



## **AX2XML Setup guide**

*Microsoft Dynamics AX 2012*



**Copyright © 2013.** In2Scope B.V. All rights reserved.  
Use of this document is at your own risk and without warranty.  
In2Scope B.V. cannot be held responsible for error's or damage  
that result from the use of this document.

## Table of content

1	Prerequisites.....	2
2	Setup AX2XML .....	3
2.1	Setup AX2XML Printers.....	3
2.2	Setup parameters.....	3
2.2.1	General .....	4
2.2.2	Framework reports.....	5
2.2.3	Document handling .....	5
2.2.4	Print management.....	6
2.2.5	Process output queue.....	7
2.3	Setup standard AX print management.....	8
2.4	Setup AX2XML print management .....	10
2.4.1	Create new specific print settings .....	11
2.4.2	Print a report .....	12



## 1 Prerequisites

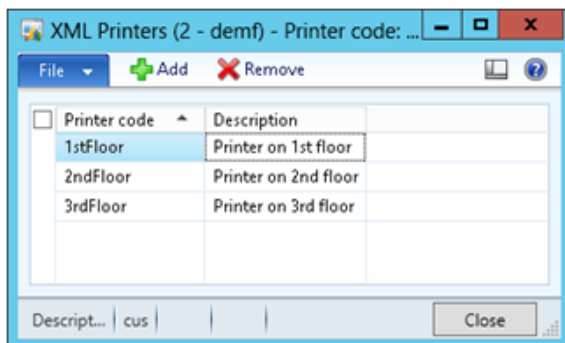
AX2XML is installed and activated in the ALF component.

Follow the procedure described in document AX2XML Installation guide for instructions concerning AX2XML installation.

## 2 Setup AX2XML

### 2.1 Setup AX2XML Printers

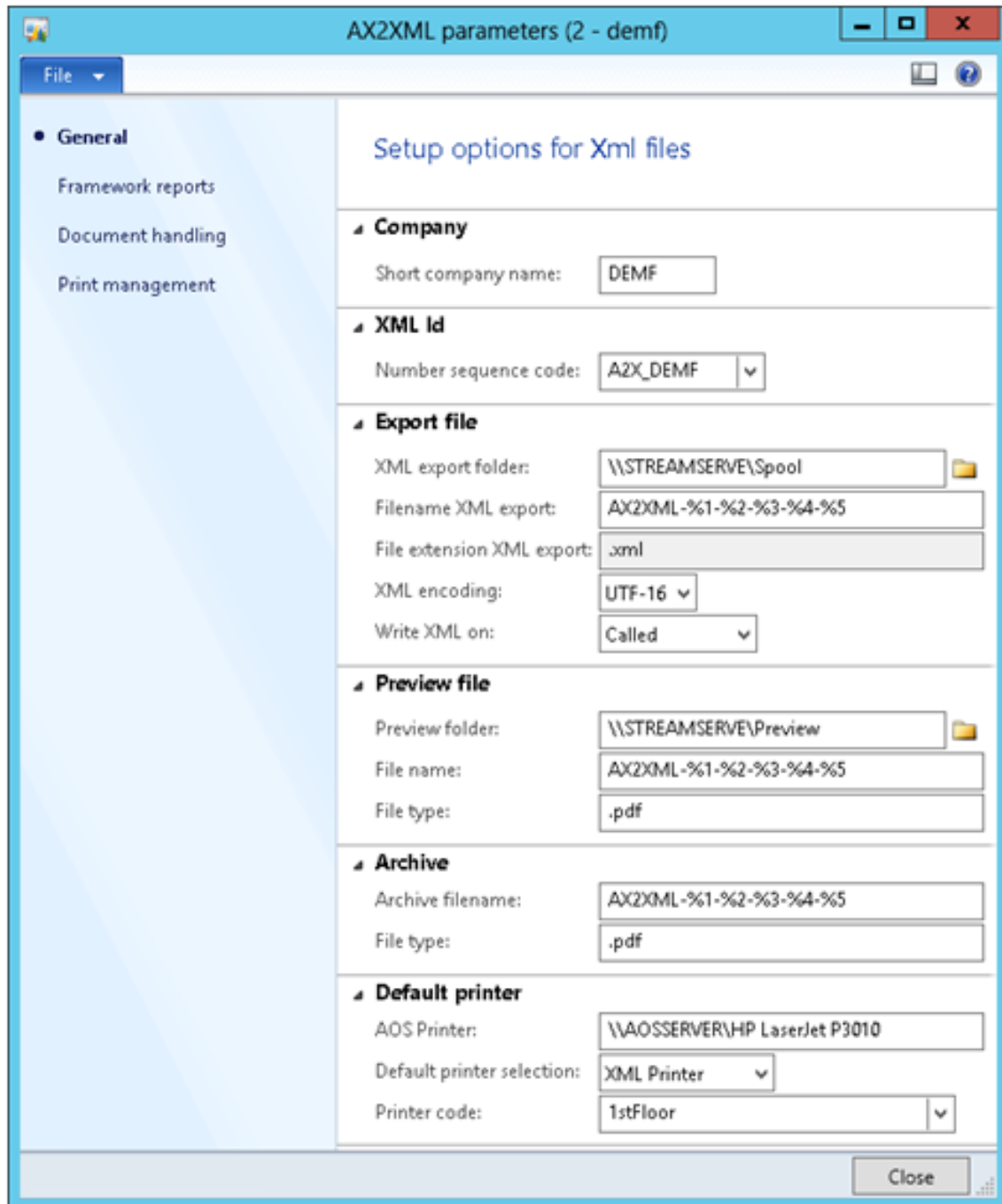
1. Click AX2XML/Setup/**XML Printers**.
2. Click **Add**.
3. Create a new record in the XML Printers form.  
NOTE: the Printer code value exists in the applicable StreamServe installation.
4. Click **Close**.



### 2.2 Setup parameters

1. Click AX2XML/Setup/**AX2XML parameters**.

## 2.2.1 General



The screenshot shows a Windows-style dialog box titled "AX2XML parameters (2 - demf)". On the left is a navigation pane with a "File" menu and four options: "General" (selected), "Framework reports", "Document handling", and "Print management". The main area is titled "Setup options for Xml files" and contains several expandable sections:

- Company:** Short company name: DEMF
- XML Id:** Number sequence code: A2X\_DEMF
- Export file:**
  - XML export folder: \\STREAMSERVE\Spool
  - Filename XML export: AX2XML-%1-%2-%3-%4-%5
  - File extension XML export: .xml
  - XML encoding: UTF-16
  - Write XML on: Called
- Preview file:**
  - Preview folder: \\STREAMSERVE\Preview
  - File name: AX2XML-%1-%2-%3-%4-%5
  - File type: .pdf
- Archive:**
  - Archive filename: AX2XML-%1-%2-%3-%4-%5
  - File type: .pdf
- Default printer:**
  - AOS Printer: \\VAOSSERVER\HP LaserJet P3010
  - Default printer selection: XML Printer
  - Printer code: 1stFloor

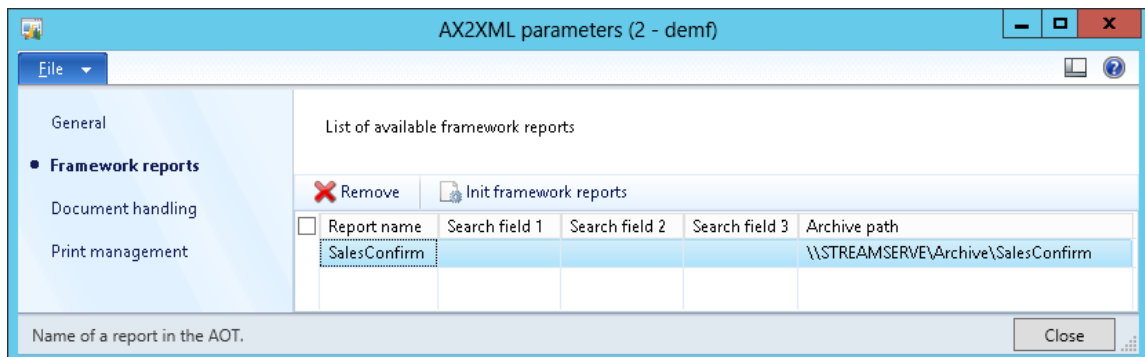
A "Close" button is located at the bottom right of the dialog.

<b>Short company name</b>	Identifies the company specific derivations of the XML generation classes.
<b>Number sequence code</b>	Create or choose a number sequence code. This number sequence is used to create a unique id for every XML output. Make sure the number sequence is company specific.
<b>XML export folder</b>	The spool folder of StreamServe (UNC path)
<b>Preview folder</b>	A general folder to store preview files (UNC path).
<b>AOS Printer</b>	The default printer used by AX when sales orders, purchase orders, etc. are posted using the standard batch framework. Required format (UNC path): \\[AOS server name]\\[full AOS printer name]
<b>Default printer selection</b>	Provide a printer selection from the Windows client environment or available printer (drivers) in StreamServe. Recommended value: 'XML printer'.
<b>Printer code</b>	The main virtual XML Printer.

All AX2XML users must have write-permissions on the XML export folder and the Preview folder.

## 2.2.2 Framework reports

1. Switch to the **Framework reports** tab on the **AX2XML parameters** form.



2. Click the **Init framework reports** button.

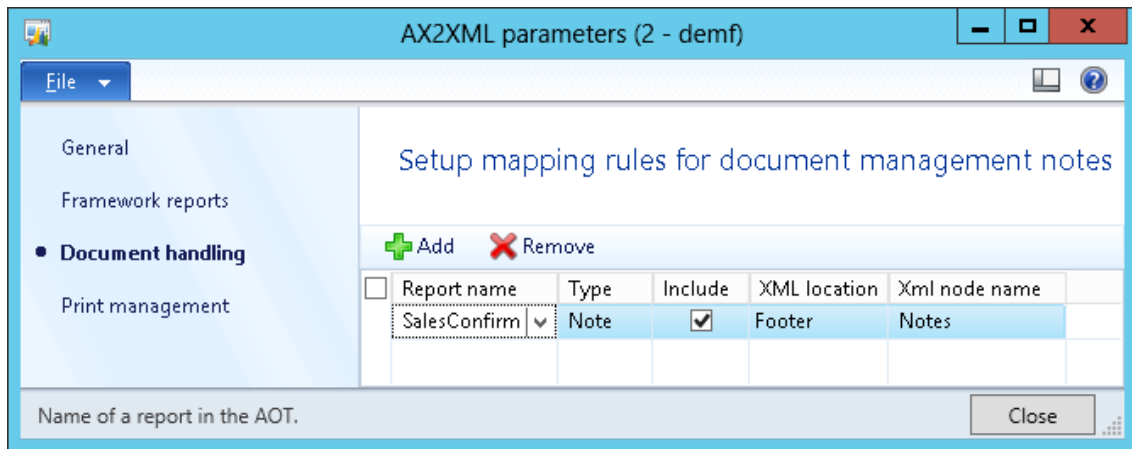
This form contains all implemented AX2XML reports.

**Search field #:** Contains a description of the search content. The applicable search fields per framework report are set in the corresponding framework report class.

**Archive path:** A UNC path that refers to a general folder in which AX2XML stores processed XML files.

## 2.2.3 Document handling

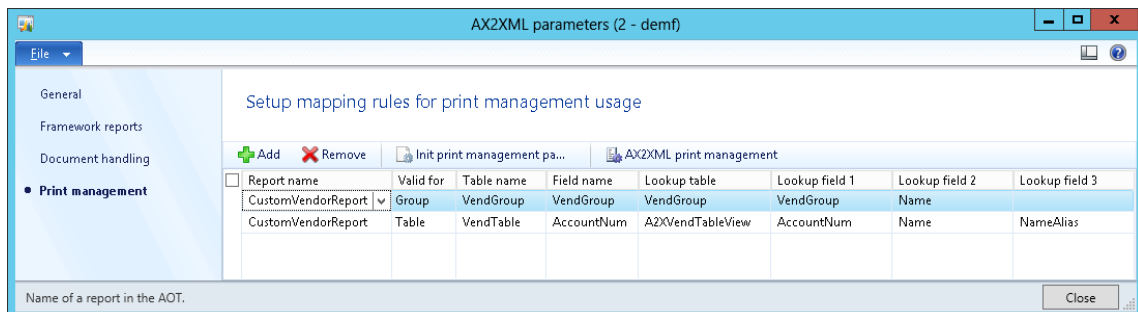
1. Switch to the **Document handling** tab on the **AX2XML parameters** form.



This form contains rules to reposition Document notes for a specific report. These can be moved to Header, Body or Footer.  
**Xml node name:** is the name of the sub node in the Header, Body or Footer node.

## 2.2.4 Print management

1. Switch to the **Print management tab**.
2. Click **Init print management parameters**.

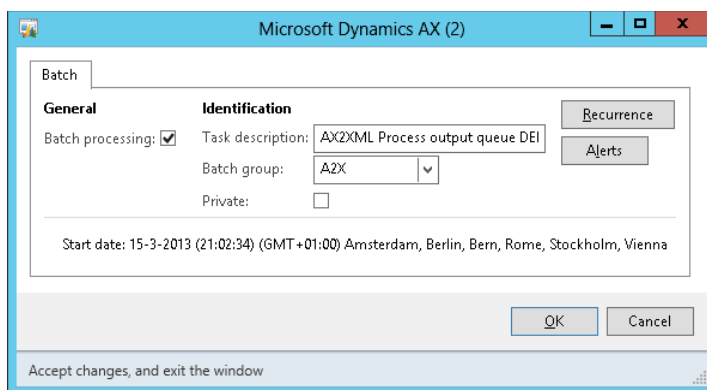


- a. This form contains specifications for AX2XML print management.
- b. Reports included in standard AX print management cannot be configured for AX2XML print management.
- c. Reports not included in standard AX print management must be configured for AX2XML print management.  
 NOTE: The required configuration specifies Table/Group/All filter definitions for Print options (fields: Table name and Field name).

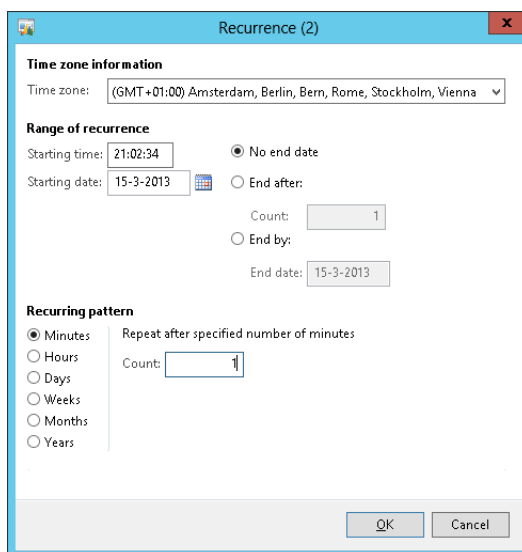
## 2.2.5 Process output queue

Setup the processing of queued documents to write to XML.

1. Click AX2XML/Periodic/**Process output queue**.
2. Setup parameters.
  - a. Enable **Batch processing**.
  - b. Enter a **Task description**.
  - c. Choose a **Batch group**.



3. Click **Recurrence**.
  - a. Select option **No end date**
  - b. Specify a recurring interval.  
Note: recommended value: 1 minutes.

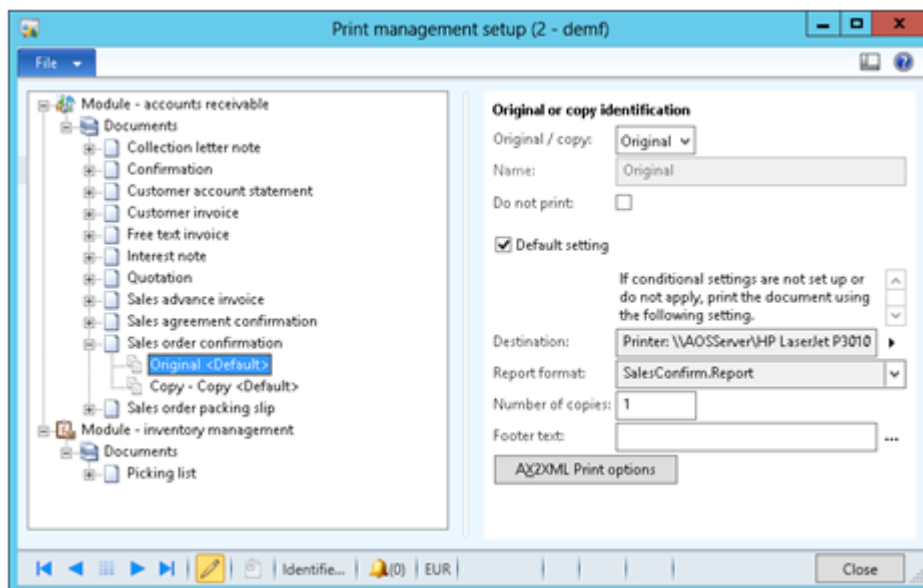


4. Click **OK**.
5. Click **OK**.

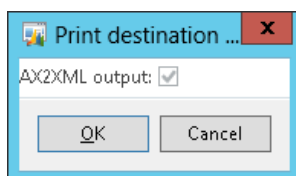


## 2.3 Setup standard AX print management

1. Open the print management of a report. E.g.: Sales order confirmation (SalesConfirm)
  - a. Click Accounts receivable/Setup/Forms/**Form setup**
  - b. Click **Print management**.
2. Browse to the corresponding report node



3. Perform the following steps for each print type (i.e.: Original, Copy):
  - a. Click Destination arrow > Print settings



- b. Click **OK**.
- c. Click **AX2XML Print options**.

AX2XML Print options (2 - demf) - Priority: 1,0000000000, Priority: 1,0000000000

**Settings**  
Print settings

**Print options**  
Printer:  E-mail:  File:

**Printer**  
Default printer selection: XML Printer  
Printer code: 2ndFloor

**E-mail**  
E-mail ID:   
Subject:

+ Add - Remove

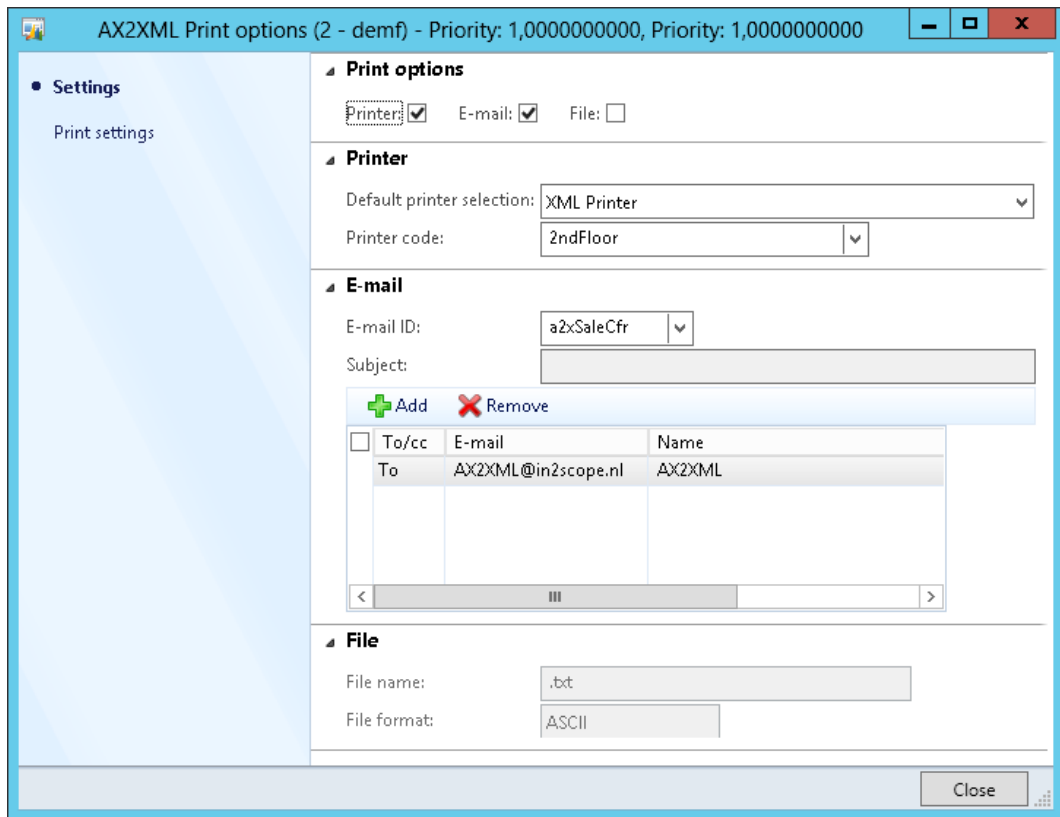
<input type="checkbox"/>	To/cc	E-mail	Name
This grid is empty.			

**File**  
File name: .bt  
File format: ASCII

Identification of the printer Close

d. Setup a printer as default target.

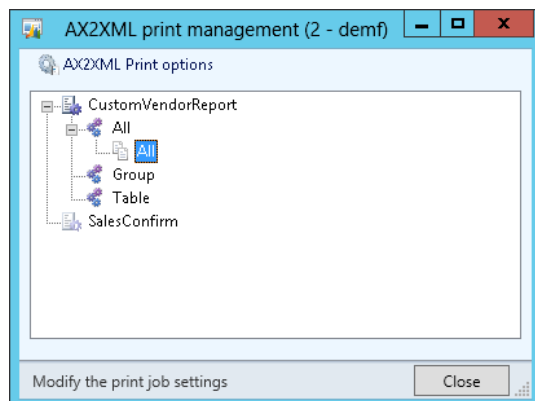
NOTE: for a specific customer or sales order you can enter email settings.



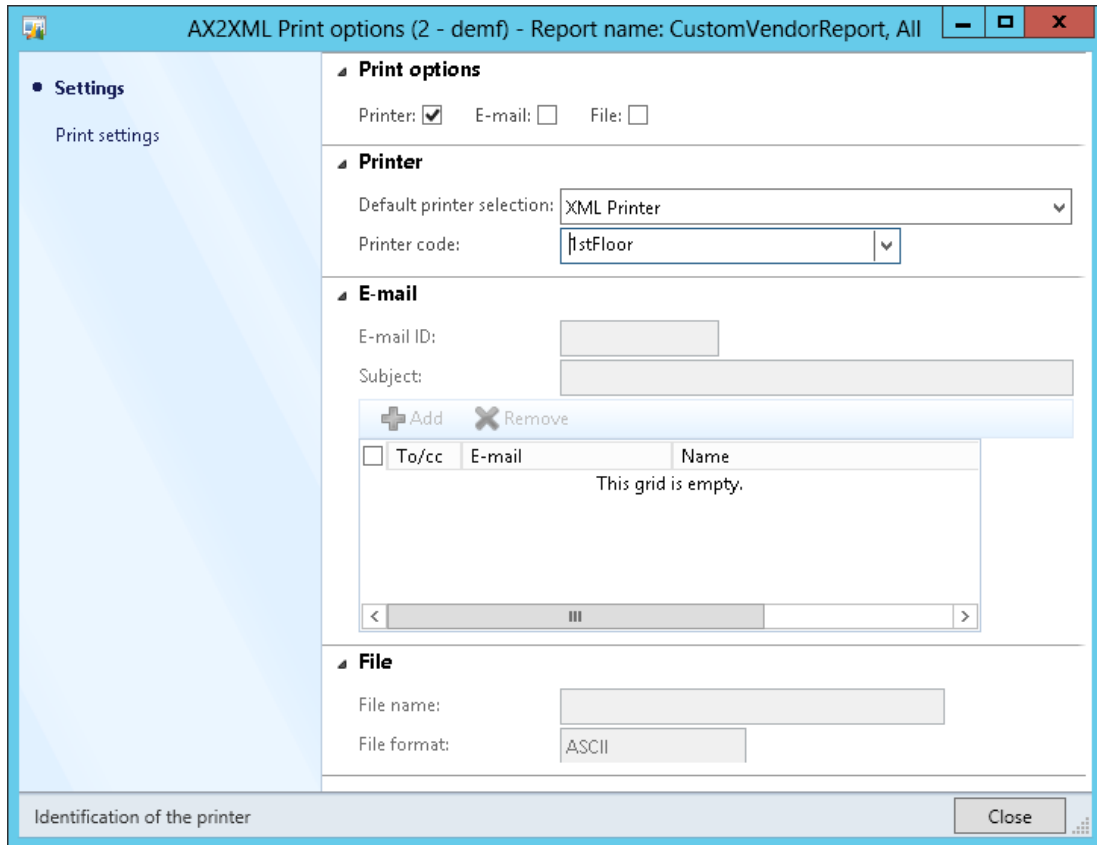
- e. Click **Close**.
  - f. Click **Yes** to save changes.
4. Click **Close**

## 2.4 Setup AX2XML print management

1. Click Area Page node: AX2XML/Setup/**AX2XML print management**.
2. Select a node to set print settings for. Choose one within the Table/Group/All nodes.



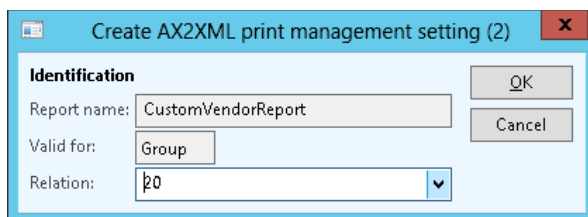
3. Click **AX2XML Print options**.



4. Configure the fields.
5. Click **Close**.
6. Click **Yes** to save changes.

#### 2.4.1 Create new specific print settings

1. Right click a **Table** or **Group** node. Click **Create**.  
NOTE: The AX2XML Print management lookup parameters must be setup to use this form.
2. Select **Relation**.

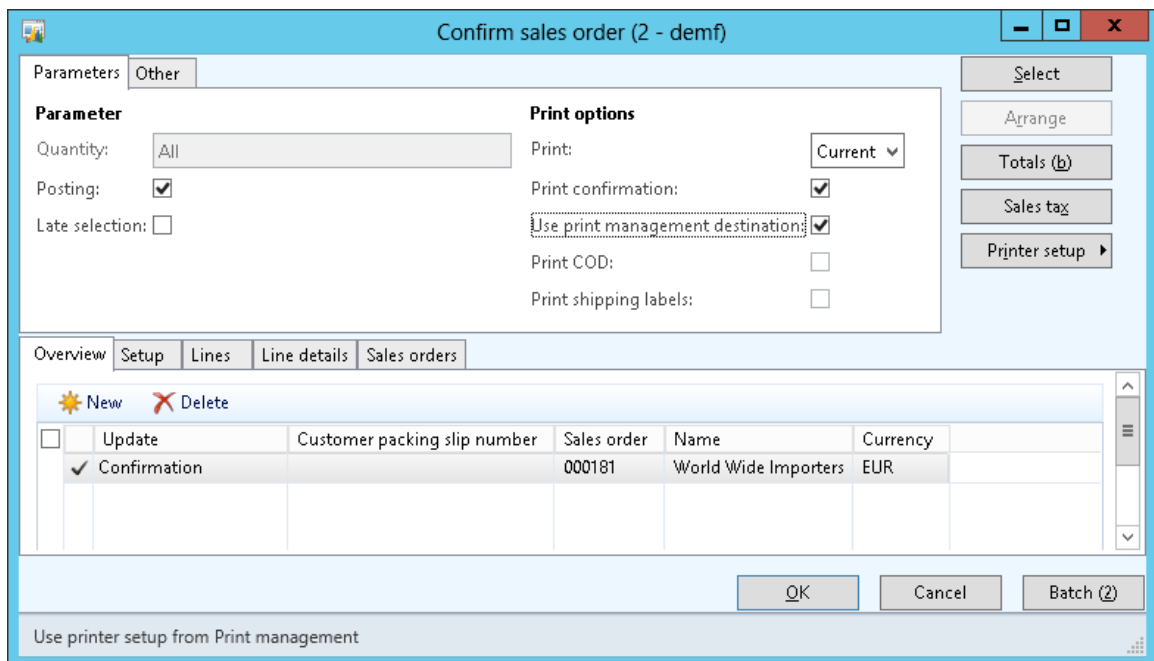


Vendor group	Description
10	Parts vendors
20	Services vendors
30	Tax authorities
40	Other vendors
50	Intercompany vendors

3. Click **OK**.
4. Select the newly created node.
5. Setup print settings for this node.

## 2.4.2 Print a report

1. Click the print button of the report. E.g.: Accounts receivable/Common/Sales orders/**All sales orders/ Tab: Sell/Button: Confirmation.**



Confirm sales order (2 - demf)

Parameters Other

**Parameter**

Quantity: All

Posting:

Late selection:

**Print options**

Print: Current

Print confirmation:

Use print management destination:

Print COD:

Print shipping labels:

Select

Arrange

Totals (b)

Sales tax

Printer setup

Overview Setup Lines Line details Sales orders

New Delete

	Update	Customer packing slip number	Sales order	Name	Currency
<input checked="" type="checkbox"/>	Confirmation		000181	World Wide Importers	EUR

OK Cancel Batch (2)

Use printer setup from Print management

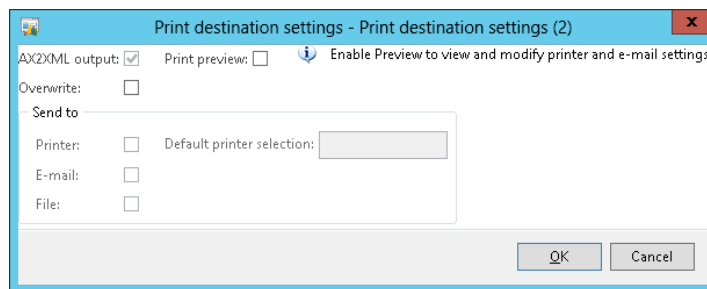
2. Choose one of the following:

a. Print using print management.

- i. Select **Use print management destination**.
- ii. Click **OK** to print.
- iii. The XML is now placed in batch and will be handled by the process output queue batch.

b. Print using Printer setup.

- i. Click **Printer setup** > choose the setting to modify.



- ii. Choose whether to preview or not.
- iii. Choose whether to overwrite or not (AX2XML) print management target destinations.
- iv. Click **OK**.
- v. Click **OK** to print.
- vi. The XML is now placed in batch and will be handled by the process output queue batch, or the AX2XML preview is opened, based on the value in field **Print preview**.

The setup of AX2ML is completed.