1ClickFactory Microsoft Dynamics NAV Classic Report Transformation Service Guidelines

Prepared by: Sigita Mažonaitė
Date: 2014-07-18

Contents

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."**
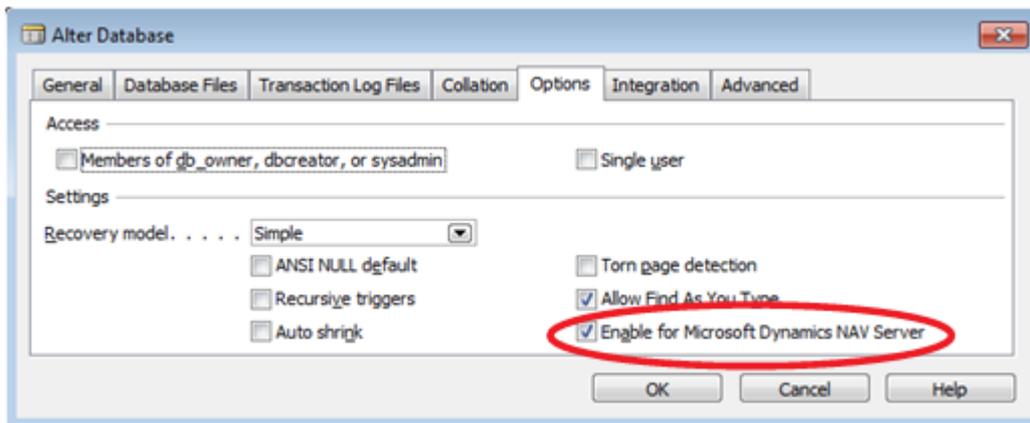

Figure 1 "Enable for Microsoft Dynamics NAV Server" option

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).
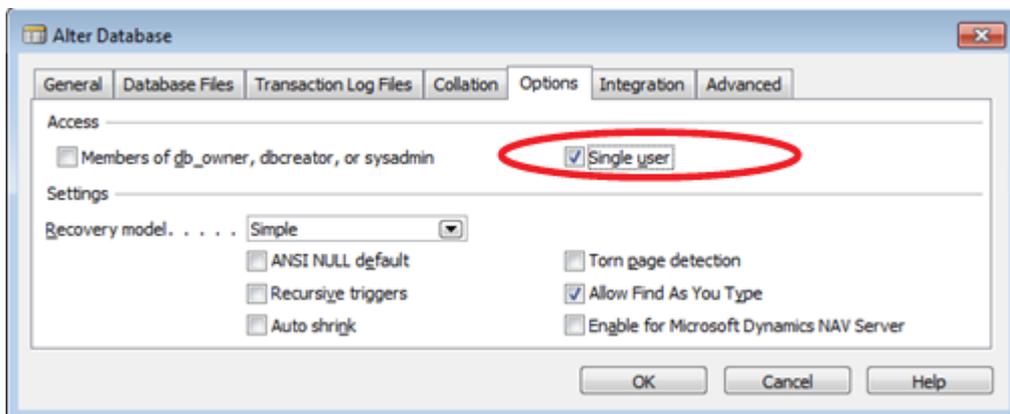
   Figure 1.1 "Single user" option

   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).

3
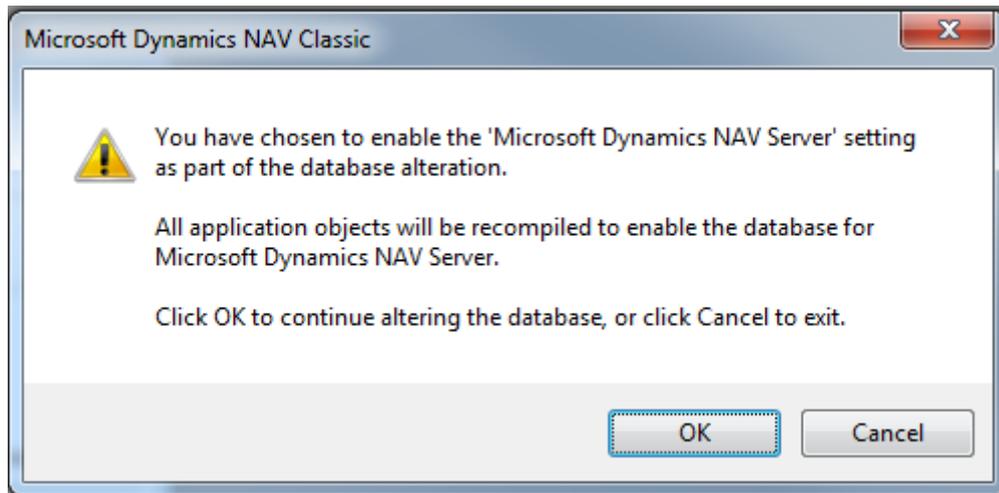
Figure 1.2 Dialog window

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!

4
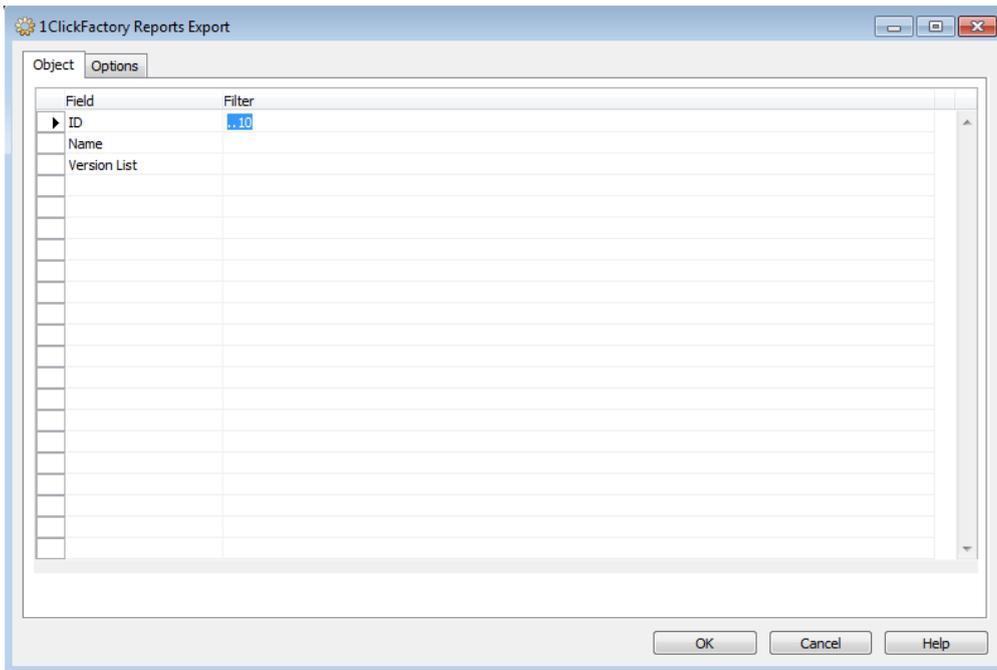
Figure 1.4 "1ClickFactory Reports Export" Object Tab

5. 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)*.
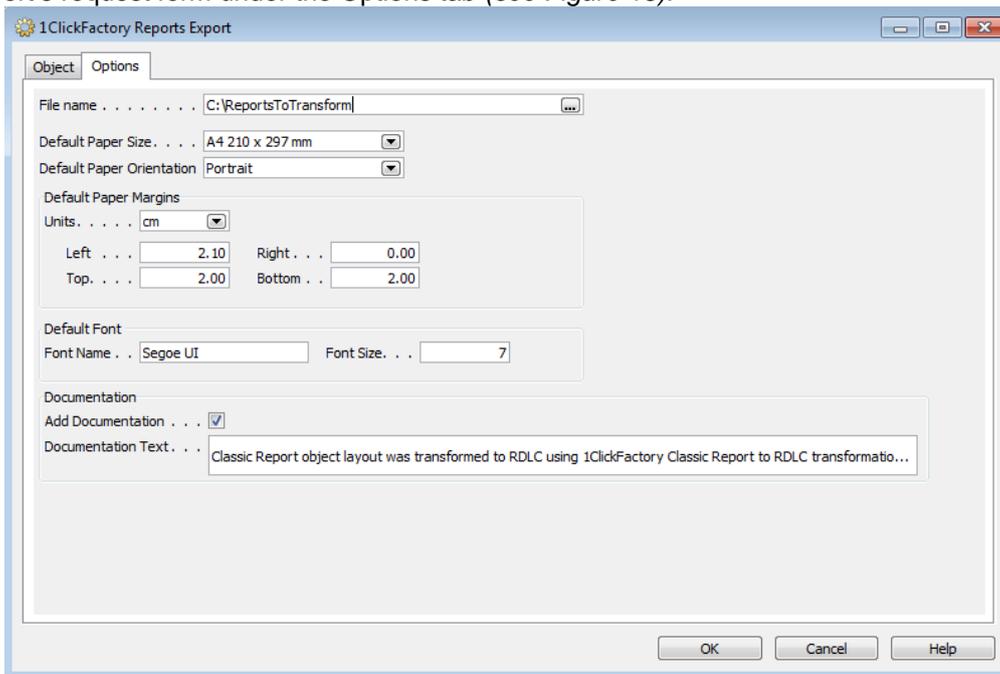

Figure 1.5 "1ClickFactory Reports Export" Options Tab

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 programing in Visual Studio more conformable (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.
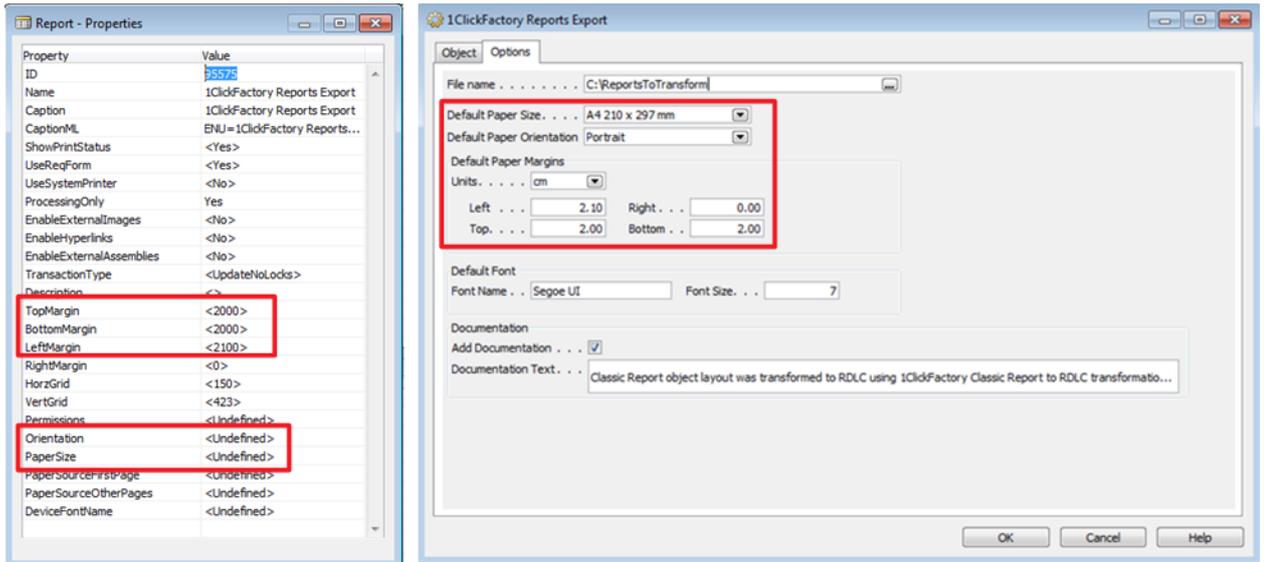
Figure 1.6.1 Corresponding Report Properties and "1ClickFactory Reports Export" Properties

Default Font:
–   **Font Name** – corresponds to TextBox Property FontName.
–   **Font Size** – corresponds to TextBox Property FontSize.
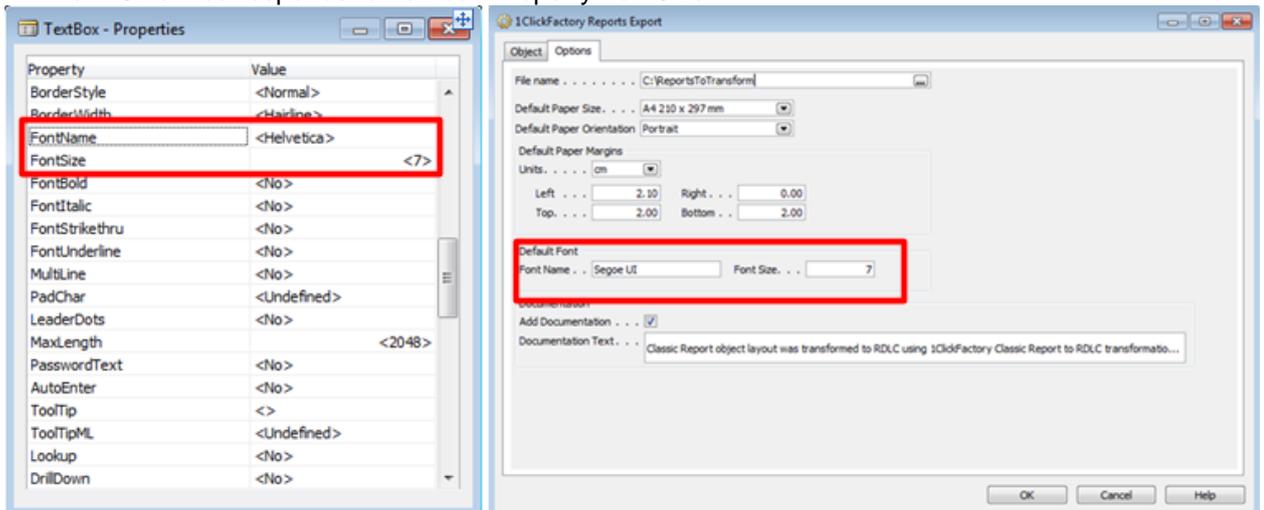
Figure 1.6.2 Corresponding Textbox Properties and "1ClickFactory Reports Export" Properties

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.

6
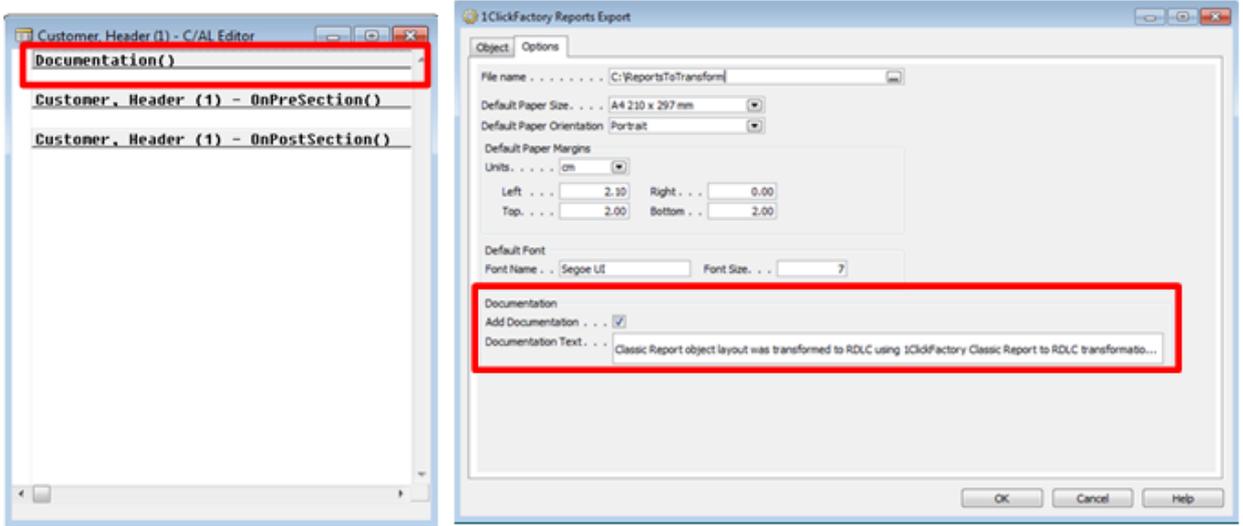
Figure 1.6.3 Corresponding Documentation trigger and "1ClickFactory Reports Export" Properties

7. To start exporting reports to rts file, click OK (see Figure 17).
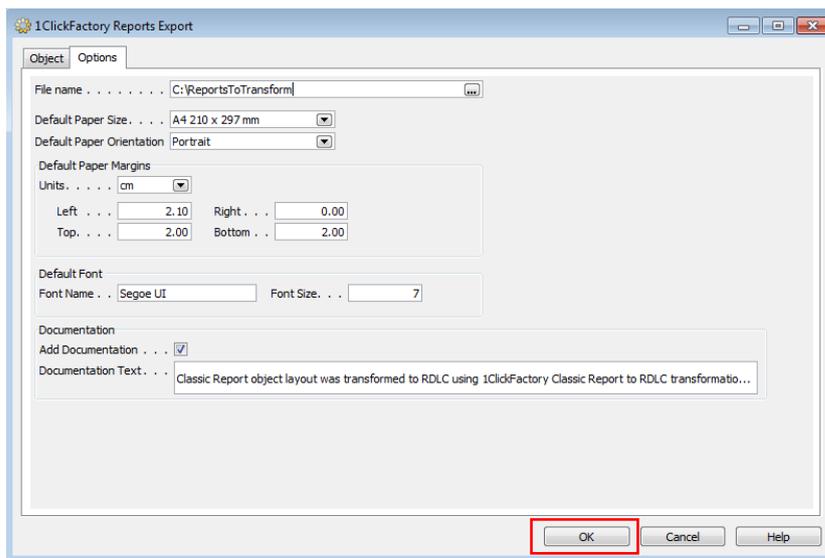
Figure 1.7

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).
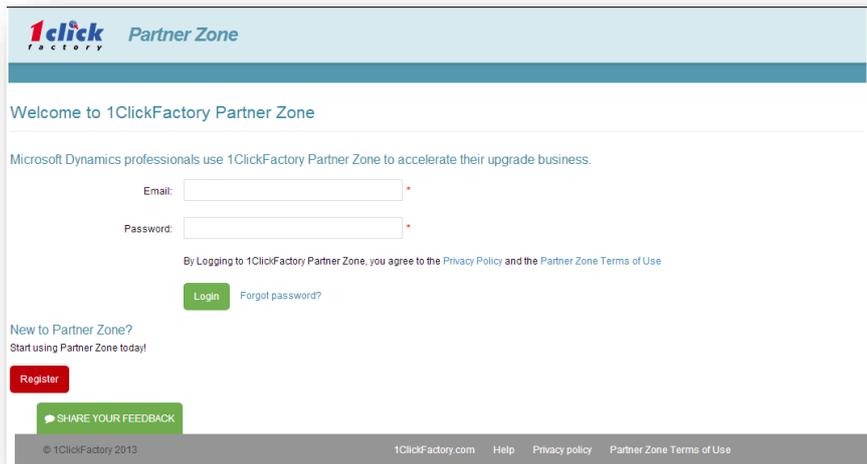
Figure 1.1 Partner Zone log-in page

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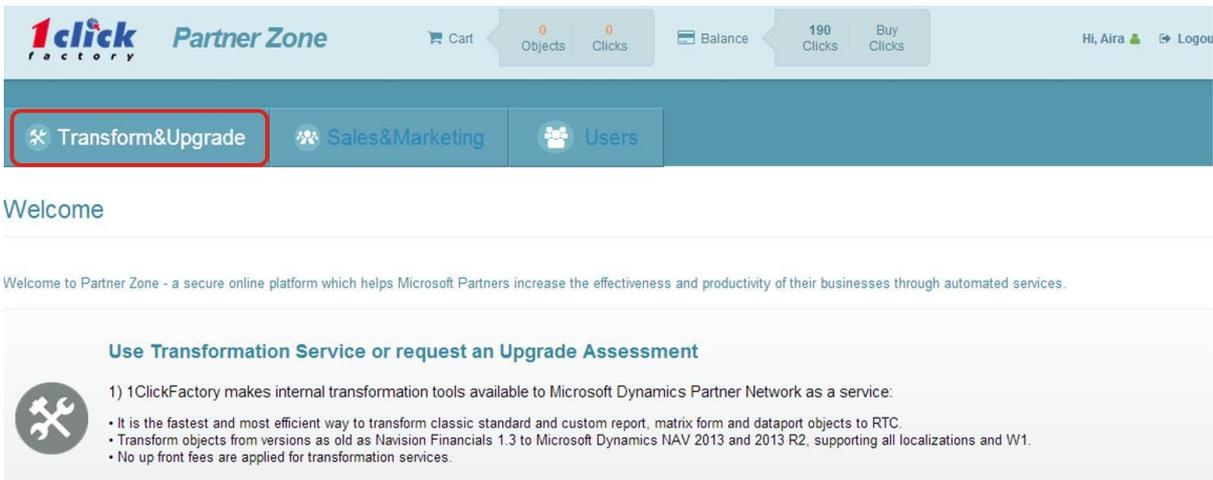
Figure 1.2 Transform&Upgrade tab

:

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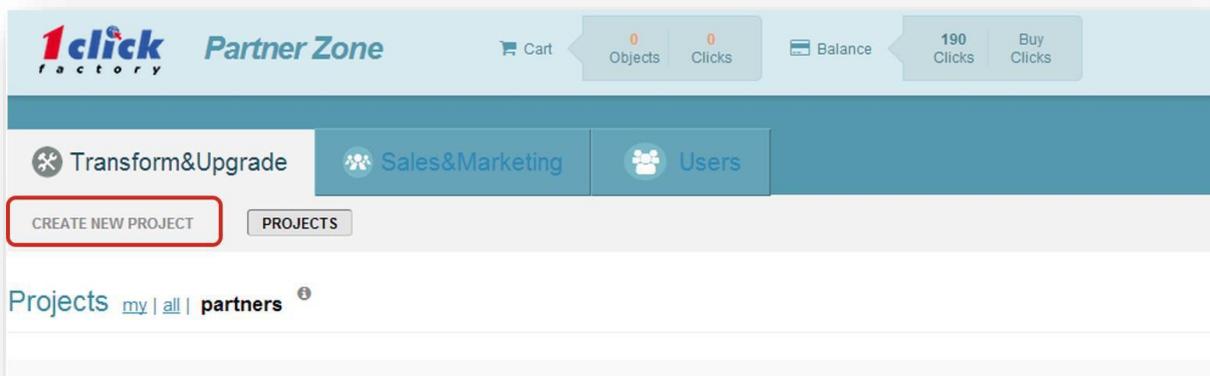
Figure 1.3 Create New Project button

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).

Figure 1.4.1 Create new customer or solution

Figure 1.4.2 Use existing customer or solution

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

Figure 1.5 Project name

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

Figure 1.6 Microsoft Dynamic NAV Report transformation to RDLC

7. 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).
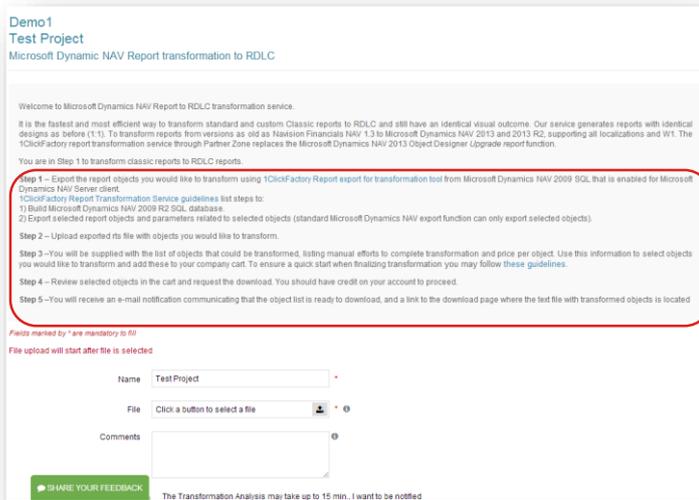
Figure 1.7 Steps to follow during report transformation

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).*
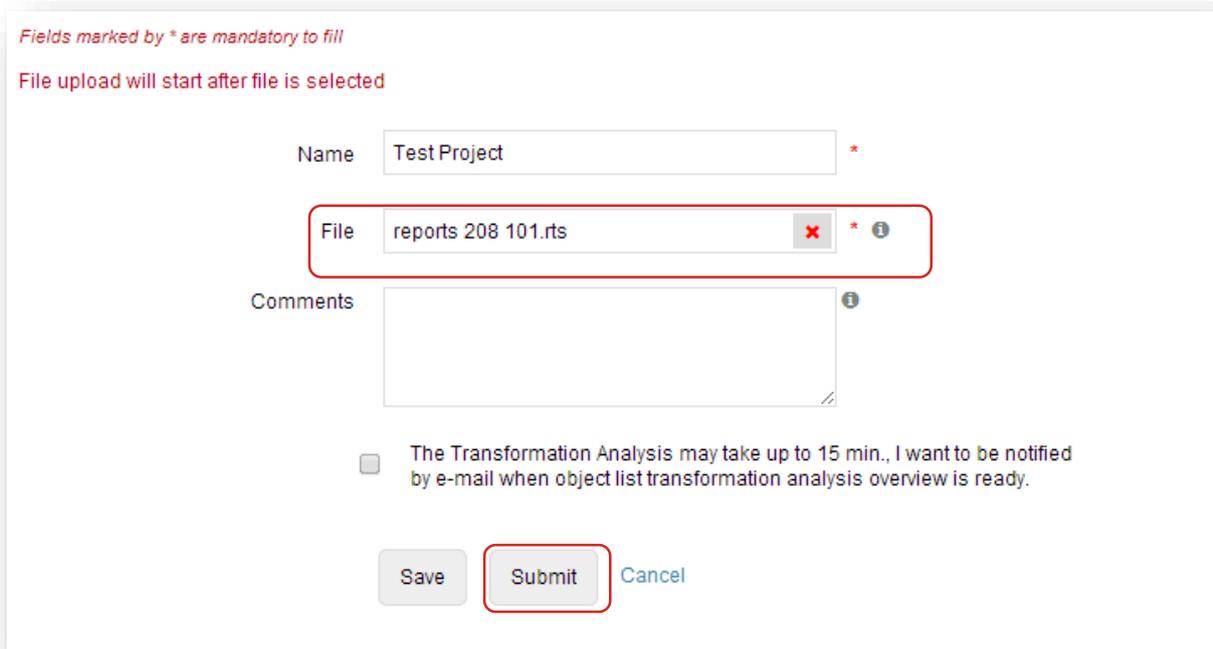
Figure 1.8 Upload .rts file with reports to be transformed

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.
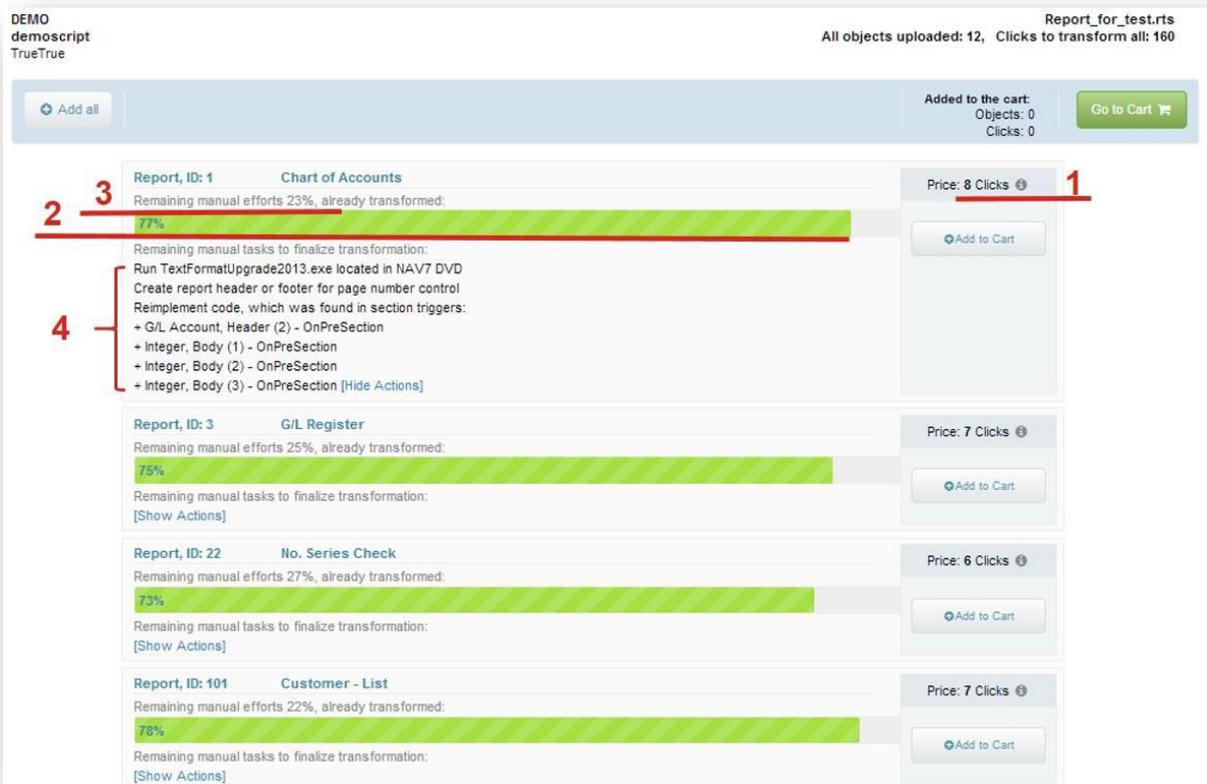
Figure 1.11 Detailed analysis of objects ready to be transformed