Report Designer

&

Report Converter

User Manual

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1. Simplanova Report Designer

1.1. Introduction

Simplanova Report Designer (SRD) is a tool, which simplifies Microsoft Dynamics NAV report development and reduces both partner and their customer costs on reporting significantly. SRD uses an innovative approach of combining all the best features from all Dynamics NAV platforms - it has a modern dataset designer, a page-designer approach to building the layout and the Classic report approach to sections. It also adds additional features to help build reports more fluently and quicker than ever. The best thing about it you don't need to install third-party software to use it - it runs in NAV and produces working RDLC reports, which have the great performance the Role Tailored Client offers. Read more and order your license here: http://simplanova.com/simplanova-report-designer

1.2. Requirements

Simplanova Report Designer works on Microsoft Dynamics NAV 2015 (first release) and later versions. In order to build reports, a working internet connection is needed.

Since the tool runs as a set of NAV objects, a working development license is required.

.NET framework 4.0 or later should be installed on server system.

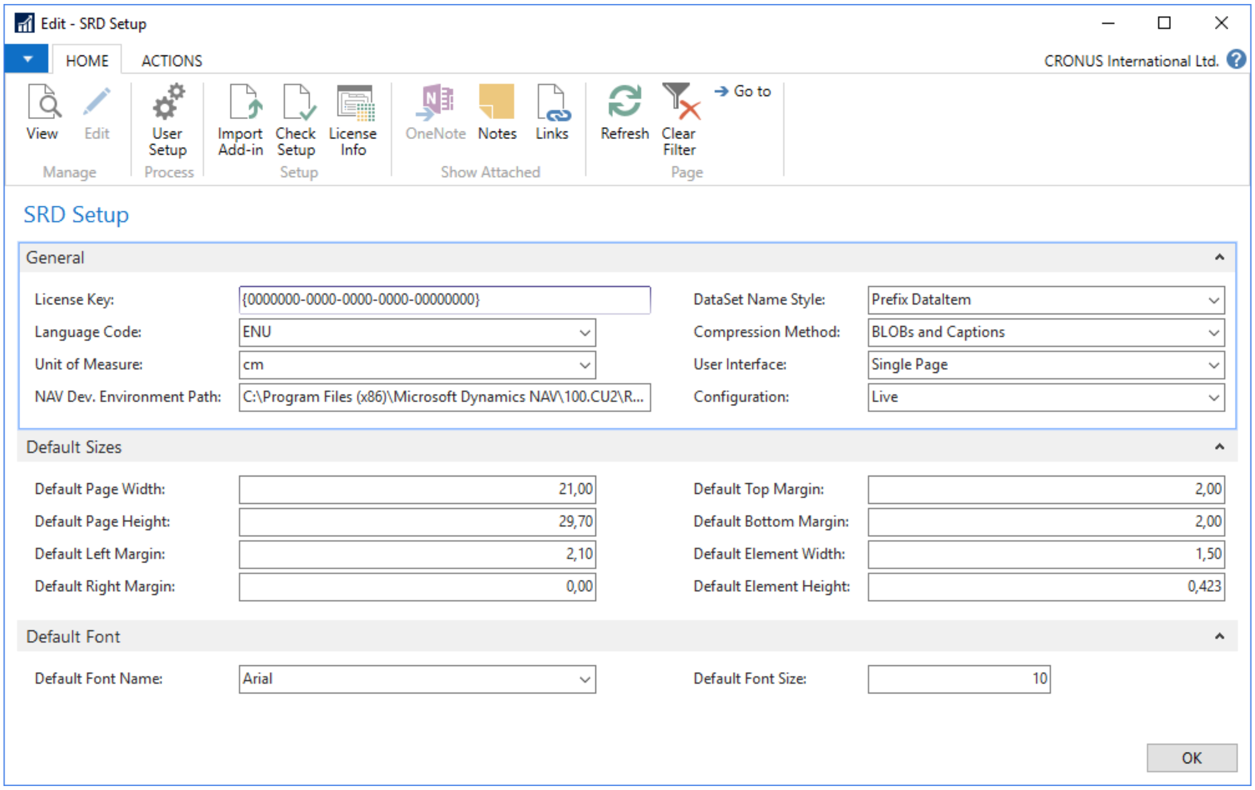
1.3. Installation

See Simplanova Tools Installation Guide for how to install and setup. You may also watch this video as an overview of how to install Simplanova Tools: https://www.youtube.com/watch?v=y2VE3ToxXw0

There is a special sample report, which is called SRD Playground Report. You can import it and use it to test features, to play around or simply see how the tool works. It bypasses the license requirement as long as the predefined tables are used exclusively in the dataset.

1.3.1. Report Designer Setup

Go to RTC, navigate to Simplanova Tools\Report Designer\Setup



The setup should look like the above. It will be populated with default values when you first run it.

In order to use the product, you must specify your **License Key.** You can acquire it here: http://simplanova.com/simplanova-report-designer

NAV Dev. Environment Path: needs to point to the NAV client on the same server where your NAV service-tier is deployed. EXAMPLE: C:\PROGRAM FILES (X86)\MICROSOFT DYNAMICS NAV\80.CU4(39663)\ROLETAILORED CLIENT\FINSQL.EXE

Language Code: default language for your report labels and captions.

Unit of Measure: default UOM for your report sizing. It can be either centimeters or inches.

Compression Method: Applies compression flag onto DataSet items, when editing a report. Compression means certain values are omitted from the DataSet and only exported into the dataset when needed. The problem of not using compression is very apparent in BLOBs. Whenever there's a logo on a report, it tends to be repeated in the Dataset as many times as there are rows in the dataset, occasionally crashing the NAV client because of memory overflow.
The setting can have the following values:

- Blank: does not use compression
- BLOBs: only BLOBs are compressed
- BLOBs and Captions: field captions and BLOBs are compressed
- All: everything is compressed

NOTE: When fields are compressed, it has a potential risk. You need to be aware that properties like decimal places for decimal fields will not work, so you will need to use the Custom Format property instead.

User Interface: specifies user interface experience. Can be one of the following:

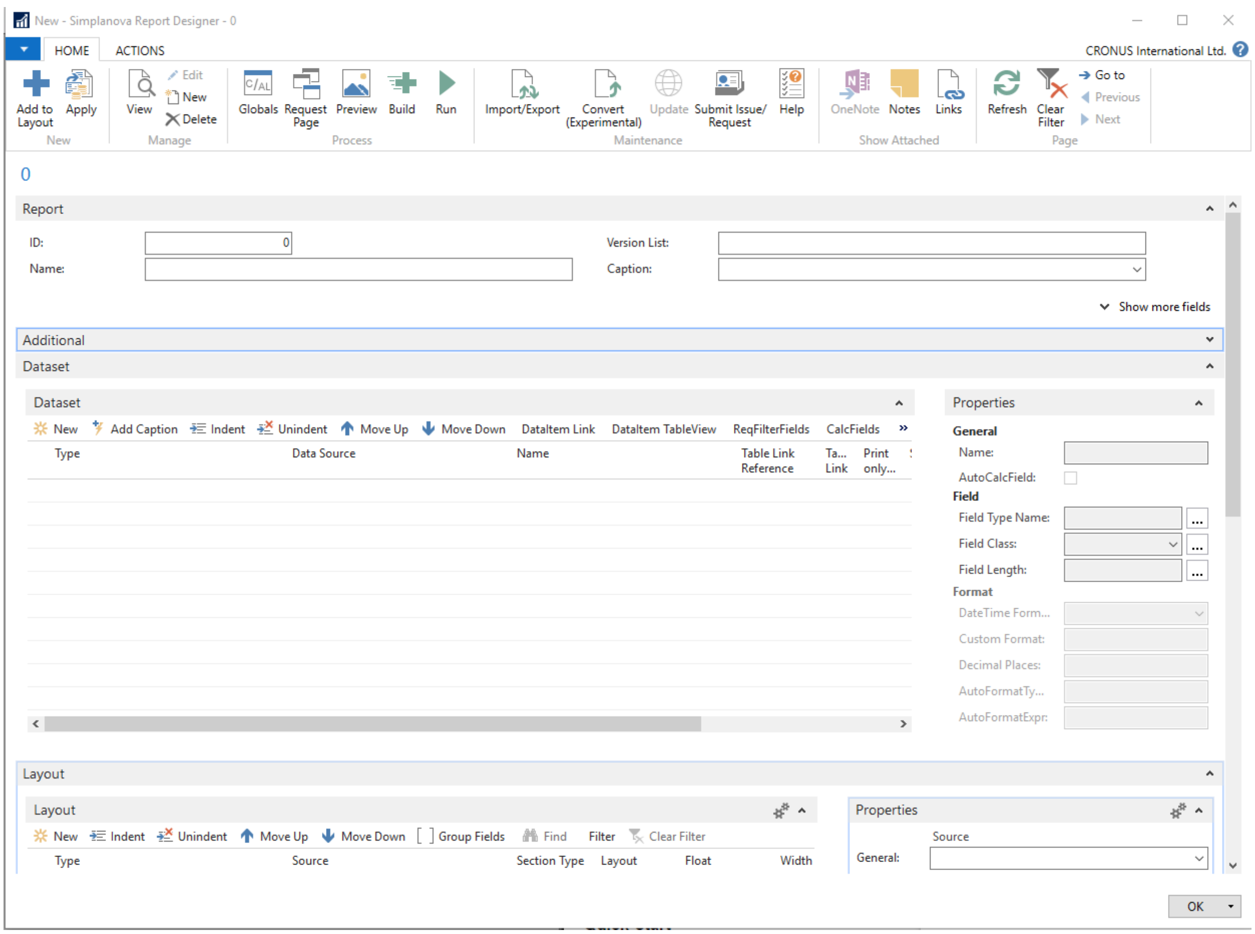
- Single Page – designer is styled to be used in a single page, where both Dataset and Layout is being edited.
- Multiple Pages - designer is separated into Dataset and separate page for Layout.

The rest of the settings speak for themselves. Those are the default sizes and fonts which apply when creating new reports.

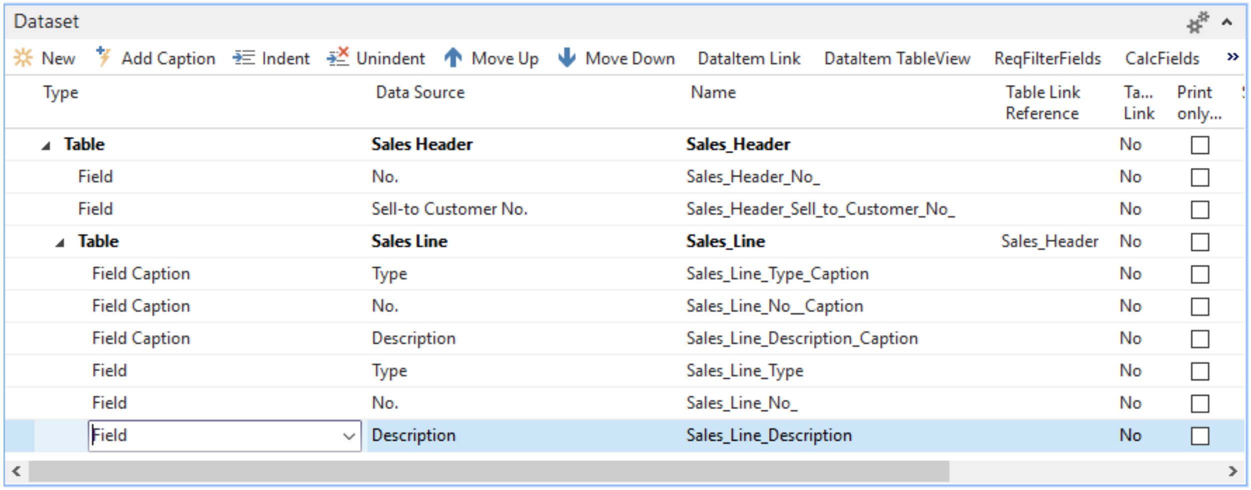
1.4. Quick Start

Get familiar with the designer. It consists of

1. Object properties
2. Dataset designer
3. Layout designer



Use the dataset designer to build your dataitem tree.

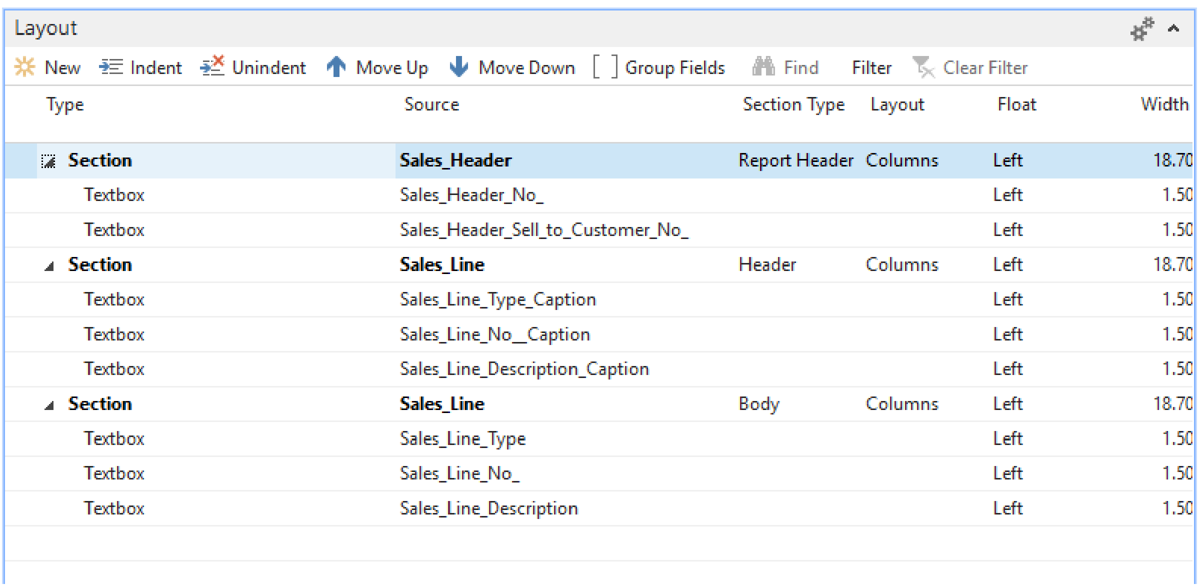


Dataset

New | Add Caption | Indent | Unindent | Move Up | Move Down | DataItem Link | DataItem TableView | ReqFilterFields | CalcFields

Type	Data Source	Name	Table Link Reference	Ta... Link	Print only...
Table	**Sales Header**	**Sales_Header**		No	☐
Field	No.	Sales_Header_No_		No	☐
Field	Sell-to Customer No.	Sales_Header_Sell_to_Customer_No_		No	☐
Table	**Sales Line**	**Sales_Line**	Sales_Header	No	☐
Field Caption	Type	Sales_Line_Type_Caption		No	☐
Field Caption	No.	Sales_Line_No__Caption		No	☐
Field Caption	Description	Sales_Line_Description_Caption		No	☐
Field	Type	Sales_Line_Type		No	☐
Field	No.	Sales_Line_No_		No	☐
Field	Description	Sales_Line_Description		No	☐

Use the Layout designer to build Header, Body and Footer sections and place textboxes and other elements inside them. You can do it manually or you can select tables and fields in the dataset and click Add to Layout.



Layout

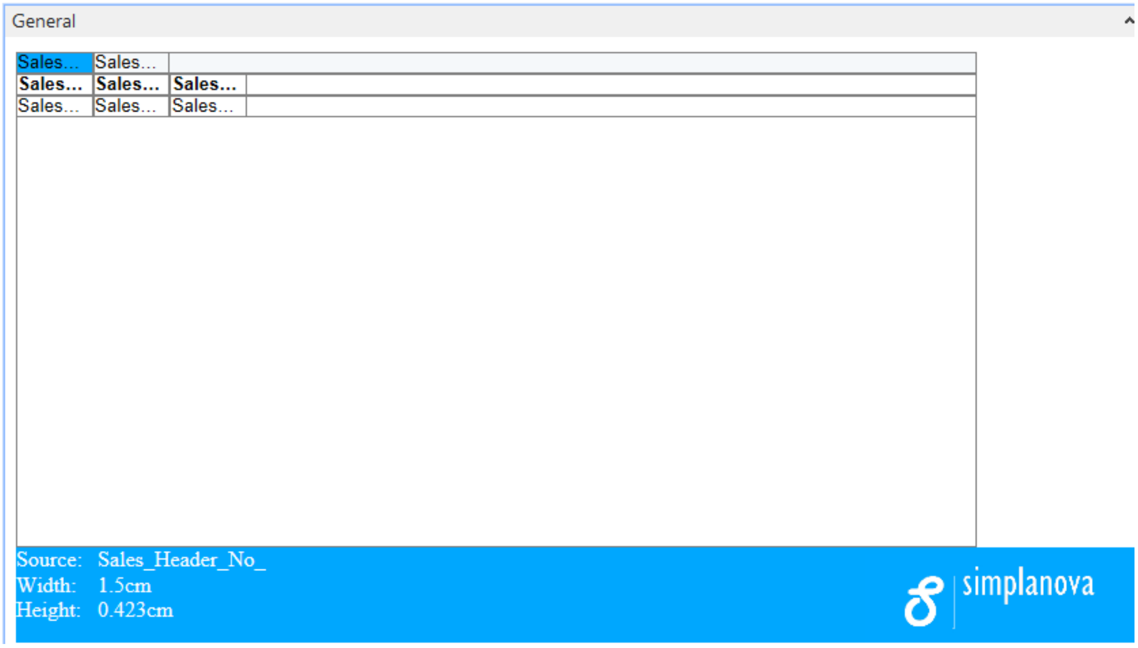
New | Indent | Unindent | Move Up | Move Down | [ ] Group Fields | Find | Filter | Clear Filter

Type	Source	Section Type	Layout	Float	Width
Section	**Sales_Header**	Report Header	Columns	Left	18.70
Textbox	Sales_Header_No_			Left	1.50
Textbox	Sales_Header_Sell_to_Customer_No_			Left	1.50
Section	**Sales_Line**	Header	Columns	Left	18.70
Textbox	Sales_Line_Type_Caption			Left	1.50
Textbox	Sales_Line_No__Caption			Left	1.50
Textbox	Sales_Line_Description_Caption			Left	1.50
Section	**Sales_Line**	Body	Columns	Left	18.70
Textbox	Sales_Line_Type			Left	1.50
Textbox	Sales_Line_No_			Left	1.50
Textbox	Sales_Line_Description			Left	1.50

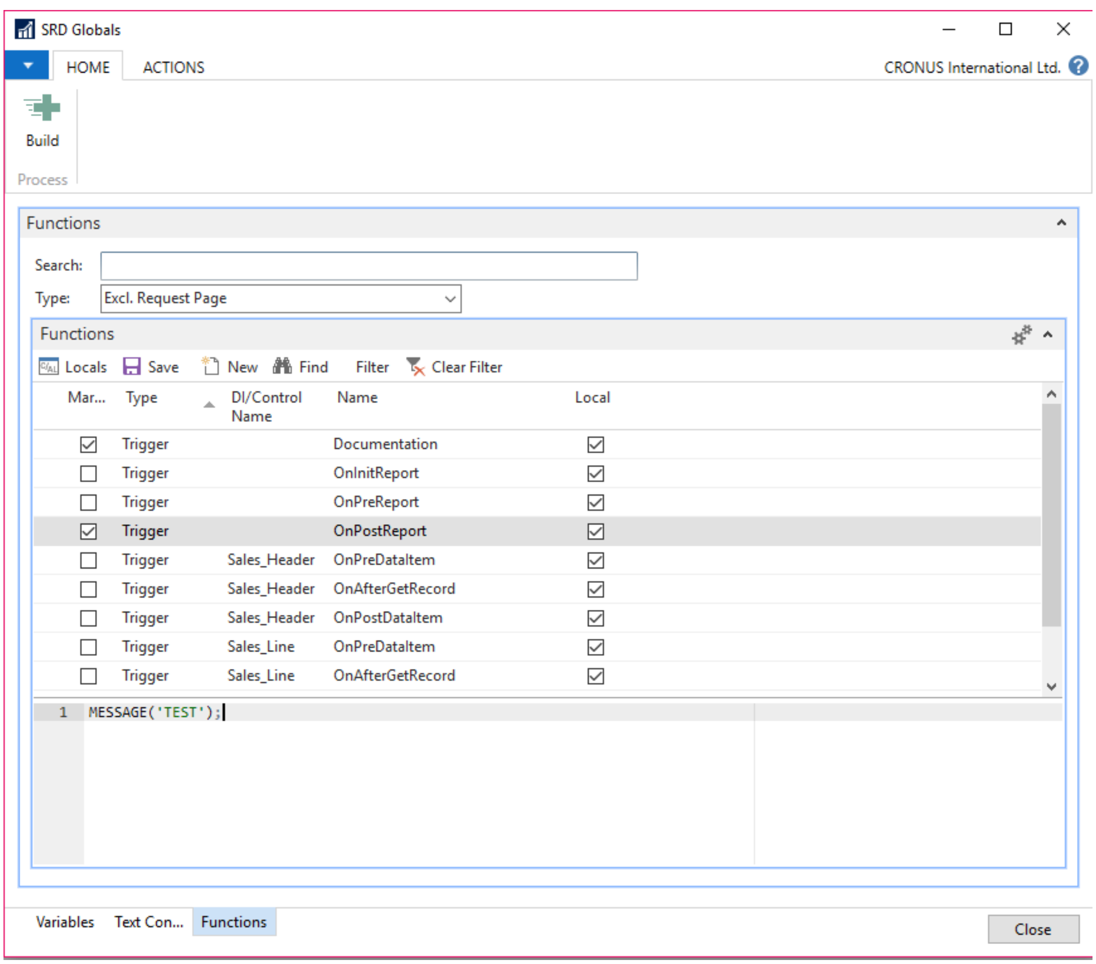
Note that sections are equivalent to Classic NAV report sections.

Elements are placed in sections using a grid layout. Elements can be placed vertically (layout Rows) and horizontally (layout Columns').

You can check what your layout looks like in the Preview page (Preview action) or you can even work with it open alongside SRD.



If you want to write C/AL code - go to Globals.



To build a NAV report - use action Build (F11) and Run (Ctrl+R) to test it. For more details, read this manual or our blog at www.simplanova.com

1.5. Simplanova Report Designer features

1. Simple NAV report development.
2. Compatible with NAV 2013 and later versions
3. Works in the Role-Tailored Client.
4. Portable (you can use it on any database, transfer both SRD reports and produced reports to other databases).
5. Produces native NAV reports with RDLC layout.
6. Multilingual (constants, captions and labels).
7. Dataset designer (for data model design).
    a. Automatically naming dataset elements.
    b. Data compression (better performance, not to overflowing users' memory, fully customizable).
    c. Automatic conversion of labels to captions and vice-versa (for dynamically changed language).
8. Layout designer.
    a. Preview add-in (visual representation of a report).
    b. NAV classic report concepts - header, footer, body sections.
    c. Page designer concepts - grid layout (columns or rows), tree-like design.
    d. Simple section building (converting dataset items to sections and textboxes).
    e. Straightforward Report Header and Report Footer building (no VB workarounds).
    f. Section, textbox, picture, line and rectangle element types.
    g. Simple definition of group headers and footers.
    h. Transport headers and transport footers.
    i. Aggregate functions (sum, count, average, running value).
    j. Customizable elements (fonts, sizes, colors, padding, borders).
    k. Dynamic visibility expressions (for hiding sections and textboxes).
    l. Simple element placement using group elements.
    m. Element floating (to left, right or center of parent element).
9. Request page designer.
10. C/AL code designer (compatible with all triggers, variable types and custom functions).
11. Unit of Measure of your choice (centimeters and inches).
12. NAV report conversion to SRD format.
13. Advanced features:
    a. VB expressions (for source, visibility, styling).
    b. Top/Left coordinates.
    c. Report Header, Report Footer and Report Body section properties.
14. Support
15. User Manual

1.6. Using Simplanova Report Designer

To quickly guide you through the main features.

The Report Designer card is divided into three sections:

- o Report properties (object, page sizes and global properties)
- o Dataset (table structure, fields, labels)
- o Layout (sections and elements)

Process actions:

- o Globals (variables, textconsts, methods, triggers)
- o Build (generates NAV report object, imports it into NAV and compiles it)
- o Preview (demonstrates what the report will look like, updates when refreshed)
- o Run (runs the report object)

New actions:

- o Add to Layout (select a table and a set of fields from the dataset and mark the last layout element, then click on this action to generate a section with a set of fields).
- o Apply (select multiple layout elements, change a single property in the Layout Properties subpage and click Apply to apply the change on all layout items).

Dataset:

- o The dataset is structured the same way as in standard NAV designer, except you've additionally got Labels and System items, which represent things like Page Number.

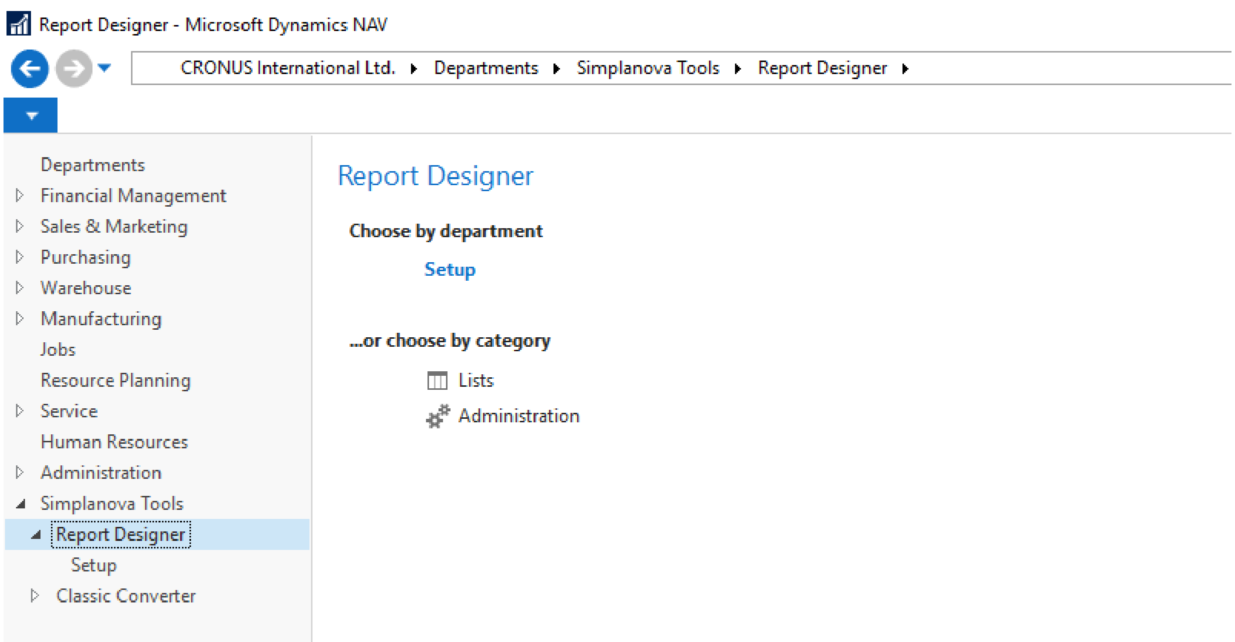
Layout:

- o Layout is structured similarly to Classic NAV reporting - you have sections at the bottom level and all the elements inside of them.
- o It is also similar to the page designer grid layout - you can use groups to join several elements and use layout of columns or rows (horizontal or vertical layering of elements).
- o The default flow is Columns, meaning every consecutive element is added from left to right of each other.
- o When you use Rows, every element is added below each other from top to bottom.
- o Float option allows you to stick the elements either on the Left, Center or Right of the parent element. This is especially helpful, when working with Report Header or Report Footer.
- o Coordinates can be overridden manually (left and top columns), but in that case the element will not follow the layout and float properties anymore. Coordinates are relative to the parent control.
- o Sections can be of 5 types: report header, report footer, header, body, footer.
- o And you can have group headers and footers, if you fill out Group Fields on a section.
- o Use Operation Type column for aggregate functions like sums and also to simulate the transheader and transfooter behaviour.
- o Expressions are for advanced users, because it allows writing VB.NET code into the Source column. In order to do it, start your Source with = sign. E.g., =Fields!Quantity.Value * Fields!Unit_Price.Value
- o Concat checkbox joins a textbox with the one above it and can be used to concatenate several dataset fields into a single one (best used with „Page X of Y“ label).
- o Visible property allows you to set a boolean field, which would control the visibility of any report element.

You can follow our blog to be the first to know about new features, get tips & tricks.
http://simplanova.com/#Blog
If you want to see a full walk-through on how to build a sample report, read this article:
http://simplanova.com/simplanova-report-wizard-phase-1/
In case you encounter any problems please register them on our support website
http://simplanova.com/support

1.6.1. Menu

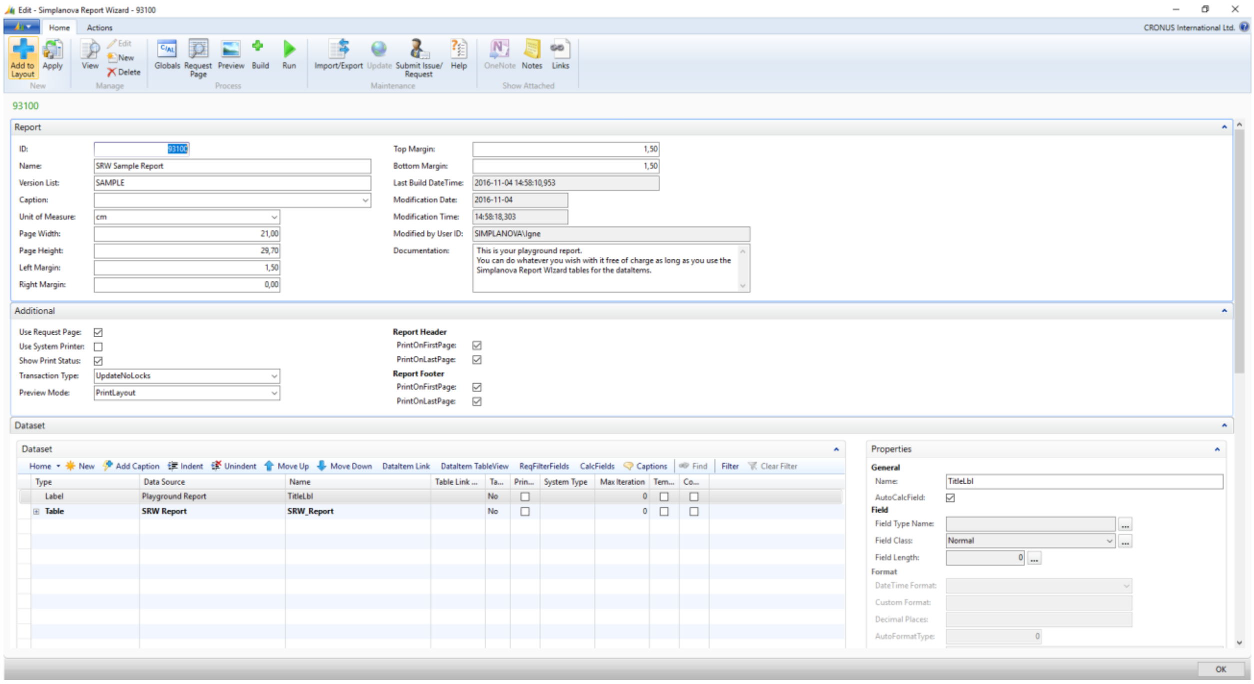
Report Designer menu can be navigated via Simplanova Tools \ Report Designer department.



1.6.2. SRD Setup

See 1.3.1 for more details

1.6.3. Report Designer

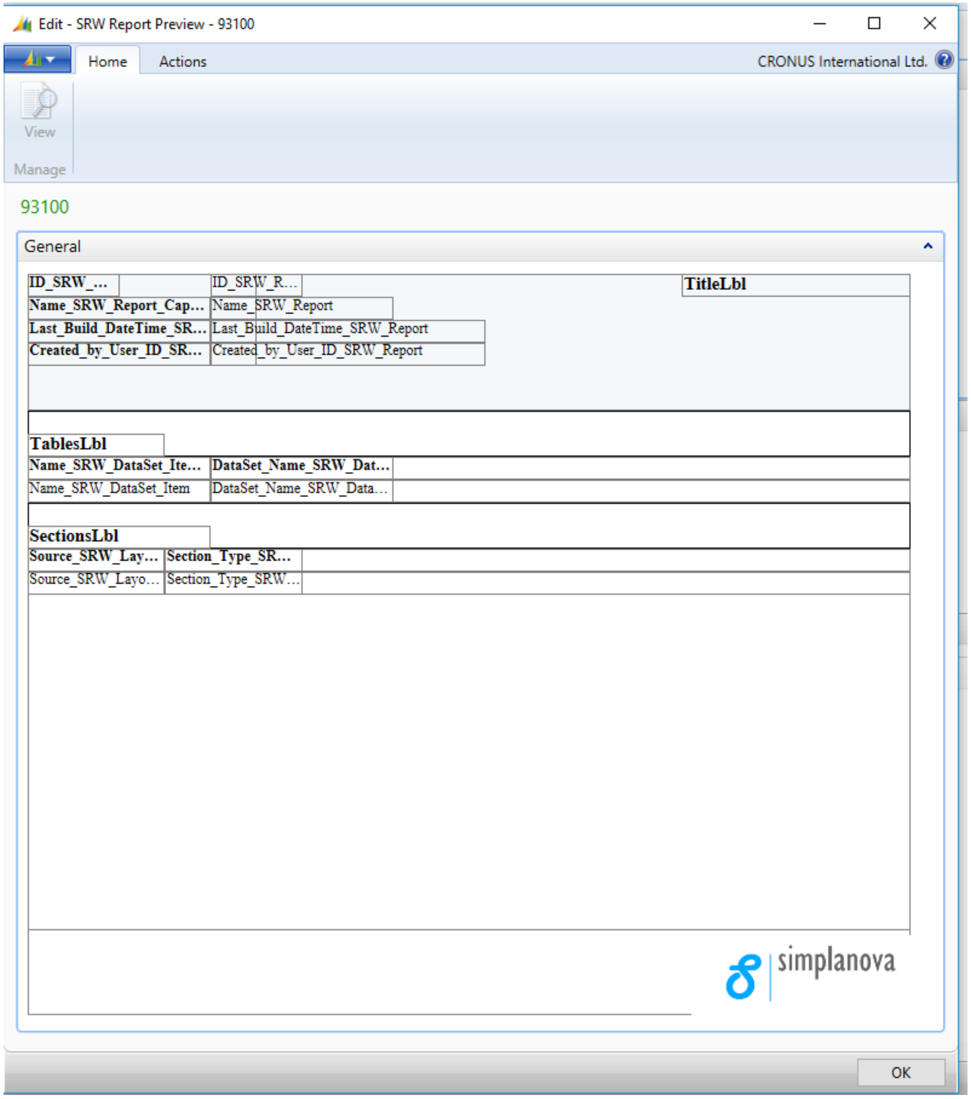


The Report Designer main page consists of three main parts: header, dataset and layout. Header contains all the object and page information, dataset is the data model of the report and the layout contains the visual description of the report.

1.6.3.1. Preview

Shortcut: Ctrl + E

Shows the Preview add-in, where you can view what the report layout will look like. Can be used alongside Report Designer to see what changes are made. Additional information is shown when you point at an element on the preview.



1.6.3.2. Build

Shortcut: F11

Builds the NAV report object, imports it and compiles it automatically. Can be used while developing the report to test, to verify the layout or to validate C/AL code.

1.6.3.3. Run

Shortcut: Ctrl + R

Runs the generated NAV report.

1.6.3.4. Import/Export

Imports or exports the report object to an Xml file. Can be used for transferring a report to another client’s database.

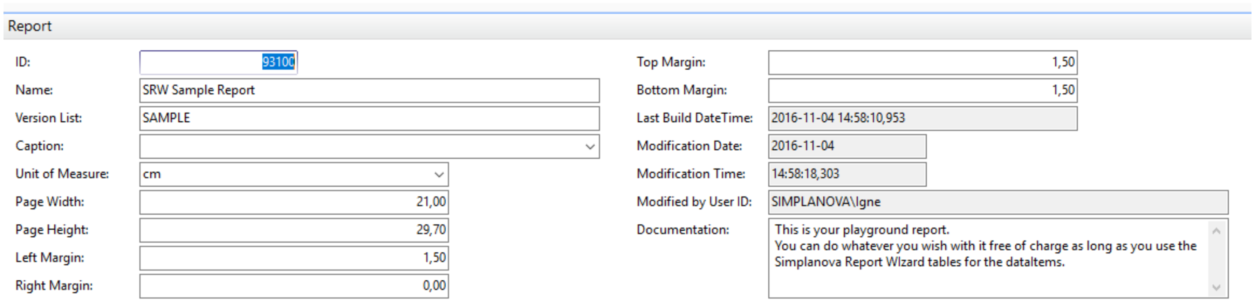
1.6.3.5. Submit Issue/Request

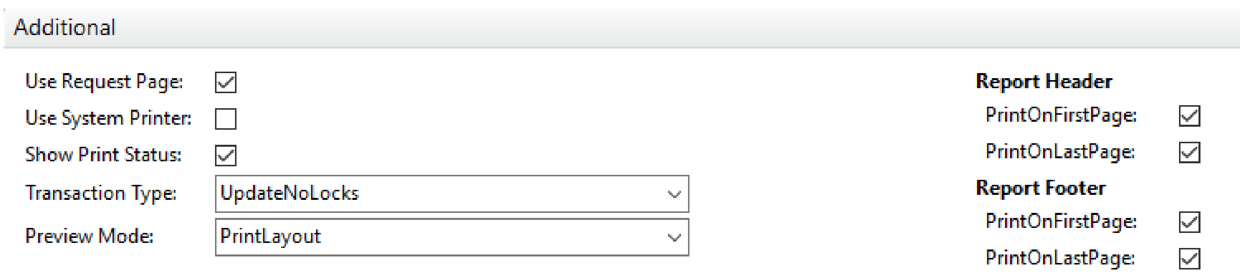
Triggers a hyperlink to www.simplanova.com/support. You can login (or register if you haven't previously) and submit a feature request or an issue you found.

1.6.3.6. Help

Triggers a hyperlink to this document.

1.6.4. Report Properties



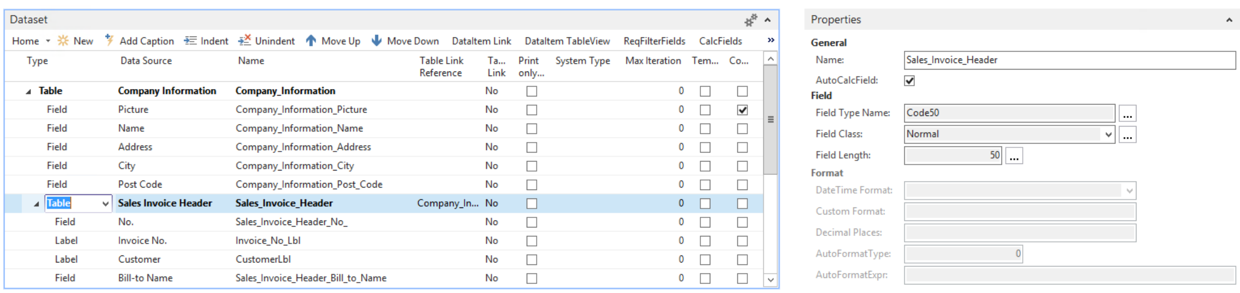


Property	Description
ID	NAV report object ID
Name	NAV report object name
Version List	NAV report object version list
Caption	Report object caption. When it is blank, NAV uses the report name instead
Unit of Measure	The UOM of all layout element sizes and coordinates. Can be centimeters or inches. By default the value from SRD Setup is applied
Page Width	Paper width. Default value from SRD Setup is applied
Page Height	Paper height. Default value from SRD Setup is applied
Left Margin	Paper margin. Default value from SRD Setup is applied
Right Margin	Paper margin. Default value from SRD Setup is applied
Top Margin	Paper margin. Default value from SRD Setup is applied
Bottom Margin	Paper margin. Default value from SRD Setup is applied
Last Build Date/Time	The date and time when the last compiled report object has been generated
Modification Date	Date, when object has been modified last
Modification Time	Time, when object has been modified last

Modified by User ID	User, who has modified the report last
Documentation	NAV documentation trigger
Use Request Page	Controls whether the request page should be shown or omitted. True by default
Use System Printer	Controls whether system printer or NAV printer setup is used. False by default
Show Print Status	Flag to show print status. True by default
Transaction Type	Equivalent to NAV report property. Control over committed, partially committed or uncommitted data is to be shown
Preview Mode	The default Preview Mode. Can be Normal or PrintLayout
Report Header/Footer PrintOnFirstPage	Controls whether Report Header or Footer is printed on the first page
Report Header/Footer PrintOnLastPage	Controls whether Report Header or Footer is printed on the last page

1.6.5. Dataset

Dataset controls the data structure of the report.



Property	Description
Type	Defines the data element. Possible values: ● Table - the source for the outlined fields ● Field - parent table field ● Field Caption - parent table caption ● Label - manually typed in text in multiple languages. This translate into NAV report label or in multi-language document context, becomes a text constant. Full list of language captions can be accessed by drilling down into the Data Source ● System - sets things like Page Number, Execution DateTime, Username ● Expression - any C/AL expression
Data Source	Table name, field name, label default language caption or expression, depending on the Type Tip: when looking up field names, it is possible to select more than one and

	all of them will be added as separate lines
Name	Dataset name generates automatically, but can be overridden to whatever is clearer
Table Link Reference	Contains the name of the parent table by default, otherwise can contain any ancestor table, which can be linked with the table in question by using the DataItem Link action.
Print only if Detail	If ticked, skips this record, if there are no records in the underlying table
Temporary	If ticked, the dataitem runs on temporary records
Max Iteration	The number limit of iterations on the dataitem
Field Class	The class of a field (Normal, FlowField, FlowFilter)
Field Length	The length of a field
Field Type Name	The type of a field
DateTime Format	Short - short date format on the system report runs in Long - long date format on the system report runs in Custom - can be set to any in the Customer Format field
Custom Format	Sets static format on textboxes, the format is RDLC format. E.g., f2 - float with 2 decimal places
Decimal Places	Number of decimal places, applies to decimal fields
AutoFormatType	Format for numerical fields
AutoFormatExpr	Format for numerical fields
System Type	Applies to the System type rows, can be used to print Page Numbers, Total Pages and a few other values
AutoCalcField	If set, automatically calculates the FlowField values
Compress	When set, a design pattern will apply, which removes the value of an item from the dataset, keeping it only where it is actually going to be used. Please note, when printing a document header field on the lines, compression will make it blank, so it needs to be disabled

1.6.5.1. New

Shortcut: Ctrl + Insert.

Creates a new row below the selected one.

1.6.5.2. Add Caption

When one or more fields is selected, this function adds their corresponding captions in the dataset.

1.6.5.3. Indent

Shortcut: Alt+Shift+Right.

Indents selected rows.

1.6.5.4. Unindent

Shortcut: Alt+Shift+Left.

Unindents selected rows.

1.6.5.5. Move Up

Shortcut: Alt+Shift+Up.

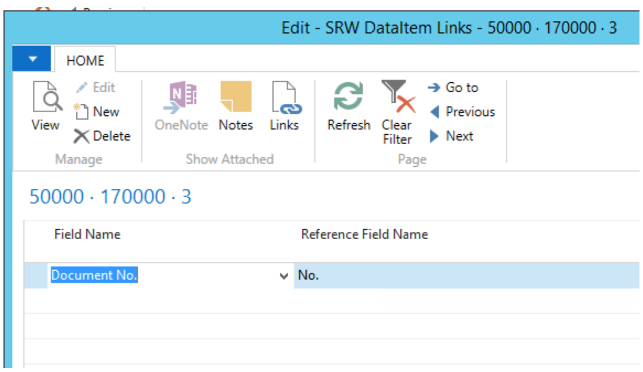
Moves selected rows up.

1.6.5.6. Move Down

Shortcut: Alt+Shift+Down.

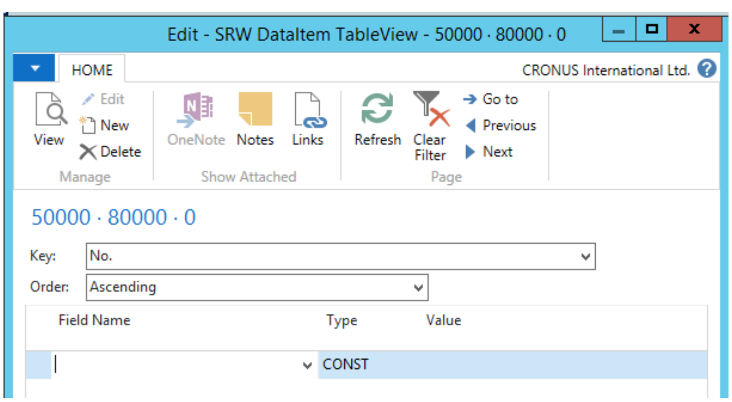
Moves selected rows down.

1.6.5.7. DataItem Link



Shows a list of links between the current dataitem (table) and the one it is linking to.

1.6.5.8. DataItem TableView



TableView allows to add static filters on certain columns and set the sorting order of a dataitem.

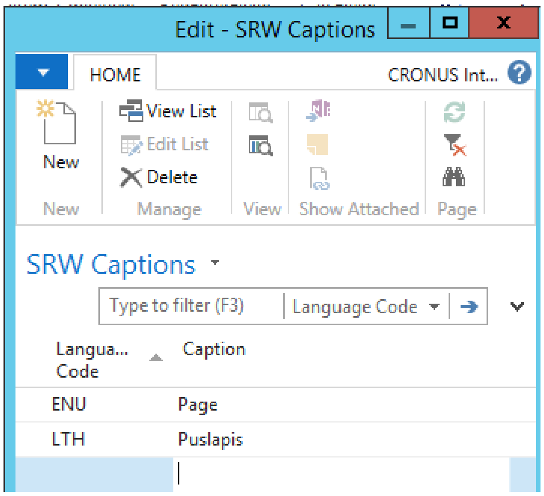
1.6.5.9. ReqFilterFields

Request filter fields allow setting a list of fields to filter by.

1.6.5.10. CalcFields

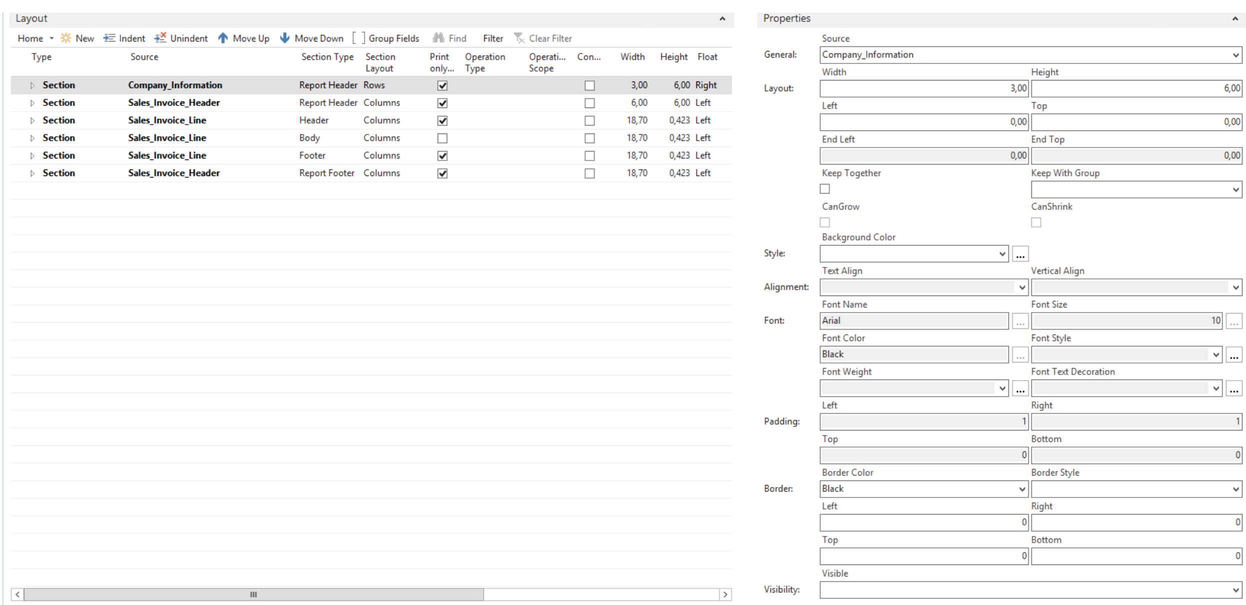
A list of flowfields to be calculated, when reading records from the database.

1.6.5.11. Captions



Applies to labels only, shows a list of captions in different languages.

1.6.6. Layout



Report layout is built in an intuitive way, which is different from the usual drag and drop type of workflow. Instead it works like NAV page designer, where elements are grouped together and placed partially automatically.

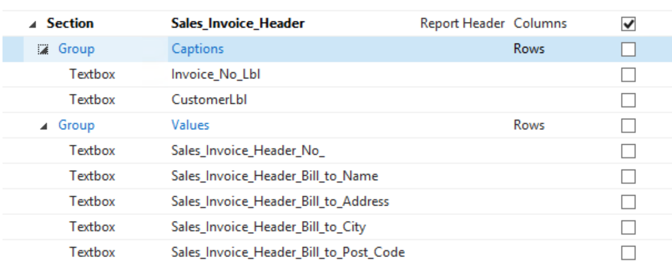
The placement of elements works in two modes: absolute (when Left and Top properties are set to a particular coordinate) or grid (when element placement is controlled using Group element, Section Layout and Float properties).

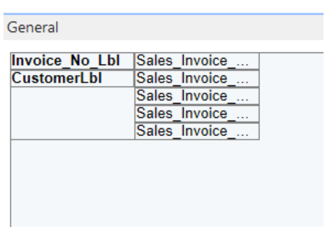
Property	Description
Type	• Section - section is a Tablix row, when in the Report Body or Rectangle, when in Report Header or Footer, which can contain other elements and loops over the Source dataitem records • Group - rectangle, which groups other elements together • Textbox • Picture • Line • Rectangle
Section Type	• Header - prints once per dataitem, always above body section, usually used for captions • Body - prints once per every dataitem record • Footer - prints once per dataitem, always below body section, mostly used for totals • Report Header - prints in a fixed area on top of the report • Report Footer - prints in a fixed area at the bottom of the report
Section Layout	Applies to sections and groups • Columns - each element is placed after one another from left to right • Rows - each element is placed after one another from top to bottom
Float	Left, Right, Center. Depending on the value, an element sticks to the particular place of it's parent element.
Operation Type	Aggregate functions • Blank • Sum • Count • Avg • Running Value - Sum (can be used on Transport Footer) • Running Value - Count • Previous Value - Sum (can be used on Transport Header) • Previous Value - Count • First • Last • Min • Max
Operation Scope	In which dataitem scope the aggregate should work
Source	Source dataset item Tip: you can type the names using asterisks Tip: using lookup, if more than one dataset item is selected, all of them will

	be added Advanced tip: if source is started with an equal sign, it can contain Visual Basic expressions, e.g., “=Fields!Price.Value * Fields!Quantity.Value” The above expression can also be written in a simplified form, referencing a dataset item in curly brackets as such: ={Price} * {Quantity}
Visible	Can be set to an expression or field in the dataset to control whether a section or an element is shown or hidden. Advanced tip: source can start with equality sign to write Visual Basic expressions, e.g., “=False”. Advanced expressions can be written by referencing dataset item in curly brackets: ={Page_Number} = 1
Font Name	Tip: font properties can be set to a dataset expression to dynamically change Tip: use specific font names to print barcodes
Font Size	
Font Color	
Font Style	
Font Weight	
Font Text Decoration	
Width	Width of an element
Height	Height of an element
Top	Top coordinate. If it is set, section layout and float properties are ignored
Left	Top coordinate. If it is set, section layout and float properties are ignored
End Top	Line end coordinate
End Left	Line end coordinate
Text Align	
Vertical Align	
Page Break	Controls when the page is split ● Blank ● Start - at the beginning of the section ● End - at the end of the section ● StartAndEnd - at beginning and end of section ● Between - between each record
Reset Page Number	When ticked, resets the page number on every record of the particular dataitem
Repeat On New Page	When ticked, section is printed on every page
Padding Left	
Padding Right	
Padding Top	
Padding Bottom	

Border Color	
Border Style	
BorderWidth Left	
BorderWidth Right	
BorderWidth Top	
BorderWidth Bottom	
Concat	Applies to textboxes only. When ticked, the textbox is not created, but instead its value is concatenated with the textbox above. Tip: useful in cases, where it is needed to save space and have all values in one textbox. PageLbl & " " & PageNumber & " " & ofLbl & " " & TotalPages could be an example, where each of the textboxes are concatenated to form a single one, printing text "Page 1 of 10"
Print only if Records	Applies to Header and Footer sections. This flag controls, whether a section is printed, when there are no records for the particular dataitem.
Keep Together	If ticked, an element, not fitting in the page will carry forward into the next page with surrounding elements, which are set to keep together
Keep With Group	
Background Color	
CanGrow	If ticked, a textbox will expand, in case its value is too big
CanShrink	If ticked, a textbox will shrink, when its value is smaller

Tip: use Group element to group report header elements together. For example, to group captions and values.





1.6.6.1. Add to Layout

Shortcut: Ctrl + D

This function can be called from the header and it adds all the selected Dataset items into selected place in the layout.

Tip: selected tables become sections and all other items become textboxes (BLOBs are set to Pictures). If you select a table with the fields you want in the section, you can add all of them in a click of a button. E.g., select table Sales Header and all Field Captions in it to create the Header section for this dataitem.

1.6.6.2. Apply

Shortcut: Ctrl + Q

Apply action sets the last changed property on all selected layout items. E.g., to quickly change the width of multiple textboxes, just change the first one, mark the rest and click Apply.

1.6.6.3. New

Shortcut: Ctrl + Insert.

Creates a new row below the selected one.

1.6.6.4. Indent

Shortcut: Alt+Shift+Right.

Indents selected rows.

1.6.6.5. Unindent

Shortcut: Alt+Shift+Left.

Unindents selected rows.

1.6.6.6. Move Up

Shortcut: Alt+Shift+Up.

Moves selected rows up.

1.6.6.7. Move Down

Shortcut: Alt+Shift+Down.

Moves selected rows down.

1.6.6.8. Group Fields

Applies to sections only. This option allows setting the group key for Header or Footer section. This way it is possible to build GroupHeaders and GroupFooters from any fields in the dataset.

Important: in order for group fields to work properly, they need to exist in the Sorting Key (or Primary Key, if sorting key is blank) of the containing DataItem.

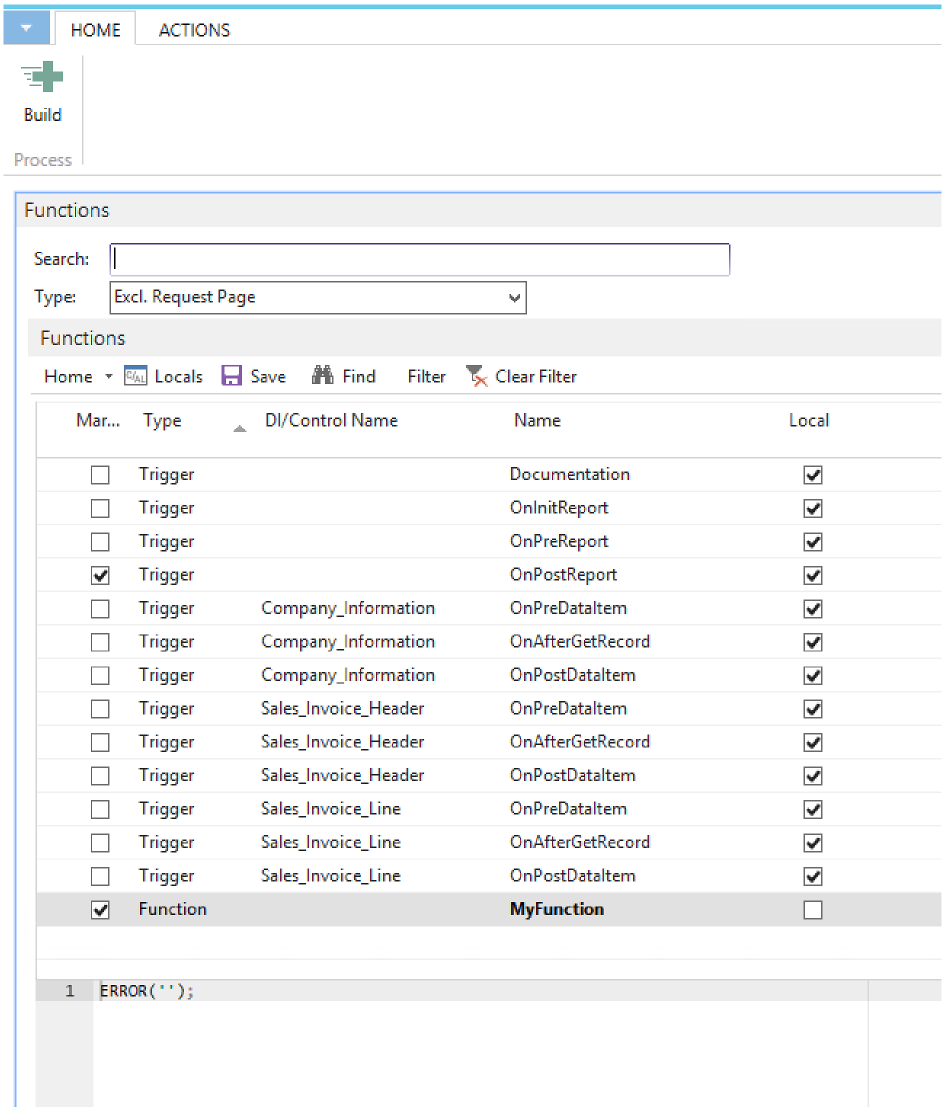
1.6.7. Globals

Shortcut: F9.

Action Globals contains functions, triggers and variables.

Tip: custom functions can be simply inserted at the end of the list.

Tip: to enter option variable option strings, use subtype column.



1.6.7.1. Search

Search bar marks all triggers and functions, which contain the text in it.

1.6.7.2. Locals

Gives access to local variables.

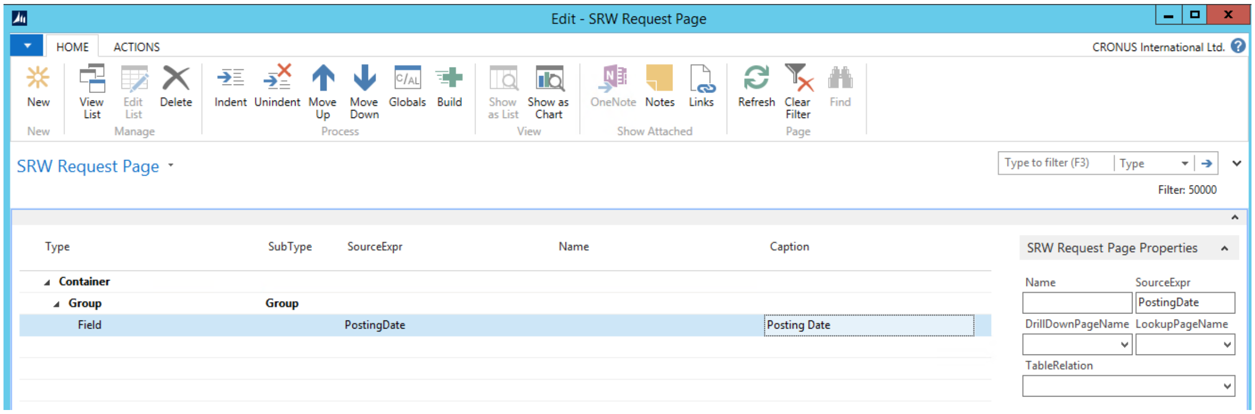
1.6.7.3. Save

Shortcut: Ctrl+S.

Saves the function or trigger changes. It is required to use the Save button in order to store the changes to the trigger or function code.

1.6.8. Request Page

Shortcut: F10.



1.7. Frequently Asked Questions (FAQ)

Q: How to create page numbering?

Let’s say you want to show Page X of Y on your report.

In the dataset you need to create these items:

- Label with text “Page “ (for simplicity add the space in there)
- Dataset item of System type with Page Number set as System Type
- Label with text “ of “
- Dataset item of System type with Total Pages set as System Type

Dataset

Home ▾ New Add Caption Indent Unindent Move Up Move Down DataItem Link DataItem TableView ReqFilterFields CalcFields Captions Find Filter Clear Filter

Type	Data Source	Name	Table Link Reference	Ta... Link	Print only...	System Type	Max Iteration	Tem...	Co...
Field	Bill-to Name	Sales_Invoice_Header_Bill_to_Name		No	☐		0	☐	☐
Field	Bill-to Address	Sales_Invoice_Header_Bill_to_Address		No	☐		0	☐	☐
Field	Bill-to City	Sales_Invoice_Header_Bill_to_City		No	☐		0	☐	☐
Field	Bill-to Post Code	Sales_Invoice_Header_Bill_to_Post_Code		No	☐		0	☐	☐
Label	Page	Page_Lbl		No	☐		0	☐	☐
System		Page_Number		No	☐	Page Number	0	☐	☐
Label	of	ofLbl		No	☐		0	☐	☐
System		Total_Pages		No	☐	Total Pages	0	☐	☐
Field	Amount	Sales_Invoice_Header_Amount		No	☐		0	☐	☐
▷ **Table**	**Sales Invoice Line**	**Sales_Invoice_Line**	Sales_Invoic...	Yes	☐		0	☐	☐

Now you can only add page numbering either in the Report Header or Report Footer. In order to do that, add all four elements in the layout and concatenate them together using Concat flag (it concatenates a textbox with one above, so just be sure to mark last 3).

Layout

Home ▾ New Indent Unindent Move Up Move Down [ ] Group Fields Find Filter Clear Filter

Type	Source	Section Type	Section Layout	Print only...	Operation Type	Operati... Scope	Con...	Width	Height	Float
▷ **Section**	**Sales_Invoice_Header**	Report Header	Columns	☑			☐	6,00	0,423	Left
▷ **Section**	**Sales_Invoice_Header**	Report Header	Columns	☑			☐	3,00	0,423	Left
▷ **Section**	**Company_Information**	Report Header	Rows	☑			☐	6,00	6,00	Right
▷ **Section**	**Sales_Invoice_Header**	Report Header	Columns	☑			☐	6,00	1,00	Left
▷ **Section**	**Sales_Invoice_Line**	Header	Columns	☑			☐	18,70	0,423	Left
▷ **Section**	**Sales_Invoice_Line**	Body	Columns	☐			☐	18,70	0,423	Left
▷ **Section**	**Sales_Invoice_Line**	Footer	Columns	☑			☐	18,70	0,423	Left
▷ **Section**	**Sales_Invoice_Line**	Footer	Columns	☑			☐	18,70	0,423	Left
◢ **Section**	**Sales_Invoice_Header**	Report Footer	Columns	☑			☐	3,00	0,423	Right
Textbox	Page_Lbl			☐			☐	3,00	0,423	Left
Textbox	Page_Number			☐			☑	0,00	0,00	Left
Textbox	ofLbl			☐			☑	0,00	0,00	Left
Textbox	Total_Pages			☐			☑	0,00	0,00	Left

2. Simplanova Report Converter

2.1. Requirements

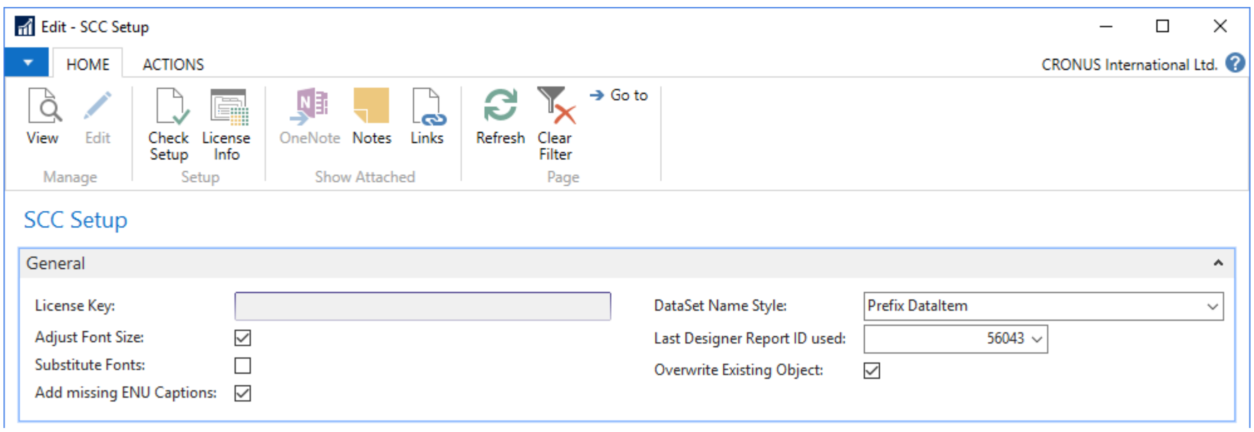
Simplanova Report Converter has the same requirements as Report Designer (see 1.2)

2.2. Installation

See Simplanova Tools Installation Guide for how to install and setup. You may also watch this video as an overview of how to install Simplanova Tools: https://www.youtube.com/watch?v=y2VE3ToxXw0

2.2.1. Converter setup page

Run the Role-Tailored Client and locate the Simplanova Tools department in the menu. Expand it, then "Classic converter" and click "Setup".



The setup should look like the above. It will be populated with default values when you first run it.

The license key is the same as for Simplanova Report Designer – you should refer to 1.3.1 on how to obtain and install it. You can set your license key in this page, then you check license info from this setup it shows only points for dataport and report conversion.

Adjust font sizes: if checked the tool will automatically reduce font sizes for the text to fit in available textbox height. When unchecked, original font size will be retained.

Substitute fonts: if checked the tool will apply Segoe UI font for textboxes that do not have font family specified. Arial font will be used otherwise.

Add missing ENU captions: if checked and ENU caption translation is not available in original report, the tool will automatically create it by copying the first available caption translation.

DataSet name style: selects naming style for dataset items in produced report. Original DataItem name will be added either as a prefix or a suffix to new dataset items.

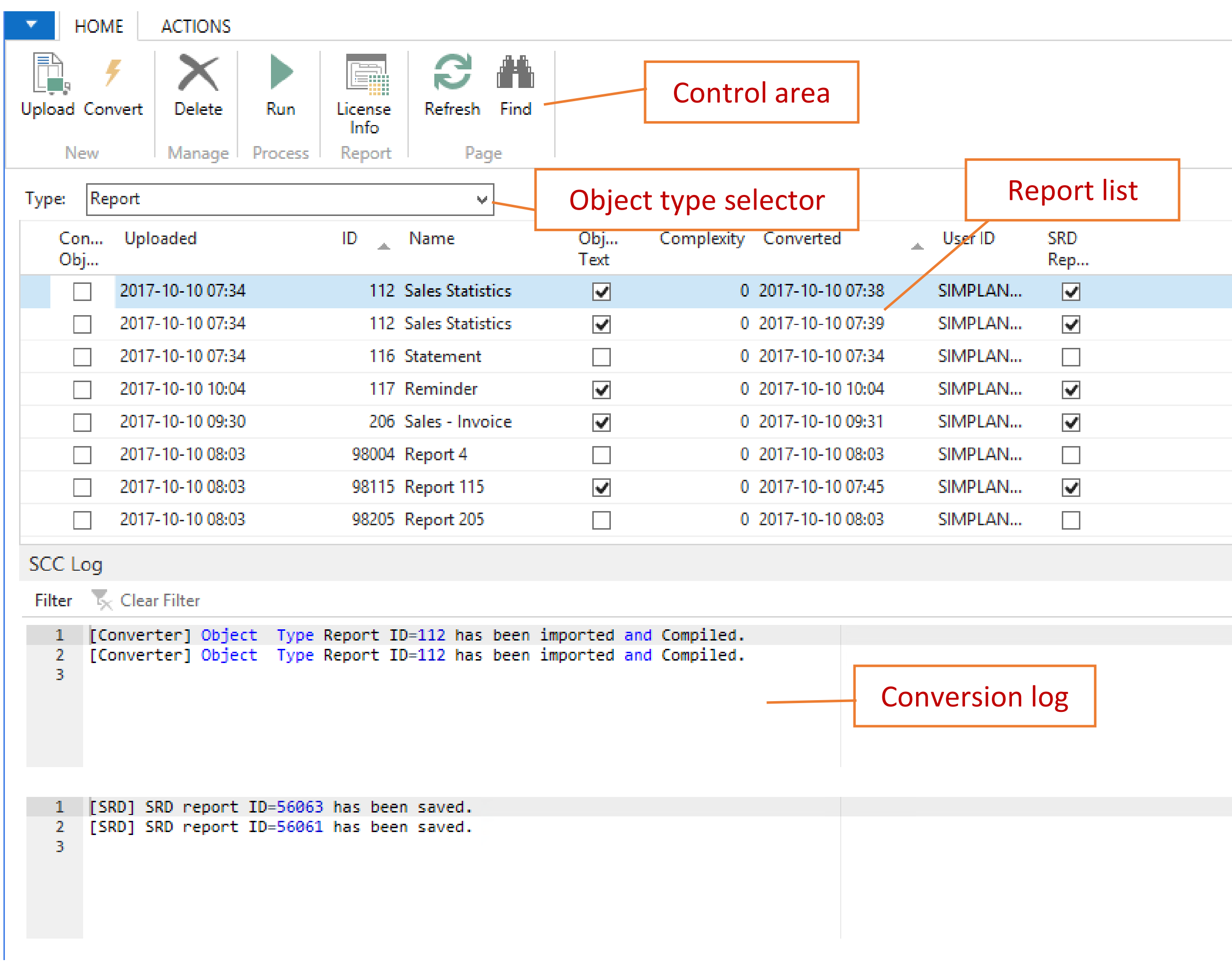
Last Designer Report ID used: when converting classic report to modern version, the tool will also automatically import it to Simplanova Report Designer format. This setting specifies the id range used for SRD reports.

Overwrite Existing Object: if checked the tool will automatically overwrite existing reports with the same id when making a conversion. When unchecked a user dialog will be displayed asking to confirm the overwrite.

2.3. How to use

2.3.1. General interface

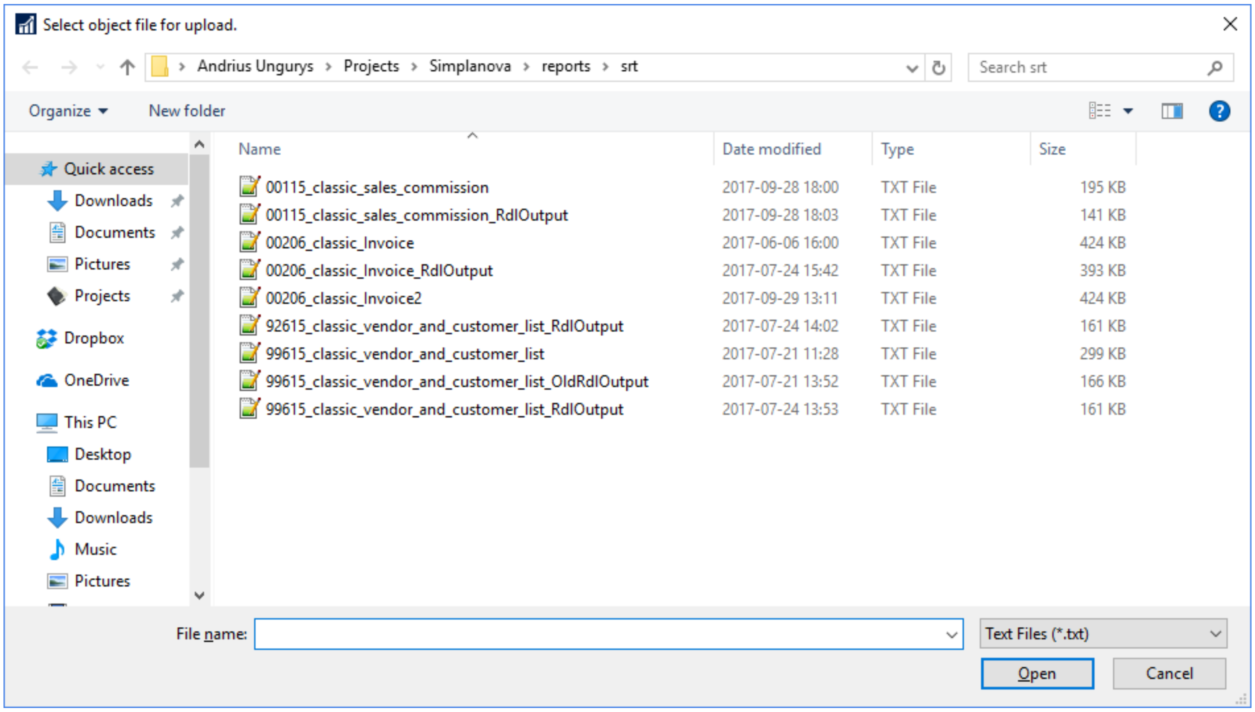
Navigate to Simplanova Tools\Classic Converter section and click “Tasks” – a new window opens



2.3.2. Uploading reports for conversion

When you want to upload new reports for conversion, click “Upload” button and select an object file that contains classic reports. Then click “Open” to close the dialog.

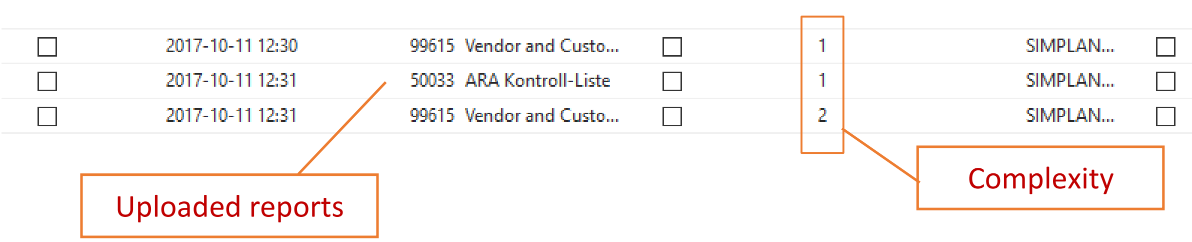
IMPORTANT: Table objects defined as report DataItems MUST BE INCLUDED in the uploaded file. Failing to do so will result in multiple conversion errors.



Note: you can include any number of reports in uploaded file.

After the upload is done Simplanova Report Converter will extract and evaluate all included reports. You should see a list with all uploaded items.

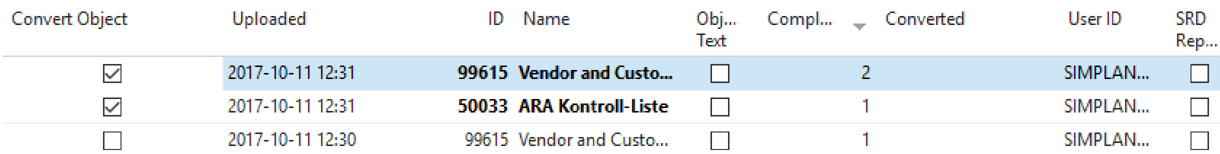
IMPORTANT: Reports can vary in their conversion complexity therefore Simplanova Report Converter automatically analyzes each of them and assigns a complexity rating. It can be a value of 1 (simple reports), 2 (intermediate reports) and 4 (advanced reports). Depending on report complexity your converter license count will be decreased by displayed amount when you run the conversion.



2.3.3. Converting reports

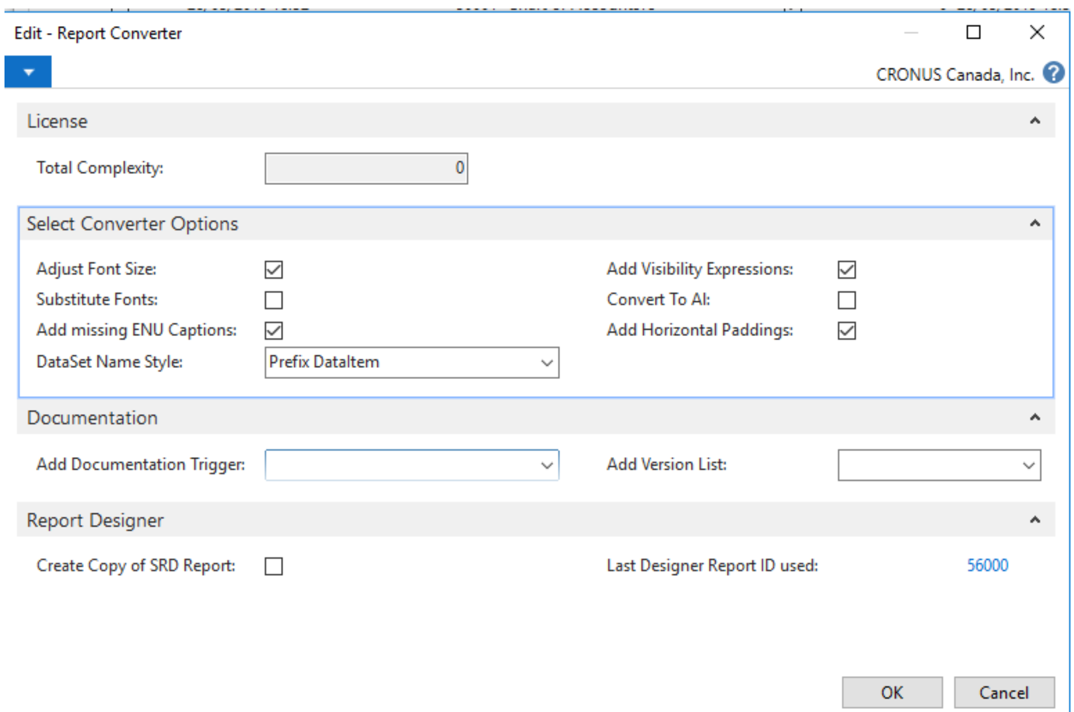
After reports have been uploaded and evaluated, you can convert them.

First select which reports you want to convert by clicking checkbox in “Convert Object” column:



Convert Object	Uploaded	ID	Name	Obj... Text	Compl...	Converted	User ID	SRD Rep...
☑	2017-10-11 12:31	**99615**	**Vendor and Custo...**	☐	2		SIMPLAN...	☐
☑	2017-10-11 12:31	**50033**	**ARA Kontroll-Liste**	☐	1		SIMPLAN...	☐
☐	2017-10-11 12:30	99615	Vendor and Custo...	☐	1		SIMPLAN...	☐

Then click button “Convert”. A dialog will open:



In total complexity field you will see how many converter licenses will be used for this operation. Certain advanced reports can use more than one license to convert.

Adjust font sizes: if checked the tool will automatically reduce font sizes for the text to fit in available textbox height. When unchecked, original font size will be retained.

Substitute fonts: if checked the tool will apply Segoe UI font for textboxes that do not have font family specified. Arial font will be used otherwise.

Add missing ENU captions: if checked and ENU caption translation is not available in original report, the tool will automatically create it by copying the first available caption translation.

DataSet name style: selects naming style for dataset items in produced report. Original DataItem name will be added either as a prefix or a suffix to new dataset items.

Add Visibility Expressions – creates visibility expressions (recommended true).

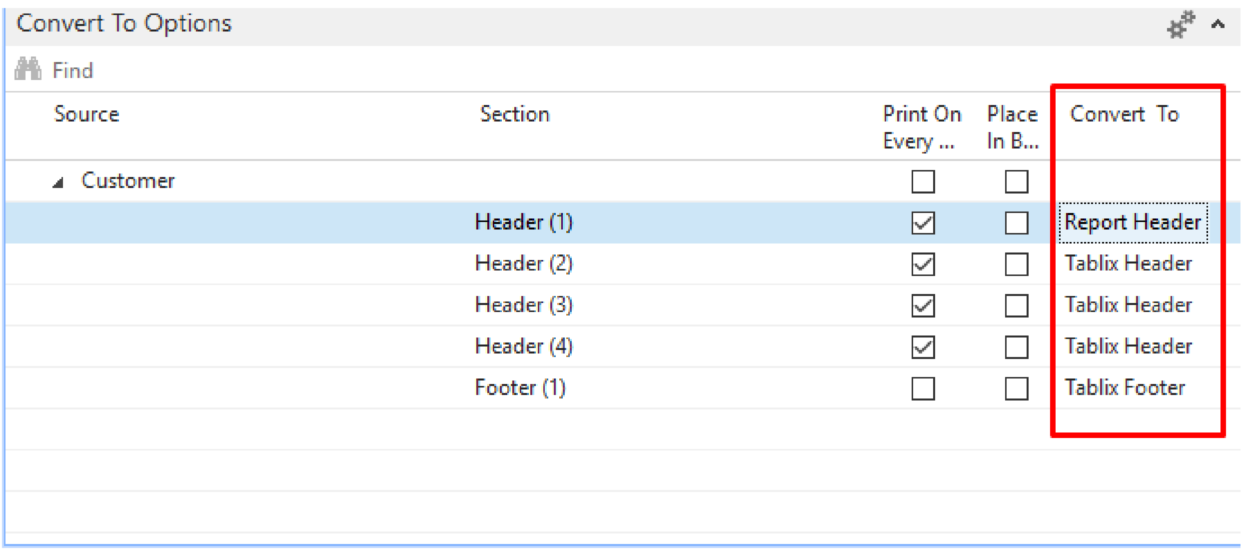
Convert To AL – converts report from classic to rdlc and to AL.

Add Horizontal Paddings – sets 1pt left and right paddings on textboxes.

Add Documentation Trigger – adds specified text in documentation trigger.

Add Version List – sets version list for converted reports.

Create Copy of SRD Report – creates SRD report for converted report.

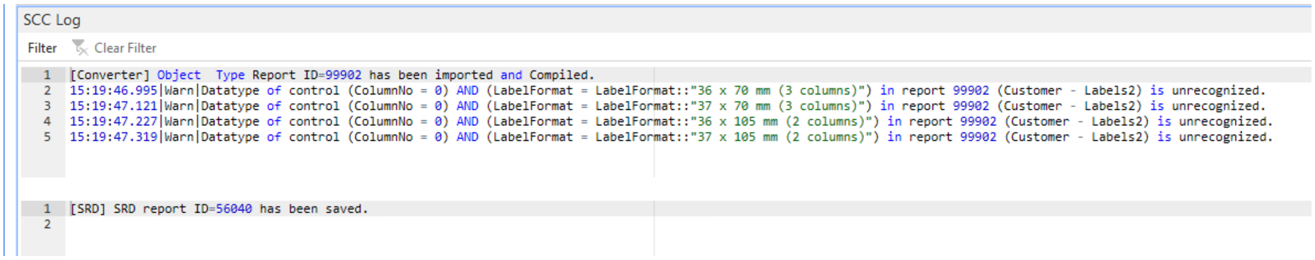


After complexity calculation where is a possibility to correct some of report header/footer conversion options. You can chose where to place your header/footer sections in body or in header/footer.

Last Designer Report ID used: when converting classic report to modern version, the tool will also automatically import it to Simplanova Report Designer format. This setting specifies the id range used for SRD reports.

To start the conversion process, click “OK”. The tool will then proceed with conversion and will display the results. Check conversion log for each selected reports to see more details.

You should see an output similar to this:



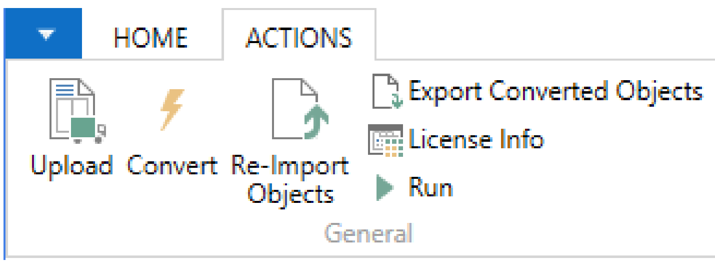
When the operation is successful the converted report is automatically imported and compiled.

2.3.4. Running converted reports

After report has been converted, imported and complied, you can run it by selecting and clicking "Run" button.

2.3.5. Additional converter actions

When you click on the "Actions" tab in converter menu, there are additional actions available.



Re-Import Objects: tries to run import operation again for converted reports. Useful when you choose not to overwrite existing objects during initial conversion.

Export Converted Objects: exports converted reports into object file and allow to download them.

License Info: displays available Simplanova Report Converter license amount and usage history. You can order converter licenses here http://simplanova.com/simplanova-report-converter

2.4. Frequently Asked Questions

Q: Report conversion log warns that compilation has failed because table 359 is missing - what should I do?

Simplanova Report Converter does not handle errors related to changed objects between NAV versions. In this case compiler warns that table 359 'Posted Document Dimension' (which was available in previous NAV version) no longer exists. This table, together with all other dimension tables, had been redesigned into table 480 'Dimension Set Entry' starting from version NAV2013.

You must manually resolve the error by editing the converted report and replacing all links to table 359 with table 480.

Q: Do I need to include related tables when uploading classic reports for conversion?

Tables defined as report DataItems MUST BE EXPORTED together with report source. Failing to do so will result in multiple conversion errors as the Simplanova Report Converter uses table information to determine primary keys for tablix grouping purposes.

Some source report sections might have references to fields from other data tables as well. We recommend to include those tables when performing conversion. If they are missing, the conversion will succeed but decimal and date textboxes might have incorrect formatting.

You can quickly identify which tables should be included by reviewing conversion log. Look for lines similar to this: "Datatype of Control SourceExpr: CompanyInfo."Phone No." in Report ID: 206, Report name: Sales - Invoice10 is unrecognized, Table: CompanyInfo ID 79 is missing". It means that table 79 'CompanyInfo' should be included in the uploaded object file.

Q: Dynamics 365 Business Central Spring release throw: Attempted to issue a client callback while a write transaction started… How do I fix that error?

If you getting similar error you shoul check your CustomSetting.Config file and set or include AllowSessionCallSuspendWhenWriteTransactionStarder = true.

```
<add key="AllowSessionCallSuspendWhenWriteTransactionStarted" value="True" />
```

Q: What features are currently not supported by Simplanova Report Converter?

We are working very hard to make full conversion of classic reports to RDLC format possible however some features are not yet available at this time. These include:

- Report transheader / transfooter conversion
- Oval shapes in controls
- Background pictures

2.5. Known issues

The following list of issues is known to development team and is being worked on in the order of decreasing priority.

2.5.1. Incorrect totals calculation in footer sections

Description: Some complex cases of totals aggregation produce incorrect results in converted footer sections.

Proposed solution: Manually edit trigger code and / or layout textbox values to fix the issue.

2.5.2. Percentage values are incorrectly calculated in footer sections

Description: When percentage values are calculated using C/AL code, they are incorrectly displayed in footer sections.

Proposed solution: Manually edit trigger code to fix the issue.

3. Simplanova Dataport Converter

3.1. Requirements

Simplanova Dataport Converter has the same requirements as Report Designer (see 1.2)

3.2. Installation

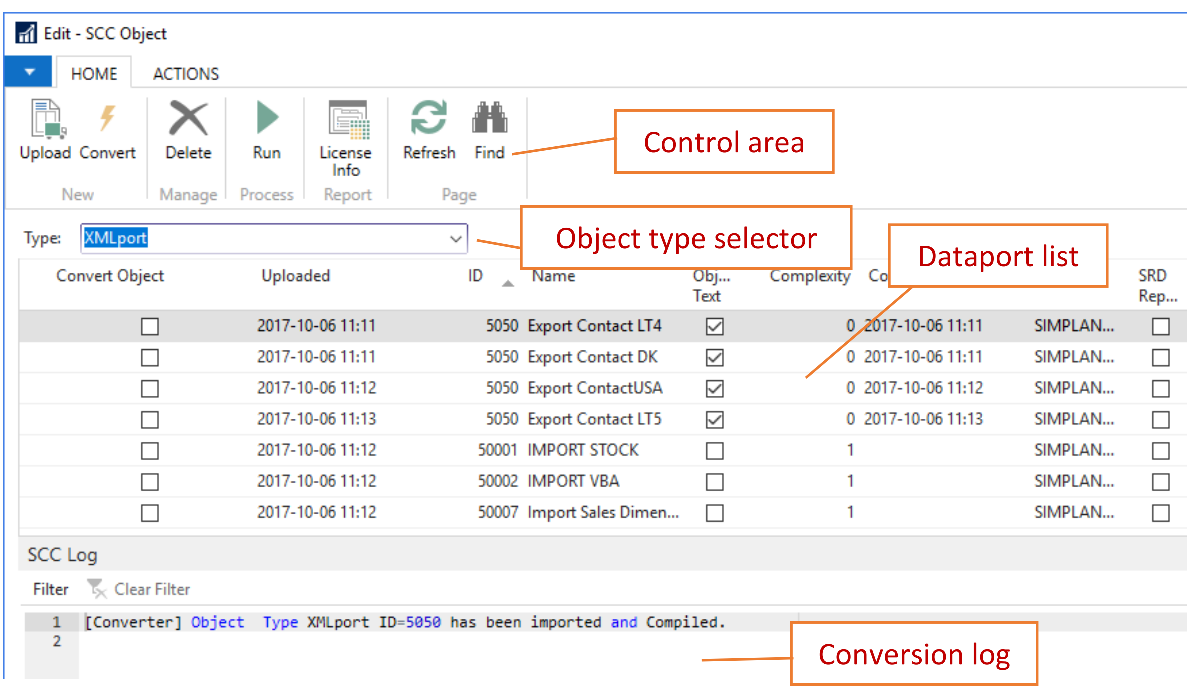
See Simplanova Tools Installation Guide for how to install and setup. You may also watch this video as an overview of how to install Simplanova Tools: https://www.youtube.com/watch?v=y2VE3ToxXw0

There are no additional configuration steps to complete for this tool.

3.3. How to use

3.3.1. General interface

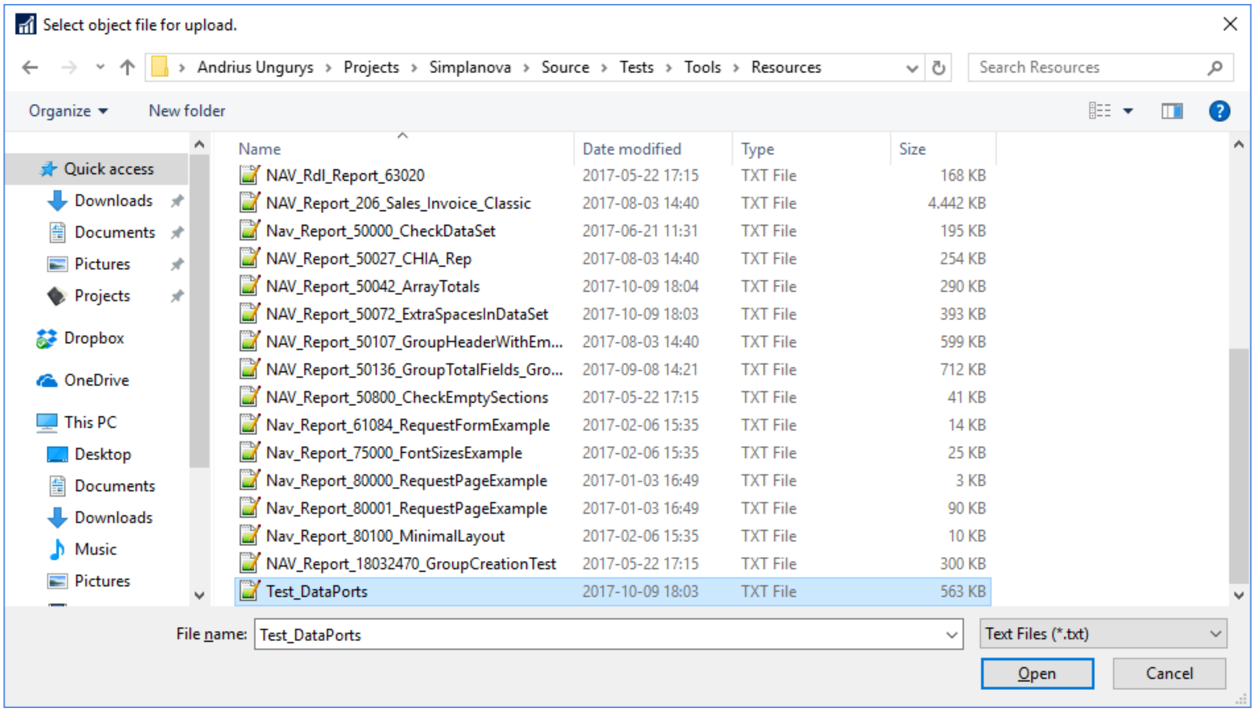
Navigate to Simplanova Tools\Classic Converter section and click “Tasks” – a new window opens. Select XMLPort in object type selector dropdown.



3.3.2. Uploading dataports for conversion

When you want to upload new dataports reports for conversion, click “Upload” button and select an object file that contains classic dataports. Then click “Open” to close the dialog.

IMPORTANT: Table objects used in dataports MUST BE INCLUDED in the uploaded file. Failing to do so will result in conversion errors.



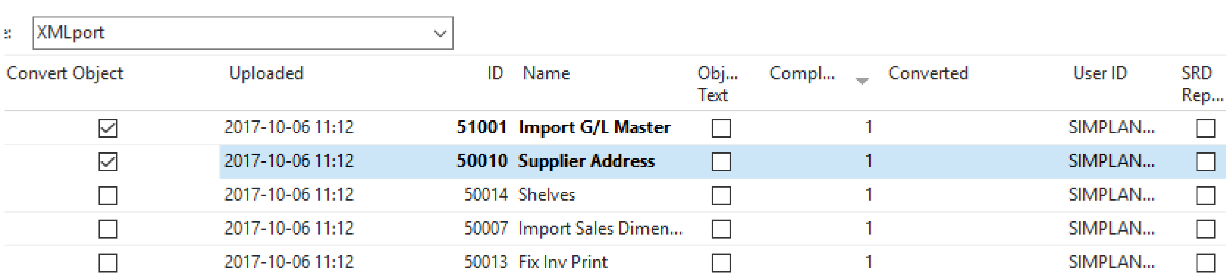
Note: you can include any number of dataports and tables in uploaded file.

After the upload is done Simplanova Report Converter will extract and evaluate all included objects. You should see a list with all uploaded items.

3.3.3. Converting dataports to xmlports

After dataport objects have been uploaded, you can convert them.

First select which objects you want to convert by clicking checkbox in “Convert Object” column:

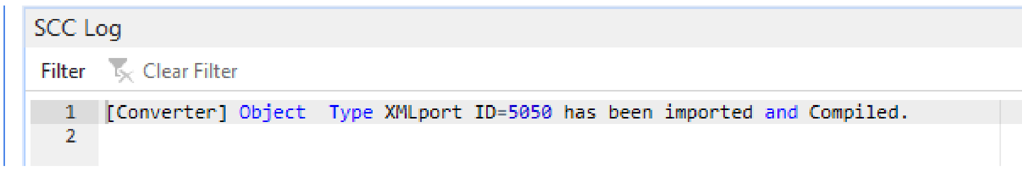


XMLport

Convert Object	Uploaded	ID	Name	Obj... Text	Compl...	Converted	User ID	SRD Rep...
☑	2017-10-06 11:12	**51001**	**Import G/L Master**	☐	1		SIMPLAN...	☐
☑	2017-10-06 11:12	**50010**	**Supplier Address**	☐	1		SIMPLAN...	☐
☐	2017-10-06 11:12	50014	Shelves	☐	1		SIMPLAN...	☐
☐	2017-10-06 11:12	50007	Import Sales Dimen...	☐	1		SIMPLAN...	☐
☐	2017-10-06 11:12	50013	Fix Inv Print	☐	1		SIMPLAN...	☐

For each selected dataport one license item will be used during conversion. When you are ready, click "Convert" button. Conversion will start immediately and you will be notified of results.

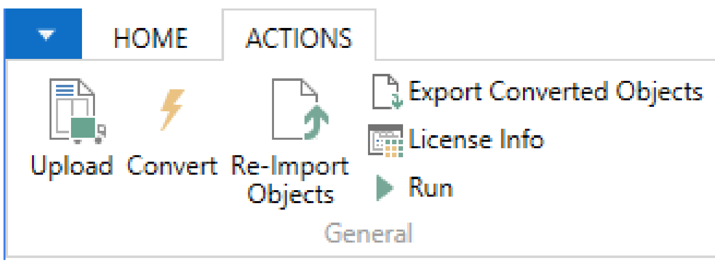
Check conversion log for each object to see more details. You should see an output similar to this:



When the operation is successful the converted xmlports are automatically imported and compiled.

3.3.4. Additional converter actions

When you click on the "Actions" tab in converter menu, there are additional actions available.



Re-Import Objects: tries to run import operation again for converted xmlports. Useful when you choose not to overwrite existing objects during initial conversion.

Export Converted Objects: exports converted xmlports into object file and allow to download them.

License Info: displays available Simplanova Report Converter license amount and usage history.
You can order converter licenses here http://simplanova.com/simplanova-report-converter

3.4. Frequently Asked Questions

3.5. Known issues