



dox42 AX

Documentation

Solutions Factory / dox42

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What is dox42 AX?

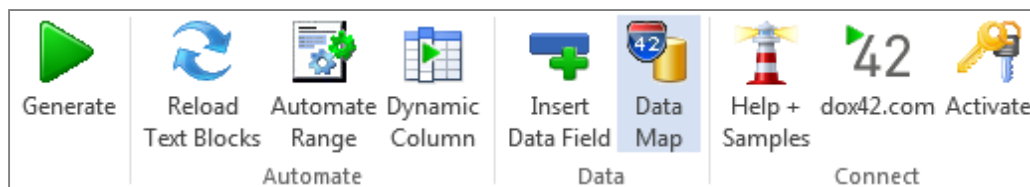
The dox42 AX data source enables you to use AX-data for document automation. Furthermore, multiple data sources can be integrated into one document at the same time.

dox42 AX is a supplementary package for dox42. dox42 AX consists of a Custom dox42 Data Source and an AX add-on.

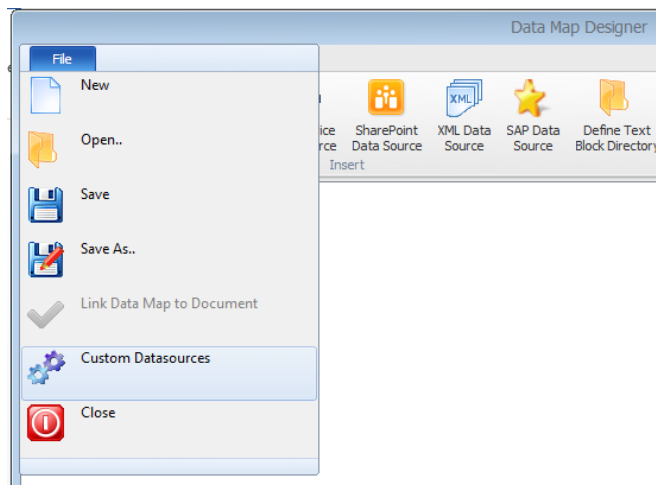
Installation for the dox42 Office Add-Ins

Save the dox42 AX files to a fixed directory on the computer, on which you want to use dox42. To do that, just unzip the file **dox42_AX_<Version Number>.zip**. The files will not be copied during installation and need to remain on the selected path.

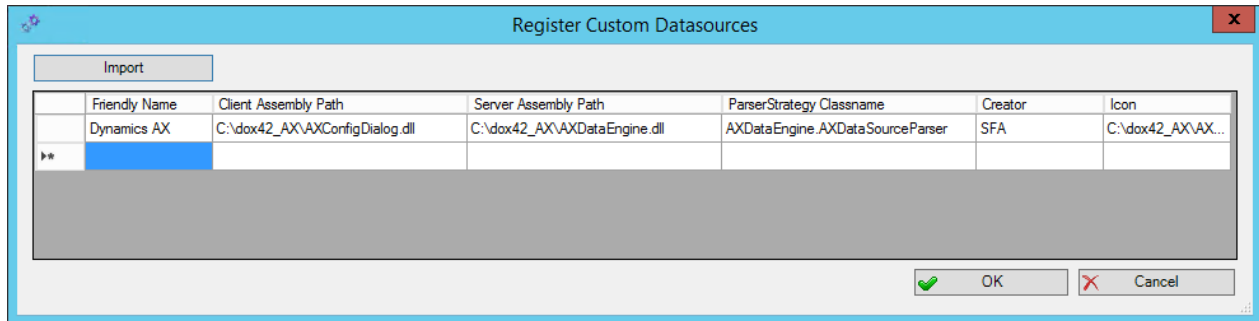
Start Word/Excel/PowerPoint, activate the dox42-Ribbon and select „**Data Map**“.



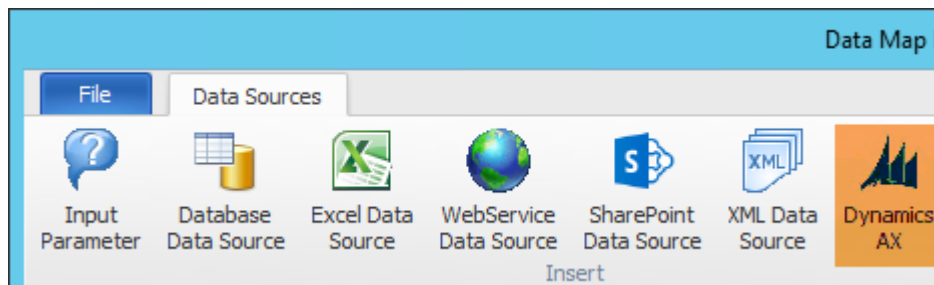
In the Data Map Designer select „**Data Map**“. Open the File-Menu and select „**Custom Datasources**“.



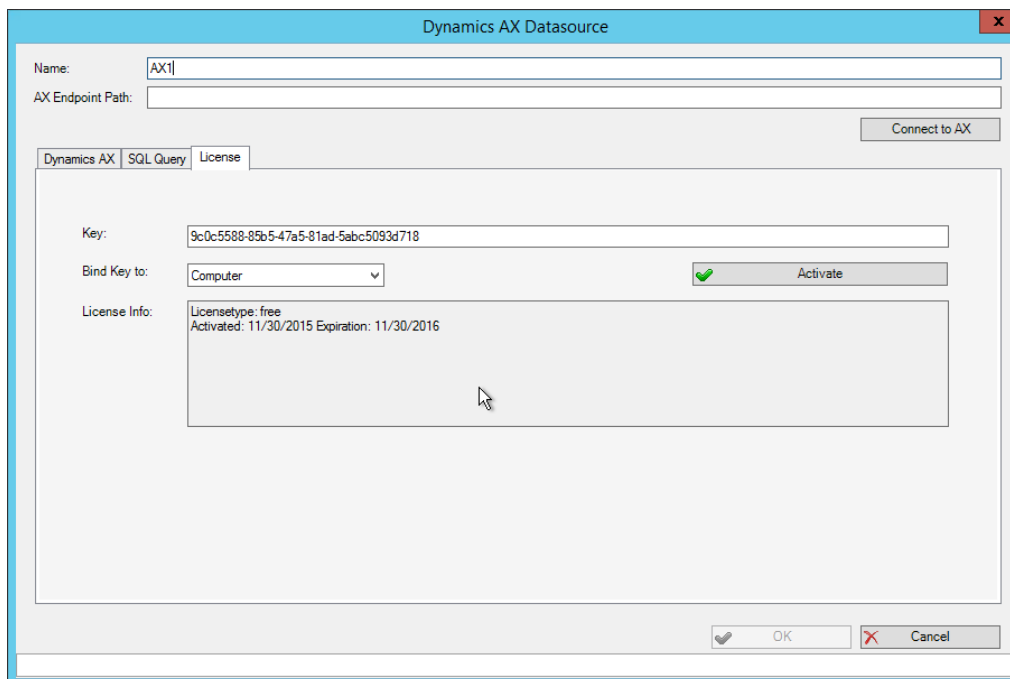
In the dialog „**Register Custom Datasources**“, you can import the Import Configuration (**AXDataSourceImport.config**). This way, the configuration will be defined in the Custom Data Source.



Now, the Custom Data Source is ready for use as any other dox42 data source.



Now you need to activate your license key. To do that, simply click on “Dynamics AX” and go to register “**License**”. Insert your license key here and click “Activate”. After installing the license the dialog can be closed with cancel or close button.



System Requirements

- ✓ Activated dox42 Office Add-In and dox42 Server
- ✓ Microsoft Dynamics AX 2012 R3 CU9

Installation of dox42 AX for dox42 Server

In order to use the Custom AX Data Source on the dox42 Server, please copy the following Assemblies in the /Bin directory on your dox42 Server:

- ✓ AXDataEngine.dll

Now the Custom AX Data Source has to be registered in the **web.config** of your server.

```
<customDataSources>
    <add key="AXDataEngine.AXDataSourceParser"
        value="AX Custom DS;c:\dox42Server\bin\AXDataEngine.dll;" />
</customDataSources>
```

Furthermore, please insert the license key in the **web.config**:

```
<appSettings>
    <add key="LicenseFilePath" value="c:\dox42Server\License" />
    <add key="LicenseKey" value="..." />
    <add key="dox42AXLicenseKey" value="..." />
    <add key="MailServer" value="smtp.1und1.de" />
    <add key="dox42ServerMail" value="mydox42server@dox42.com" />
    <add key="MailServerPassWord" value="..." />
    <add key="SendErrorsToMail" value="mymonitoring@dox42.com" />
    <add key="Certificate" value="c:\dox42Server\Certs\Certificate.pfx" />
    <add key="CertificatePassWord" value="..." />
    <add key="CheckServiceHeader" value="true" />
    <add key="UserPermissionODBCConnectionString"
        value="Driver={SQL Server Native Client 10.0};Server=...;Database=...;Uid=...;Pwd=...;" />
    <add key="CheckUserPermissionSQL"
        value="SELECT COUNT(*) FROM Users where Username =
            '%username%' and Password = '%password%' " />
    <add key="ThrowExceptionOnError" value="false" />
</appSettings>
```

For further details also take a look at the dox42 Server Documentation:
www.dox42.com/dox42Server.aspx.

Installation of dox42 AX Model on AX 2012 R3 CU9

Start the **Microsoft Dynamics AX Management Shell** as Administrator. At the command prompt enter

```
Install-AXModel -File <PathTo_dox42.axmodel>
```

to import the model into the default AX model store. To continue the installation, enter **Y** when you are prompted with “The model is not signed. Are you sure you want to install this model (Y/N)?”.

For further information on how to import an .axmodel file go to: <https://technet.microsoft.com/en-us/library/hh352314.aspx>.

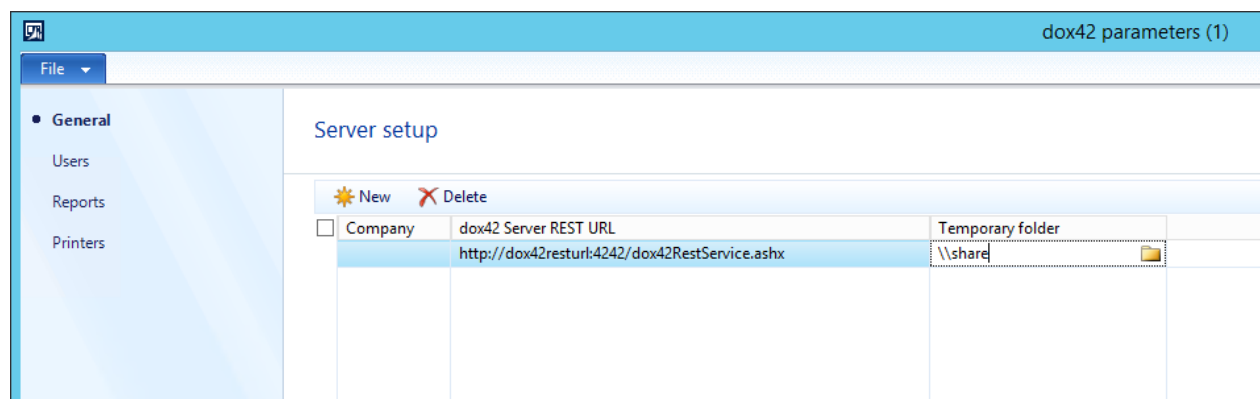
Restart the AOS service, and start the AX 2012 client afterwards. Please follow the upgrade checklist. Important steps are:

- ✓ Compile the model in X++
- ✓ Generate a full CIL
- ✓ Synchronize the data dictionary
- ✓ Deploy the web service called **SFADox42MSOfficeServices**

Under **System administration > Setup > Business intelligence > dox42 > dox42 parameters**, select the **General** tab page.

Create a new Server setup record by clicking on **New**.

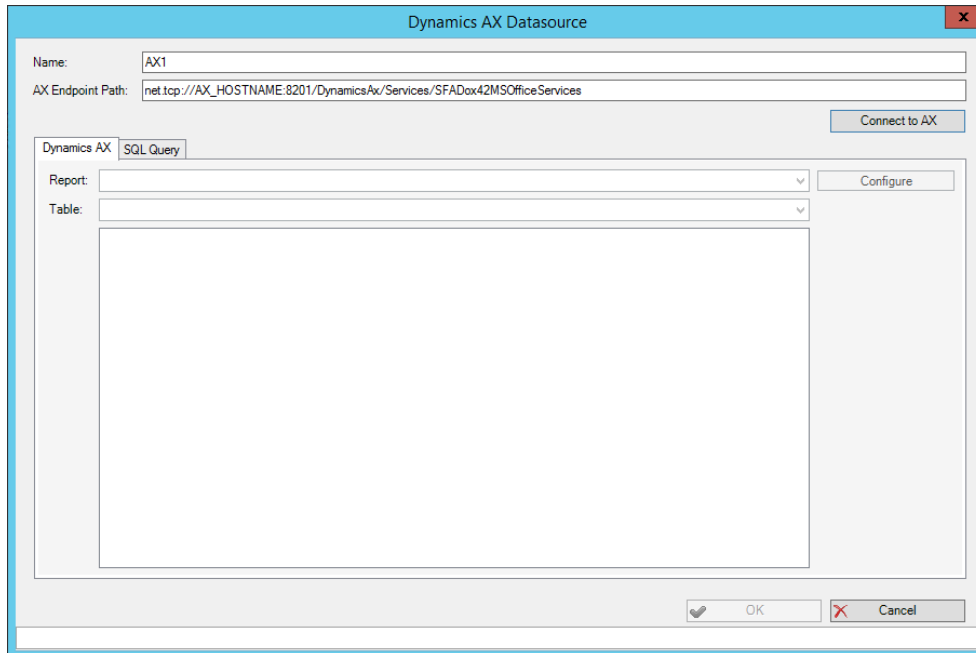
Under the column **dox42 Server REST URL**, enter the path to the dox42 Server service. At **temporary folder**, enter a directory where AX and dox42 service have read/write access to store temporary files.



Data integration with dox42 AX

Connection to AX

Configure AX Endpoint Path to establish a connection to an AX instance. It expects a net.tcp link of the dox42 AX Web service. You can look up the specific address in AX under **System Administration -> Setup -> Services and Application Integration Framework -> Inbound ports**. Look for the Port name **SFADox42MSOfficeServices**. The default port for net.tcp services is 8201.

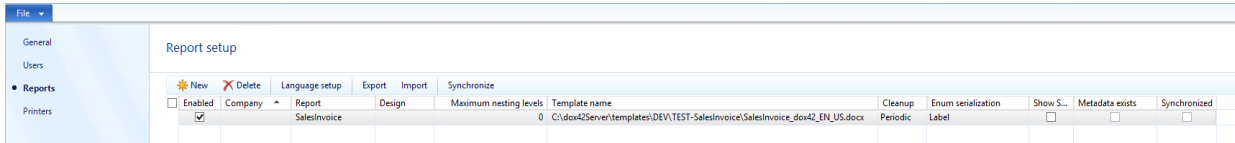


With the dox42 AX Custom AX Data Source you can:

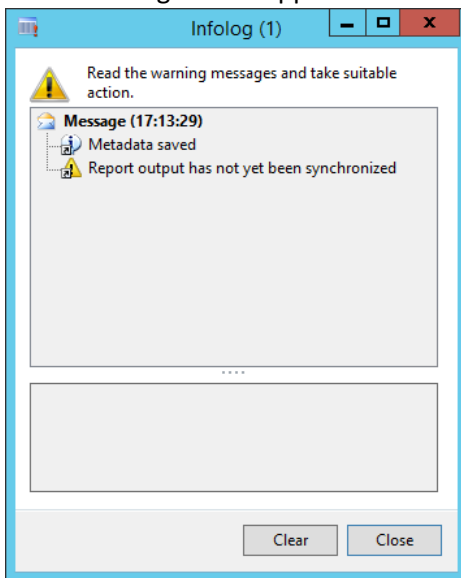
- ✓ Read and filter captured report data
- ✓ Customize queries to include AX table data

Test an existing report (Sample: Sales invoice)

1. In **dox42 parameters**, select the **Reports** tab.
2. Create a new record
In the report column enter **SalesInvoice**. At the column **Template name** enter the path to the template which will be used to create the report.

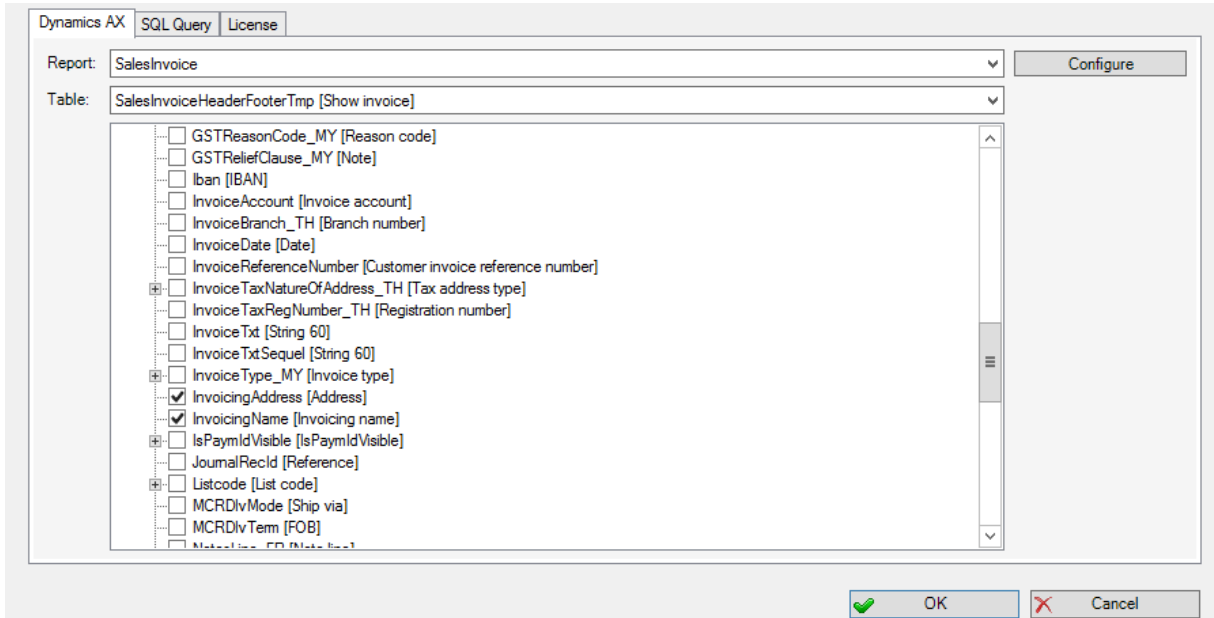


3. Print a **Sales invoice** from the **Invoice journal**.
An info dialog should appear:

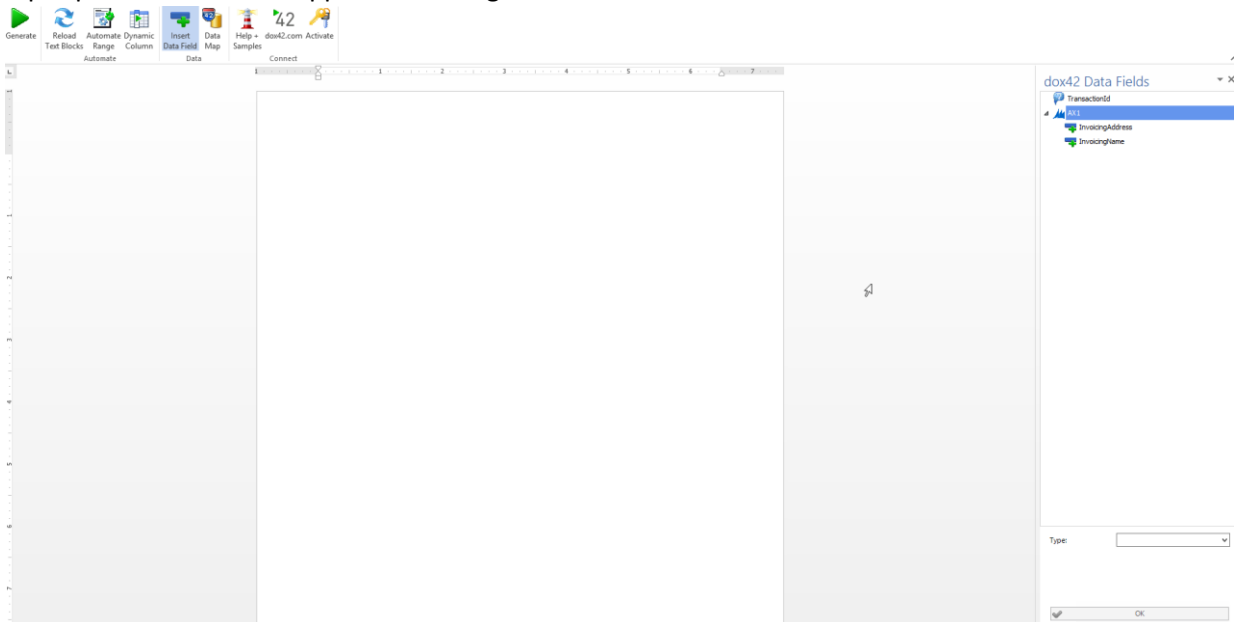


4. Open your template and create a new **Dynamics AX data source**.
Enter the **AX Endpoint** path and click **Connect to AX**.
5. Click on **Configure**. A new form should open called **Configure Metadata**.
From there, choose our newly created report **SalesInvoice**.
Confirm with **OK**. A message box may appear, to ask for synchronization. Click **Yes**.
6. Back at the main form select a custom table, e.g. **SalesInvoiceHeaderFooterTmp [Show invoice]**.

- In the Tree-View choose **Fields > InvoicingName [Name]** and **Fields > InvoicingAddress [Address]**. Confirm with **OK**.

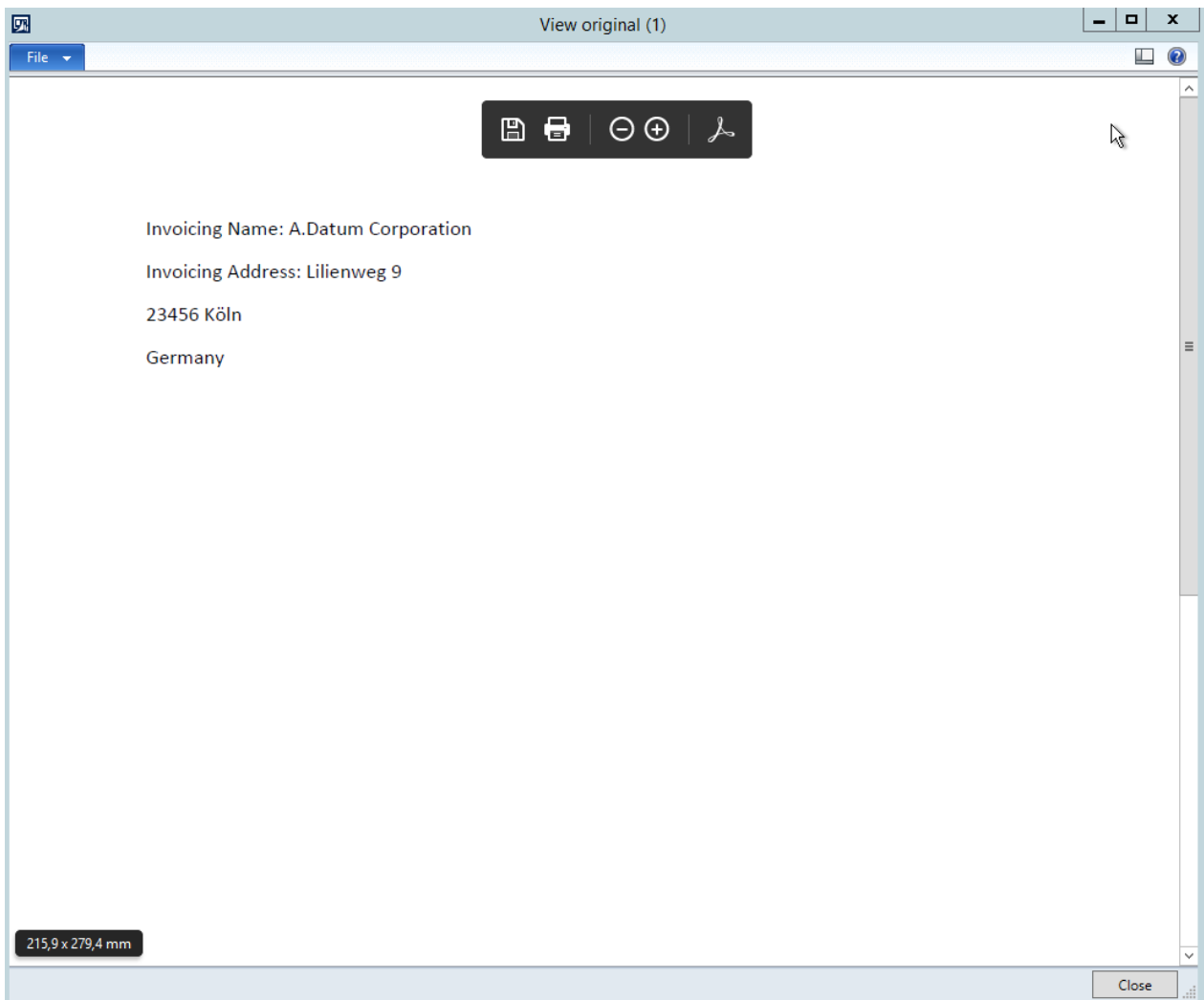


- Back in the Data Map Designer, create a new Input Parameter. In the textbox **Input Parameter Name**, fill in: **TransactionId**. Confirm with **OK**.
- Close the **Data Map Designer**. Save the changes to your **Data Map**.
- In the **dox42** tab, click on **Insert Data Field**. Our chosen data fields from AX and the **TransactionId** input parameter should appear on the right hand side.



- Put the two fields in our document. Save the changes made to the document and close it.
- Now print a **Sales invoice** again from the **Invoice journal**.

13. Congratulations! You have successfully installed dox42 AX!



Support

Should you have any questions, please do not hesitate to contact support@dox42.com. We are happy to help you!

Good luck with dox42!