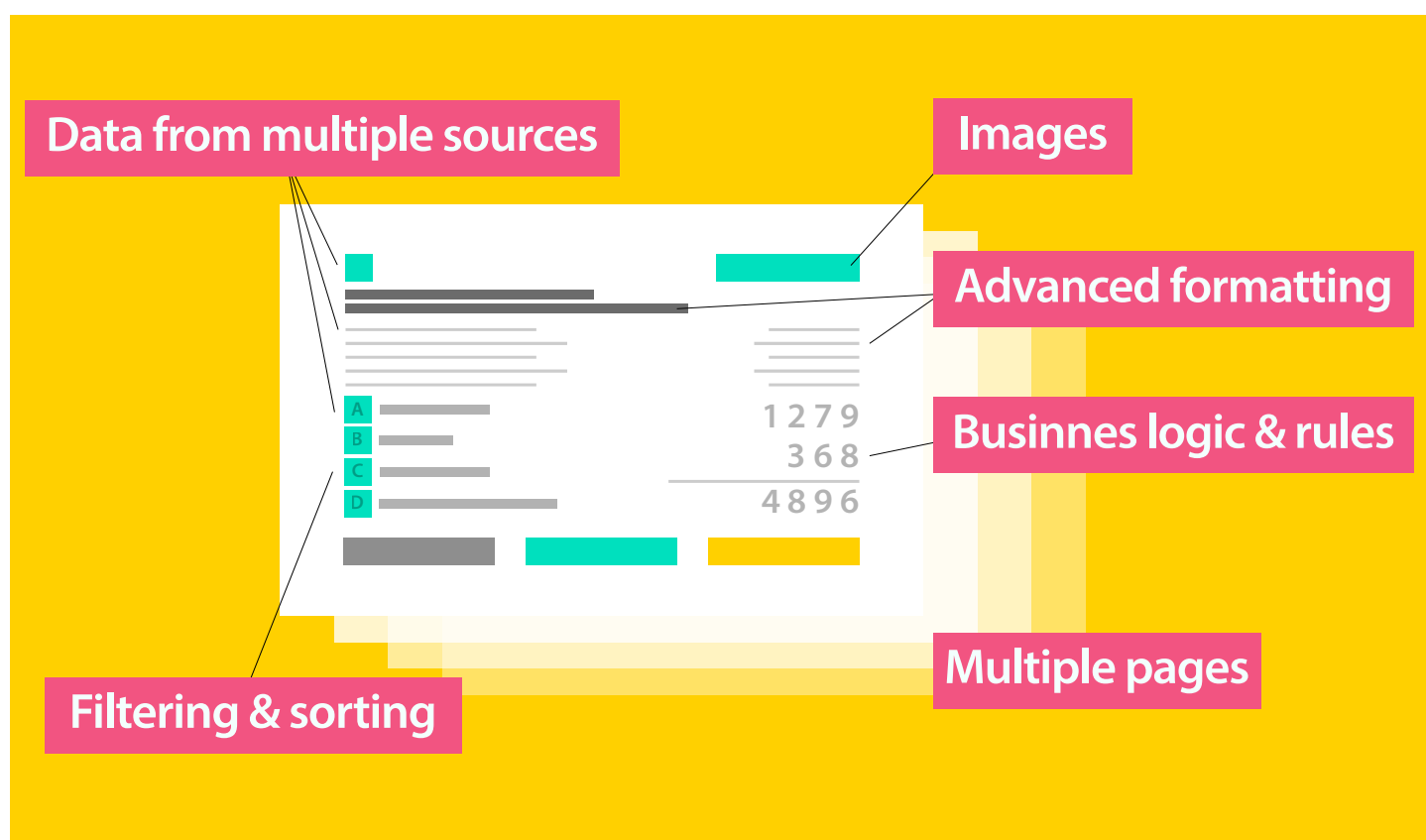
Introduction

All businesses and governments need to generate documents.

Document automation is a common digitization requirement for most medium- to large-sized organizations. This doesn't come as a surprise; according to a [Zapier study](#), 76 percent of workers spend 1-3 hours a day simply moving data from one place to another. Additionally, 73 percent spend 1-3 hours trying to find specific information or a particular document.

By switching from manual to automatic generation of documents, organizations can save resources, prevent errors, and increase productivity.

There are several options to choose from when generating documents on Power Platform. This paper will examine these options to help determine the best choice for different use cases.



What tools to use for document generation in Power Platform?

In this document, we will cover four ways for generating documents on Power Platform. Two of them use Microsoft tools only; the other two use third-party solutions.

All of them rely on Power Automate for setting up the workflows for populating the document templates with data and automating the sending / saving process.

Using Microsoft tools only

Using only Microsoft tools for generating documents offers the benefit of dealing with a single supplier. This potentially eliminates cross-compatibility issues and incompatible updates. However, these tools were not specifically tailored for document generation on Power Platform, leading to complexities in setup and usage.

Microsoft Word + Power Automate page 4

Power BI Paginated Reports + Power Automate page 4

Using third-party solutions

Third-party solutions are specifically developed for their intended purpose and many companies opt for them to efficiently fulfill their needs. Let's look at their pros and limitations.

What should you consider when evaluating third-party solutions? page 5

Solutions using Microsoft Office to design templates + Power Automate, Documents Core Pack, Experlogix, Dox42 page 6

Solution with a dedicated Documents designer + Power Automate, Resco Docs+ page 7

Let's dive right in.

Microsoft Word + Power Automate

The first and simplest method for document generation involves using the Developer tab in Microsoft Word to create document templates, combined with the Word Online Connector to integrate with Power Automate.

This approach is suitable for basic document generation needs. It may fall short for producing complex documents in high volumes.

Pros

- Well-suited for quick, simple tasks
- Ideal for documents using simple templates
- Affordable for moderate workloads

Limitations

- Not ideal for lengthy documents with complex layouts
- Restricted support for conditional logic and formulas
- Limits on the number of related records, levels of relationship, and number of root entities
- Costs can increase with extensive workloads

Read more

Using Word templates to create standardized documents: <https://learn.microsoft.com/en-us/power-platform/admin/using-word-templates-dynamics-365>

Power BI + Power Automate

This method involves Power BI paginated reports. Templates are created in Power BI Report Builder and then populated with data and distributed to their intended destination using Power Automate.

Using Power BI might not be cost-effective if used solely for document generation. This makes this option more appropriate for medium- to large-sized companies with several hundred users.

Pros

- Suitable for complex documents
- Capable of handling complex queries
- Overcomes the limitations of Microsoft Word in template creation

Limitations

- Power BI is primarily designed for report creation, not document generation
- Requires skills in report-building
- May not be cost-effective for smaller companies

Read more

Export Power BI paginated reports with Power Automate:

<https://learn.microsoft.com/en-us/power-bi/collaborate-share/service-automate-paginated-integration>

What to take in mind when considering a third-party add-on

Using third-party add-ons to generate documents on Power Platform offers several benefits, enhancing the native capabilities of the platform and addressing specific needs. Let's look at the points to consider when choosing a third-party add-on.

The key advantages of third-party addons

Customization and advanced features: Third-party add-ons often provide tailored user-friendly interfaces and include custom templates, advanced formatting options, and the ability to incorporate complex data structures.

Scalability: As businesses grow, their document generation needs become more complex. Third-party add-ons are built to scale, supporting increased document volumes and more sophisticated document generation scenarios.

Rapid Deployment and Updates: Add-ons can be quickly deployed and easily updated, ensuring that businesses can take advantage of the latest features and improvements without significant downtime or development efforts.

Support and Expertise: Third-party providers often offer dedicated support and bring specialized expertise in document automation, ensuring that businesses can address any issues swiftly. Opt for a provider with a strong track record of reliability and consistent support.

What to consider

Procurement process: Selecting a third-party solution requires comprehensive market research and a clear understanding of your organizational needs. Choose vendors who offer substantial support during the procurement process.

Data storage and handling: Regulations in many countries mandate domestic data storage. Additionally, certain industries are governed by strict data handling rules. Verify the provider's data storage locations and management practices.

Additional data management: Some add-ons may store configuration records in Dataverse, and they might install workflows, scripts, and business rules. This can result in increased storage costs and fees for API calls. It's important to understand the data structure and operational mechanism of the chosen solution.

Performance Issues: In some cases, complex queries — especially in large volumes — might process slowly and even cause timeouts. Discuss performance capabilities and limitations with your provider.

With these considerations in mind, let's explore the available options.

➤ Solutions using Microsoft Word to design templates + Power Automate

Various solutions utilize Microsoft Office products, primarily Microsoft Word, for template creation. These templates are then integrated with Power Automate through dedicated connectors.

Solutions like Documents Core Pack by mscrm-addons and Document Automation Software by Experlogix allow template designing within Microsoft Word. Dox42 extends this to include Microsoft PowerPoint and Excel for template creation.

Document templates and data connections are created in familiar office software. No programming skills are needed. Business users can create the document templates by themselves. The solutions overcome Microsoft Word's limitations by supporting dynamic tables, conditions and calculations, diagrams, deeper relational data handling and business logic integration.

The third-party addons also often support data import from various sources and enable data sorting, filtering, and exporting documents in multiple formats.

Pros

- Ease of use – users work in a familiar environment
- Advanced functionalities for complex use cases
- Addons are specifically designed for document automation

Limitations

- Potential slowness and timeouts with complex queries

Read more

Documents Core Pack: <https://www.mscrm-addons.com/Products/DocumentsCorePack>

Experlogix Document Automation Software: <https://www.experlogix.com/document-automation/>

Dox42: <https://www.dox42.com/>

More apps for document generation on Power Platform in AppSource:

<https://appsource.microsoft.com/en-us/marketplace/apps?search=document%20generation%20for%20power%20platform&page=1>

Third-party addons

Resco Docs+ with a Document designer + Power Automate

Resco Docs+ is an addon that utilizes its own Document designer, natively integrated in model-driven apps. This means users can complete tasks without opening other software. The add-on employs a proprietary Power Automate connector.

With the Documents designer, users can employ grids to design pixel-perfect documents. Data can be added from numerous sources and from multiple tables (related or unrelated), and they can be sorted and filtered. The solution is also compatible with [Resco Forms+](#) for instant document creation from field data.

Resco Docs+ supports rules, repeatable groups, and complex business logic. All parts of the report are built in a low-code / no-code, point-and-click environment.

The solution performs well, with average document generation requests typically taking less than 12 seconds. Even complex reports with non-trivial rules and calculated columns are processed swiftly.

The outstanding performance stems from the design of the solution. Resco is well-known for its platform that enables developers to create mobile business applications. Field users employ these apps to accomplish their work tasks, including document generation. Workers needing service reports, invoices, or inspection protocols can generate them on-the-go using pre-defined templates in their mobile apps.

This document generation functionality is now also available on Power Platform. Resco has preserved the reliability and speed of its original product in its Power Platform enhancement.

The solution is well-suited for organizations seeking a swift, reliable method to address complex use cases, and those comfortable with a slightly more complex template generation process that remains coding-free.

Pros

- Document designer natively integrated in model-driven Power Apps
- Simple installation process
- Comprehensive tool offering many automation options
- Exceptional performance
- Ideal for mobile use cases

Limitations

- Requires report-building skills in a low-code / no-code environment

Read more

Resco Docs+: <https://www.resco.net/power-platform/docs/>

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06 Partnerstich	<input type="checkbox"/>	26 Kettenführung	<input type="checkbox"/>	116 Vierd. für Ösen	<input type="checkbox"/>	166 Ketten-Risikozon	<input type="checkbox"/>

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Resco Docs+ for Power Platform

Automate document generation and delivery in Power Platform

Combine Dataverse and field data to automatically create invoices, contracts, and reports in PDF or any format you choose. Use Power Automate to build flows for automatic document creation, data population, and distribution.

For more information, contact us at info@resco.net

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