Perceptive Interact for Microsoft Dynamics AX

Installation and Setup Guide

Version 1.2
Compatible with ImageNow, version 6.7.x

perceptivesoftware

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Overview

Perceptive Interact for Microsoft Dynamics AX is a content management solution for users of Microsoft Dynamics AX. This solution enables you to add and manage documents in an ImageNow system using the Microsoft Dynamics AX user interface.

This document explains how to set up Perceptive Interact for Microsoft Dynamics AX.

Required components

Perceptive Interact for Microsoft Dynamics AX model

You must have the Interact for Microsoft Dynamics AX model ready to be imported into Microsoft Dynamics AX.

Software prerequisites

Before you set up Interact for Microsoft Dynamics AX, you must have the following software installed on the target machine.

- Microsoft Dynamics AX Server, version 2012 R2
- Microsoft Dynamics AX Client, version 2012 R2
- ImageNow Server, version 6.7
- ImageNow Client, version 6.7

  Notes

  - Install ImageNow Client on the same machine on which you install Microsoft Dynamics AX Client.
  - For more information on installing ImageNow Client and ImageNow Server, refer to *ImageNow Server and Client Installation and Setup Guide* for your environment.
- Perceptive Integration Server, version 6.7

  Note For more information on installing Perceptive Integration Server, refer to *Perceptive Integration Server Installation and Setup Guide*.

You must have the following files ready for use.

- iScripts:
  - DAX_Doc_ContentServer.js
  - DAX_Doc_VersionControl.js
- INFolderTreeViewer.dll

Licenses

You must have the following ImageNow licenses.

- ImageNow Server, version 6.7
- Perceptive Integration Server, version 6.7

Conditions for importing the solution

You must prepare the system as follows before importing the solution.

- Ensure that the Microsoft Dynamics Server is running.
- Ensure that the Perceptive Integration Server is running.
- Set up ImageNow so that the appropriate folder types, document types, custom properties, workflow queues, and iScripts are available for use by Interact for Microsoft Dynamics AX.

  Note For more information on configuring ImageNow, refer to ImageNow Administrator Help.
- Verify that you have the following permissions to work with the model.
  - Administrative permissions on the local computer
  - Administrator rights in Microsoft Dynamics AX
  - In Microsoft SQL Server:
    - Membership in the Securityadmin server role on the SQL Server instance
    - Membership in the db_owner role in the Microsoft Dynamics AX database

Installation and setup

The following sections provide instructions on how to set up Interact for Microsoft Dynamics AX.

- Copy files to the relevant folders
- Import the Perceptive Interact for Microsoft Dynamics AX model
- Set up Interact for Microsoft Dynamics AX user privileges
- Configure ImageNow parameters
- Configure Interact for Microsoft Dynamics AX user interface controls
- Run a batch job

Copy files to the relevant folders

1. To make the iScripts available to ImageNow Server, copy and paste DAX_Doc_ContentServer.js and DAX_Doc_VersionControl.js to the **[*drive*:]\inserver6\script** directory.
2. Copy and paste INFolderTreeViewer.dll and INFolderViewer.dll to the Microsoft Dynamics AX Client Bin folder.

   Example: C:\Program Files (x86)\Microsoft Dynamics AX\60\Client\Bin

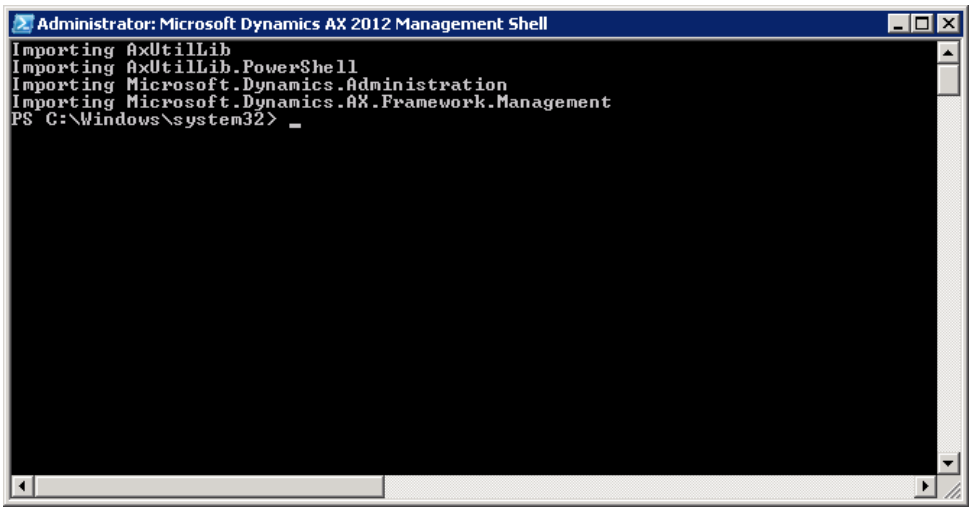
Import the Perceptive Interact for Microsoft Dynamics AX model

Before importing the model, complete the following steps.

1. Close the client connections to the Application Object Server (AOS) instance that you are working with.
2. If more than one server is using the same database, stop all other AOS servers.

To import the model, complete the following steps.

1. On the **Start** menu, point to **All Programs**, point to **Administrative Tools**, and then click **Microsoft Dynamics AX Management Shell**. The following diagram shows how the window should look when it is ready.

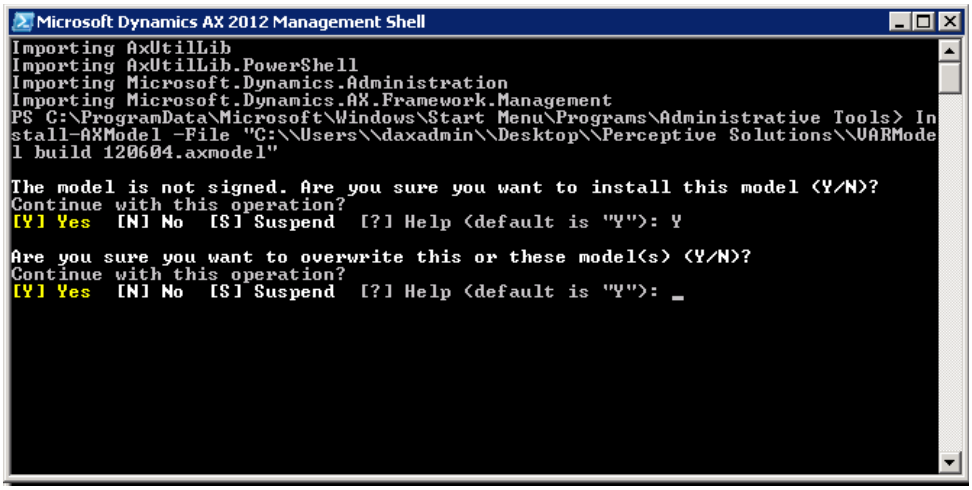


2. At the Windows PowerShell command prompt, type the import command, and then press **ENTER**. The import command syntax is `Install-AXModel -File "<File Name>"` where <*File Name*> is the absolute path of the file.

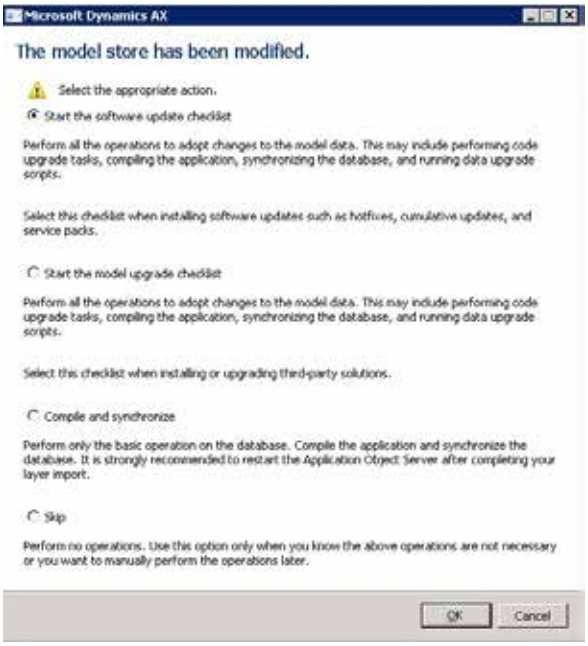
   Example: `Install-AXModel -File "C:\\DAXModel\\VARModel build 120607.axmodel"`

   This command prompts the following security messages.

   - Are you sure you want to install this model <Y/N>?
   - Are you sure you want to overwrite this or these model<s> <Y/N>?



3. Enter **Y** for each query.
4. After completion, start the AOS.
5. Open Microsoft Dynamics AX Client. A message appears with the information that the new model has been modified and provides options to run the model as required.



6. To successfully upgrade the model, perform one of the following actions.
   - If you are uploading the model for the first time, select **Start the model upgrade checklist**, click **OK**, and then proceed with the instructions that follow.
   - If you have uploaded the same model before, select **Compile and synchronize** and click **OK**.

7. If you have selected the **Compile and synchronize** option, generate **Incremental CIL Build From X++** after completing the compilation and database synchronization.
    1. To generate **Incremental CIL Build From X++**, open **New Development workspace** and right-click **AOT**.
    2. In the list of options, click **AddIns**, and then click **Incremental CIL Build From X++**. When the process is complete, proceed with the usual operations.

Set up Interact for Microsoft Dynamics AX user privileges

Interact for Microsoft Dynamics AX supports the following user privileges.

- Interact administrator
- Interact user

Assign the appropriate privilege to an Interact for Microsoft Dynamics AX user. The following table shows the functions that are available to the respective user.

Feature	Interact administrator	Interact user
Customize Interact administration module	P	
Set up Interact parameters for a specific form	P	
Capture a document	P	P
View a document	P	P

Note For information on how to assign privilege, refer to Microsoft Dynamics AX Help.

Configure ImageNow parameters

To enable Interact features, you must configure the ImageNow parameters in Microsoft Dynamics AX.

1. Launch Microsoft Dynamics AX Client.
2. In the Navigation pane, click **Interact administration**.
3. In the **Interact administration** area page, under **Setup**, click **ImageNow parameters**.
4. In the **ImageNow parameters** window, in the left pane, click **Credentials**.
5. In **Set up requirements to log in to ImageNow Server**, provide the following credentials.
    - **User name**. Enter the ImageNow user name. The user must have privilege settings in ImageNow to browse and create documents.
    - **Password**. Enter the password for the ImageNow user.
    - **Perceptive Integration Server URL**. Enter the full URL of Perceptive Integration Server.
6. To verify the credentials and test the ImageNow Server connection, click **Test connection**.

Configure Interact for Microsoft Dynamics AX user interface controls

To make the Interact controls available in the Microsoft Dynamics AX user interface, you must configure them accordingly.

Interact for Microsoft Dynamics AX controls

The following Interact for Microsoft Dynamics AX controls appear in the user interface.

Control Name	Type	Location in Microsoft Dynamics AX	Description
Capture	Button	Action pane	Using the **Capture** button, you can add a document and store it in ImageNow.
Interact	FactBox or tab	FactBox pane or menu bar	The **Interact** FactBox acts as a folder viewer. It is divided into the following sections. · **Content**. This provides a tree structure view of all the folders and related documents in ImageNow. To view a document in any folder, double-click the document icon or name. · **Document preview**. This provides a thumbnail view of the document you select in **Content**. To view the document, click the thumbnail. **Note** The **Interact** tab appears on the forms that do not have a FactBox pane.
Document indicator	Icon	Grid	Denotes captured documents. In a form, the document indicator appears beside a record if that record has related documents stored in ImageNow. To synchronize ImageNow with Interact for Microsoft Dynamics AX data, you must run a batch job at regular intervals. Refer to the "Run a batch job" section.

Configure Interact for Microsoft Dynamics AX controls

You can show or hide the Interact for Microsoft Dynamics AX controls in the Microsoft Dynamics AX user interface according to the following options.

- Show or hide all Interact controls across all modules.
- Show or hide specific Interact controls across all modules.
- Show or hide specific Interact controls in a specific module.
- Show or hide specific Interact controls in a specific form.

To configure Interact for Microsoft Dynamics AX controls, complete the following steps.

1. Launch Microsoft Dynamics AX Client.
2. In the Navigation pane, click **System administration**.
3. In the **System administration** area page, under **Setup**, click **Checklists**, and then click **Initialization checklist**.

4. In the **Initialization checklist** dialog box, open **Prepare initialization**, and then click **Configure application functionality**.
5. In the **License configuration** window, in the tree control, perform one of the following actions.

   Note To select a check box, ensure that the parent check box in the hierarchy is selected.

   - To show or hide all Interact controls across all modules, select or deselect **Interact**.
   - To show or hide an Interact control across all modules, under **Interact**, select or deselect the specific Interact control. For example, **Folder viewer**.
   - To show or hide an Interact control in a specific module, under **Interact**, under the specific Interact control, select or deselect the module. For example, **Accounts payable**.
   - To show or hide an Interact control in a specific form, under **Interact**, under the specific Interact control, under the specific module, select or deselect the form. For example, **Purchase orders**.
6. Click **Apply**.
7. In the **Configuration** dialog box, click **Yes** to synchronize all tables.
8. Click **OK**.
9. Close the **Initialization checklist** dialog box.

Run a batch job

You must run a batch job to synchronize ImageNow content with Interact for Microsoft Dynamics AX data. You must create the batch job and then add a task before running the batch job. The following procedures explain how to run a batch job.

Create a batch job

1. Launch Microsoft Dynamics AX Client.
2. In the Navigation pane, click **System administration**.
3. In the **System administration** area page, under **Inquiries**, click **Batch jobs**, and then click **Batch jobs**.
4. In the **Batch job** list page, press CTRL+N to create a new batch job.
5. Enter a description for the batch job.
6. In the **Scheduled start date/time** field, enter the date and time at which you want the batch job to run.

   Note If you do not enter a date and time, the current date and time appear by default.
7. Press CTRL+S to save the job.

Set up a recurrence

To set up a recurring job, click the **Recurrence** tab and in the **Recurrence** dialog box, enter a range and a pattern for the recurrence.

Set up alerts

To set up an alert for the batch job, click the **Alerts** tab and then set up alerts for the batch job.

Note Alerts are always sent if on the **General** tab, the **Save job to history** option is set to **Always**. If this option is set to **Errors only**, alerts are sent only if the job is unsuccessful. If this option is set to **Never**, alerts are not sent.

Add a task to the batch job

1. In the **Batch tasks** form, click the **View tasks** button.
2. Press CTRL+N to create a new task.
3. Enter a description for the batch task.
4. In the **Company accounts** list, click the company database in which the task will run.
5. In the **Class name** list, click **INDocumentIndicatorSynchronizedBatch**.
6. Press CTRL+S to save the task.
7. Click **Close**.