

1ClickFactory Microsoft Dynamics NAV Classic Report Transformation Service Guidelines

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1. Prepare old (current) database for objects to be exported

Reports for transformation should be exported from Microsoft Dynamics NAV 2009 R2 with “*Enable for Microsoft Dynamics NAV Server*” property checked (see Figure 1). This property can be found under “**File** → **Database** → **Alter**.”

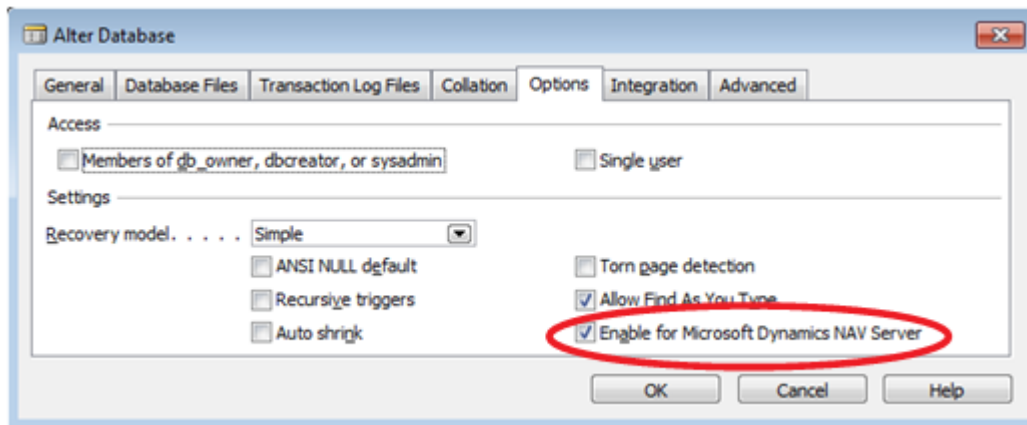


Figure 1 “Enable for Microsoft Dynamics NAV Server” option

1. If your current database is NAV 2009 R2 but “*Enable for Microsoft Dynamics NAV Server*” property is checked, follow these steps:

1. Check “*Single user*” checkbox and then click OK (see Figure 1.1).

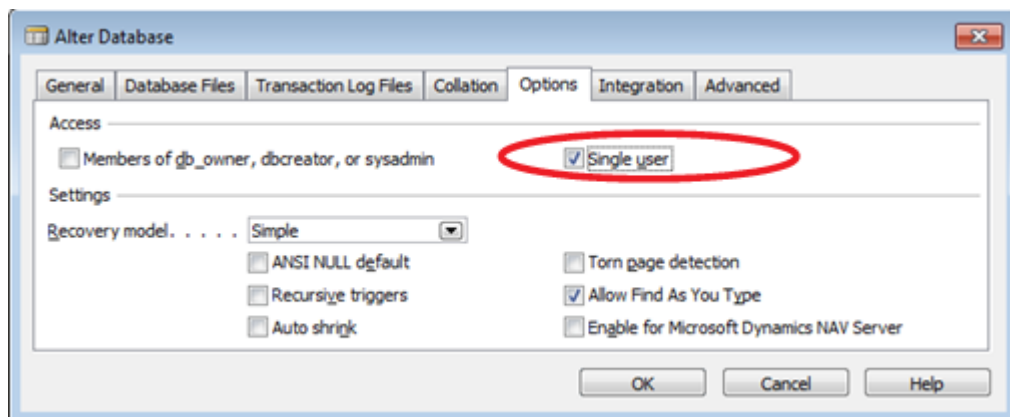


Figure 1.1 “Single user” option

2. Open the Alter database window from the file menu again, select “*Enable for Microsoft Dynamics NAV Server*,” and click OK. Then confirm the following dialog box by clicking OK (see Figure 1.2).

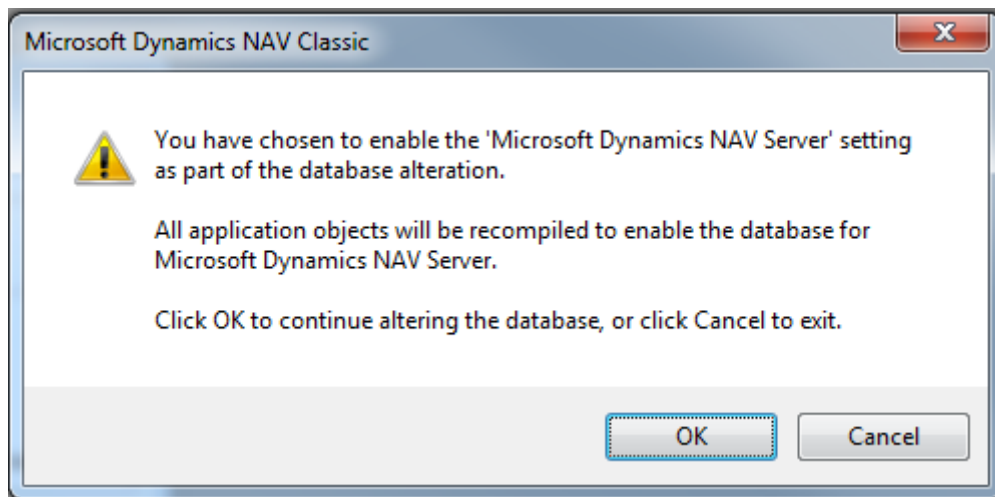


Figure 1.2 Dialog window

3. After Microsoft Dynamics NAV finishes processing the objects, go to “File → Database → Alter,” uncheck the “*Single user*” checkbox, and click OK.

2. If your current database is earlier than NAV 2009 R2, follow these steps:

1. Open your current Microsoft Dynamics NAV solution and export all objects (except object from range 2000000000) to fob format file.
2. Create new SQL database with Microsoft Dynamics NAV 2009 R2 SQL client. When creating a database, under the options tab select “*Enable for Microsoft Dynamics NAV Server.*”
3. Import all objects to Microsoft Dynamics NAV 2009 R2 from file exported in Step 1.
4. Recompile all objects.

2. Export reports to rts file

Step by step process:

1. Download “**1ClickFactory Report Export for Transformation Tool.**”
2. Import fob file (Report “*1ClickFactory Reports Export*” ID 95575) to NAV 2009 R2 database.

Please note that it is your sole responsibility to inform customers about “Report objects and objects’ related properties export Tool” before implementing it in a *live environment*. Official consent from the customer may be required depending on local and international Data Privacy Laws. The exemplary version of such consent could be: “*Customer (name) agrees and gives its consent to Partner (name) and its partner “1ClickFactory” to export report objects and their properties code, and to use such information for the purpose of transforming report objects to RDLC report objects.*”

3. Run Report “*1ClickFactory Reports Export*” ID 95575 imported in Step 2.
 4. Set filters in “*1ClickFactory Reports Export*” report’s request form under the Object Tab to specify reports you would like to transform (see Figure 14).
- NOTE: Selected reports must be compiled!

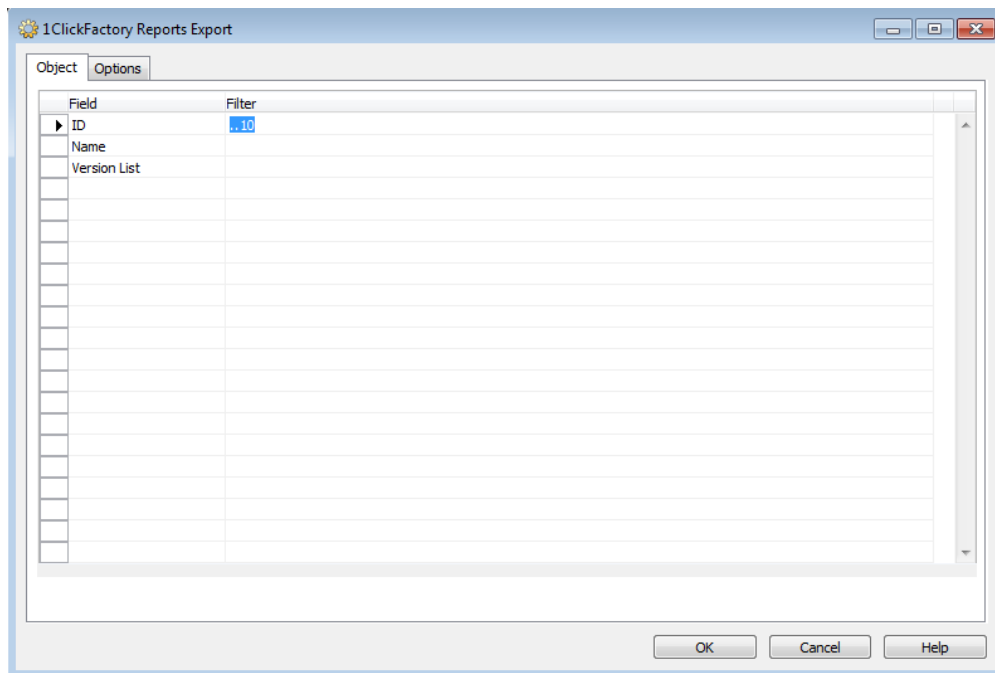


Figure 1.4 “1ClickFactory Reports Export” Object Tab

- Specify path where .rts would be saved by selecting "File Name" in "1ClickFactory Reports Export" report's request form under the Options tab (see Figure 15).

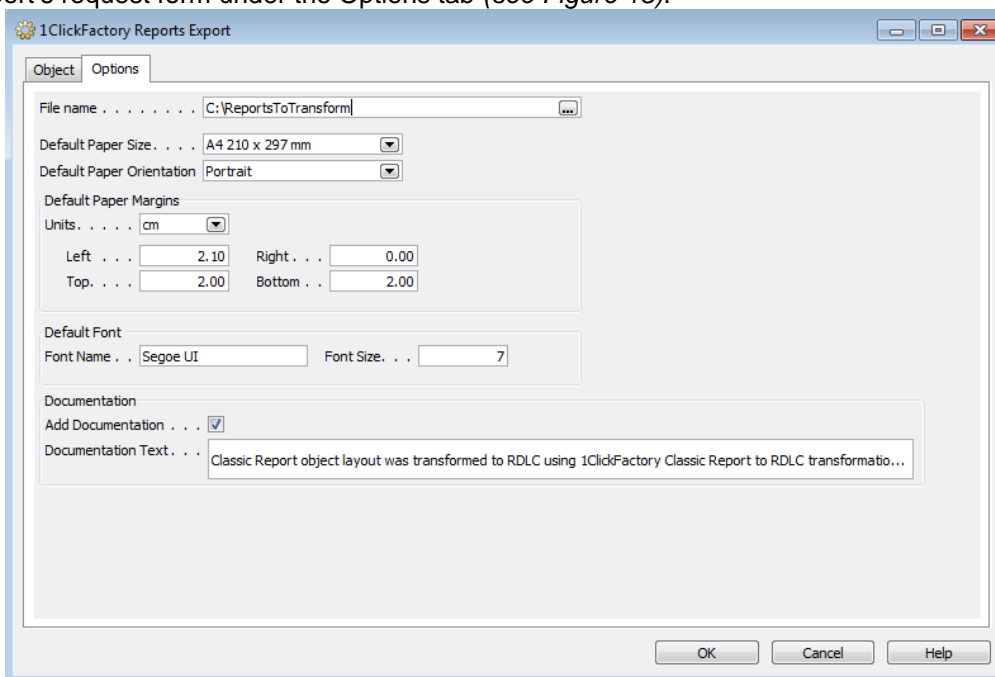


Figure 1.5 “1ClickFactory Reports Export” Options Tab

6. You may specify the default values of your report's properties in "1ClickFactory Reports Export" report's request form under the options tab (see *Figure 16.1*; *Figure 16.2*; *Figure 16.3*):

- **Default Paper Size** – corresponds to report property `PaperSize`.
- **Default Paper Orientation** – corresponds to report property `Orientation`.

Default Paper Margins:

- **Units** – default measure which should be set in order to make programming in Visual Studio more comfortable (in classic NAV reports default measurement was pt, i.e. 1000pt = 1cm).
- **Left** – corresponds to report property LeftMargin.
- **Right** – corresponds to report property RightMargin.
- **Top** – corresponds to report property TopMargin.

- **Bottom** – corresponds to report property BottomMargin.

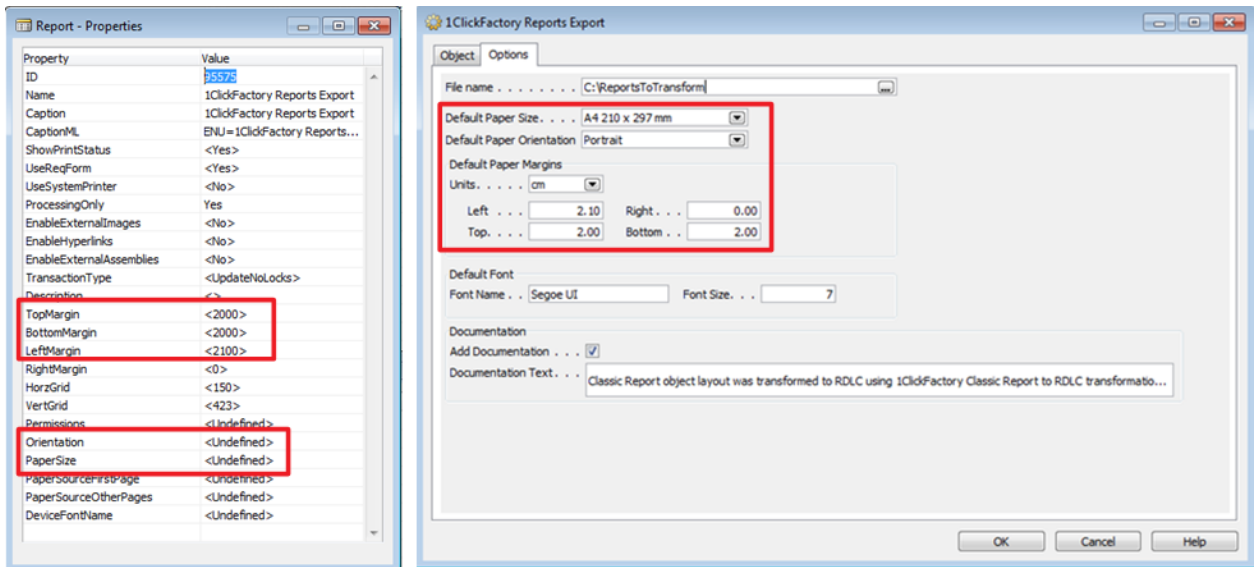


Figure 1.6.1 Corresponding Report Properties and "1ClickFactory Reports Export" Properties

Default Font:

- **Font Name** – corresponds to TextBox Property FontName.
- **Font Size** – corresponds to TextBox Property FontSize.

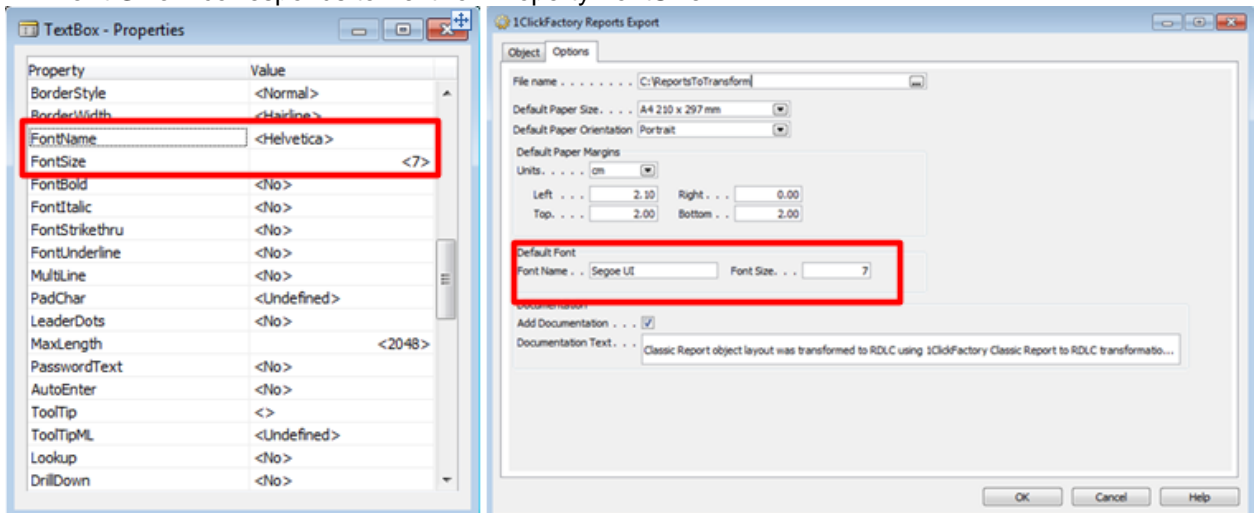


Figure 1.6.2 Corresponding Textbox Properties and "1ClickFactory Reports Export" Properties

Documentation:

- **Add Documentation** – this option should be checked if the Documentation() trigger of transformed reports should be updated with a new line with your specified text.
- **Documentation Text** – text which needs be added in Documentation() trigger should be entered here.

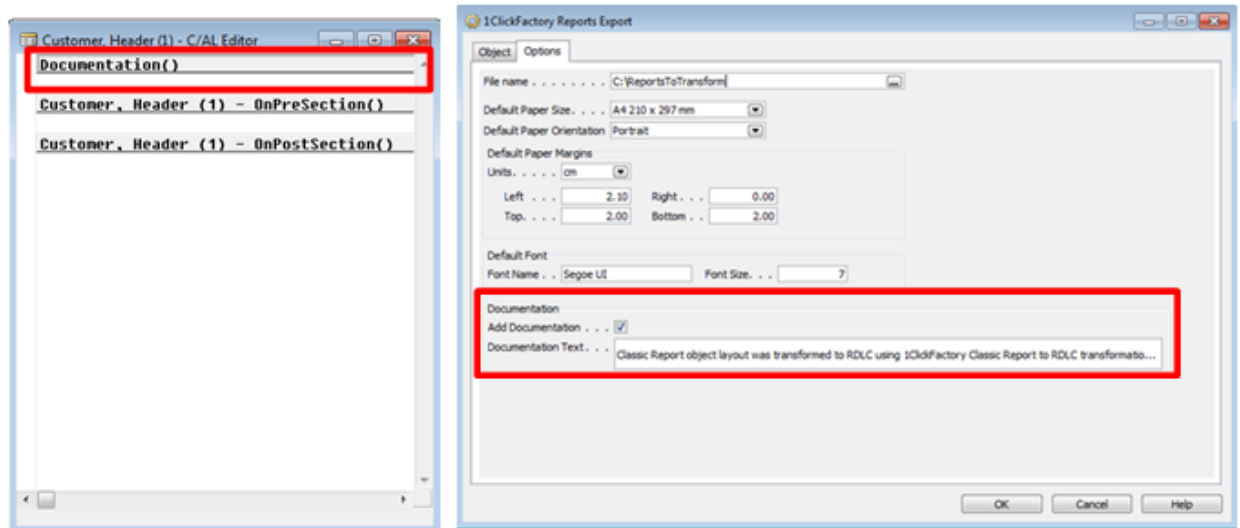


Figure 1.6.3 Corresponding Documentation trigger and “1ClickFactory Reports Export” Properties

7. To start exporting reports to rts file, click OK (see Figure 17).

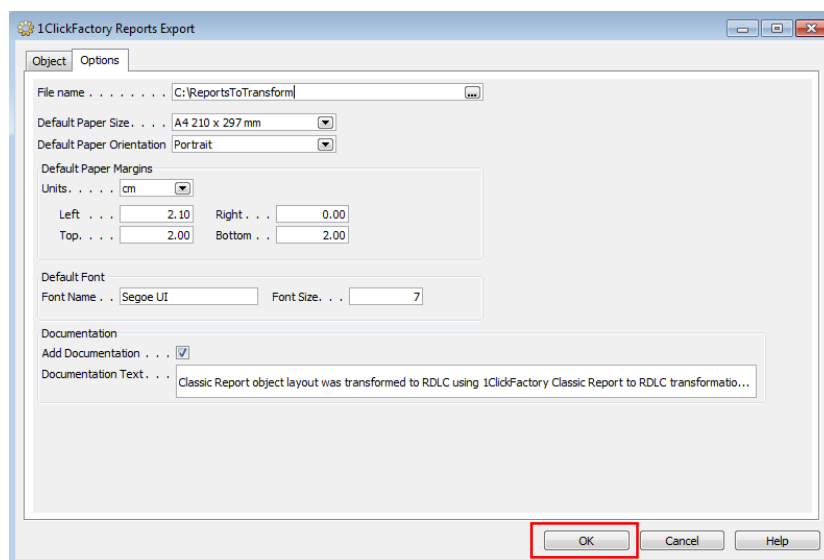


Figure 1.7

3. Submit report transformation service and see analysis results

1. Log in to www.partners.1clickfactory.com by entering your email and password (See Figure 1.1).

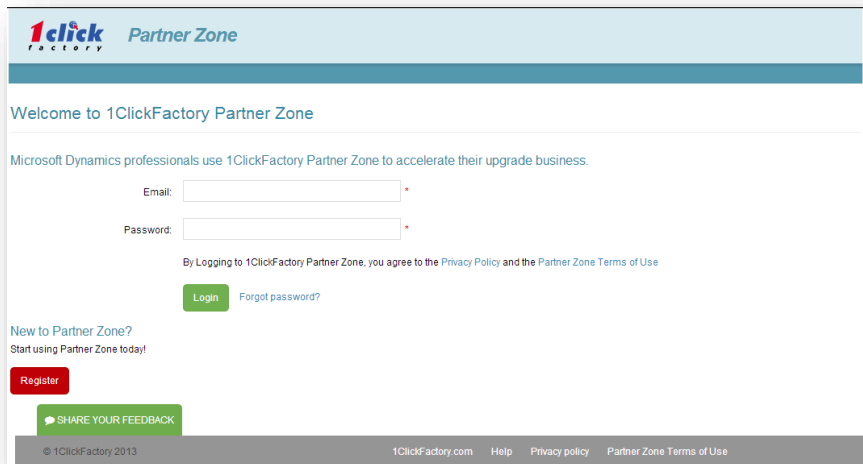


Figure 1.1 Partner Zone log-in page

2. Click the *Transform&Upgrade Tab* (See Figure 1.2).

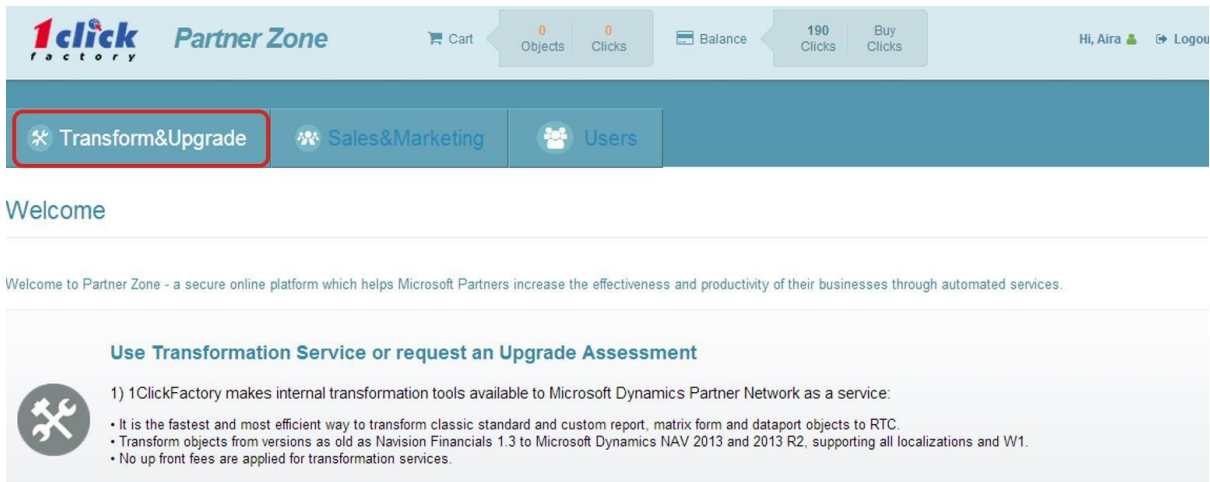


Figure 1.2 Transform&Upgrade tab

3. Click *Create New Project* (See Figure 1.3).

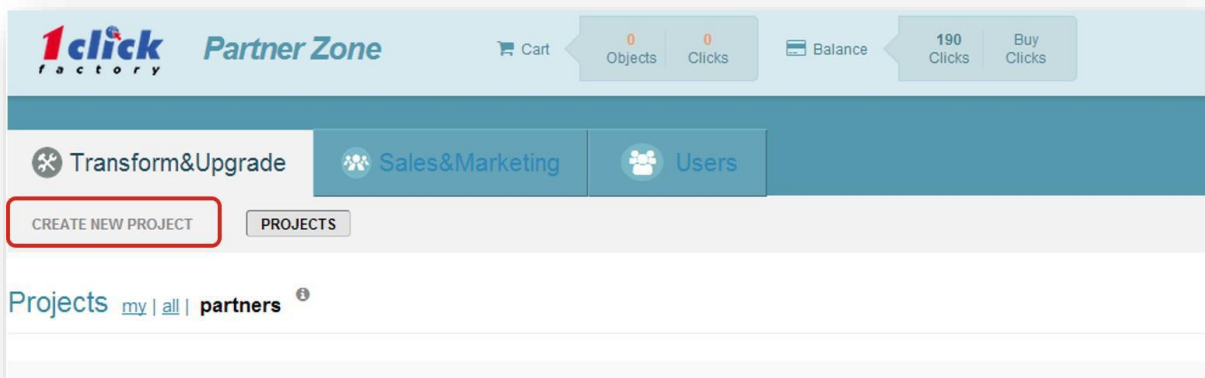


Figure 1.3 Create New Project button

4. Select “New customer or solution” and type in the customer or solution name (See Figure 1.4.1), or choose “Use existing customer or solution” and select one from the drop-down list (See Figure 1.4.2).

1ClickFactory Partner Zone

Cart 0 Objects 0 Clicks Balance 967 Clicks Buy Clicks Hi, Sigita Logout

Transform&Upgrade Sales&Marketing Self-Provisioning

CREATE NEW PROJECT PROJECTS

Create New Project

☒ Create new customer or solution ☐ Use existing customer or solution

Fields marked by * are mandatory to fill

Customer or Solution name

Project name

Transformation Service

- ☒ Microsoft Dynamic NAV Dataports and Matrix Forms transformation to RTC
- ☐ Microsoft Dynamic NAV Report transformation to RDLC

Data Transformation Service

- ☐ Microsoft Dynamics C5 data transformation to Microsoft Dynamics NAV 2013 (R2) (Beta)

Estimation Service (free)

- ☐ Microsoft Dynamic NAV upgrade assessment
- ☐ Microsoft Dynamic NAV upgrade subscription assessment (for application on NAV 2013 R2)

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Figure 1.4.1 Create new customer or solution

CREATE NEW PROJECT PROJECTS

Create New Project

☐ Create new customer or solution ☒ Use existing customer or solution

Fields marked by * are mandatory to fill

Customer or Solution name

Project name

Transformation Service

- ☒ Microsoft Dynamic NAV Dataports and Matrix Forms transformation to RTC
- ☐ Microsoft Dynamic NAV Report transformation to RDLC

Data Transformation Service

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Continue Cancel

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Figure 1.4.2 Use existing customer or solution

5. Enter the project name (See Figure 1.5).

CREATE NEW PROJECT PROJECTS

Create New Project

☐ Create new customer or solution ☒ Use existing customer or solution

Fields marked by * are mandatory to fill

Customer or Solution name Demo1 *

Project name Test Project *

Transformation Service

- ☒ Microsoft Dynamic NAV Dataports and Matrix Forms transformation to RTC
- ☐ Microsoft Dynamic NAV Report transformation to RDLC

Data Transformation Service

- ☐ Microsoft Dynamics C5 data transformation to Microsoft Dynamics NAV 2013 (R2) (Beta)

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Figure 1.5 Project name

- Click *Microsoft Dynamic NAV Report transformation to RDLC*, and then click *Continue*. (See Figure 1.6).

CREATE NEW PROJECT PROJECTS

Create New Project

☐ Create new customer or solution ☒ Use existing customer or solution

Fields marked by * are mandatory to fill

Customer or Solution name Demo1 *

Project name Test Project *

Transformation Service

- ☐ Microsoft Dynamic NAV Dataports and Matrix Forms transformation to RTC
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Figure 1.6 Microsoft Dynamic NAV Report transformation to RDLC

- You will be directed to a page where you can upload the Classic report for transformation. To make your experience as smooth as possible, make sure you follow all five steps provided on this page (See Figure 1.7).

Demo1
Test Project
Microsoft Dynamic NAV Report transformation to RDLC

Welcome to Microsoft Dynamics NAV Report to RDLC transformation service.

It is the fastest and most efficient way to transform standard and custom Classic reports to RDLC and still have an identical visual outcome. Our service generates reports with identical designs as before (1:1). To transform reports from versions as old as Navision Financials NAV 1.3 to Microsoft Dynamics NAV 2013 and 2013 R2, supporting all localizations and W1. The 1ClickFactory report transformation service through Partner Zone replaces the Microsoft Dynamics NAV 2013 Object Designer Upgrade report function.

You are in Step 1 to transform classic reports to RDLC reports.

Step 1 – Export the report objects you would like to transform using 1ClickFactory Report export for transformation tool from Microsoft Dynamics NAV 2009 SQL that is enabled for Microsoft Dynamics NAV Server client.

1ClickFactory Report Transformation Service guidelines list steps to:

- 1) Build Microsoft Dynamics NAV 2009 R2 SQL database.
- 2) Export selected report objects and parameters related to selected objects (standard Microsoft Dynamics NAV export function can only export selected objects).

Step 2 – Upload exported file with objects you would like to transform.

Step 3 – You will be supplied with the list of objects that could be transformed, listing manual efforts to complete transformation and price per object. Use this information to select objects you would like to transform and add these to your company cart. To ensure a quick start when finalizing transformation you may follow [these guidelines](#).

Step 4 – Review selected objects in the cart and request the download. You should have credit on your account to proceed.

Step 5 – You will receive an e-mail notification communicating that the object list is ready to download, and a link to the download page where the text file with transformed objects is located.

Fields marked by * are mandatory to fill

File upload will start after file is selected

Name: Test Project *

File: Click a button to select a file *

Comments:

[SHARE YOUR FEEDBACK](#)

The Transformation Analysis may take up to 15 min. I want to be notified

Figure 1.7 Steps to follow during report transformation

8. Upload the .rts file with all compiled and exported report objects from Microsoft Dynamics NAV 2009 R2 (see Figure 1.8). Click **Submit** if you want to get the analysis of the objects immediately. (If you want to save the project's information in your projects list, but don't want us to perform the analysis of the objects yet, click **Save**).

Fields marked by * are mandatory to fill

File upload will start after file is selected

Name: Test Project *

File: reports 208 101.rts *

Comments:

☐ The Transformation Analysis may take up to 15 min., I want to be notified by e-mail when object list transformation analysis overview is ready.

Save **Submit** Cancel

Figure 1.8 Upload .rts file with reports to be transformed

9. The Transformation Analysis takes up to 15 minutes. In order to check the results of your recently submitted project, you can come back to the project list and find the particular project or, after the analysis is done, you will get an e-mail notification that the Transformation tools service estimate is ready. This e-mail includes the link to the objects' analysis page.
10. When you are viewing your transformed object from the projects list (See Figure 1.10):

1. On the left side you will see the number of objects that have been ordered and are ready for download.
2. On the right side you will see how many objects are still available to order and the total price of those objects.

Click on the project name to see the detailed analysis of objects ready to be transformed.



Figure 1.10 Transformed object list

11. The page with the project's detailed analysis of objects ready to be transformed contains the list of objects that could be transformed with the following information (See Figure 1.11):
 1. The price per object
 2. The percentage of automatic object transformation
 3. The percentage of manual effort required to complete transformation
 4. The tasks that remain to finalize the object

Use this information to select objects you would like to transform, and add these to your company cart.

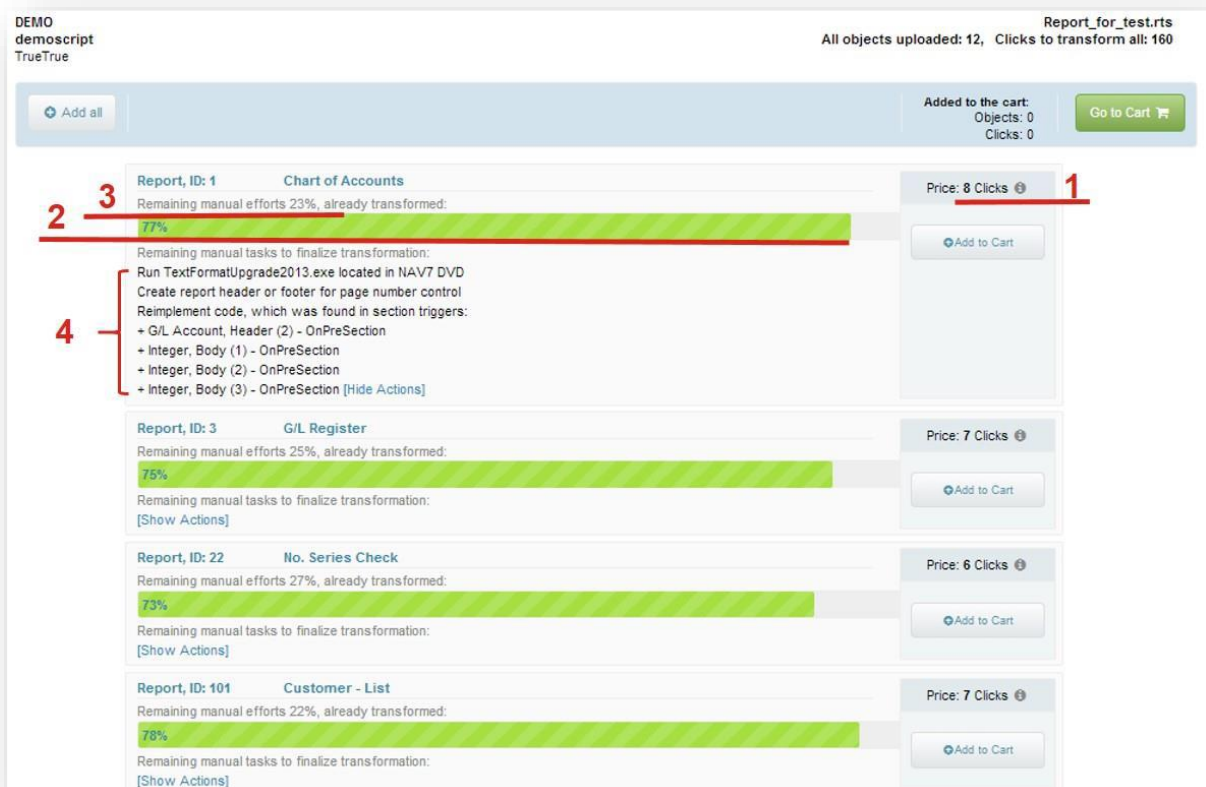


Figure 1.11 Detailed analysis of objects ready to be transformed