Perceptive Interact for Microsoft Dynamics AX

Installation and Setup Guide

Version 2.1.x
Compatible with ImageNow version 6.7.x

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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 ImageNow Server by using the Microsoft Dynamics AX user interface.

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

Required components

Software prerequisites

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

- Microsoft Dynamics AX Server, version 2012 R2, R2 CU6, or R2 CU7

- Microsoft Dynamics AX Client, version 2012 R2, R2 CU6, or R2 CU7

- 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 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 information on installing Perceptive Integration Server, refer to *Perceptive Integration Server Installation and Setup Guide*.

- .Net Framework, version 4 (full version)

    Note Do not install the client version.

You must have the following files ready for use.

- iScripts:
    - DAX_Doc_VersionControl.js
    - DAX_SearchFolderByPath.js

- Installers:
    - PerceptiveInteractforMSDynamicsAXSetupServer_2.1.x.xxx.exe
    - PerceptiveInteractforMSDynamicsAXSetupClient_2.1.x.xxx.exe

Based on the Microsoft Dynamics AX version you use, you must have one of the following Perceptive Interact for Microsoft Dynamics AX models ready to be imported into Microsoft Dynamics AX.

- PerceptiveInteractR22.1.x.xxx.axmodel

- PerceptiveInteractR2CU62.1.x.xxx.axmodel

- PerceptiveInteractR2CU72.1.x.xxx.axmodel

Licenses

You must have the following licenses.

- ImageNow Server, version 6.7

- ImageNow Client, version 6.7

- Perceptive Interact for Microsoft Dynamics AX

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 Perceptive Interact for Microsoft Dynamics AX.

  Note For 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

To set up Perceptive Interact for Microsoft Dynamics AX, perform the following procedures.

1. Download the required files from the Customer Portal.

2. Copy files to the relevant folders.

3. Run Perceptive Interact for Microsoft Dynamics AX Server installer.

4. Run Perceptive Interact for Microsoft Dynamics AX Client installer.

5. Import Perceptive Interact for Microsoft Dynamics AX model.

6. Set up user privileges.

7. Set up an environment to log in to ImageNow Server.

8. Connect to ImageNow Server.

The following sections provide instructions on how to complete each procedure.

Download the required files from the Customer Portal

1. Go to the Perceptive Software website at www.perceptivesoftware.com and log in to the Customer Portal.

2. In the Product Downloads page, search for all downloadable items for Perceptive Interact for Microsoft Dynamics AX, version 2.1.

3. Download the iScripts, installers, and the required model for your environment to a temporary directory on your computer.

Copy files to the relevant folders

1. To make the iScripts available to ImageNow Server, copy and paste the following .JS files to the **[*drive*:]\inserver6\script** directory.

   - DAX_Doc_VersionControl.js

   - DAX_SearchFolderByPath.js

2. Copy and paste the **PerceptiveInteractforMSDynamicsAXSetupServer_2.1.x.xxx.exe** file to the machine that hosts the Application Object Server (AOS).

3. Copy and paste the **PerceptiveInteractforMSDynamicsAXSetupClient_2.1.x.xxx.exe** file to the machine that hosts the Microsoft Dynamics AX Client.

Run Perceptive Interact for Microsoft Dynamics AX Server installer

1. Run the **PerceptiveInteractforMSDynamicsAXSetupServer_2.1.x.xxx.exe** file on the machine that hosts the AOS.

2. In the **Perceptive Interact for Microsoft Dynamics AX Server Installation Wizard** window, complete the following substeps.

   1. In the **Welcome to the Perceptive Interact for Microsoft Dynamics AX Server Installation Wizard** page, click **Next**.

   2. In the **License Agreement** page, scroll down to the end of the agreement, select the **I accept the terms in the license agreement** check box and then click **Next**.

   3. In the **Destination Folder** page, ensure that the default location is set to **C:\Program Files\Microsoft Dynamics AX\60\Server\MicrosoftDynamicsAX\bin**.

      - Optional. To set a different location, click **Change** and then, in the **Change Current Destination Folder** page, set the correct location and then click **OK**.

   4. Click **Next**.

   5. In the **Ready to Install the Program** page, to begin the installation, click **Install**.

   6. After the installation is complete, in the **Installation Wizard Completed** page, click **Finish** to exit the Installation Wizard.

Run Perceptive Interact for Microsoft Dynamics AX Client installer

1. Run the **PerceptiveInteractforMSDynamicsAXSetupClient_2.1.x.xxx.exe** file on the machine that hosts Microsoft Dynamics AX Client.

2. In the **Perceptive Interact for Microsoft Dynamics AX Client Installation Wizard** window, complete the following substeps.

   1. In the **Welcome to the Perceptive Interact for Microsoft Dynamics AX Client Installation Wizard** page, click **Next**.

   2. In the **License Agreement** page, scroll down to the end of the agreement, select the **I accept the terms in the license agreement** check box and then click **Next**.

   3. In the **Destination Folder** page, ensure that the default location is set to **C:\Program Files (x86)\Microsoft Dynamics AX\60\Client\Bin**.

      - Optional. To set a different location, click **Change** and then, in the **Change Current Destination Folder** page, set the correct location and then click **OK**.

   4. Click **Next**.

   5. In the **Ready to Install the Program** page, to begin the installation, click **Install**.

   6. After the installation is complete, in the **Installation Wizard Completed** page, click **Finish** to exit the Installation Wizard.

Import Perceptive Interact for Microsoft Dynamics AX model

Before importing the model, complete the following steps.

1. Close the client connections to the AOS instance that you are working with.

2. If more than one server is using the same database, stop all other AOS instances.

To import the model, complete the following steps.

1. On the **Start** menu, click **Command Prompt**.

2. Navigate to the directory for the management utilities. Typically, the location of this directory is %ProgramFiles%\Microsoft Dynamics AX\60\ManagementUtilities.

3. At the command prompt, type the import command and then press ENTER. The import command syntax is `axutil import /file:<File name>` where `<File name>` is the absolute path of the file.

4. After completion, start the AOS.

5. Open Microsoft Dynamics AX Client. A dialog box appears with the message that the new model has been modified and provides options to run the model as required.

6. To upgrade the model, in the **Microsoft Dynamics AX dialog** box, 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 uploaded the same model before, select **Compile and synchronize** and click **OK**.

7. Optional. If you selected the **Compile and synchronize** option, generate Incremental CIL build from X++ after the compilation and database synchronization is complete. To generate Incremental CIL build from X++, complete the following substeps.

    1. In Microsoft Dynamics AX Client, open **New Development Workspace** and right-click **AOT**.

    2. Click **Add-Ins** and then click **Incremental CIL generation from X++**. When the process is complete, proceed with the usual operations.

8. Optional. If you receive a database error, to troubleshoot, complete the following steps.

    1. Open Microsoft Dynamics AX Client.

    2. In the Navigation pane, click **System administration**.

    3. In the **System administration** area page, under **Periodic**, under **Database**, click **SQL administration**.

    4. In the **SQL administration** window, under **All tables**, select the following tables.

        - INAutoFoldersRecordLog

        - INDataBaseLogSetup

        - INEnvironmentProfile

        - INFolderSetup

        - INFormGroup

        - INImageNowFormSetup

        - INImageNowParameters

        - INRoleFormAccessSetup

        - INTmpCaptureCustomProperties

    5. In the menu bar, click **Table actions** and then click **Synchronize database**.

    6. Close all open windows.

    7. Restart Microsoft Dynamics AX Client.

Set up user privileges

Perceptive Interact for Microsoft Dynamics AX supports both administrative and end-user tasks. To enable a user to perform any task, in Microsoft Dynamics AX, under Information technology cycle, assign one or more of the following duties and respective privileges to a Microsoft Dynamics AX role as applicable.

For information on how to assign a duty or privilege to a role, refer to Microsoft Dynamics AX Help.

- **Maintain Interact setup**. This enables the user to perform all administrative tasks in Perceptive Interact for Microsoft Dynamics AX. Assign this duty to the Perceptive Interact for Microsoft Dynamics AX administrator.

- **Content maintain**. This enables the user to add documents by capturing files and maintain the content documents.

- **View content**. This enables the user to view content documents.

The following table lists the functions that are available to the user for each assigned duty.

Task	Maintain Interact setup	Content maintain	View content
Set up an environment for Interact	✓		
Create a form group for Interact	✓		
Configure a form for Interact	✓		
Modify an existing form configuration	✓		
Remove an existing form configuration	✓		
Set up form access for a Microsoft Dynamics AX role	✓		
Run a batch job to create automatic folders for old records	✓		
Capture a file		✓	
View a captured document			✓
Download a captured document			✓

Set up an environment to log in to ImageNow Server

To perform administrative tasks in Perceptive Interact for Microsoft Dynamics AX, the user must log in to ImageNow Server with the ImageNow user name and password. You must set up an environment to connect to ImageNow Server from within Microsoft Dynamics AX. The following steps explain how to set up such an environment.

1. In the Navigation pane, click **Interact administration**.

2. In the **Interact administration** area page, under **Setup**, click **Interact parameters**.

3. In the **Interact parameters** window, in the left pane, click **Environments**.

4. Under **Set up environments to log in to ImageNow Server**, in the **Environment profile** box, type a name for the environment.

5. In the **Description** box, type a brief description for the environment.

6. Under **Setup**, 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.

   - **Integration Server URL**. Enter the URL of Perceptive Integration Server.

7. To verify the credentials and test Perceptive Server connection, click **Test connection**.

8. To set this environment profile as a default environment profile during login, in **Interact parameters** window, complete the following steps.

9. In the left pane, click **General**.

10. Under **General**, in the **Default environment profile** list, select the environment profile.

Connect to ImageNow Server

To connect to ImageNow Server from within Microsoft Dynamics AX, complete the following steps.

1. Under **Connect to ImageNow Server**, under **Credentials**, in the **User name** box, type your ImageNow user name.

2. In the **Password** box, type your password.

3. Click **OK**.

Copy an existing configuration

You can copy an existing Perceptive Interact for Microsoft Dynamics AX configuration from one system environment to another. In Microsoft Dynamics AX, to move a configuration to a new environment, you must export and import groups of tables.

Export a configuration

To export an existing configuration, complete the following procedures.

Create a definition group

To create a definition group, complete the following steps.

1. In the Navigation pane, click **System administration**.

2. In the **System administration** area page, under **Common**, under **Data export/import**, click **Definition groups**.

3. In the **Definition groups** window, click **New**.

4. In the **Create table definition group** window, on the **General** tab, complete the following steps.

   - In the **Definition group** box, type a name for the definition group.

   - In the **Description** box, type a description for the definition group.

   - To clear all values on the **Options** and **Include table groups** tabs, click **Clear**.

5. Click **OK**.

Add tables to a definition group

You must add the following tables to the definition group you create.

- INDataBaseLogSetup

- INEnvironmentProfile

- INFolderSetup

- INFormGroup

- INImageNowFormSetup

- INImageNowParameters

To add each table to the definition group, complete the following steps.

1. In the **Definition groups** window, select the definition group and click **Select tables**.

2. In the **Select tables** window, click **Add**.

3. In the **Name of table** column, type the name of the table.

4. To update information about table references, in Development workspace, under **AOT**, under **Jobs**, execute the **INUpdateXRefTableRelation** job. To execute the job, right-click the job and then click **Open**.

5. In the **Select tables** window, for the **INDataBaseLogSetup** table, select the **Specify related tables** check box.

6. Click **Select related tables**.

7. In the **Select related tables** window, select the check box for the **DataBaseLog** table and then click **Close**.

8. In the **Select tables** window, click **Close**.

Notes

The DatabaseLog table is added when you select related tables for the INDataBaseLogSetup table.

The system is unable to transfer the INRoleFormAccessSetup table across environments as it is related to the SecurityRole table, which is a system table. You must reconfigure all security configurations manually.

Export the definition group

To export the definition group, complete the following steps.

1. In the **Definition groups** window, select the definition group and click **Export to**.

2. Under **Export options**, on the **General** tab, in the **Definition group** box, type the name of the definition group.

3. In the **File name** box, type a folder path and file name.

    Note To select an existing file path, click the folder icon.

4. Click **OK**.

5. In the **Definition groups** window, click **Close**.

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Import a configuration

To import an exported configuration, complete the following steps.

1. Make a backup of the database.

2. To delete previous data, in Development workspace, under **AOT**, under **Jobs**, execute the **INDeleteConfigData** job.

3. To update information about table references, in Development workspace, under **AOT**, under **Jobs**, execute the **INUpdateXRefTableRelation** job.

4. Create the same definition group with the same tables as in the source environment. Refer to Create a definition group and Add tables to a definition group sections in this document.

5. In the **Definition groups** window, select the definition group and click **Import**.

6. Under **Import options**, on the **General** tab, in the **Definition group** box, type the name of the definition group.

7. On the **Advanced** tab, select the following check boxes.

   - Include shared tables

   - Include system tables

8. On the **General** tab, in the **File name** box, type a folder path and file name.

   Note To select an existing file path, click the folder   icon.

9. Click **OK**.

10. In the **Definition groups** window, click **Close**.

    Note If identical tables already exist in your environment, you must delete them before importing the new configuration. In such a case, after you close the Definition groups window, a window with a list of tables appears.

11. To delete previous tables, under **Delete following tables**, click **Yes to all** and then click **OK**.

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