ANVEO

Best Practices Guide

Anveo Client Suite

☐ MOBILE APPS   ☐ WEB PORTALS
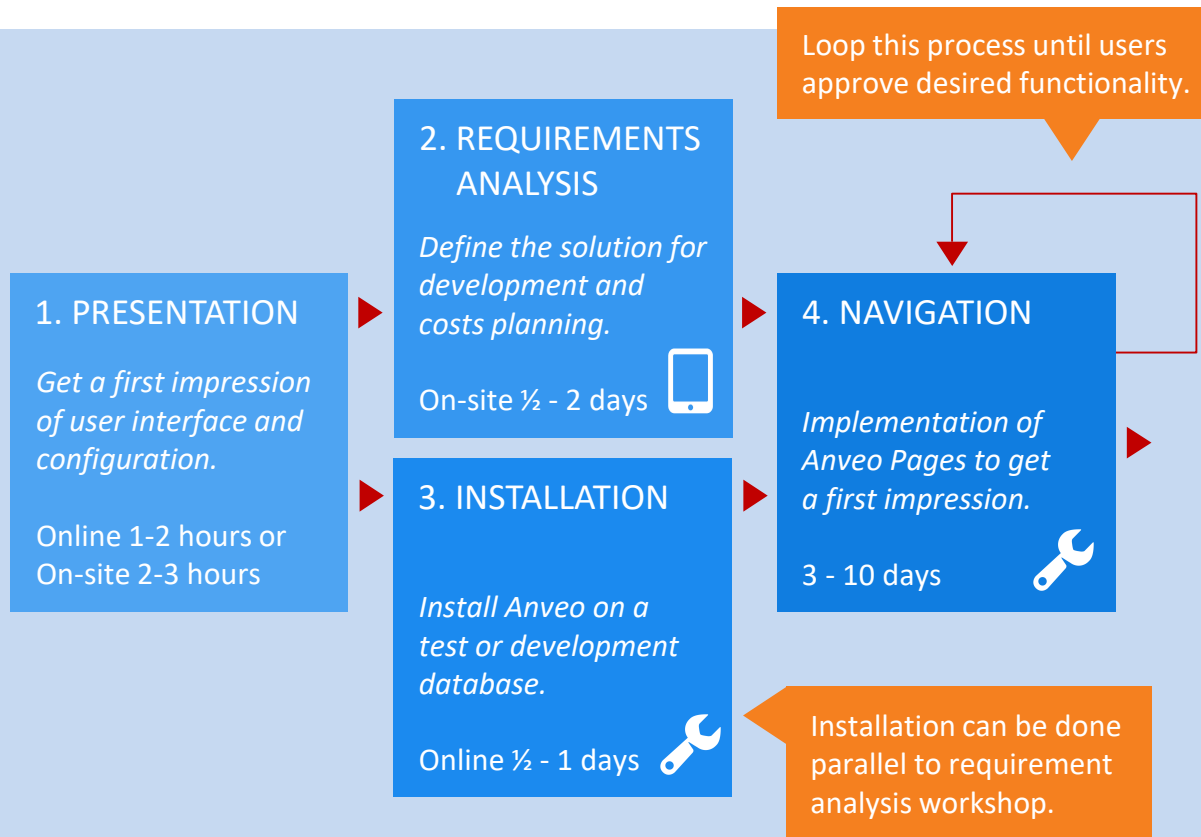
Anveo Client Suite Projects

This document is a useful guide to implement successful Anveo Client Suite projects.

Loop this process until users approve desired functionality.

2. REQUIREMENTS ANALYSIS

Define the solution for development and costs planning.

On-site ½ - 2 days

1. PRESENTATION

Get a first impression of user interface and configuration.

Online 1-2 hours or On-site 2-3 hours

3. INSTALLATION

Install Anveo on a test or development database.

Online ½ - 1 days

4. NAVIGATION

Implementation of Anveo Pages to get a first impression.

3 - 10 days

Installation can be done parallel to requirement analysis workshop.
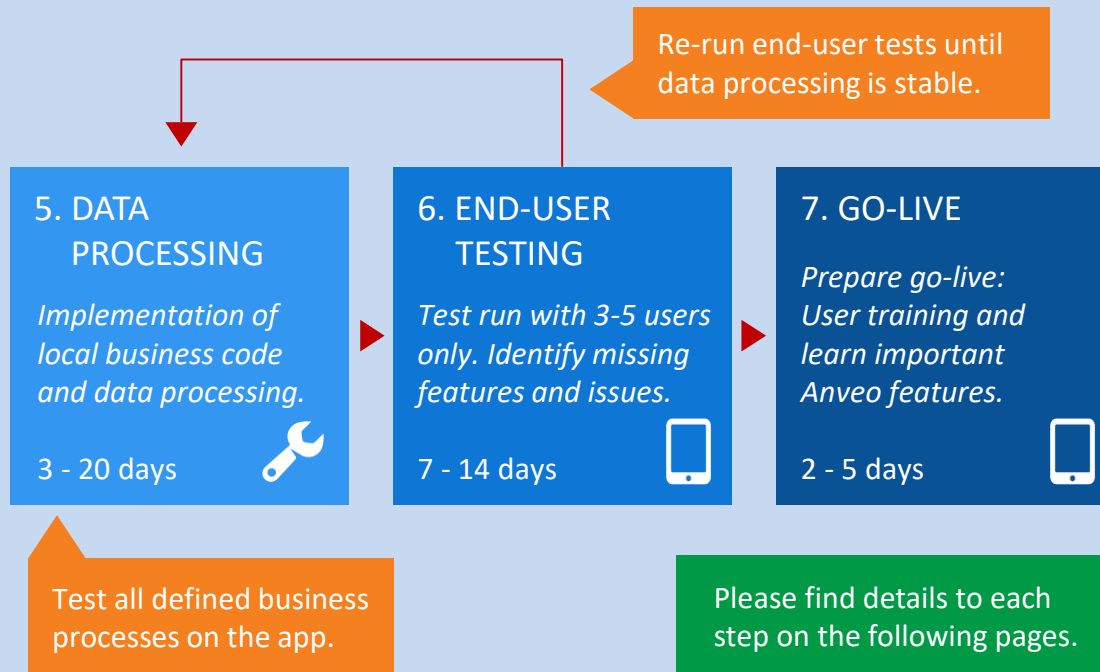
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Anveo is perfectly designed to be implemented by Microsoft Dynamics partners on their own. However, we highly recommend to include an Anveo Client Suite trainer as a valuable assistance in your first project.

Re-run end-user tests until data processing is stable.

5. DATA PROCESSING

Implementation of local business code and data processing.

3 - 20 days

6. END-USER TESTING

Test run with 3-5 users only. Identify missing features and issues.

7 - 14 days

7. GO-LIVE

Prepare go-live: User training and learn important Anveo features.

2 - 5 days

Test all defined business processes on the app.

Please find details to each step on the following pages.

All times are unbinding estimates of typical sales and service solutions to support your project planning. Anveo is not responsible for any project plans or quotes of Anveo partners.

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How To Present Anveo

Anveo provides two different ways to present the solution.

Prepare Your Presentation

- Download PowerPoint templates from the Anveo Knowledge Base.
- Order free marketing material.
- Get-to know Anveo's Top Features: (like for the app)
  1. **Offline Capability**
  2. **Flexible Configuration**
  3. **Full-Featured App**

NO INSTALLATION REQUIRED **+**

USER INTERFACE ONLY
NO ANVEO CONFIGURATION **–**
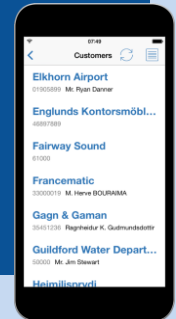
Anveo Presentation System

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WEB PORTAL

No installation required, just open your browser. Demo Account Cards available for sales personnel and prospects. Request via e-mail for free

MOBILE APP

Download for free from the App Store (iOS), Google Play or Microsoft Store.

Runs under iOS (iPad, iPhone), Android Smartphone and Tablet PC and Windows 10.

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Your Own Presentation System

LOCAL, HOSTED OR CLOUD

RECOMMENDED

Installation of Anveo Client Suite on your presentation system or on a server on the internet. effort: about 2-4 hours

We provide free Anveo presentation licenses

ACCESS

Same access like with Anveo's presentation system.

+ SHOW ANVEO'S FLEXIBLE CONFIGURATION

+ YOUR OWN DATA
ISV-solution or customer data

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Do an On-Site Workshop

Get to know all requirements and expectations of your customer.

- Invite all **key-users** and **decision makers**.
- Designate a **recorder** to get a well-documented workshop result.
- Repeat **Anveo presentation**, some participants may not have seen Anveo before.
- Talk about desired functionality on *"page-level"* – see example on the right.
- Be honest with **limitations**. Example for the app: There is a limit on max. amount of data or complexity of business processes. A mobile device is no SQL server.
- **Anveo Client Suite is "as-is"**: Do not sell solutions you cannot provide with Anveo. Anveo is not responsible for wrong expectations. Test your desired functionality first using a **free Anveo test license**.

TOP 5 HOT TIPS

1. Talk about **all requirements**.
2. Do not accept *"like in Dynamics"* – **talk about details**.
3. Divide all requirements into *must-haves* and *nice-to-haves*. First things first: Do not go-live with all features at once.
4. An **estimate go-live** cannot be planned at this time.
5. Anveo is a tool-kit to build individual solutions including a template for quick start. But it is **not a ready-to-use solution**.
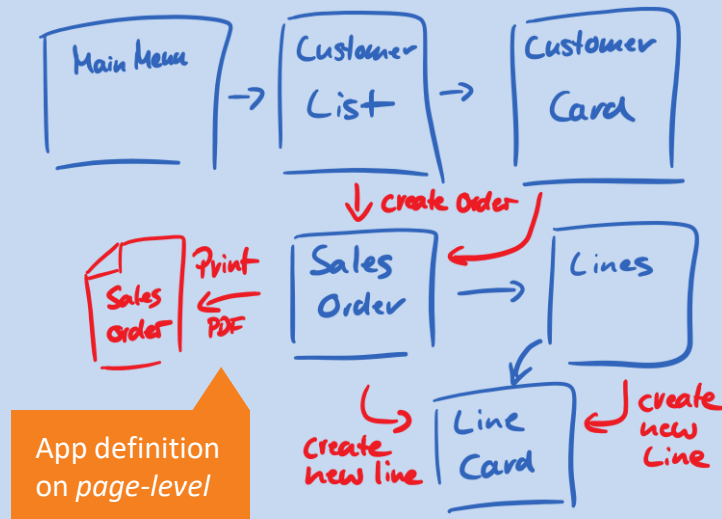
Page Definition Example

App definition on *page-level*

This overview provides an example on how the solution will look. It is also a very useful document for the development team to implement the solution later.

10 TOPICS TO TALK ABOUT

1. **Number series** management
   Temporary or pre-assigned nos.?
2. **FlowFields** or their replacements
   like inventory or customer balance
3. Data definition like **filters** on users
4. Offline price calculation
   or other **local business logic**
5. Offline capable **reports**
6. **Conflict management**
   Who is allowed to change data?
   How to avoid conflicts?
   Who wins in conflict situation?
7. **Statistic** views
8. Expected amount of data and app
   synchronization speed.
9. **Pictures**
10. App performance on complex
    business processes.

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Technical Installation of Anveo Client Suite

An installation can be done quickly if all requirements are well-prepared.

1. PREPARE INSTALLATION

Requirements
- *Microsoft Dynamics 365 BC / NAV 2009R2 – 2018 test or live database*
- *Dynamics BC/NAV Server including Web Services must be installed and configured properly.*
- *Please find all requirements in "Installation Documentation.pdf"*

Do not run your first installation on a live system.

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2. INSTALLATION

The installation includes all steps of "installation documentation" like Anveo Server installation, fob import, Anveo Base App import…
All preparations must be finished to run an installation, otherwise it must be interrupted.
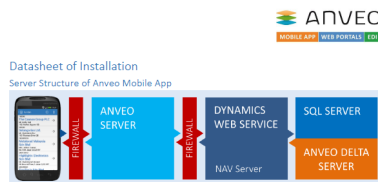Online ½ - 1 days, On-Site is not required and not recommended

Configuration of Synchronization Packages and Anveo Pages is not part of this step. See 4./5.

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DELEGATION

If you are using Microsoft Dynamics NAV 2009 R2 and Web Services is not installed on SQL Server, you have to configure *DELEGATION*. This is a complex and very time-consuming process. Anveo technically can run on this installation scenario. However, Anveo Support cannot help setting up delegation. This is a infrastructural task for Active Directory specialists. **We highly recommend to install Web Services on SQL server for 2009 R2.**

The installation datasheet is a very helpful document for the installation.

Datasheet of Installation
Server Structure of Anveo Mobile App

Parameters of Installation

PROJECT NAME	
DATE	
INSTALLED BY	
CONTACT	
PHONE / E-MAIL	
↓ REQUIRED IN INSTALLATION STEP	
DYNAMICS NAV VERSION & BUILD	C1
ANVEO CLIENT SUITE VERSION	
TYPE OF INSTALLATION	B3 ☐ PRESENTATION ☐ DEVELOPMENT ☐ LIVE
ANVEO ADD-ONS	C2 ☐ SALES ☐ SERVICE
SERVER NAME SQL + DATABASE NAME	D1
SERVERNAME WEB SERVICE (NAV SERVER) AND INSTANCE NAME	B2b, E1b, E1c
PUBLIC URL OF ANVEO SERVER	F4a
SERVER NAME ANVEO SERVER	E1d, F4a
DOMAIN	B2a
DYNAMICS NAV USER NAME FOR ANVEO SERVER	B2a
DEFAULT COMPANY	B2c, E1b, E1c
TCP PORTS ANVEO SERVER	☐ DEFAULT: 8888 / 7020 / 7021

TOP 3 HOT TIPS

1. Prepare your infrastructure before an installation appointment.
2. Fill out the installation datasheet (together with Anveo support).
3. Avoid a delegation scenario with NAV 2009 R2.

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User Interface Configuration

In this step, a mock-up of the desired app will be created.

IMPLEMENTATION OF NAVIGATION

An Anveo Client Suite Developer uses the workshop results from step 2 to build a read-only mock-up solution. This includes:

- *Main Menu and Anveo Pages including fields and menus*
- *Synchronization Package to get demo data and to test total amount of data. (Anveo Mobile App only)*

Only include required business code to make the mock-up running. Fine-tuning of data processing will be done in step 5.

MOCKUP-PRESENTATION

Present the mock-up to 2-5 end-users.

Include feedback from end-users for a second or third mock-up presentation.

STEP 5 DATA PROCESSING

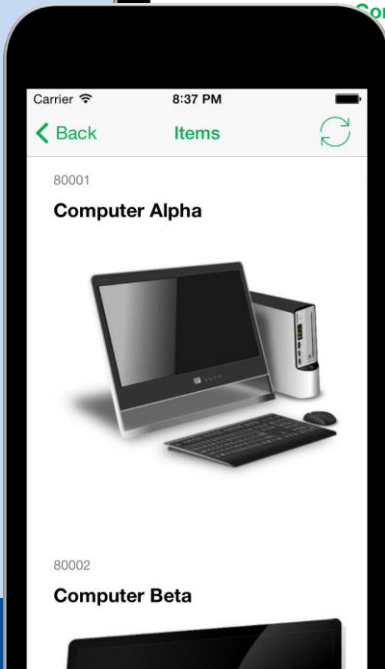Only continue after users final approval!

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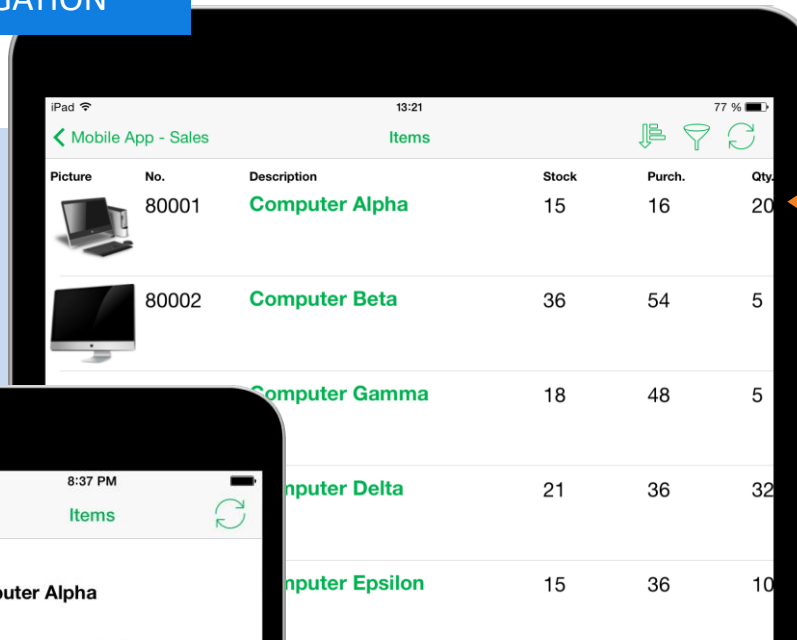
Talk about desired operating systems and device sizes.

TOP 3 HOT TIPS

1. The first goal is an idea of the app or web portal, not a full-running solution. **Communicate this before presenting!**
2. Leave out synchronization topics completely in this step.
3. Keep the implementation time for Anveo Script and AL / C/AL code low. Only include code that is required for a first presentation.
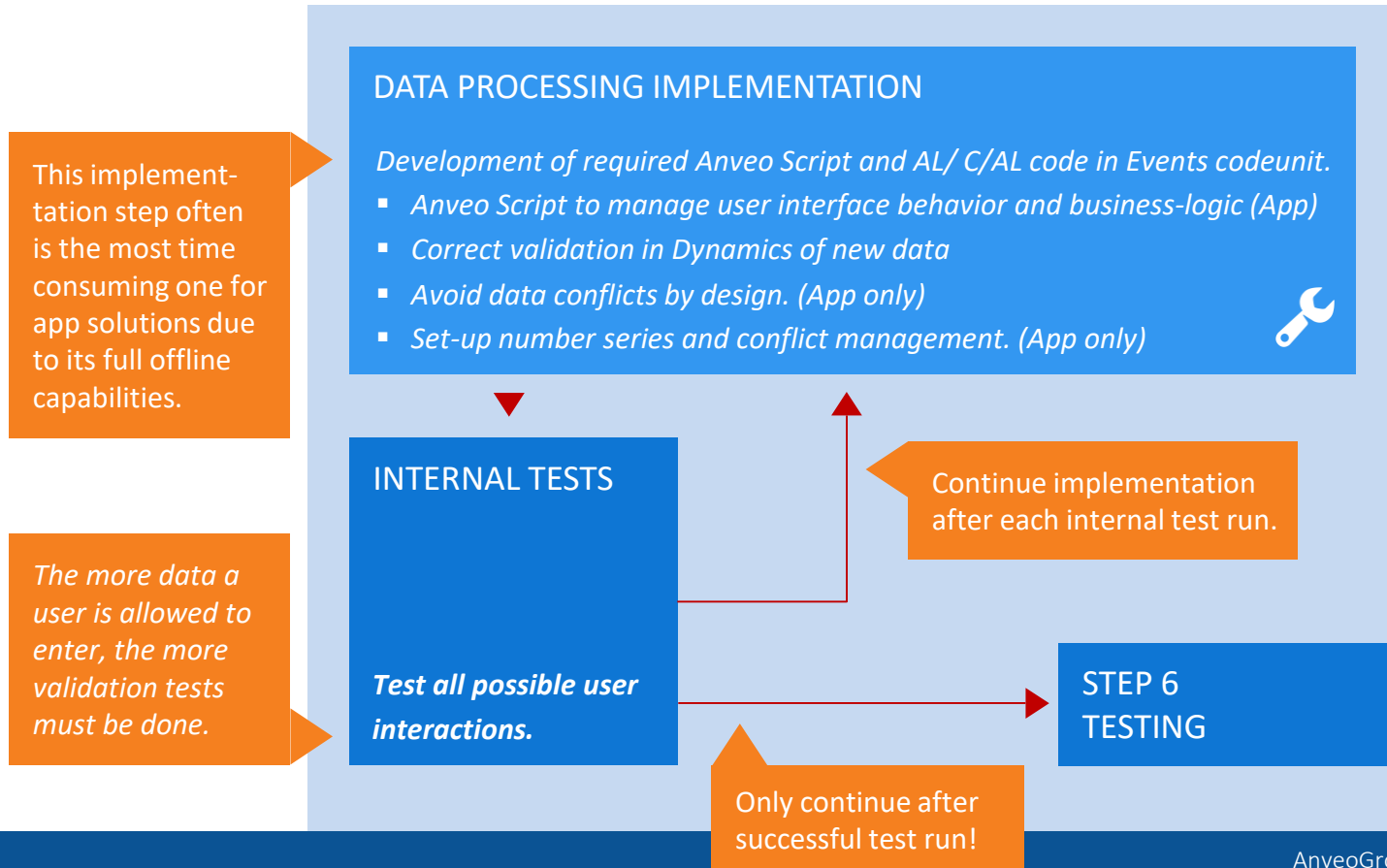
5. DATA
PROCESSING

Implementation of Data Processing

This is the core implementation of the app based on the mock-up of step 4.

DATA PROCESSING IMPLEMENTATION

Development of required Anveo Script and AL/ C/AL code in Events codeunit.
- *Anveo Script to manage user interface behavior and business-logic (App)*
- *Correct validation in Dynamics of new data*
- *Avoid data conflicts by design. (App only)*
- *Set-up number series and conflict management. (App only)*

This implement-tation step often is the most time consuming one for app solutions due to its full offline capabilities.

INTERNAL TESTS

The more data a user is allowed to enter, the more validation tests must be done.

Test all possible user interactions.

Continue implementation after each internal test run.

Only continue after successful test run!

STEP 6
TESTING

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5. DATA PROCESSING

- **Minimize the amount of data** as much as possible using filters in Anveo Synchronization Packages.
- **Test your application** on all devices that are planned for a go-live.
- Pose your questions to **Anveo support early**.
- If you have any issues, keep in mind that some request may take up to 6-8 weeks before an updated version may be available due to Apple's restricted app publishing policies.

TOP 3 HOT TIPS

1. Test your application with **real data**. A large amount of data may not fit users app speed expectations.
2. Run tests with parallel synchronizations of **multiple devices** to detect missing LOCKTABLE in your events codeunits.
3. You only have **one "first-impression"**. Give the solution to users after successful testing only.

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End-User Testing Process

After internal tests are successful, end-users may begin test runs.

END-USER TEST RUN

Ship the application to 3-5 designated test users.
- *Provide a user training on how-to use your solution.*
- *Run all use cases by end-users.*

Do not test with more than 3-5 users at once. This will allow you to detect open issues with a small group of users only.

UPDATES 🔧

Review user feedback and update your solution accordingly.

Re-submit to user for a next test run.

STEP 7 GO-LIVE

Only go-live after successful test run!

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APP DISTRIBUTION AND SUPPORT PROCESSES

Be aware that app distribution and support processes are more complex than having one central Microsoft Dynamics implementation. Users are usually not in the office. And in the event of issues, remote support cases are more difficult to solve.

Some users do not even know how to do a screenshot of the device and send it via e-mail to administrator to identify issues.

TOP 5 HOT TIPS

1. Do not skip this **very important testing process**.
2. Do not go-live before **all processes** are intensively tested and approved by end-users.
3. Do not underestimate the additional workload of a **remote user scenario**.
4. Include **error scenarios** in your testing processes.
5. Provide a good **training** to end-users.

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Roll-Out to Users

PREPARE YOUR GO-LIVE

Before roll-out, prepare the following:
- *Test update procedures (like new page definitions)*
- *Inform **Anveo support** two weeks in advance of a planned go-live date and **reserve support times** to get high priority response times.*

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GO-LIVE

Control and test correct validation of incoming data.

Convey to your development team that a new solution is in use on your system. Any changes to database structures may cause havoc. Develop a modification strategy.

Roll-out in waves if you have a large number of users like ¼ of all in each wave.

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**CONGRATULATIONS
ON YOUR SUCCESSFUL GO-LIVE**

TOP 3 HOT TIPS

1. Delete inactive *Anveo User Devices* to keep the amount of data in the Anveo Delta Server low. *(App only)*
2. Activate all log features during the first days of go-live. This may impact performance but will provide valuable information in the event of any issues.
3. Learn about Anveo emergency features like the *Emergency Data Export* and *Manual Processing* of incoming data. *(App)*

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8. STEPS TO SUCCESS

1. Have a development system **separate** from the LIVE system.

2. **Test ALL flavors** and not just 80%. Failing processes in the LIVE system will be expensive and demotivate end users.

3. Do a **dress rehearsal** under LIVE conditions (real data, real processes, real environment).

4. Put **first things first** and start with a minimum viable product. You will identify necessary features and process improvement whilst working with the App.

5. Consider a **phased go live** with key users going LIVE first.

6. **Know your tools** when setting up synchronization packages (e.g. sendonly, background synchronization, precalculation, pull data on demand)

7. **Reduce the amount of data** by reducing the complexity of synchronization packages.

8. Clarify the synchronization process.

9. **Be proactive** and check the status of your mobile devices in the Anveo device overview to identify unused devices and synchronization issues (available from Anveo 9.0)

10. **Report test results** and deadlines quickly to Anveo

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8. STEPS TO SUCCESS

11. Clearly **define responsibilities** between customer, partner and Anveo.

12. Provide a **separate NAV server for Anveo** to improve stability and performance.

13. **Monitor the performance** of the Dynamics and SQL server.

14. Build Anveo upon **existing processes** within Dynamics. Key Users have to know the processes in Dynamics in order to be able to design them in the app.

15. **Provide access** to the customer system with a dedicated test user (for test and live system)

16. **Consider using Mobile Device Management (MDM)** for app distribution and centralized testing of new app versions.

17. Subscribe to the Anveo knowledge base to **be up to date** about releases and technical announcements. Distribute information about updates to your customers.

18. Create **clean up tasks** and automated batch jobs.

19. **Reserve time** for quality assurance, dress rehearsal and go live. Don't set the expectation that Anveo is a plug and play product.

20. **Pay attention to specialties** in the Dynamics database when having Anveo installed.

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AnveoGroup.com
info@AnveoGroup.com

Phone
Europe   +49 (0)40 211 078 101
US   (813) 448 7617