

INTOGRATE Axapta – Mail
Lotus Notes Integration Kit
Version 1.8



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0. Introduction

0.1 Axapta Mail for Lotus Notes Integration Kit

The standard version of Axapta only supports Microsoft Outlook as mail and calendar client. Intoint's Lotus Notes Mail Integration Kit for Axapta enables the use of the e-mail in Lotus Notes from Axapta.

To avoid any unnecessary changes to the Axapta application, the term Outlook is used in the Axapta Application in stead of Lotus Notes in some places.

The Lotus Notes Mail integration for Axapta is used in the same way as the Microsoft Outlook integration in Axapta. Further information about the mail possibilities can be found in the Axapta documentation from Microsoft Business Solutions.

0.2 Disclaimer

To prevent any side effects in your existing Axapta any changes to your Axapta installation should be verified by the authority responsible for your Axapta application (normally your Axapta vendor). This includes hot fixes, patches, upgrades etc.

0.3 Target group

This manual can be used by system administrators, developers as well as users of Axapta.

Axapta developers can find additional information in Appendix A where adjustments in relation to the standard Axapta application are described.

0.4 Explanatory chart

In the following sections, elements of Axapta, menu selections etc. are listed in different ways. The following is a brief explanation of the de various styles and expressions used:

<KEY>	Indicates a key on the keyboard. E.g. <ENTER> means that you must press the Enter key.
Windows Start menu 	In Windows, the Start menu is typically located in the lower left corner of the screen.
'Menu\sub-menu\menu-item'	Indicates a menu selection. E.g. 'File\Open' means that you must click 'Open' in the 'File' menu.
"c:\Lotus\Notes"	Indicates the path to a file or a directory. Notice that the style resembles that of menu selections.
<i>AxaptaElement</i>	Axapta elements are listed in <i>italics</i> , e.g. the class <i>SysInetMail</i> .
[button]	Refers to a button on the screen. E.g. [OK] refers to a button with the text OK.

0.5 Components

The Integration Kit consists of four overall components:

- The Integration Kit. This component handles the underlying communication between Lotus Notes and Axapta.
- Axapta component which handles the overall communication between Axapta and the Integration Kit.
- Mail component used for sending e-mails and reports from Axapta.

0.5.1 The Integration Kit

The Integration Kit mainly consists of one DLL-file - er2ln.dll. This file handles all communication between Axapta and Lotus Notes.

The Integration Kit is also used for other integration types. For example, it is also used for the integration between Lotus Notes and CONCORDE XAL and for the Axapta Mail to Lotus Notes integration.

0.5.2 Axapta – Lotus Notes API

In Axapta, a single class called *AX2LN* works as the connection between the Integration Kit and the rest of Axapta. This class is a general class defining all Axapta interfaces to and from Lotus Notes.

Only a fraction of these interfaces is used in the mail integration.

0.5.3 Mail-component

This component is used by Axapta when an e-mail is to be sent. It replaces the part normally used for Microsoft Outlook. This way, no major operation is needed when switching from Outlook to Lotus Notes.

The component is present as a class called *SysInetMail*.

1. Program installation

Installation of the Integration Kit is normally carried out from a workstation where Lotus Notes and Axapta clients are installed. All descriptions and tasks are based on the assumption that they are carried out on a local workstation (in the examples, an English version of both Lotus Notes and Axapta are used).

1.1 Before you begin

1.1.1 System requirements

The following software is required:

- Microsoft Windows Workstation/Server 98, NT, 2000 or XP.
- Lotus Notes client version 5.02c or later.¹
- Axapta version 2.0 or newer.

1.2 Check list

Before you begin the actual installation of the Integration Kit it is recommended that you carry out the following points. They may prevent potential problems not related to the Integration Kit itself.

- Start your local Lotus Notes client. Use the shortcut key [CTRL]+[M] to create a new e-mail. If an error occurs at this point this must be fixed before the installation of the Integration Kit can continue. It is a prerequisite that the Lotus Notes mail client has been set up correctly and that it is possible to send e-mails from the client.
- Since Axapta uses the local Lotus Notes client for e.g. sending e-mails, the user will be asked for a password for Lotus Notes when starting Axapta regardless of whether the Lotus Notes client has been started or not. This can be changed so that no

password must be entered if the Lotus Notes client has already been started. Start your Lotus Notes client and select the menu 'File\Tools\User ID'. Mark 'Don't prompt for a password from other Notes-based programs.'. Close the dialog box by clicking [OK]. After this the user will not be asked for a Lotus Notes password when starting Axapta (however, this requires Lotus Notes to be running in the background and the user to be logged in).

- Deactivating the 'visible notification' in Lotus Notes is recommended, since active message-boxes in Lotus Notes can prevent the mail-client to open for a new mail when activating a mail from Axapta. Deactivating can be done from the menu 'File\Preferences\User preferences.'. Select the 'Mail and News' icon in the left side of the dialog box. In the section 'Receiving', remove the mark at 'Visible Notification'. This change is advantageous because Lotus Notes is locked when a message about a new e-mail appears. Therefore, the Integration Kit cannot access Lotus Notes as long as the message is being shown.
- Start Axapta and make sure that you have a valid user name and password for Axapta. Remember to exit Axapta before you continue with the installation.
- If you are using an Axapta client located on a common network drive, you must make sure that you have sufficient rights to modify the bin directory ("Navision\Axapta Client\bin"). Several files will be copied to this directory during the installation.
- If you install labels for Axapta yourself you must also be allowed to modify the application directory.

1.3 Installation of Integration Kit

Insert the CD-ROM with the title 'Axapta Mail for Lotus Notes Integration Kit'. If the installation program does not start automatically, double-click "install.exe" at the root of the CD-ROM (Select 'Run' in the Windows Start menu and type "D:\install.exe", if your CD-ROM drive is the D-drive).

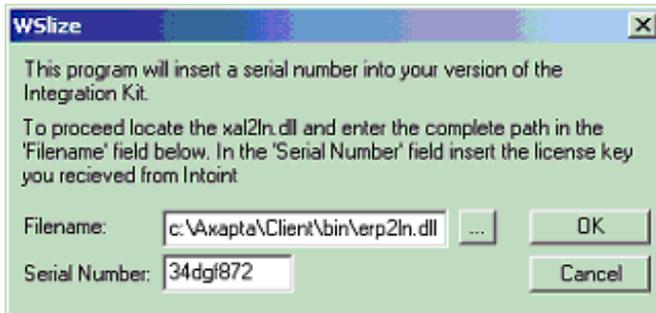
Follow the installation guidelines on the screen. For a detailed guide to the installation, see Appendix B Manual installation of the Integration Kit.

If the installation is not carried out from the CD-ROM, the files on CD-ROM must be copied to either a local drive or a mapped network drive. Currently, the installation does not run from a UNC-path.

14 Enter serial number

The Integration Kit is supplied with a code letter which contains a serial number matching the licence name and serial number of Axapta.

Open the sub-menu 'Programs\Intoint' in the Windows Start menu. Then select the menu item 'Enter serial number information'. This will launch the program 'WSize' (see the screen-dump below).



Enter the full path to "ERP2LN.DLL"² in the field 'Filename' and the serial number you have received from Intoint in the 'Serial Number' field. Click [OK] to save the serial number.

If an error message occurs, you must check that the path and the file name are correct and that you have sufficient rights to modify the file and that it is not write-protected.

1.5 Installation of Axapta elements

Start Windows Explorer and find the directory where the Axapta client is installed (this directory contains bin, share, std, etc.). Open the sub-directory "bin\Intoint\Axapta". Here are the files to be used for the installation of the Axapta part (xpo files).

² Placed in the Axapta client bin directory

Start the Axapta client. Press [CTRL]+[D] to open the AOT. Then select the menu 'Command\Import'.

The files to be imported are (remember the order):

1. I2I_LN.xpo
2. I2I_Mail.xpo

To ensure cross-references in Axapta, all projects must be recompiled (again in the above order). Open the projects one by one and highlight the project name, e.g. 'I2I_LN'. Press the F7 key to compile.

2. Setup of Axapta and Lotus Notes

As the Lotus Notes Mail Integration Kit for Axapta fully replaces the corresponding Outlook functionality, there is no need for any special setup in Axapta to be able to use the application.

This section describes how Axapta must be set up in order to enable the integration with Lotus Notes.

In the same way the Integration Kit has been designed in a way, which eliminates any requirements for modifications in Lotus Notes. So the Lotus Notes clients can be used as they are.

3. Getting started

This section describes how to quickly start using the mail integration between Lotus Notes and Axapta.

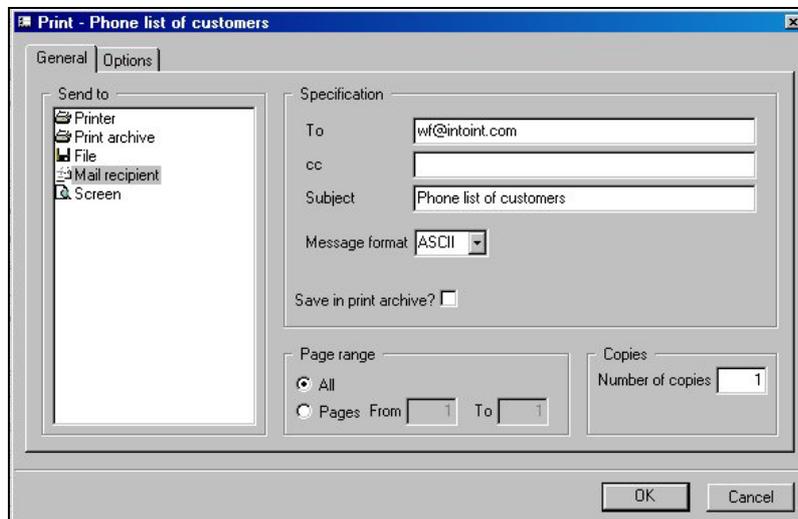
Before continuing be sure, that you are familiar with the basic mail-functionality in Axapta – described in the Axapta documentation.

The following example shows how to send a report from Axapta.

Before you send a report as an e-mail, try printing it to the screen. This will ensure that Axapta has been correctly set up for normal use.

Select 'Accounts receivable'. Under 'Reports', select 'Phone list of customers'. This will open the selection window. If desired, limit the number of debtors and click [OK]. The below window will be shown.

First you must select the 'Send to'. This may be to e.g. a printer, a file, the screen or an e-mail recipient. In this case, choose E-mail recipient. Then, in the specification area, fill in the fields 'To' and 'Subject' as a minimum.



Click [OK] to send the report to the e-mail recipient.

Check that the recipient received the e-mail and that the customer list is attached.

4. Use of the integration

In this section the various ways to apply the integration are more closely described.

In Axapta there are several ways to use the e-mail facilities. For example the following:

- In a print dialog box it can be specified that the printout is to be sent to an e-mail recipient.
- In Axapta you can use the mail icon (). This will start Lotus Notes, open a new e-mail and fill out the 'To'-field.

4.1 Sending a report as an e-mail

Axapta enables the user to send reports by e-mail.

This functionality is supported by the integration module. By default, reports are sent without starting the Lotus Notes client and thus without any further user intervention.

The integration module supports all report formats (ASCII, RTF, HTML and PDF (3.0))

For a more elaborate description of how to send reports as e-mail, see the Axapta documentation.

4.2 Creating e-mails from contact information

Anywhere in Axapta where an e-mail window can be opened by clicking the e-mail icon () , the Lotus Notes e-mail client can be activated. The field 'To' will be filled out with the contents of the e-mail field in Axapta. The other fields must be filled in manually.

Appendix A. Adjustments in Axapta

The below table describes all the elements in Axapta which are adjusted or added by the Integration Kit.

New elements

Object type	Object - method	Code from Intoint
Class	AX2LN	New class
Class	WaitForDialogObject	New class
Class	WaitForMailDialog	New class
Table	LotusNotesDraftMail	New table
Enum	LotusNotesUNID	New enum
Form	I2I_WaitForDialog	New form

Adjustments of existing elements

Object type	Object - method	Code from Intoint
Class	SysInetMail	ClassDeclarations closeProfile getSysInet logoff logon` mailAddress mapiStatus new numberProfiles ok openProfile profile readMail sendmailAttach status

Appendix B. Manual installation of the Integration Kit

It is possible to install the Integration Kit without using the installation program. This may be advantageous if the installation is to be carried out in a large environment and the files are to be distributed to multiple workstations or an advanced installation is involved e.g. a Citrix-based network.

Unpacking files

If the installation is packed into one file, it must first be unpacked. This is done by starting install.exe and selecting the drive in which the files are to be unpacked. The destination of the files must be a local drive or a network drive.

Copying files

When the files have been unpacked they must be distributed to the relevant directories.

The following files must be copied to "Axapta\bin" (the files can be found in "data\files" in the installation directory).

ERP2LN.DLL
ERP2LN_ADDON.DLL
BORLNDMM.DLL

Setup of PATH

For the integration to work properly Notes' binary files and notes.ini must be located in the system variable "PATH". In our example, both the binary files and notes.ini located in "C:\LOTUS\nOTES". If this is different in your installation, use your settings in stead.

Check PATH configuration

To check if PATH has been correctly set up, you must start an MS-DOS prompt. In MS-DOS, type "Path" and press return. The operating system will now present a list of the directories in the current setup separated by semi-colons. Check that both the directory for the

binary files and the one for notes.ini are included in the list separated by semi-colons.

Setup of PATH in Windows 9x

If the path to the binary files or notes.ini is missing, Autoexec.bat must be modified in the following way:

1. Start the text editor by typing "EDIT C:\AUTOEXEC.BAT" in an MS-DOS prompt.
2. Find the line that begins with "PATH="
3. If the line exists, add the following: ";C:\LOTUS\notes". Example of correct PATH:

```
PATH=C:\WINDOWS;C:\WINDOWS\COMMAND;C:\LOTUS\notes;
```

4. If the PATH line does not exist, then add the following at the end of AUTOEXEC.BAT:

```
PATH=%PATH%;C:\LOTUS\notes;
```

5. Save the changes by selecting 'Save' in the 'File' menu.
6. Close the text editor by selecting the menu 'File' and the item 'Exit'.
7. Exit the MS-DOS command prompt by typing "EXIT" and pressing return.
8. Restart your computer and check the "PATH" settings by means of the procedure described in the section 'Check Path configuration'.

Setup of PATH in Windows NT/2000

1. Right-click on 'My computer' on your desktop and select 'Properties'.
2. Select the 'Advanced' tab and click the button 'Environment Variables...'
3. Under 'System Variables', select the line that includes the word "Path".
4. Click 'Edit' and check if the path to "C:\LOTUS\notes" is there. If not then add it at the end of the line (remember to insert a semi-colon before you add the directory name to the path).
5. Save the settings by clicking the [OK] button in the three following dialog boxes.

Appendix C. Troubleshooting

Checklist

1. Check if you can send an email from your Lotus Notes client. Try starting your Lotus Notes client and pressing [CTRL]+[M] to create a new memo. If this does not work, check the settings in your location document (check that a mail server and a mail file have been specified). If your Lotus Notes is not set up to use mail you can follow the instructions in the document "Setting up Lotus Notes Mail File.pdf". This will guide you in settings op a local mail-file for demo purpose.
2. Check if the path to the binary files in Lotus Notes and notes.ini are located in the system variable PATH. See Appendix B for help with this.
3. Check that there is an individual notes.ini file for all users. The Integration Kit reads information about the user's mail settings. This requires a notes.ini for each user in e.g. a Citrix-environment.
4. If you have a Lotus Notes client version 6 or you recently upgraded your Lotus Notes client 5 to a 6 the dll 'nlsxbe.dll' might have to be reregistered. Do this by opening the Windows start-menu, select Run and enter the following (without the single quotes): 'regsvr32 c:\lotus\notes\nlsxbe.dll'. Remember to replace the path 'c:\lotus\notes' with the path to you installation of the Lotus Notes client.
5. If both Lotus Notes 5 and 6 installed, this can cause problems. The Integration Kit uses a COM-object which is registered by Lotus Notes on installation. If Notes 6 is installed afterwards it will overwrite part of Notes 5's registration. Try to reinstall Lotus Notes 5 to see if the problem disappears. As a rule of thumb, the Notes client installed last must be the one to be used for the Integration Kit.
6. If Axapta freezes during startup (after the user name and password have been entered), the kernel version of Axapta must be checked. The kernel (ax32.exe) must be version 2.5.1270.3703 or later. Earlier versions cause problems if the Windows operating system is updated with the latest security updates. This is a general error in Axapta.

7. Check that the correct Axapta client is being used on startup. The Integrations Kit depends on it being the correct client since Integration Kit-files are located in the bin-directory of the client.
8. Check if there is more than one notes.ini. The notes.ini which is active and is being used by the Integration Kit can be found by selecting the Windows Start menu and clicking run. Enter notes.ini and click [OK] (if this does not find a notes.ini-file, then see the section on the setup of PATH on page 13). You can also search the local workstation for notes.ini-files. The Ini-file may be located in a network drive. If the active notes.ini is the wrong one, errors may occur in Axapta when a synchronisation job is being run. The error is that it will constantly say that the user in Axapta is not identical with the user in Lotus Notes (the user-name is found in notes.ini).
9. If Axapta says that "ERP2LN.DLL" cannot be found make sure that the 'alt. bin directory' in the Axapta configuration is set up to point to the Axapta client's bin-directory.
10. E-mail address does not appear in Lotus Notes when you click the mail icon in Axapta. This is a known issue in Axapta 3.0 SP1 and a possible solution is described in Appendix E.

Appendix D. Tips for programming

This appendix provides a few tips for making adjustments to a Axapta application. Doing so will be your own responsibility and falls outside the liability of Intoint. The descriptions in this appendix require you to have experience in Axapta programming.

Development in AOS/Cluster environment

When an AOS environment is used for developing the cache may cause a lot of unwanted errors. This typically applies when there is more than one AOS-server (clustered environment).

The following guidelines can minimize the errors that occur during development in AOS environments:

- Only make installations and developments on a thick client. This means that you do not work on the AOS server, but directly on the Axapta application.
- Create shortcuts for starting Axapta on a specific AOS-server. This makes it easier to call a flush function on all the AOS servers in the environment.
- Each time adjustments are made on the thick each AOS server must be accessed through a client and a flush function must be called. It may be that normal users (clients) must start and stop their client in order for the changes to work. The flush function is described in the following section.

Flush cache on AOS

This section describes how you create a flush function in Axapta. It is based on a technical document from Microsoft Business Solutions. The document can be found at <http://technet.navision.com> by searching for 'deploying application'.

Follow the below procedure to flush the cache on the server:

1. Create a new action menu item called *SysFlushAODServer*.
2. Set the property 'Class' to 'Class'.
3. Set the property 'Object' to 'SysFlushAOD'.
4. Set the property 'RunOn' to 'Server'.

5. Add the menu item to a main menu so that you can activate the menu item.

This menu item must then be called from a thin client. Make sure to have shortcuts to Axapta with forced choice of AOS-server, so that the menu item can run on all the AOS servers.

Appendix E

E1 E-mail address missing

E-mail address does not appear in Lotus Notes when you click the mail icon in Axapta. This is a known issue in Axapta 3.0 SP1. A possible solution to this problem is described in 'Service Request - Navigation Axapta CH-366-788-9R5P'. A copy of this resolution is appended below. To locate the service request perform an advanced search on www.partnerguide.com for the text 'CH-366-788-9R5P'.

Axapta form 'SysSendMail' in the method 'run' (the highlighted text is the actual change):

```
void run()
{
    SysINetMail m = new SysINetMail();
    FormStringControl c = this.selectTarget();
    //>>-- MBSCH -----
    // only if a control is modified a value will
    // be passed through
    if (c) {
        c.modified();
    }
    //<<-- MBSCH -----
    m.sendMail(c.text(), '', '', true);

    if ((c.text() != m.mailAddress()) && (m.getSysInet().transferName))
        if (Box::yesNo("@SYS50945", DialogButton::Yes) == DialogButton::Yes)
            this.closeSelect(m.mailAddress());

    this.close();
}
```

E2 Axapta reports

It is possible to change whether user intervention is needed when sending reports from Axapta. Use the following procedure to change this:

1. Start an Axapta client with a working installation of the integration kit.
2. Open the Application Object Tree (AOT) (shortcut: [CTRL] + [D]).

3. Expand the node 'Classes' and locate the 'Info' class (the 'Info' class can be found at the end of the classes list).
4. Expand 'Info' and double click the method 'reportSendMail'.
5. Locate the line 'm.sendMailAttach(p1.mailTo(),...'. In standard Axapta it is the last line in the method.
6. The fifth parameter for 'm.sendMailAttach' is a boolean that indicates if the reports should be send with or without user intervention. If the value is 'true' the report will be attached to a new mail and opened in Lotus Notes. The user can then modify the mail before sending the report. See example below:

User intervention enabled:

```
m.sendMailAttach(p1.mailTo(),p1.mailCc(),p1.mailSubject(),"Axapta report",TRUE,p1.fileName(),fileName);
```

User intervention disabled:

```
m.sendMailAttach(p1.mailTo(),p1.mailCc(),p1.mailSubject(),"Axapta report",FALSE,p1.fileName(),fileName);
```

7. When done remember to save and compile your changes.