



# Astral Reports

## **Astral Reports For Dynamics NAV Installation Guide**

**Version 3.1**  
11<sup>th</sup> April 2011

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# 1. Quick Installation Guide

The following is a Quick Guide to the installation of Astral Reports For Dynamics NAV.

- Review prerequisites
- Uninstall previous versions via the control panel
- Remove the existing Add-In from Excel
- Run the setup
- Configure for SQL if required
- Install the License
- Test that Astral Reports can connect to Dynamics NAV

## 2. Prerequisites

### 2.1. Operating System and Office Software

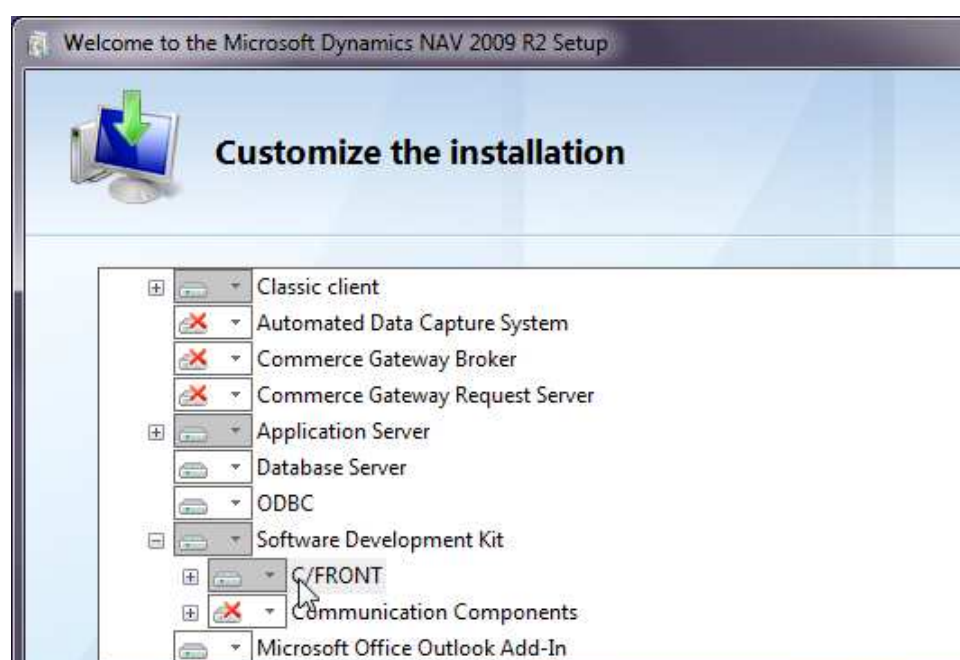
Astral Reports can be installed successfully on the following operating systems:

Windows 98 Second Edition	Windows Vista
Windows Millennium Edition	Windows 7
Windows 2000	Windows Server 2003
Windows XP	Windows Server 2008

Astral Reports has been designed to work successfully on Microsoft Office 2000 through to Microsoft Office 2010

### 2.2. Microsoft Dynamics NAV SDK (C/Front)

Prior to installation of Astral Reports for Dynamics NAV, C/Front must be installed. In earlier versions of Dynamics NAV (before V5), C/Front can be installed from the Dynamics NAV CD by following the instructions to install C/Front. In the most recent versions, C/Front is installed as part of the SDK (Software Development Kit), customise your installation of NAV and ensure you select C/Front to run from your PC.



### 2.3. Microsoft Dynamics NAV License

C/Front requires a copy of the Dynamics NAV License File, (this is the file with the .FLF extension) to be stored into the Client Directory within the Dynamics NAV application installation directory. Therefore, before installation, it is recommended that this action be performed.

Depending on your version of NAV this will be something like:

C:\Program Files (x86)\Microsoft Dynamics NAV\60\Classic\fin.flf

If you have Microsoft Dynamics NAV version 5.0 or later or you have updated your license to the Business Ready Licensing model, then CFRONT will be a part of your licence. Otherwise the C/Front granule must be purchased from Microsoft via your reseller. To see whether your license covers the use of C/Front, select "License" from the tools menu and look for Granule ID 1,800



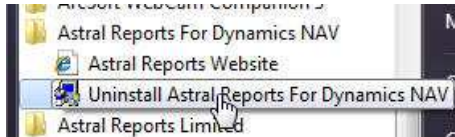
1,750 C/SQL
1,800 C/Front
1,960 Test Integration

## 3. Astral Reports Installation

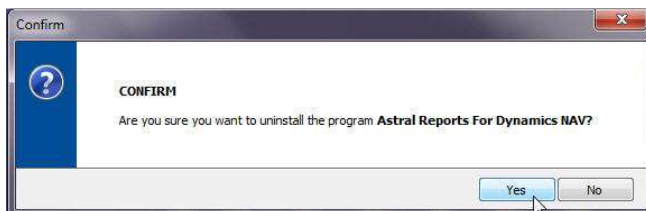
### 3.1. *Uninstall Previous Versions*

Ensure that the Excel application is not open.

From the Windows Start button, select “All Programs” and then “Astral Reports For Dynamics NAV” and then select the “Uninstall Astral Reports For Dynamics NAV” shortcut.



Alternatively, use “Add or Remove Programs” from the Windows Control Panel. Find the “Astral Reports For Dynamics NAV” entry and click the “Remove” button. You will then be prompted as to whether you wish to remove the programme.

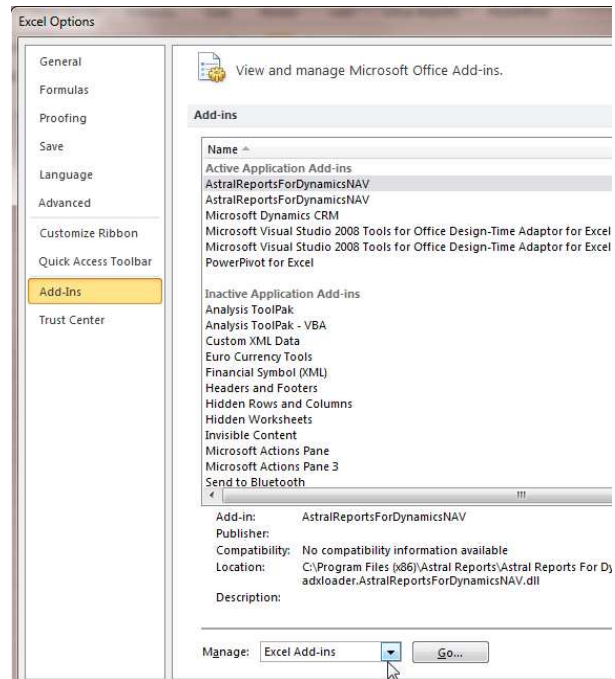


The Programme will then be uninstalled

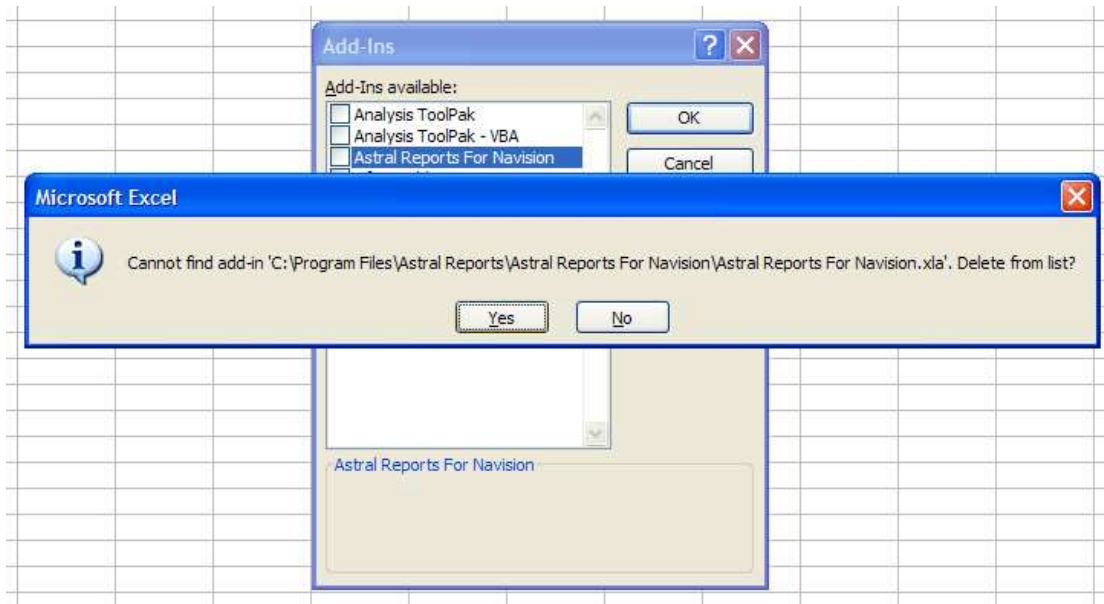


The final step is to open the Microsoft Excel application and remove the Add-In file from the list of available Add-Ins. The “Remove Add In From Excel” shortcut mentioned above merely disables the Add In file, it does not actually remove it.

To do this, go to the File menu and select Options and then select Add-Ins, making sure the “Manage” Option is set to Excel Add-Ins press the Go button.



(Alternatively for Office 2003, select Add-Ins from the Tools menu). Move down the list using the arrow keys, and when the “Astral Reports For Dynamics NAV” entry is reached, Excel will prompt you with the following message:



Click “Yes” to the message and then click “OK” on the “Add-Ins” form. Then close down Excel.

### 3.2. Installing Astral Reports

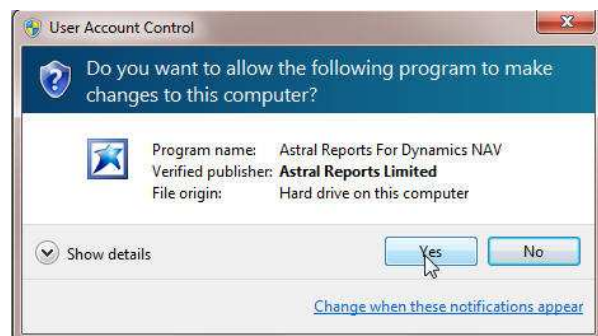
If the installation application has been downloaded from the [www.astralreports.co.uk](http://www.astralreports.co.uk) website as a zip file, unzip the contents of the file to your local hard drive or shared network drive.

Name	Date modified	Type	Size
AR4DNSetup-Build3.0.012.zip	05/01/2011 11:32	Compressed (zipp...	15,271 KB

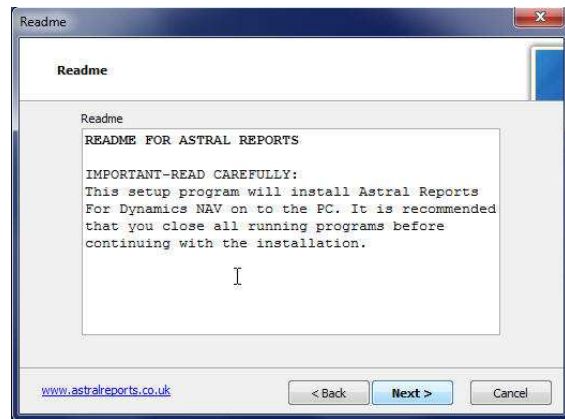
Now double-click the “Setup.Exe” file to start the installation.

Name	Date modified	Type	Size
AR4DNSetup.exe	31/12/2010 00:24	Application	15,449 KB

For later versions of Windows you will have to say yes to the user account control to load the programme.



Follow the onscreen instructions to install Astral Reports, ensuring that you read the license file before accepting it.

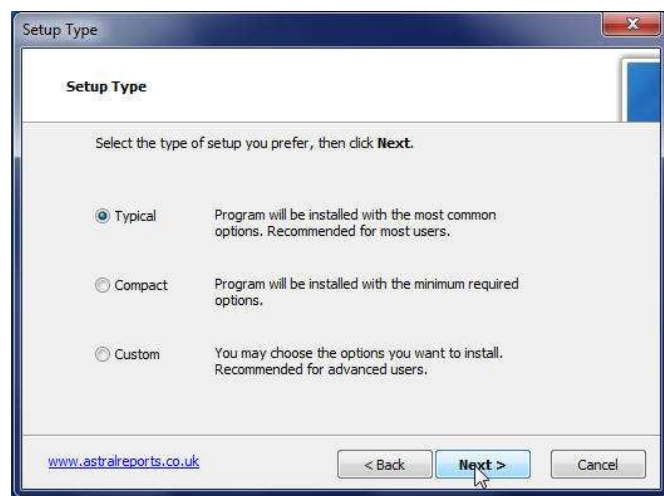


There are 3 types of installation available :

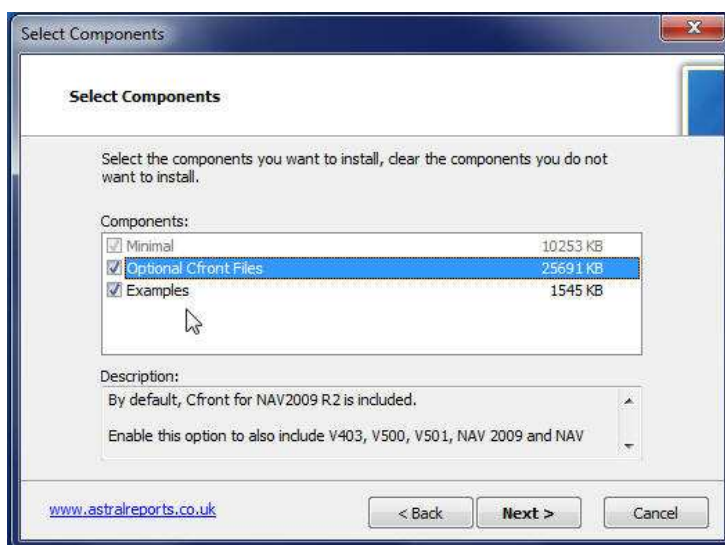
**Typical:** Installs all programme files, the latest version of CFRONT (currently 6.0 R2) plus the example Excel reports.

**Compact:** Installs all programme files, and the latest version of CFRONT (currently 6.0 R2)

**Custom:** Installs all programme files, and allows the user to select all versions of CFRONT from version 4 SP3 onwards and the Example reports as required



If you are running any version of NAV earlier than 2009 R2 you will need to select the Custom type and install the optional CFRONT files.



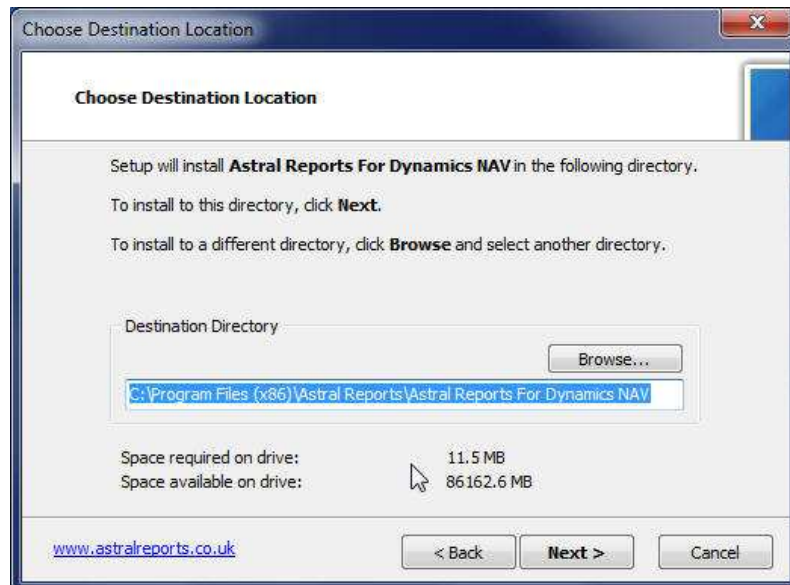
*If your version of NAV is earlier than version 4 SP3 then please refer to **Appendix A - How to install CFRONT for versions of NA prior to V4SP3.***

**NOTE:**

It is recommended that the default installation location is **NOT** changed.

Since Astral Reports allows you to include custom built functions within a spreadsheet, the function will be referencing a function that is contained in another file.

Should the spreadsheet be opened by another user, Excel will look for the function within the same file in the same location on their C drive.



If you do wish to install the functions to an alternate location, all other installs should use the same alternative location.

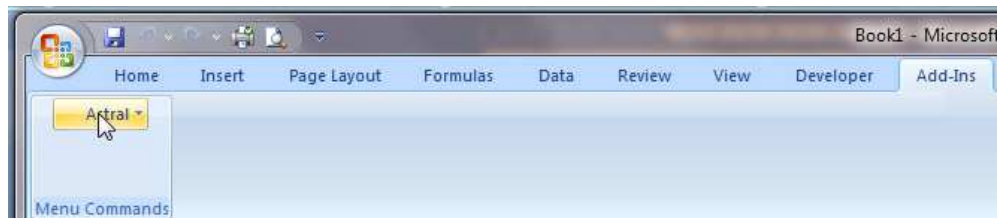
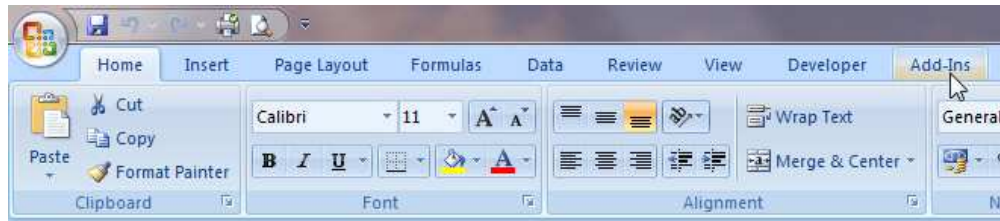
Confirm setup settings by pressing Next and the programme will be installed.



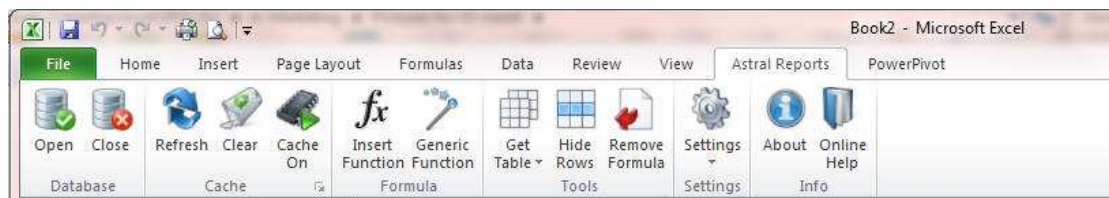
### 3.3. After Installation

After the above procedures have been followed, Astral Reports will be ready for use. To check that the installation was successful, open Microsoft Excel.

Depending on your version of Excel you will either see the “Astral” drop down menu. Microsoft Office 2003 or earlier.

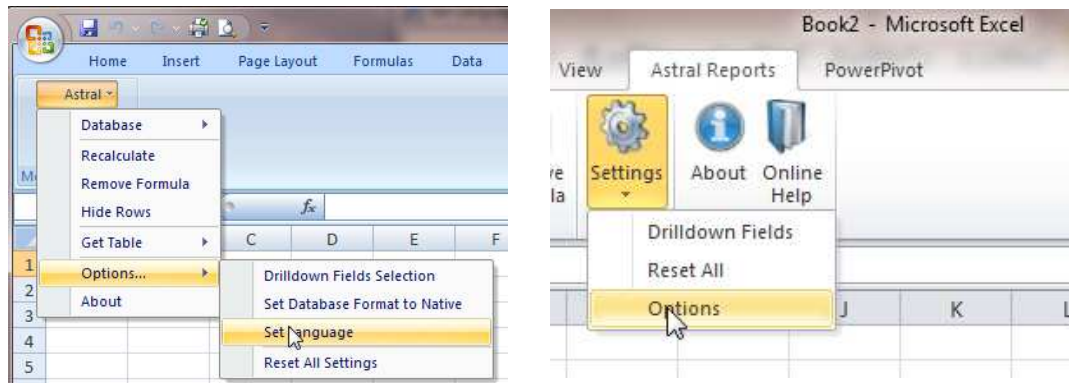


If you have Microsoft Excel 2003 onwards you will see the new ribbon toolbar.



### 3.4. Changing the Language

Astral Reports installs with the English language (ENG) as a default. To change the language, select “Set Language” from the Astral Reports Options menu item.



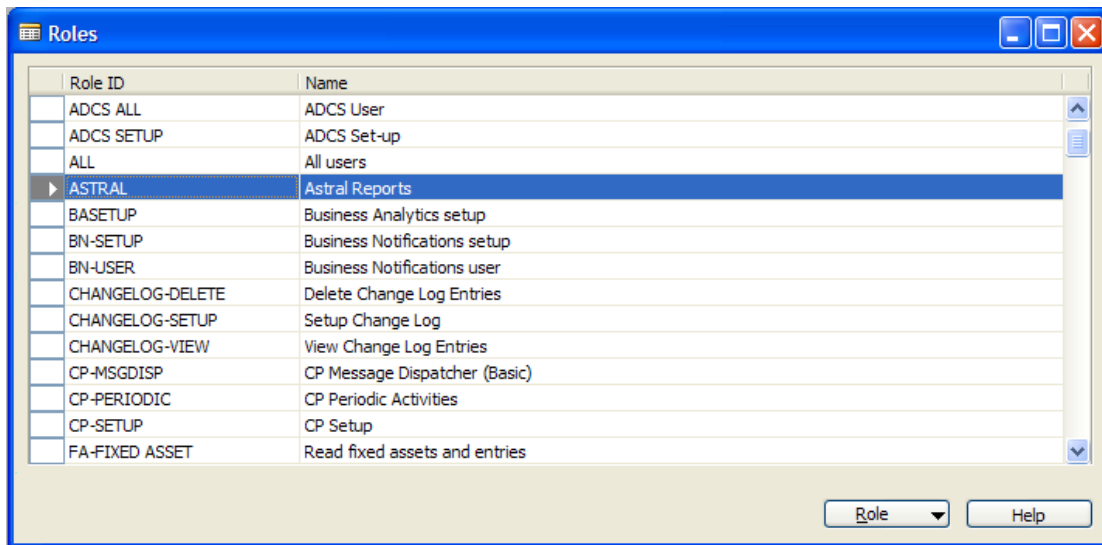
Select your preferred language from the drop down list and then select “OK”. After selecting OK, the menu captions and form captions will update, and the Help File automatically linked to the correct Help File.

For more information on changing Language codes please look at our online video or help regarding installing languages.

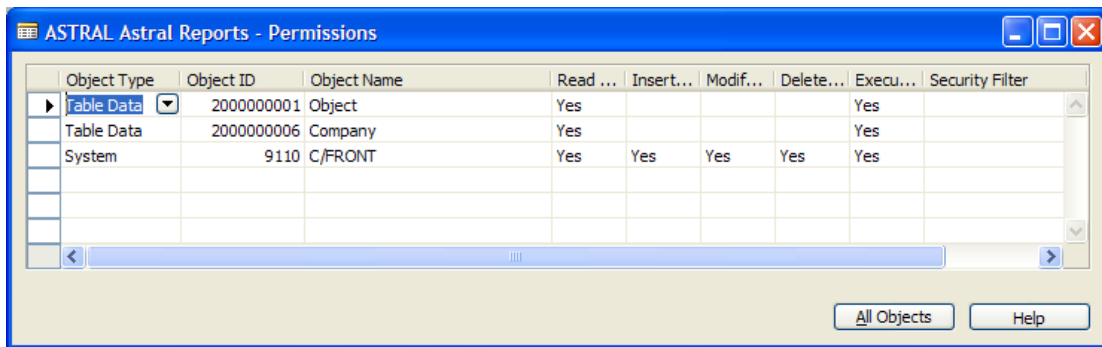
### 3.5. Security

Each user will need to have a base level of permissions in each company. These permissions are simply to allow C/Front the ability to evaluate whether the user has further permissions for the desired data.

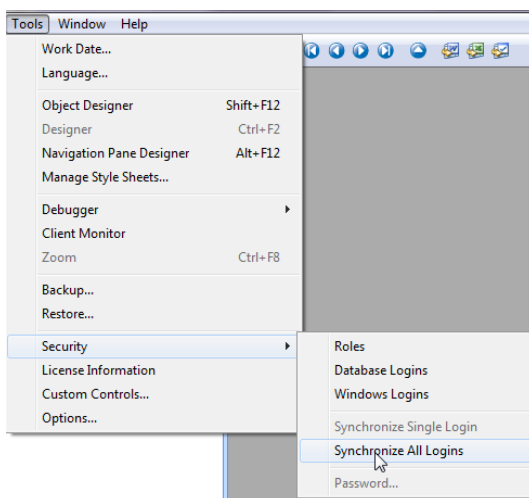
The simplest method of configuring the Dynamics NAV security is to create a new “Role” called “Astral” in Dynamics NAV (if the user is a Super user this step is not required).



Within this Role, permissions are required for three items.



The “Object” Table Data allows Astral Reports to evaluate whether the user has permissions for a certain table within the required company, and the “Company” Table Data allows Astral Reports to build a dropdown list of companies for use when retrieving data from Dynamics NAV.

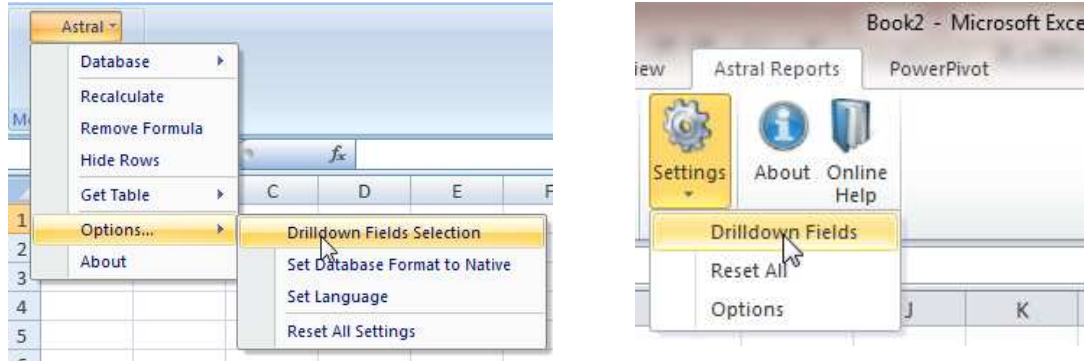


Once the Role is created, you will need to assign this Role to each user that will be using Astral Reports.

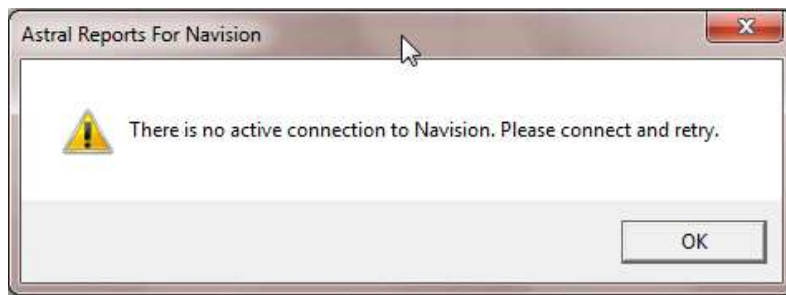
For users with Windows Logins, assign the Role and either Synchronise a Single Login or All Logins, depending on security settings.

### 3.6. *Configuring Fields for Drilldown*

On first connection, default drilldown fields are configured. These can be changed at any time by opening the “Drilldown Fields Selection” form.



Before opening the form, a connection to Dynamics NAV must have been established.



Once a connection has been established, the user can double-click the various drilldown enabled tables and double-click on the fields to toggle the field on/off.



Once finished, clicking “Save” will store the required field combinations to the computers registry.

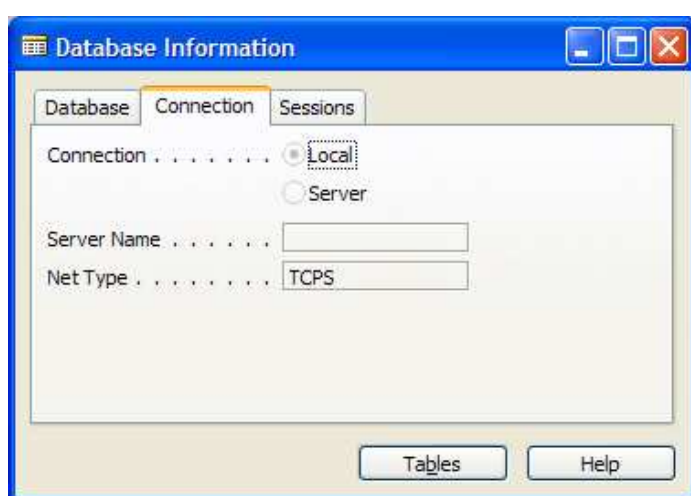
## 4. Testing Dynamics NAV C/Front connection

### 4.1. *Establishing Dynamics NAV Connection Method*

The simplest method to establish how you connect to Dynamics NAV is from within the Dynamics NAV classic application itself, (if you run the Role Tailored Client you are connecting through SQL). Open up Dynamics NAV as normal, and when you are connected to your Dynamics NAV Database, select “File” and then “Database”.

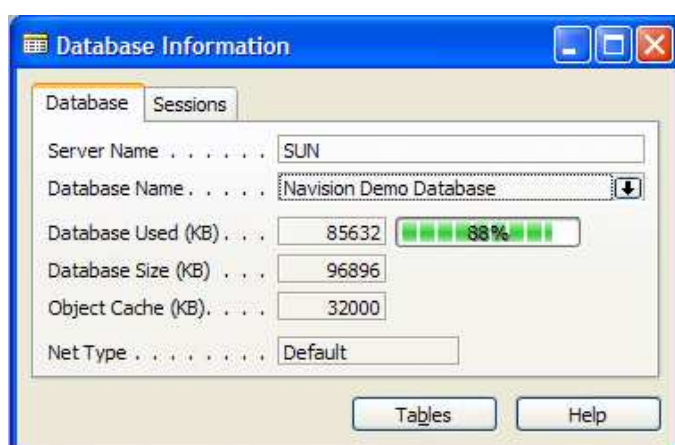
For installations that use the native database format, you will be displayed with a three tabbed form, and for SQL installations you will see a two tabbed form.

#### Native Installations



If the Connection is shown as “Local”, you will need to look at the database tab and make a note of the entry within the “Database Name” field. If the Connection is shown as “Server”, make a note of the entry in the “Server Name” field.

#### SQL Installation

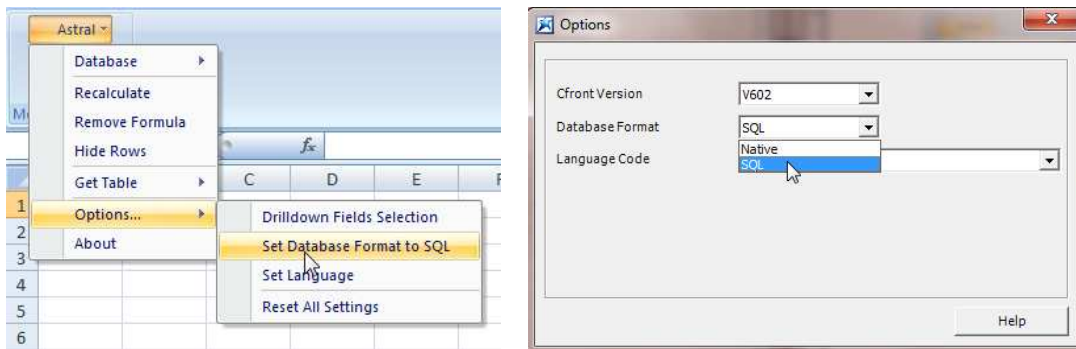


If the Connection is shown as SQL, you will need to make a note of the “Server Name” and the “Database Name” shown on the Database tab.

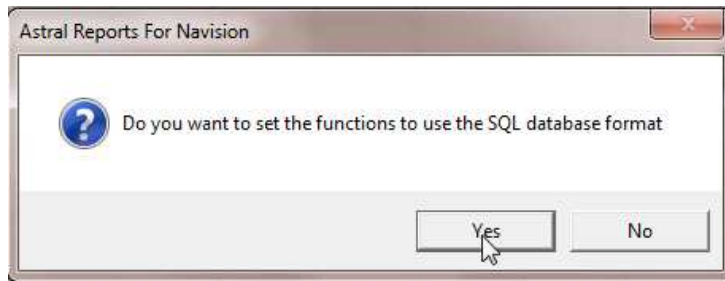
## 4.2. **Configuring Astral Reports to use SQL**

By default, Astral Reports is configured for Microsoft Dynamics NAV’s native database format. If you have established that the SQL database format is being used, you will need to perform one additional configuration step prior to connection.

From the “Astral” menu within Excel, select “Options” and then “Set Database Format to SQL”.



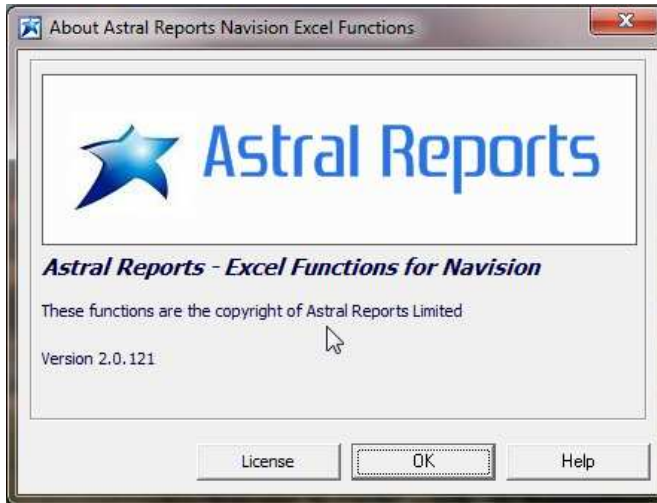
Select “Yes” at the confirmation dialog that is displayed.



At this stage you are informed that Excel must be closed and then reopened for the changes to take effect. After reopening you will note that the “Set Database Format to SQL” menu item has changed to “Set Database Format to Native”

## 4.3. **Installing the Astral Reports License File**

If you have obtained an Astral Reports license file that is linked to your own Dynamics NAV license file, or wish to use a demonstration license, you can do so by selecting the “License” button from the “About” form.

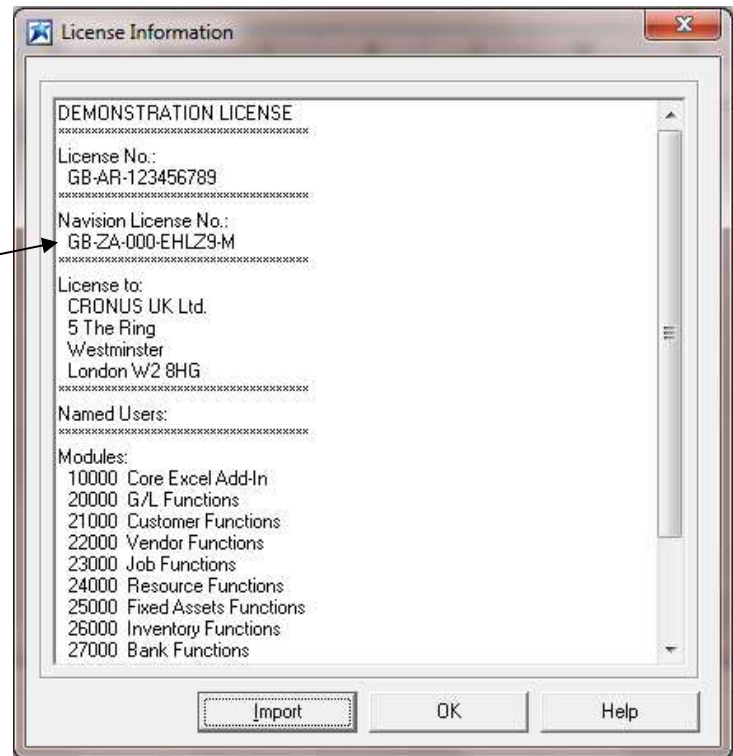


This will initially display an entry screen, but after browsing for the license file it will display it within the form.

It is suggested that the license be placed into the Astral Reports installation directory, or within a shared folder on the network.

**NOTE:**

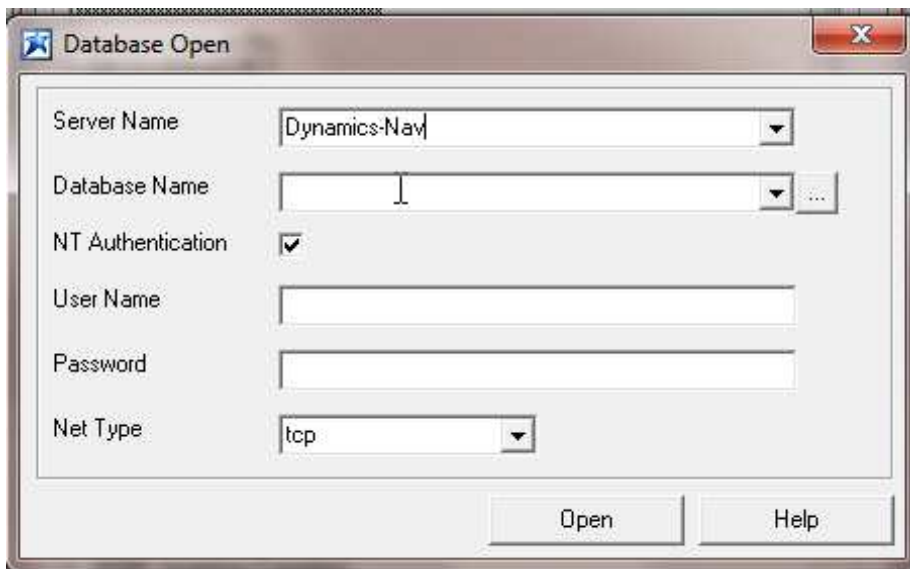
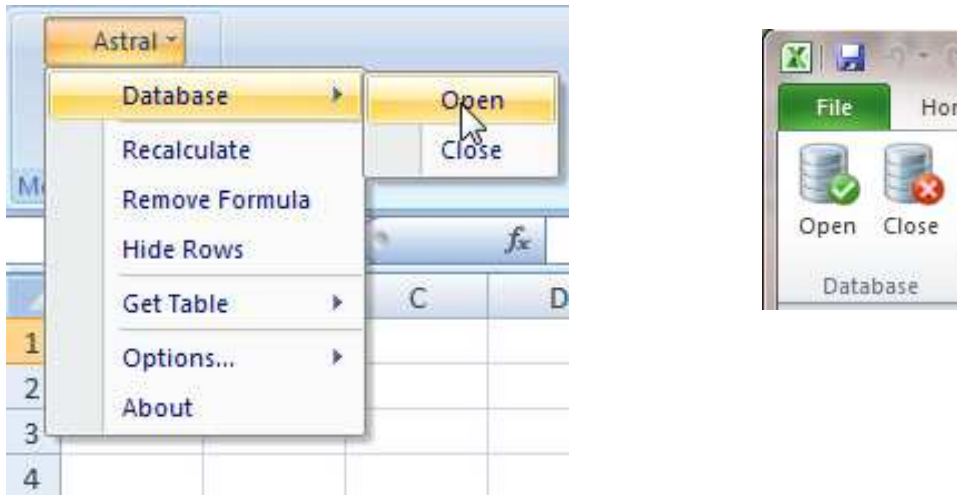
Each Astral Reports license file is linked to a Dynamics NAV license file via the "Dynamics NAV License No."



#### 4.4. Making the first connection

At this stage, you are ready to test your connection from Astral Reports to Dynamics NAV.

From the “Astral” menu within Excel, select “Database” and then “Open”, or click on the open icon on the ribbon



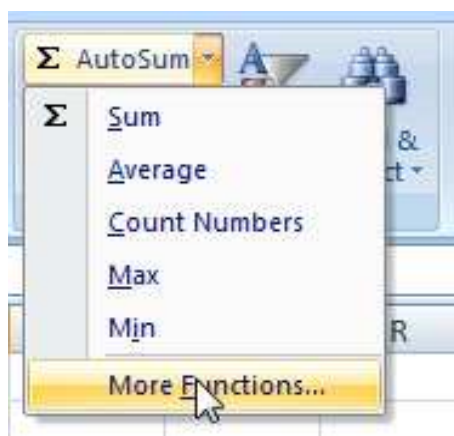
Enter the connection information obtained from the procedures above, and select NT Authentication if you normally connect to Dynamics NAV without requiring a User name and Password.

Click “Open” and if no error message is displayed; Astral Reports has successfully connected to Dynamics NAV.

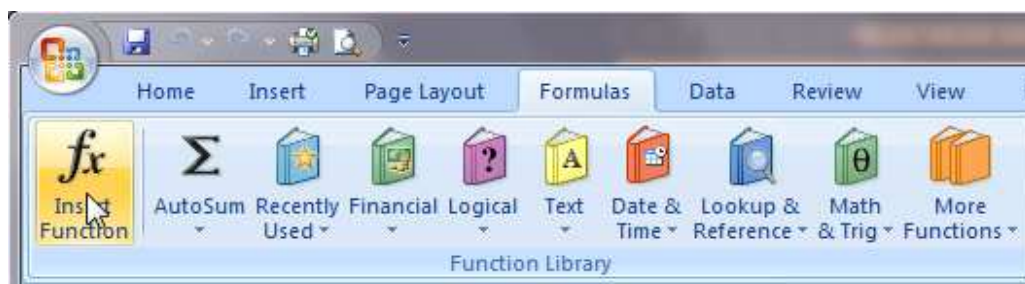
## 5. Using the Custom Functions

Astral Reports uses the concept of providing functions that are based on Dynamics NAV's SIFT technology. Each function utilises this technology, and therefore provides a "highly tuned", predetermined structure for extracting information from the system.

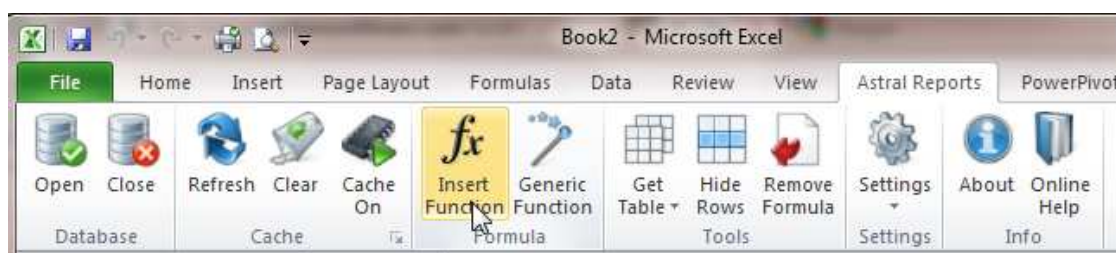
To see the extensive list of functions, click on the drop down box that is next to the "Auto Sum" icon on the toolbar, and select "More Functions".



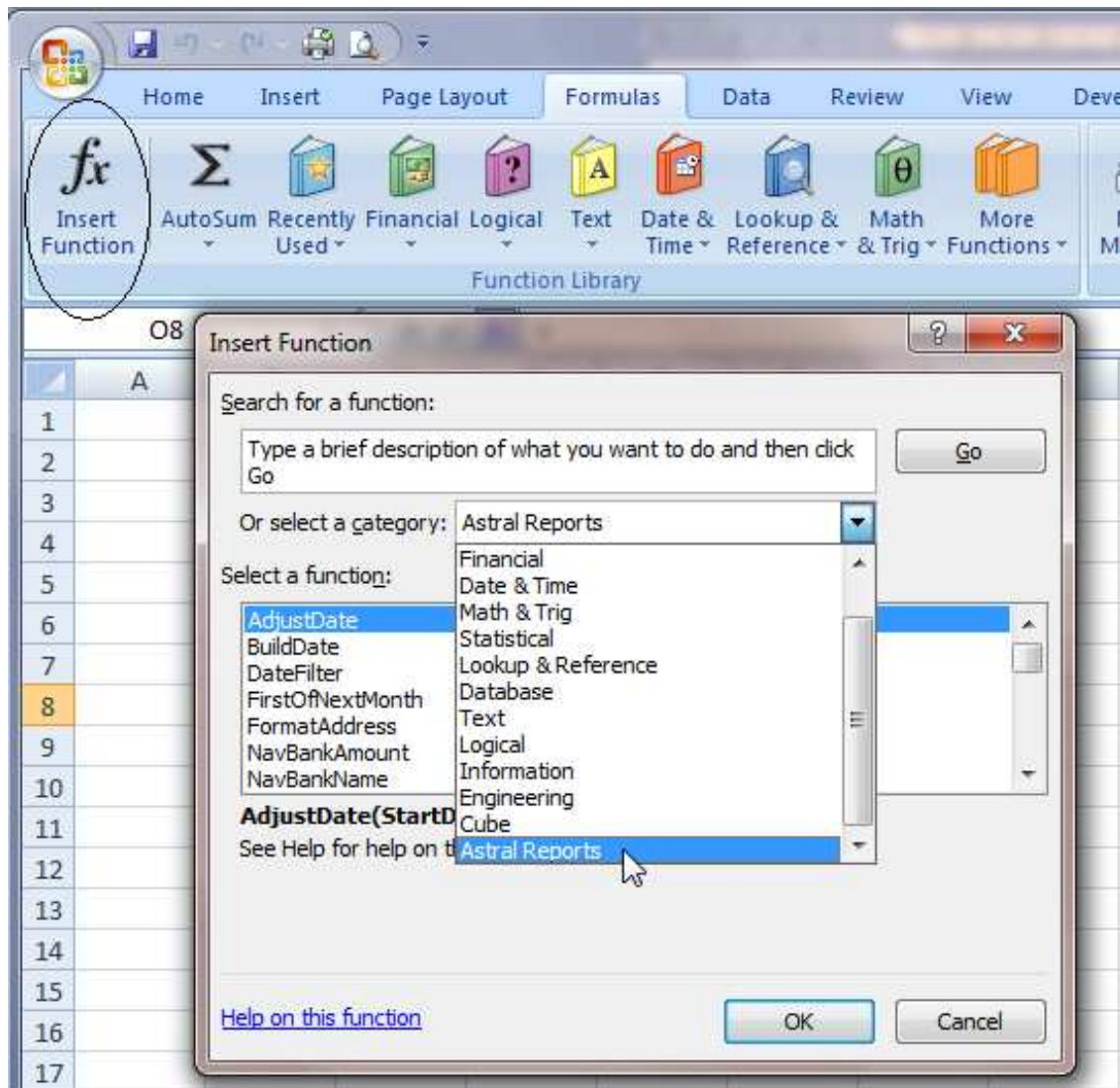
Alternatively, go to the Formulas menu and select "Insert Function".



Or select Insert function from the Astral Reports ribbon



Now, from the “Insert Function” form, change the “Category” to “Astral Reports” and you will be displayed with a complete list of the functions.

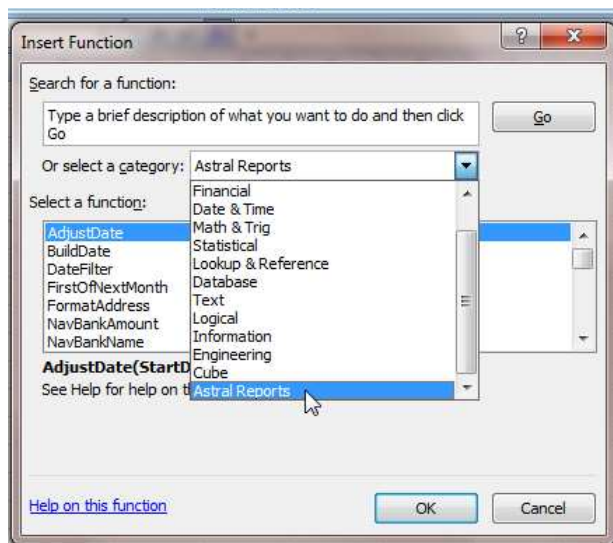


## 6. Help

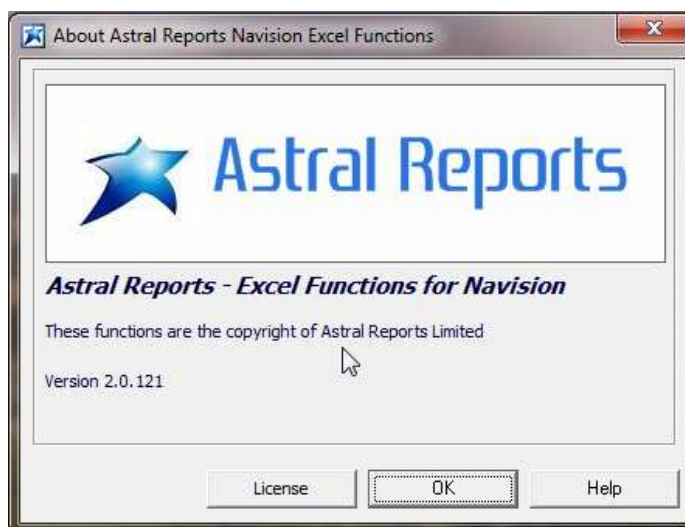
The “Help File” that is included as part of the installation is the best source of information relating to the functions that are now available to you for use within Excel. This help file can be opened from each “Astral Reports” form that is displayed, and additionally, from the “Help on this function” link which can be found at the bottom left of Excel’s standard “Insert Function” form.

The following are examples of how the Help File can be accessed.

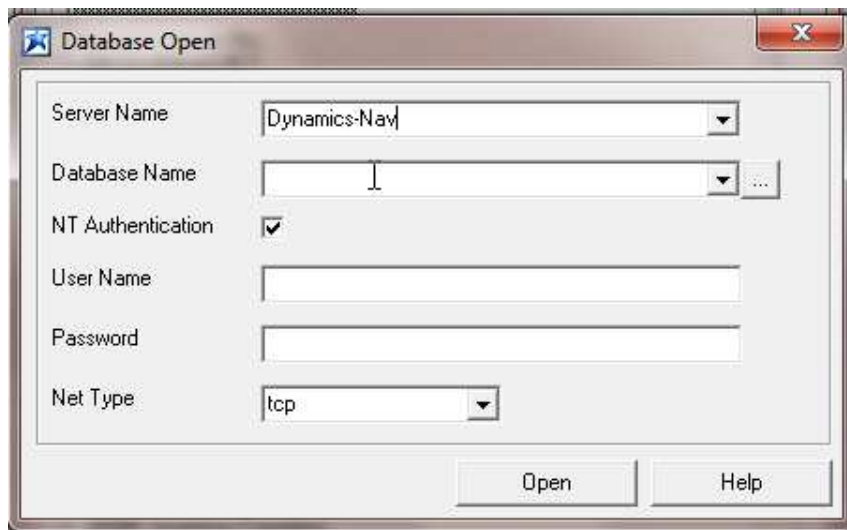
### From the “Insert Function” form



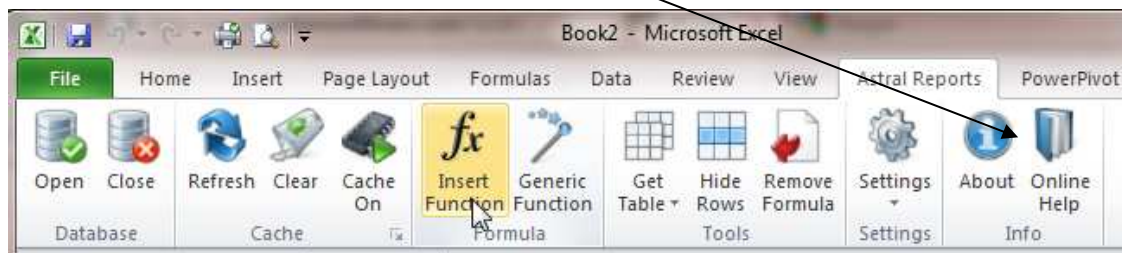
### From the “About” form



From the “Database Open” form



From the Astral Reports ribbon, select Online Help.



## Troubleshooting

The following are known issues relating to connecting C/Front to Dynamics NAV.

### ❖ **Incorrect Version of C/Front**

The installed version of C/Front must correspond to the installed version of Dynamics NAV. The safest method here is to install C/Front from your original Dynamics NAV CD. However, some CDs for older versions of Dynamics NAV (Version 2.01 for example) incorrectly shipped the wrong version of C/Front.

If you are faced with this issue, contact your reseller to provide you with the correct version for your Dynamics NAV installation.

### ❖ **The Database File is already in use**

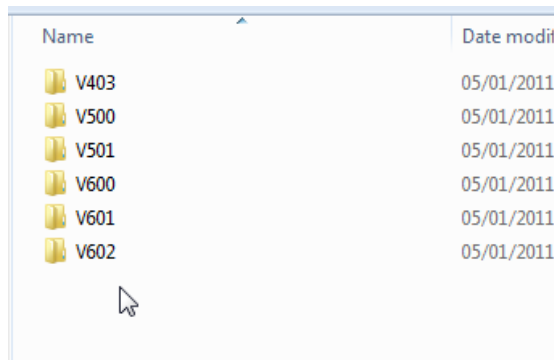
If testing Astral Reports for demonstration purposes, you may have the Dynamics NAV application open with a direct connection to a local database. Since this type of connection a single user only connection, Astral Reports will not be able to connect until Dynamics NAV is closed. However, the functions may still be used, but they will return “#NC#”, meaning “No Connection”.

## Appendix A

### How to install C/Front for versions of NAV prior to V4SP3

If you have installed Astral Reports utilising either, Typical, Compact or Custom, you will have created at least one CFRONT version in the CFRONT directory of Astral Reports for Dynamics NAV.

C:\Program Files (x86)\Astral Reports\Astral Reports For Dynamics NAV\CFront

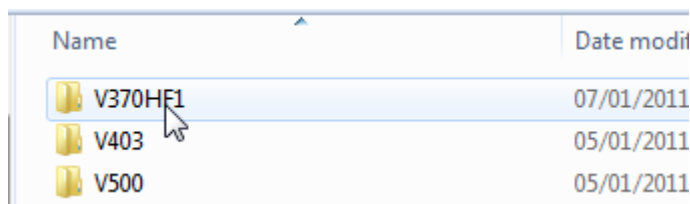


Name	Date modified
V403	05/01/2011
V500	05/01/2011
V501	05/01/2011
V600	05/01/2011
V601	05/01/2011
V602	05/01/2011

Here we have used the Custom install facility to install all of the versions available.

If I wished to install a new version of CFRONT manually all I need to do is to copy all of the file types held in one of these directories, from my Dynamics NAV DVD or network location if I have the install files held here.

The first thing I do is to create a new CFRONT version folder, in this instance I have created a version V370HF1, make sure this is the latest version you are running, especially where several hotfixes were created.



Name	Date modified
V370HF1	07/01/2011
V403	05/01/2011
V500	05/01/2011

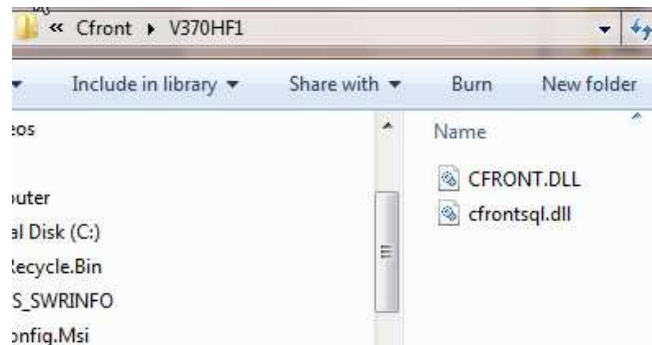
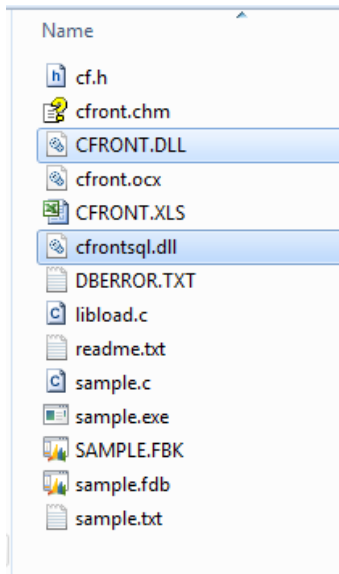
From my network location (DVD) I locate the SDK folder, and the CFRONT folder within this:

V370HF1\Devkit\Program Files\Microsoft Business Solutions-Navision\SDK\CFRONT.

From this directory I take just the two CFRONT files:

- CFRONT.DLL
- cfrontsql.dll

And copy these into my new directory.

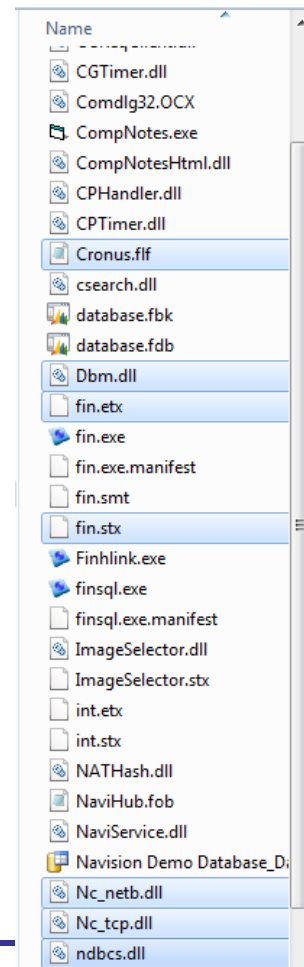
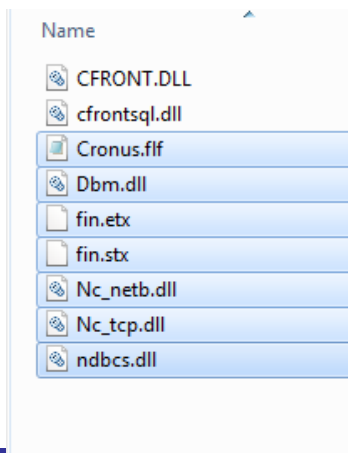


I then go to the main client directory on the DVD or network location:

V370HF1\Client\Program Files\Microsoft Business Solutions-Navision\Client\

Copy the rest of the files into the directory V370HF1

(You will notice we did not have Nc\_tcps.dll in version 3.70, as this network protocol was not available at this time.)



After creating the new directory and copying the files, simply change the version of C/Front being used by selecting the new version in the Settings >> Options form.

