



XA Output Management User Guide

Infor XA 11.0

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About this guide

This document outlines the implementation of the **XA Output Management** feature. It explains the business and technical requirements, along with the configuration steps required to set up and operate this functionality successfully.

Contacting Infor

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The latest documentation is available from docs.infor.com or from the Infor Support Portal. To access documentation on the Infor Support Portal, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

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Required products

Ensure that you have installed and configured the necessary hardware and software for all these components:

- Infor XA 11.0.0.0 client software build must be **03.11.00.01.12** or higher
- Interform

Chapter 1 Introduction

XA Output Management provides a flexible, no-code approach to report customization by using XML as the content source. This XML can be enriched with customer-specific attributes through Enterprise Integrator and sent to a document-formatting application or any REST endpoint. Interform is the preferred document-formatting application, offering a browser-based WYSIWYG editor for mapping XML content to PDF elements and orchestration to merge, generate, and store documents.

This XML-based approach improves on spooled files generated from the Printer File definitions delivered with XA, which produce a fixed, line-printer style layout. Changing report layouts in the spooled-file model requires updates to Printer File definitions and related programs, conflicting with IDF's principle of extending functionality without modifying existing code.

These are the currently supported document repositories:

- XA embedded attachments
- Infor Document Management (IDM)

You can view PDF documents created and stored in these repositories in the attachment viewer.

This table compares the benefits of this enhancement with legacy spool file-based host reports:

	Current approach	Feature enhancement
Report content	Spool files	XML
Extensibility	Custom code	No-code metadata
PDF creation	AFPDS Overlay	Browser-based WYSIWYG editor in Interform
XA embedded attachment integration	No	Yes
IDM attachment integration	No	Yes

This guide explains the required steps to implement the document output enhancement in XA.

Implementation checklist

We recommend that you use this checklist to complete the setup and configuration required to enable this feature enhancement:

☐	Install server PTFs
☐	Setup XA
☐	Setup Interform
☐	Setup Infor Document Management (IDM)
☐	Customize imported content

Server PTFs

You must install server PTFs and their pre-requisites. Refer to KB3696419 for PTF for additional setup instructions.

Chapter 2 XA Setup

This chapter describes the configuration of the Interform System-Link destination and a media host for attachments. The application-level setup and host report configurations required in XA to publish XML content and attach PDF documents is also included in this chapter.

System-Link destination

A new System-Link destination, INTERFORM, has been created for the Interform workflow REST endpoint.

The destination URL is preconfigured and only needs to be updated if you use non-default Interform port settings.

Activate transformations

Activate XA_Print_Transformation.xsl for the System-Link Requests for every document you are enabling for Output Management.

Request	Stylesheet
XA_Print_BillOfLading	XA_Print_Transformation.xsl
XA_Print_COAcknowledgments	XA_Print_Transformation.xsl
XA_Print_COCreditmemo	XA_Print_Transformation.xsl
XA_Print_CollectionLetterAmountsDue	XA_Print_Transformation.xsl
XA_Print_CollectionLetterEntity	XA_Print_Transformation.xsl
XA_Print_CollectionLetterInvoice	XA_Print_Transformation.xsl
XA_Print_CustomerInvoice	XA_Print_Transformation.xsl
XA_Print_CustomerQuotes	XA_Print_Transformation.xsl
XA_Print_PurchaseOrder	XA_Print_Transformation.xsl

Complete these steps in Net-Link:

- 1 Select **Environment** > **System-Link** destinations.
- 2 Select destination **INTERFORM**.
- 3 On the **Transformations** tab, use the contextual **Maintain** menu to activate the transformation.

Publish unattached job

A new unattached job in CAS, PSVTUBD, processes events to publish XML content for document output.

Media hosts

Media hosts provide the connectivity to the document repository you are using; either embedded attachments or Infor Document Management (IDM).

Complete these steps to configure IDM as the media host:

- 1 Create an **IONAPI** file for a connected app as a backend service. Refer to Appendix A to learn how to create this file.
- 2 Login to Net-Link.
- 3 Select **Environment > Media Hosts**.
- 4 Select media host **Infor Document Management**.
- 5 Select **Load IDM credentials**.
- 6 Select the **IONAPI** file.
- 7 Select **OK** to upload the file.
- 8 Select **Test IDM Connection** to verify the connection. If the test fails, then review the Net-Link log for exceptions.

Setup application defaults

Complete these steps in Net-Link:

- 1 Navigate to the **Application Settings** object in the **Environments** tab.
- 2 **Maintain** Cross Application Support Settings.
- 3 Specify this information:

Default output destination: Interform

This field is the System-Link destination for the Interform REST endpoint.

Default media host:

This is the connectivity to the document repository. Set this field to IDM when using Infor Document Management. Otherwise, set to IFS.

Host process settings

This feature enhancement supports multiple documents, for example, purchase orders or invoices). Use host process settings to configure document specific output options. Complete these steps in Net-Link:

- 1 Select **Environment > Settings > Host Process Settings**.
- 2 Select **Maintain > Synchronize**.
- 3 To view reports that are document output enabled, select the **Document Output Enabled** subset.
- 4 Maintain the host process setting to specify these document output options:
 - Output destination:** Specify Interform Output Manager (for those documents processed using Interform)
 - Type:** You must check XML when Interform is specified in the Output destination field.
 - Media Host:** Specify Default, IFS or IDM

In Host Process Settings, you can configure email and attachment settings by document for all output-enabled documents.

You can create personalized messages and contextual attributes available to automate the process.

For example, customer invoices can be sent to the correct customer contact, purchase orders sent to the correct vendor, and you can create email text containing applicable detail. You can also control if users are permitted to change settings at print time. The published XML includes the content required to support email delivery from Interform.

Optionally, you can refine the email recipient's contents for a print request. Variables are resolved at print time. Each email in the request has the appropriate variable substitutions that are business data specific. Note that the same settings are used for each document in a print request.

You can automatically attach formatted documents. With attachment viewer cards they show as a section of a compound card. With Infor IDM, they display in a widget.

Chapter 3 Interform Setup

To set up Interform, you must complete these steps:

- Install Interform
- Set up Interform for XA integration

Install Interform

Install Interform in the same IBM i partition as the XA environment. Use this link to complete the installation:

<https://helpcenter.interform400.com/portal/en/kb/articles/installing-interformng2-on-ibm-i>

Post installation setup

Complete these steps:

- 1 From the IBM i command line, specify this command:

```
iformng2/iformng2
```

- 2 Select option **12**, Work with IFORMNG2 subsystem, to confirm that the subsystem and associated jobs have started successfully.

Integration with XA

This feature enhancement includes a content library with Interform templates, workflows, and related assets that provide out-of-the-box PDF document generation.

Create a base tenant and XA environment specific tenants in Interform to import this content.

Creating the XA base tenant

- 1 Login into **Interform** as an **admin** user.
- 2 Select **Settings > Manage Tenants**.
- 3 Select **New Tenant**.
- 4 Specify **Idf_Base** in the **Tenant ID** field and select **Create New Tenant**.
- 5 Maintain the Idf_Base tenant.
- 6 Specify this value in the **Resource locations** field:

```
file:/IFormNG2/InterFormNG-shell/user/resources/{_TENANTID_}/{_CONTENTTYPE_}
```

- 7 Click **Save**.

Assign Idf_Base tenant to the default user

- 1 Select Manage Users.
- 2 Maintain the default user.
- 3 Select **Add Tenant Access**.
- 4 Select the base tenant from the list and check these Roles:
 - Administrator
 - User
 - Web Service
- 5 Click **Add**.
- 6 Click **Close**.

Setup IBM i Connection Properties

- 1 Navigate to Settings, locate IBMi Connection in System.
- 2 Specify the IBMi **Username** and **Password**.

Import content in the base tenant

- 1 Download export_Infor_Idf_Base.zip from XA KB3696414.
- 2 Log off **admin** user from Interform, and login with **default** user.
- 3 Select the Idf_Base tenant.
- 4 Select **Settings**.
- 5 Select Import tenant from the **Other** section and then select **Import Tenant**.
- 6 Upload export_Infor_Idf_Base.zip file to the Idf_Base tenant. Use the Choose File option to select the file.
- 7 Select **Import** to import the artefacts to this tenant.
- 8 Click **OK**.

Creating the tenant for each XA environment

Complete these steps to set up the environment tenant:

- 1 Login into Interform as an **admin** user.
- 2 Select **System Admin**.
- 3 Select **Settings > Manage Tenants**.
- 4 Select **New Tenant**.
- 5 Specify Idf_XY in the **Tenant ID** field where XY is the XA environment designator.
- 6 Select **Create New Tenant**.
- 7 **Maintain** the environment specific tenant.
- 8 Specify this value in the **Resource locations** field:

```
file:/IFormNG2/InterFormNG-shell/user/custom_resources/{_TENANTID_}/{_CONTENTTYPE_};fileR:/IFormNG2/I  
nterFormNG-shell/user/resources/Idf_Base/{_CONTENTTYPE_}
```

- 9 Click **Save**.

Assign environment specific tenant to the default user

- 1 Select Manage Users.
- 2 Maintain the default user.
- 3 Select **Add Tenant Access**.
- 4 Select the environment tenant from the list and check these Roles:
 - Administrator
 - User
 - Web Service
- 5 Click **Add** and then **Close**.

Setup System-Link, Email and IDM Connection

- 1 Log off **admin** user from Interform and login with **default** user.
- 2 Select the environment tenant.
- 3 Select **Settings**.
- 4 Select **Workflow**.

- 5 Select **Infor System-Link**.
- 6 Click **+** to create a System-link instance.
- 7 On the **Infor System-Link** section, specify these settings:
Name: Infor-idf-SystemLink
System-Link Serer URL: http://IBMiSystemName:36001/SystemLink/servlet/SystemLinkServlet
Environment ID: XY
Language: en_US
Username: MXABUS
Password:
System name: IBMi System Name
- 8 Click **Save**.
- 9 In the Workflow section, select **E-mail Server**.
- 10 Click **+** to configure the SMTP details. This configuration enables Interform to automatically send emails to the recipients specified during Host Print in XA.
- 11 Specify these Infor Document Management settings:
Name: Specify Infor-Idf-IDM
Choose the downloaded IONAPI file. See Appendix A for instructions on downloading the file.
Select **Upload New ION API File**
- 12 Click **Save**.
- 13 Select **Test Connection** to test the connection.

Setup XA environment designator in REST input activity

- 1 Select **Workflow** in the top banner options.
- 2 Maintain infor-idf_CreatePdf Workflow. The first activity in the workflow is a REST webservice.
- 3 Maintain the REST webservices activity by clicking the ellipses and selecting **Edit node**.
- 4 Maintain the **Path** field. Replace EE with the environment designator.
- 5 Click **Apply** and **Save**.

Chapter 4 IDM Setup

You must import IDM document types and related metadata to set up IDM as the document repository. You must install server PTFs and their pre-requisites. Refer to KB3696414 for PTF for additional IDM setup.

Import XA Document Types in IDM

- 1 Download the IDM import file `Idf-XA-Docs.xml` from KB3696419.
- 2 Login to Infor OS and navigate to the Control Centre of Infor Document Management.
- 3 Select **Administration > Import / Export**.
- 4 Select **Import**.
- 5 Select **Idf-XA-Docs.xml**.
- 6 Select **Import**.

These IDM document types are created:

- IDF XA Bill of Lading
- IDF XA Collection
- IDF XA Credit Memo
- IDF XA Customer Invoice
- IDF XA Order Acknowledgement
- IDF XA Purchase Order
- IDF XA Quotes

Chapter 5 Customization

You can customize the content imported in Interform. This chapter includes these steps:

- Adding a company logo
- Customizing the generated document
 - Enrich the published XML with additional content
 - Map the additional content in Interform
- Customizing the email template

Adding a customer company logo

- 1 Save the company logo as `logo.png`.
- 2 Login to Interform.
- 3 Select the environment tenant.
- 4 Select **Library** from the top section.
- 5 Select the **Images** sub-folder.
- 6 Select the **XA** folder.
- 7 Select **Upload**.
- 8 Select file `logo.png`.
- 9 Select **Open**.
- 10 Select **Upload**. A message shows the file was uploaded successfully.

Customizing the generated content

This section includes steps to customize and add additional data to the document.

- Enrich the published XML with additional content
- Map the additional content in Interform

Enrich published XML with additional content

The XML published for document generation can be enriched using the System-Link Request attribute group feature in Enterprise Integrator. This enables no-code, metadata-driven customization aligned with the XA user experience.

Complete these steps in Net-Link:

- 1 Navigate to the **Integrator** tab.
- 2 Maintain the business object associated with the document being customized.
- 3 Select **Attributes**.
- 4 Select **Groups**.
- 5 Create a new Group of type **System-Link Request**.
- 6 Add the additional attributes required in the published XML.
- 7 Download the published XML. For instructions on downloading the published XML, see Appendix B, Logging Configuration.

Map the additional content in Interform

Complete these steps to add additional data to the document:

- 1 Log into Interform.
- 2 Select the environment tenant.
- 3 Select **Library**.
- 4 Select **Documents**.
- 5 Select **Upload** to upload the published XML file.
- 6 Select on the **Templates**.
- 7 Navigate to the **Infor > Idf** folder.
- 8 The Interform templates provided with this enhancement are displayed. Template names align with the XA host process; for example, the Purchase Order template is PORPRT.ift
- 9 Maintain the relevant template.
- 10 Select **Sample data**.
- 11 Select **Settings** to add sample data.
- 12 Choose the XML file uploaded earlier to the library of documents.
- 13 Use the Interform template editor to map content to the appropriate template elements.

Customizing the email template

- 1 Log into Interform.
- 2 Select the environment tenant.
- 3 Select **Library**.
- 4 Select **Templates**.
- 5 Navigate to the **Infor** folder.
- 6 Maintain **Idf_EmailTemplate.ifm** template.

Appendix A Generate ION API file for IDM Integration

To enable REST API integration between IDM and XA, create a connected application in ION API Gateway to obtain the required client credentials.

Complete these steps to create a connected application in ION API Gateway to obtain the required client credentials:

- 1 From Infor OS menu select **API Gateway**.
- 2 Select **Authorized Apps**
- 3 Select the **+** sign to create.
- 4 Specify this information:
Source: XA_IDM
Backend Service: Check the check box
Description: Specify a XA_IDM connected app
- 5 Select Password Credentials from the Grant Type list.
- 6 Select the Issue **Refresh Tokens** and **Roll Refresh Tokens** check boxes.
- 7 Select **Save**. The XA_IDM app will be listed under Authorized Apps.
- 8 Open XA_IDM app and scroll to locate Download Credentials.
- 9 Select **Download Credentials**. Specify the user the service account should impersonate.
- 10 Security role IDM-User must be assigned to the service account associated with this connected app.

For more information about creating a backend service connected app in ION API Gateway, use this link.

https://docs.infor.com/inforos/2026.x/en-us/useradminlib_cloud/default.html?helpcontent=apigatewayag_cloud/shq1761727161688.html

Appendix B Logging Configuration

To download an XML file from XA for use as sample input in Interform, you must activate logging configuration in XA. This appendix describes the steps required to enable logging for the publish transaction.

Complete these steps in Net-Link:

- 1 Select **Environment > Sytem-link destinations**.
- 2 Select destination INTERFORM.
- 3 In the **Transformations** tab maintain the appropriate print replication System-Link request.
- 4 Specify a Log duration in hours and select Set Log Dates/times.
- 5 Click **Update**.
- 6 This will activate logging for this transformation and this destination.
- 7 Run the appropriate host print, for example Purchase order print.
- 8 Review transaction status details for the print transaction.
- 9 The publish transaction includes the XML payload sent to the System-Link destination. The name of the XML is the same as the System-Link destination, for example, INTERFORM.
- 10 Double-click the entry to download the XML file.