

iFacto ReVision: Installation & Configuration

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Terminology

Repository

Our developers are located all around the world. To enable them to work together on our software, we keep the source code in an Internet-accessible revision control. Source code committers have write access to the repository, enabling them to make changes to the source code. Everyone has read access to the repositories, so you may download the most up-to-date development version of the software. If you are looking for a stable release of the source code, you should download it from the distribution directory. The repository should only be used if you want to be on the bleeding-edge of the development effort.

Source Control

The management of changes to documents, programs, and other information stored as computer files. It is most commonly used in software development, where a team of people may change the same files. Changes are usually identified by a number or letter code, termed the "revision number", "revision level", or simply "revision". For example, an initial set of files is "revision 1". When the first change is made, the resulting set is "revision 2", and so on. Each revision is associated with a timestamp and the person making the change. Revisions can be compared, restored, and with some types of files, merged.

Requirements

System Requirements

The basic system requirements are the same as these of Dynamics Navision. Additional requirements might be:

- .Net Framework 4

Supported Repositories

- Microsoft Visual SourceSafe 2005
- Microsoft Team Foundation Server 2010

Supported NAV versions

- Microsoft Dynamics NAV 4.0 SP3
- Microsoft Dynamics NAV 5.0
- Microsoft Dynamics NAV 5.0 SP1
- Microsoft Dynamics NAV 2009
- Microsoft Dynamics NAV 2009 SP1
- Microsoft Dynamics NAV 2009 R2

Installation Guide


Information

iFacto Revision is a client application, it needs to be able to run alongside Navision.

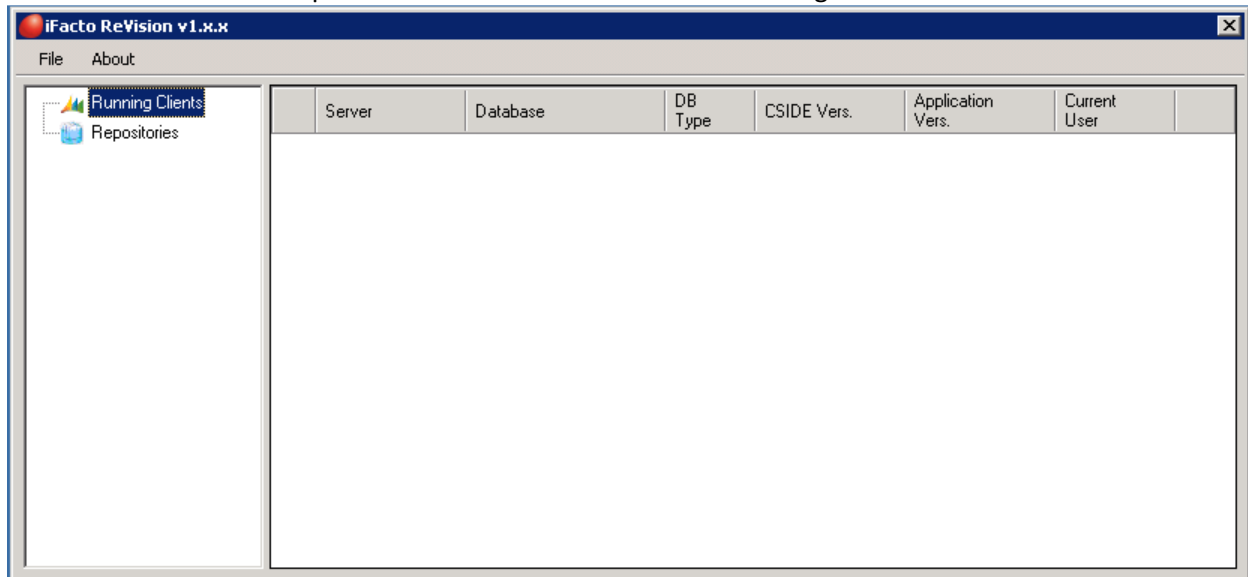
An installation on the Client PC is therefore required, an installation on a Terminal Server based machine is also possible (Domain License). A connection is required between the application and the repository.

Installation

Run the installer file and follow through the steps of the installation wizard.

When running the application an icon will appear in your Tray: 

Double Click the icon to open the Client Window and start the Configuration:

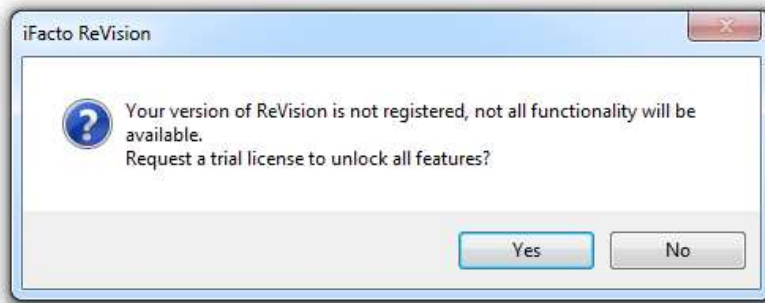


Configuration Guide

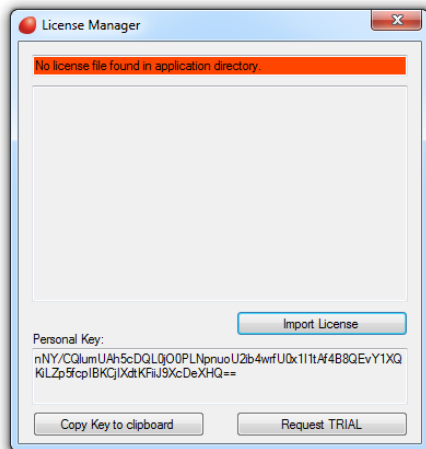
Uploading the License

When you download the product for the first time, you'll have no license installed.

When starting ReVision unregistered you'll get next message. Press "Yes" on this dialog to open the 'Request Trial' page, fill out the webform online and receive your trial license by email.

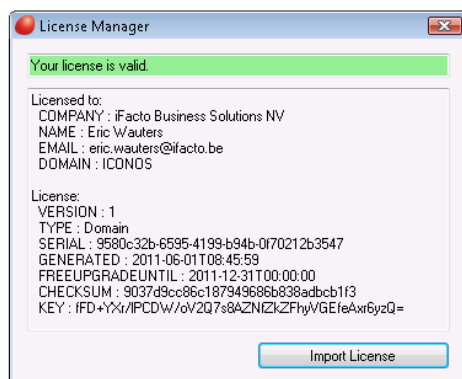


The license can be changed or uploaded via the 'License Manager'. The manager can be found in the menu 'About > Register Version', you'll get something like this:



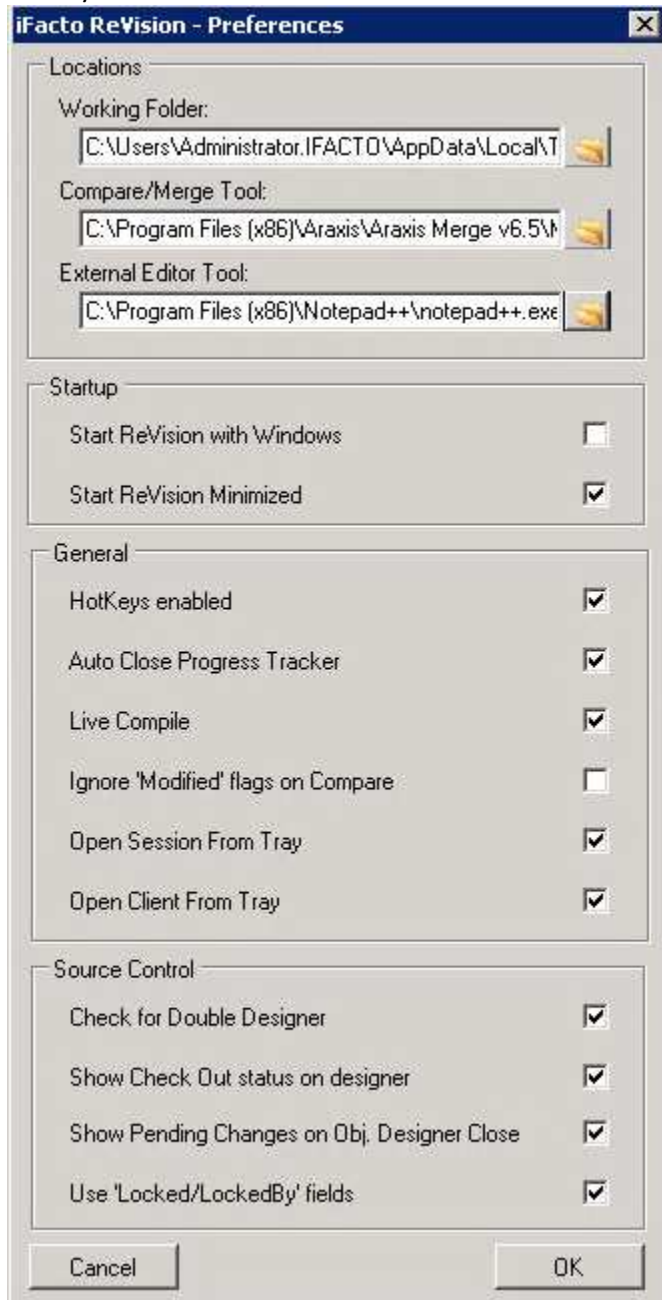
The personal key below is what we need to make a license for you. For a Trial license, you can just click the "Request TRIAL" button and fill out the webform online and receive your trial license by email.

You will receive a "license.key" from us, which you can import by the button "Import License":



Basic Preferences

Go to your Preferences:

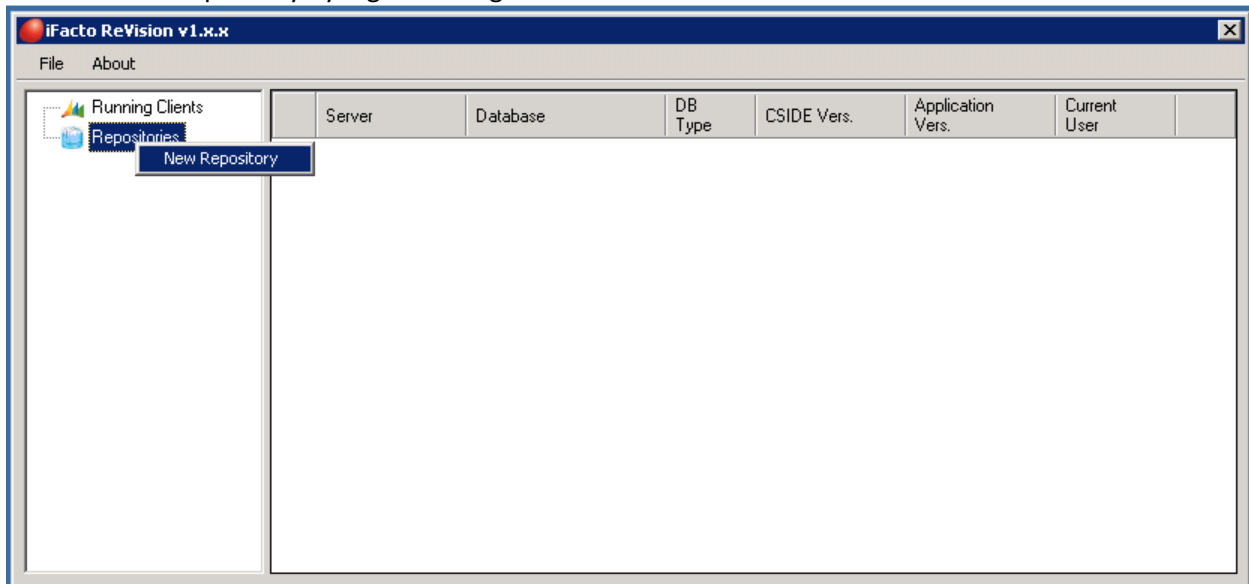


Field	Description
Working Folder	This folder is used to store Temporary Files (Default setting is the Users Temporary File Location)
Compare Merge Path	Path to Executable file of a Compare/Merge tool of your choice. (We recommend to use "Beyond Compare" or "Araxis Merge")

External Editor Path	Path to Executable file of an Editor tool of your choice. (We recommend to use "notepad", "Notepad++" or "UltraEdit")
Start with Windows	iFacto Revision will start with Windows.
Start Minimized	The Client Window will remain hidden at startup.
HotKeys Enabled	This enables all HotKeys within the application. (Some of the functions in this tool are provided with a HotKey)
Auto Close Progress Tracker	The Progress Tracker is a window that shows the steps and details of some tasks. If checked, the window will close 5 seconds after the task finished.
Live Compile	This option is used in combination with an External Editor or Compare Tool. If checked, changes made with an editor or tool will compile automatically.
Ignore 'Modified' flags on Compare	Removes 'Date', 'Time' and the 'Modified' flags from exported object to get better insight on real changes
Open Session From Tray	It enables a menu, accessible from the System Tray, to open a ReVision session (NAV Client + Database)
Open Client From Tray	It enables a menu, accessible from the System Tray, to open a client from there. (NAV Client only)
Check for Double Designer	If enabled, the user will be notified when opening more than one designer for the same object.
Show check Out Status on Designer	This option will show a green or red border around the designer window when an object is checked out.
Show Pending Changes on Object Designer Close	Shows the "Pending Objects" window when closing the object designer, to ensure the user to not forget to check in the objects.
Use 'Locked/LockedBy' fields	Enabled ReVision integration with the 'Locked/LockedBy' object fields in NAV.

Setting up the Repository

Create a New Repository by Right Clicking the item:



Give the repository a name and select it's type.

Repository Settings

Link Type: RepositoryFile

Name: VSSRepo

Repository Type: VSS

Database Ini Path: y Documents\srcsafe.ini

Username: ConfigurationGuide

Password: xxxxxxxxxxxx

Project Root: \$/VSSRepo

Working Folder: VSSRepo\

Cancel OK

Repository Settings

Link Type: RepositoryFile

Name: TFSRepo

Repository Type: TFS

TFSCollection URL: http://server:8080/default

NT Authentication: ☒

Username:

Password:

Domain:

Project: TFSRepo

Project Root: \$/TFSRepo/

Working Folder: TFSRepo\

Cancel OK

VSS Specific Settings:

In the “Database Ini Path” field, browse to the Microsoft Visual SourceSafe database file (named “srcsafe.ini”). Add a Username and Password if necessary.

TFS Specific Settings:

In the “TFSCollection URL”, browse to your TFS Server and TFS Collection where you want to keep your sources. Add a Username and Password or check “NT Authentication”.

Note:

When you’re creating this project, it won’t create the “Visual Studio Team Project” in the background. If you would like the possibility to explore the changes and checked out objects in Visual Studio, you will have to create a Team Project in Visual Studio. When you use the same naming for your repository it will connect to your Team Project and store the code changes there.

Finish Setting up the Repository

Now Click OK to create the Repository. In doing so, if this is the first time it’s initialized you will be asked to create the Project or not:



Click “Yes” to create the project and finish adding the repository.

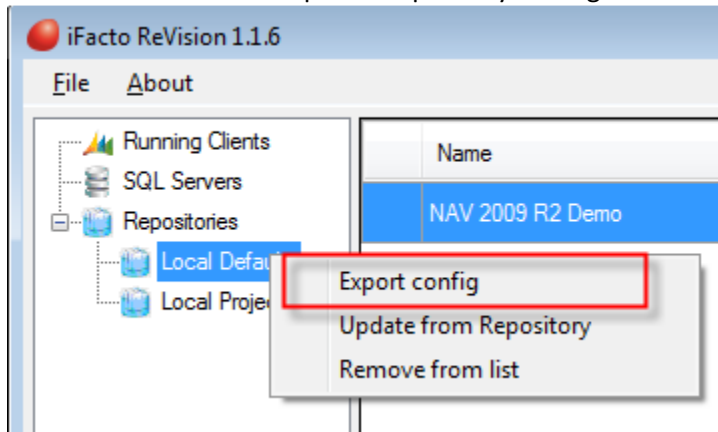
Connecting with an existing Repository

Suppose your administrator has already set up the repository, connecting with it happens in the same way, only you won’t be asked to create the project. (Follow the steps of Setting up a repository)

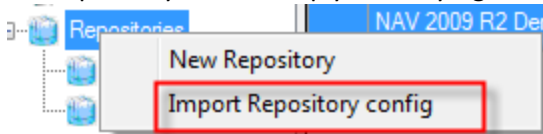
To connect to the existing repository you must make sure that the **name is exactly the same** as the one already created. If this is not the case you will be creating a new one instead.

Distributing Repository Setup by Import/Export Repository Settings

The administrator can export a Repository Setting:



It will create a .rep file, which you can send to all people who has to register this repository. Importing the repository can be simply done by right click on "Repositories":



Link a Client to a Repository

Information

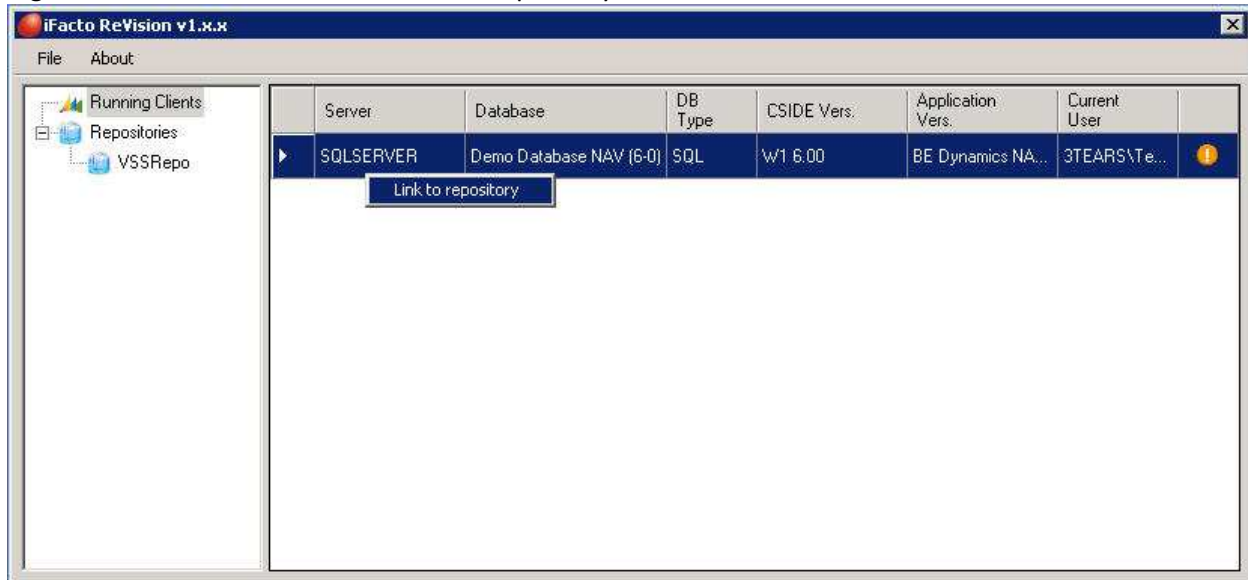
The “User Manual” gives a more detailed explanation of around this issue.

Linking the Client

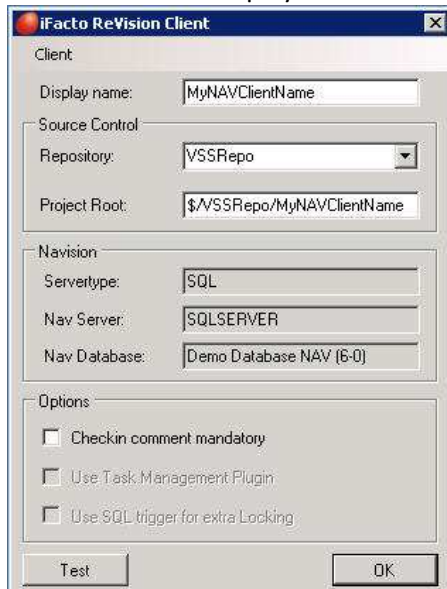
Start up your Navision Client and connect it to your database.

Go to the iFacto Revision Client Window, your Navision Client will show up in the list.

Right Click the Client and select “Link to Repository”:



Give the Client a Display Name and select it’s Repository from the dropdown menu:



Click OK to Finish the Setup. Your Source Control is now active.

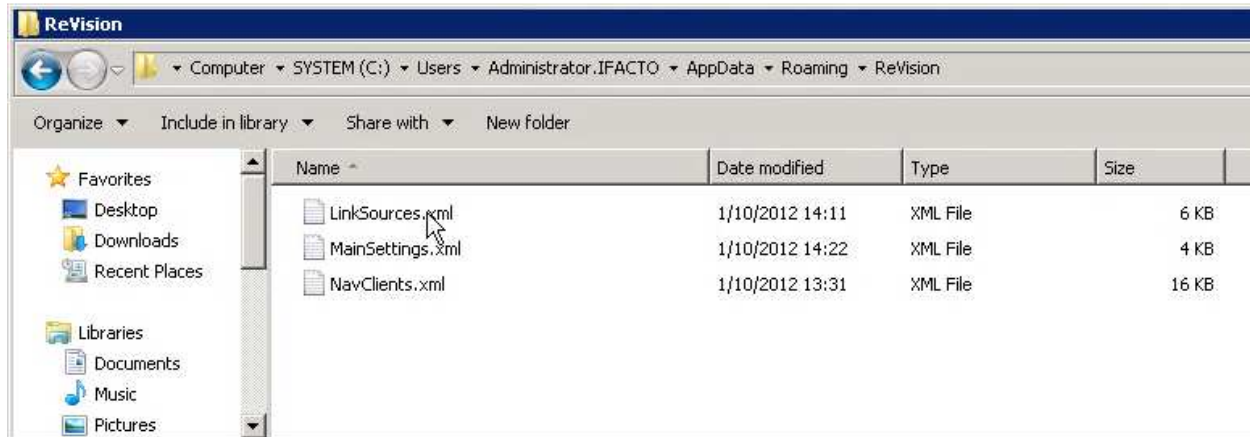
For more details please check the “User Manual”.

Managing a central configuration

iFacto ReVision allows you to manage the configuration of the ReVision client centrally.

In the root of ReVision's installation folder (program files), there is a file named "ReVisionConfig.xml". This file is default empty.

If you fill this file with references to previously set up xml-files to central locations.



```
<?xml version="1.0" encoding="utf-8"?>
<ApplicationSettings xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsd="http://www.w3.org/2001/XMLSchema">
  <NavExecutablesConfig>N:\ReVision_NavClients.xml</NavExecutablesConfig>
  <LinkSourceConfig>N:\ReVision_iFactoRepositories.xml</LinkSourceConfig>
  <DefaultEditorPath>C:\Program Files (x86)\Notepad++\notepad++.exe</DefaultEditorPath>
  <DefaultCompareTool>C:\Program Files\Araxis\Araxis Merge\Merge.exe</DefaultCompareTool>
  <TFSInteropEnabled>true</TFSInteropEnabled>
</ApplicationSettings>
```

A good practice would be:

- 1) Administrator sets up the "ReVisionConfig.xml".
- 2) Administrator fills in settings, scans for nav clients, ...
- 3) Administrator installs terminal server with ReVision, and correct references in "ReVisionConfig.xml".

When the users log in, ReVision is pre-configured for them. Updates to NAV Clients or other settings or centrally managed as well.

Upgrading ReVision to a new version

When you're upgrading ReVision to a new version, best practices are:

- 1) To remove the currently installed Version of ReVision
- 2) To Install the new version of ReVision
- 3) To renew the SQL Locks in all databases to the newest version by:
 - a. Remove the currently installed SQL Lock with the newest version of ReVision
 - b. Install the SQL Lock with the newest version of ReVision