

BI4Dynamics NAV Express Manual

Last update: September 2017
Version 5.7
Revision 1

CONTENTS

- 1. System Requirements3**
 - 1.1. Accounts and Permissions3
 - 1.2. Windows Server.....3
- 2. Installation4**
 - 2.1. Installing BI4Dynamics Express4
 - 2.2. Deploying BI4Dynamics Express.....7
 - 2.3. Schedule Automatic Data Update.....12
 - 2.4. Deleting instance14
 - 2.5. Uninstalling BI4Dynamics14
- 3. Connecting reports..... 15**
 - 3.1. Excel Reports15
 - 3.2. PowerBI Reports.....16

1. System Requirements

1.1. Accounts and Permissions

- Be (local) administrator on the windows server where BI4Dynamics Express is installed.
- Read permissions on the NAV database.
- Read permissions on the master database of the source database SQL Server (only required if the NAV license is uploaded to the SQL server)
- Create database and linked server permissions on MS SQL Server where the BI4Dynamics DWH will be deployed.

Note: All four (4) permissions can be combined into one (1) Windows domain account. One Windows domain account is preferred.

1.2. Windows Server

Hardware

- 1 processor - 4 cores Intel® processors or equivalent (limited by SQL Server Express),
- 1 GB RAM (limited by SQL Server Express),
- Required hard disk space depends on the size of NAV database; We recommend: 1.25 x size of Dynamics NAV database used (max 10GB database size - limited by SQL Server Express)

Software

- Windows Server 2008, 2008 R2, 2012, 2012 R2, 2016 or Win XP/Vista/7/8,
- SQL Server Express 2008R2, 2012, 2014 or 2016
- UAC should be disabled or application needs to be installed outside Program Files folder
- .NET Framework 4.0
- Network availability:
 - **Online server** is connected to the Internet with port 80 opened (if the server is under proxy, the application needs access to our authorization web service) or
 - **Offline servers:** special offline license is required, please contact sales@bi4dynamics.com for further assistance.

Source Database (NAV)

- NAV license needs to be uploaded either on the server (to the master database of SQL instance) or into the NAV database

If the NAV license is uploaded to NAV (SQL) server, than user also needs read permission on master database of SQL Server where NAV database resides.

2. INSTALLATION

2.1. Installing BI4Dynamics Express

IMPORTANT! Before installing BI4Dynamics Express solution, please check hardware and software requirements, make sure you have sufficient permissions and an active internet connected.

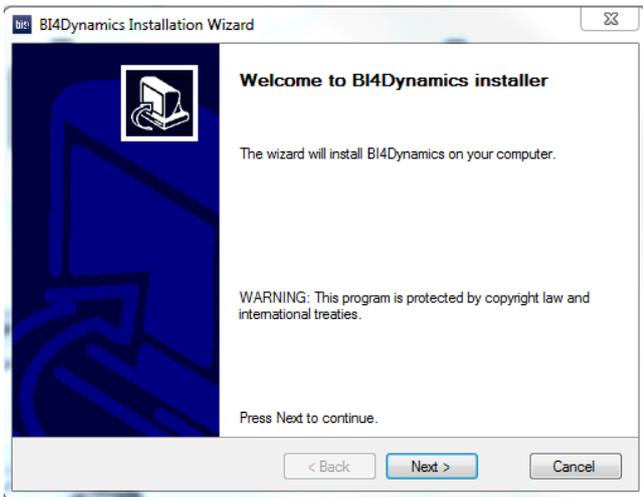
IMPORTANT! The installation process has to be started on the server where BI4Dynamics data warehouse will be created.

1. Double-click **BI4Dynamics.exe** to start the installation*.

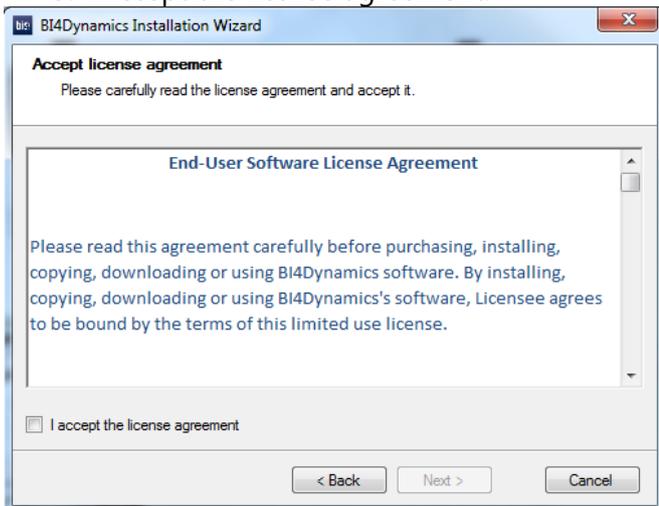
**Always start BI4Dynamics as an administrator*

Note: The name of the file varies based on the version you are using.

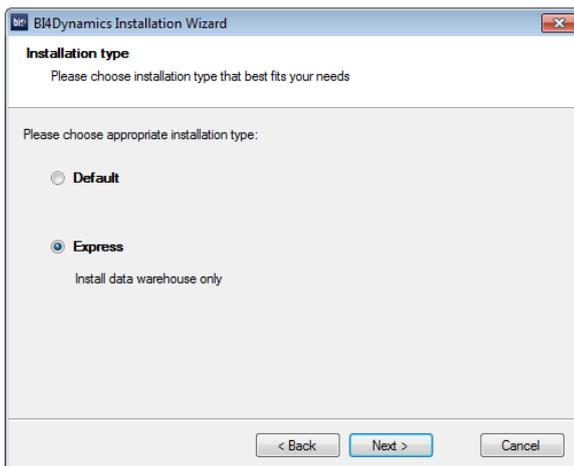
2. Follow the instructions on screen.



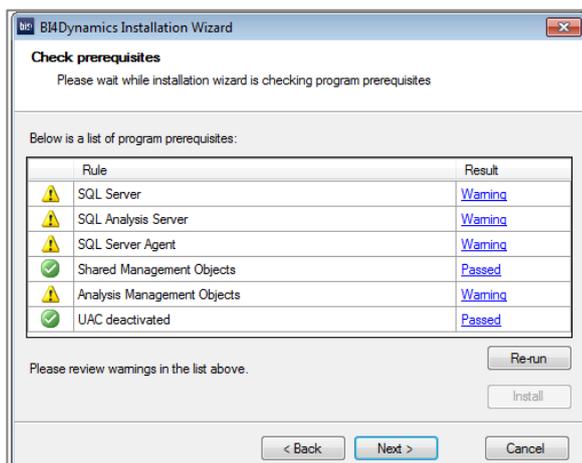
3. Accept the license agreement.



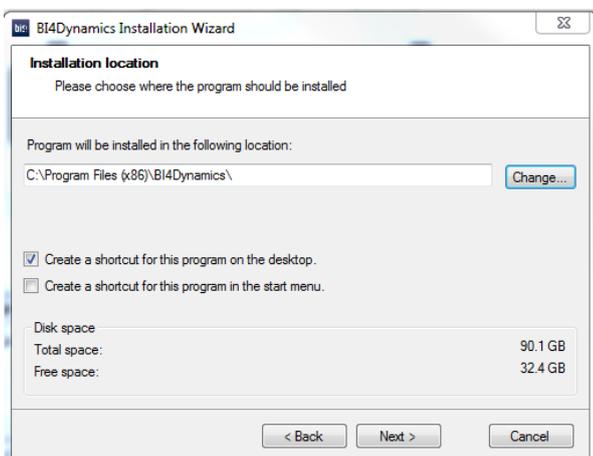
4. Choose Express Installation Type



5. The installer will check for some of the prerequisites. If you fail any of the tests you can click on the result to see the error. You have to fix the problem before you can rerun the test. Once all the tests are successfully completed you can continue with the installation.

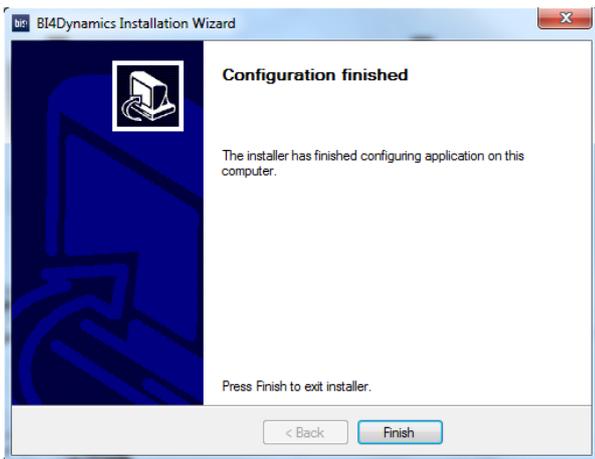


6. If Shared Management Objects are not installed, please click the Install button, which will trigger the installation of correct version of SMO's and CLR Types.
7. Select the folder where you would like to install BI4Dynamics Express. You can choose to create a shortcut on the desktop and/or in the start menu.

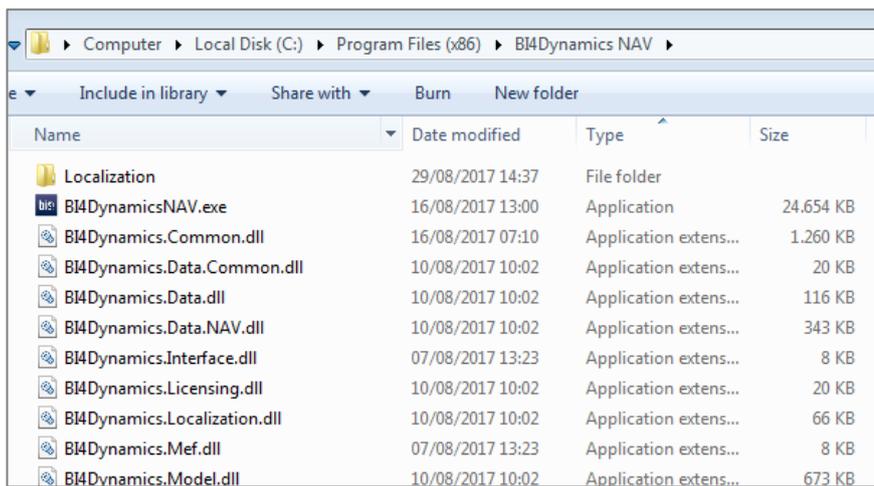


8. Confirm the configuration and begin the installation of BI4Dynamics Express.

9. Click **Finish** after the installation is completed.



10. **BI4Dynamics Express** is successfully installed



2.2. Deploying BI4Dynamics Express

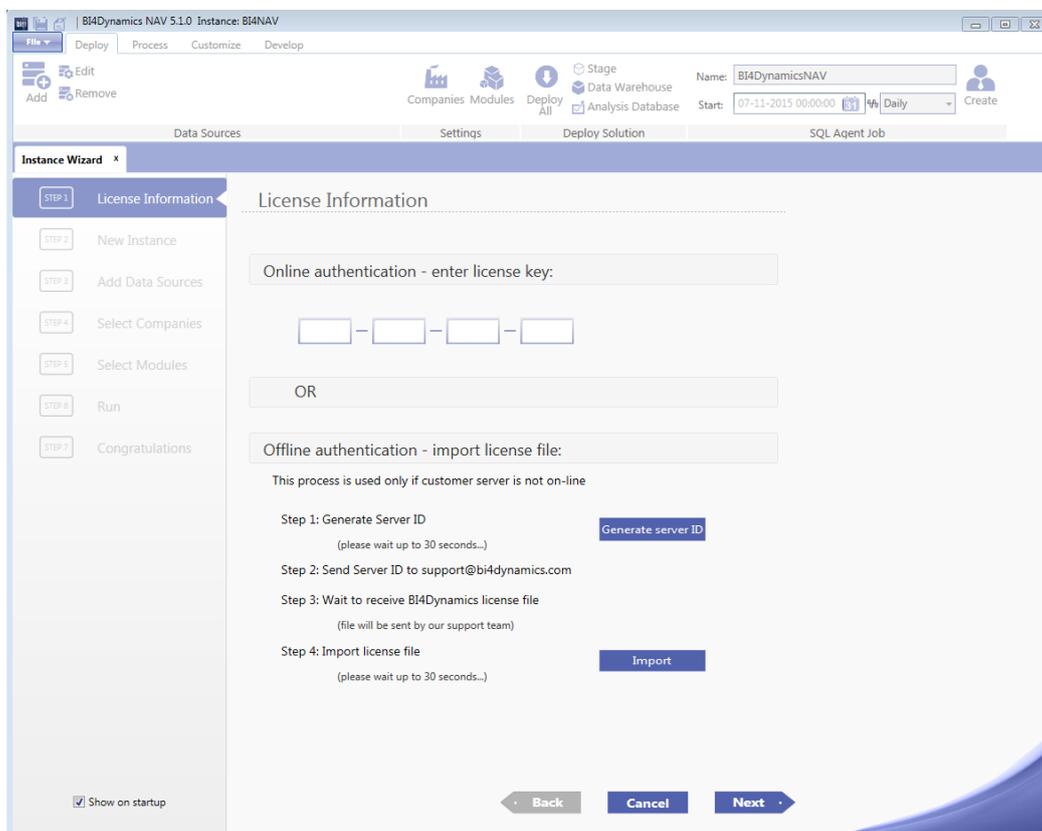
Deploying a BI4Dynamics Express solution is a six step process:

1. Providing license information
2. Creating an instance
3. Adding the data sources
4. Selecting companies
5. Selecting modules
6. Deploying and processing the selected modules

When you open the application, an instance wizard will start to guide you through the configuration.

Providing license information

1. Launch **BI4Dynamics.exe** from the folder where BI4Dynamics Express was installed to open the application.



- *Note: The default installation location is C:\Program Files (x86)\BI4Dynamics NAV. Application can also be started from the Desktop shortcut or from the Start Menu shortcut.*

2. Enter the BI4Dynamics Express **online license key**

OR

- Follow the instructions on screen to receive an **offline license key** (in case you don't have the internet connection or port 80 on the server is closed).

Offline authentication - import license file:

This process is used only if customer server is not on-line

Step 1: Generate Server ID **Generate server ID**
 (please wait up to 30 seconds...)

Step 2: Send Server ID to support@bi4dynamics.com

Step 3: Wait to receive BI4Dynamics license file
 (file will be sent by our support team)

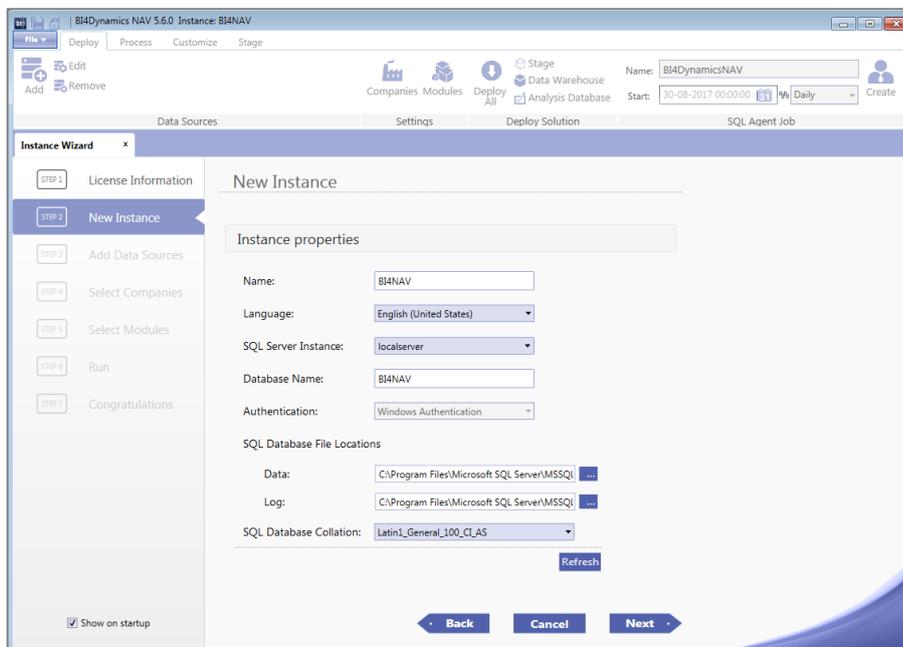
Step 4: Import license file **Import**
 (please wait up to 30 seconds...)

Note: If you experience any problems with authorization, please contact us via support@bi4dynamic.com.

3. Click **Next**.

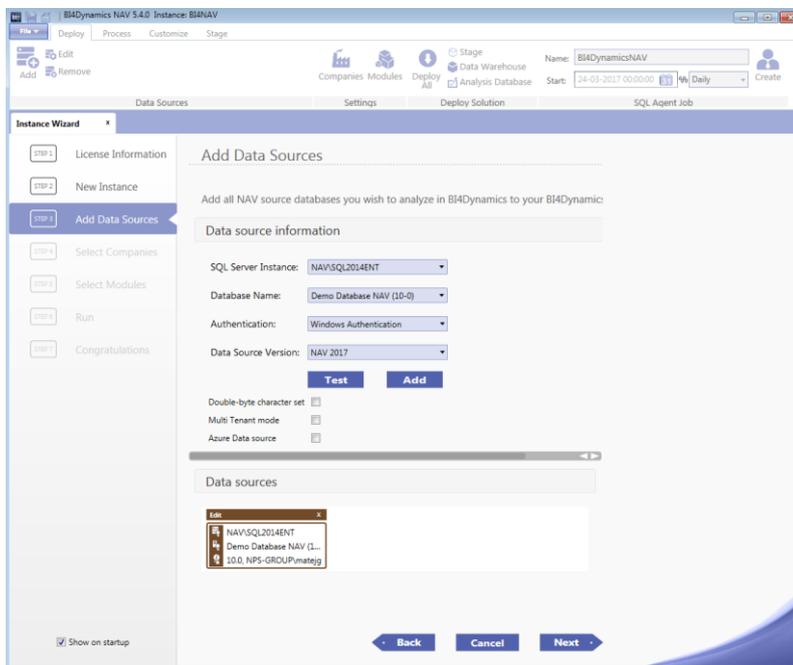
Creating an instance

1. Type the **Name** of the new instance.
2. Select what **Language** the solution will be deployed in.
3. Select or Type in the **SQL Server Instance** name where the BI4Dynamics Data Warehouse will be deployed.
4. Type in the **Database Name** of the BI4Dynamics Data Warehouse.
5. **Authentication** type: Windows Authentication only
6. The default values for **SQL Database file Locations** (data and log files) and **SQL Database Collation** are entered automatically. Check them and refresh or modify if necessary.
7. Click **Next**.



Adding the data sources

1. Select the **SQL Server Instance**, where the source database is located.
2. Select the **Database Name** of the source database.
3. Choose **Authentication** type: Windows or SQL Server (with SQL Server Authentication you also need to provide your user name and password).
4. Select your Dynamics source version – **Data Source Version**.
5. Click **Test** to test the connection to the data source. If the connection is successful click **Add** to add the selected source database to the solution.
 - *Note: You can add more than one data source by clicking Add again. Each data source you add will be coloured differently.*
6. Click **Next**.



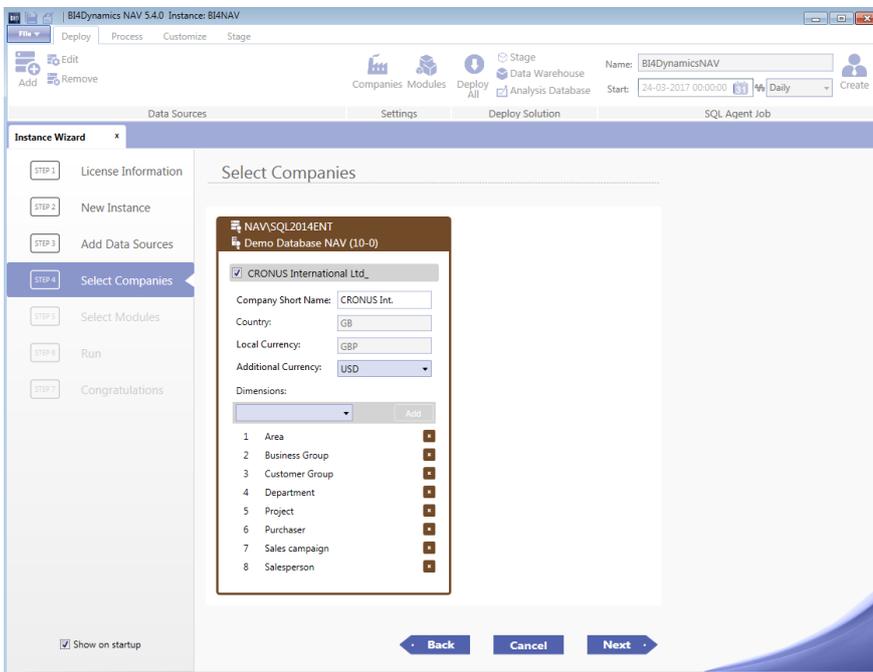
If you use non default SQL port (1433), then you have to add SQL port number when adding the data source in BI4Dynamics. SQL port number must be added after SQLServerName and must contain prefix “;”. Example “SQLServerName,SQLPort \ SQLInstance”.

Selecting Companies

1. From the list of companies tick the ones you want to include in your instance and configure additional settings for each selected company:
 - a. **Country**: local country description (e.g. Great Britain)
 - b. **Local Currency**: local currency code (e.g. GBP)
 - c. **Additional Currency**: select the additional currency code for this company (e.g. EUR)
 - d. **Dimensions**: select dimensions you would like to include in the solution and click **Add** to add them to the list. You can remove the selected dimension by clicking the X button next to the dimension name

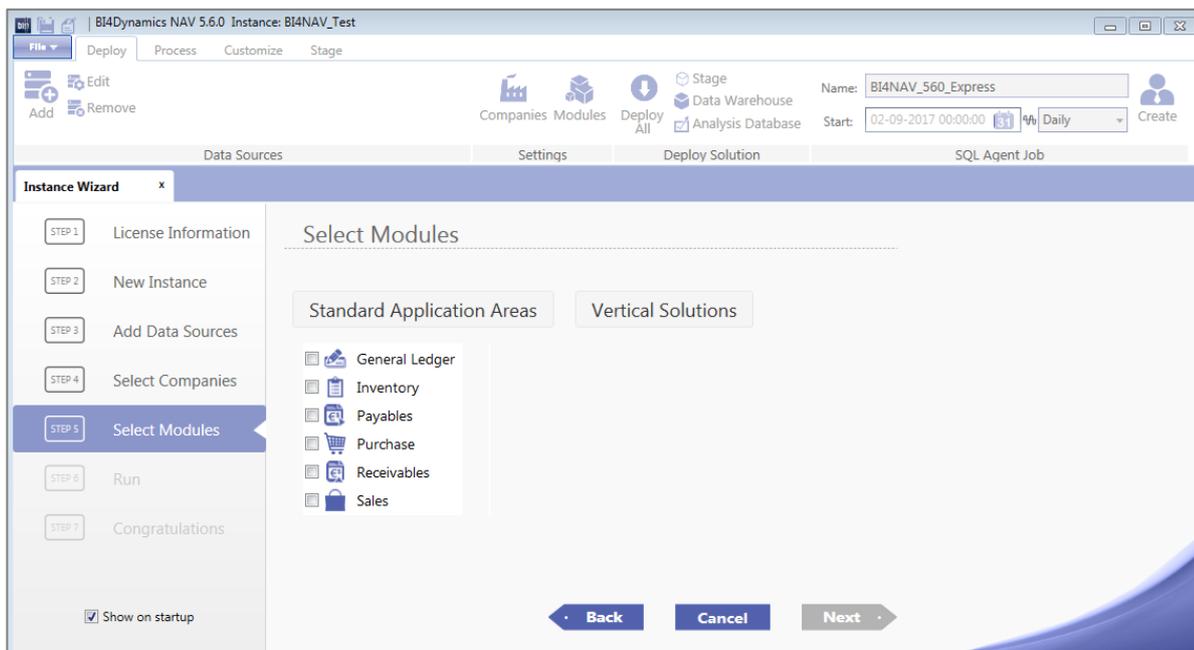
- *Note: If all selected companies have the same sort order for dimensions, dimensions will also be renamed when deploying unified dimensional model (UDM). If the sort order is different, dimensions will keep their default name (e.g. Dimension 1).*

2. Click **Next**.



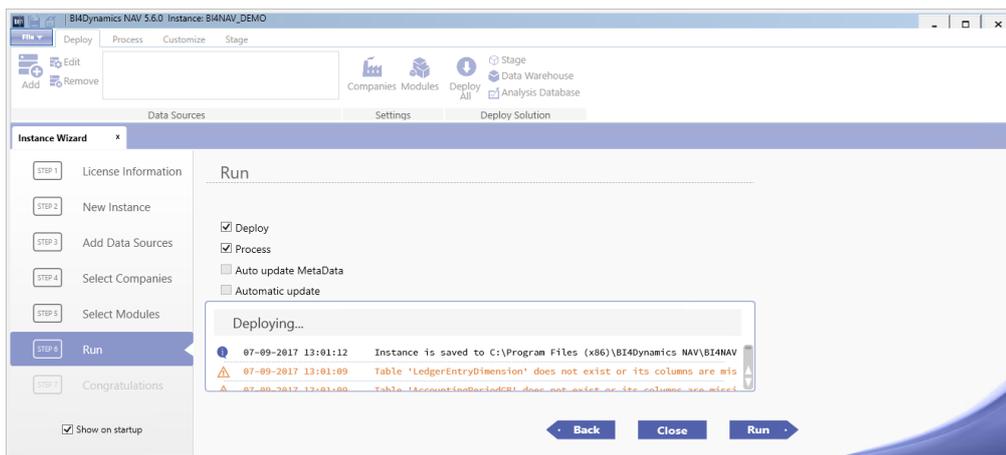
Selecting modules

1. Select the **Modules** you would like to install.
2. Click **Next**.

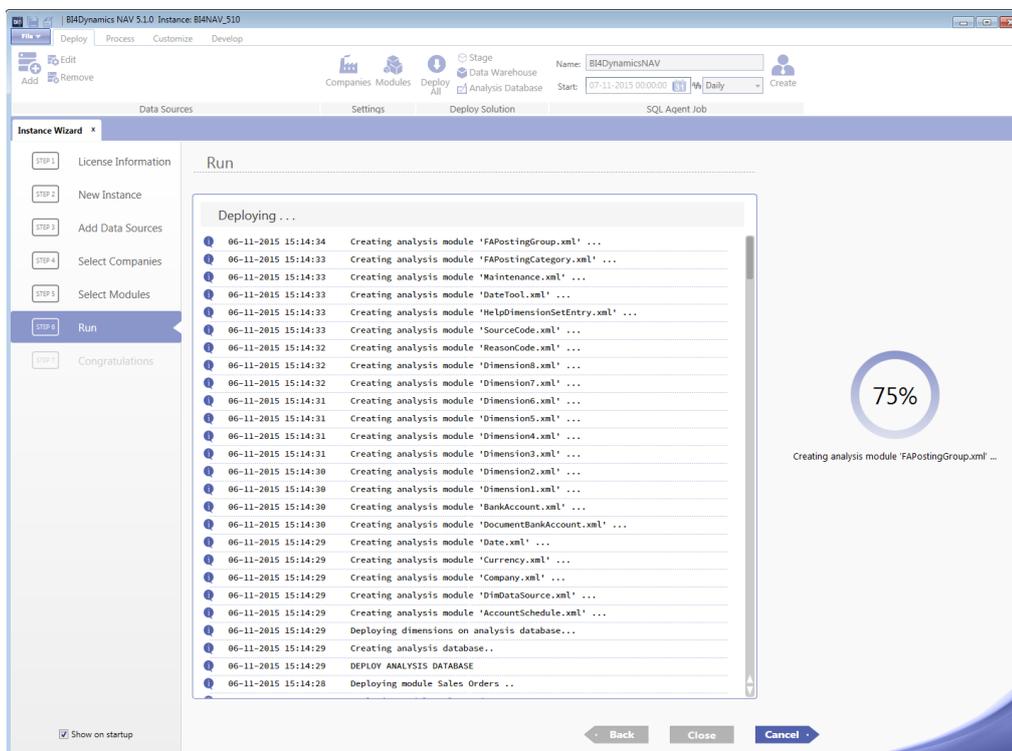


Deploying and processing selected modules

1. In the last step select the tasks you want the wizard to perform:
 - a. **Deploy** – deploys BI4Dynamics data warehouse to the specified SQL server
 - b. **Process** – transfers data from you source database to the BI4Dynamics data warehouse
2. Click **Run**.



3. A log file is displayed to monitor the installation progress.

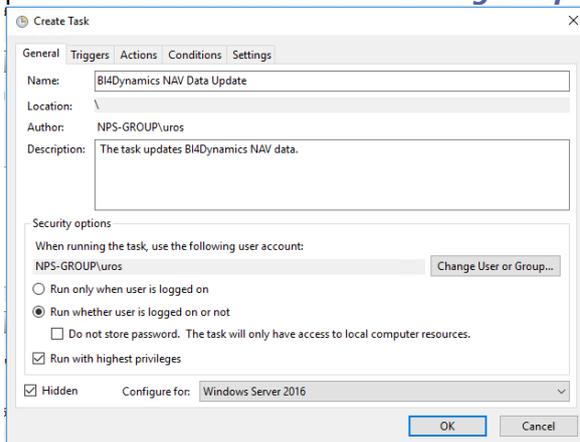


4. After successful processing the Data Warehouse with data you can use any front-end tool to begin your analysis.
 - To help you get started, [BI4Dynamics provides a set of trial reports](#).
 - You will need to change the connection of the reports to point to the OLAP server where you deployed BI4Dynamics.

2.3. Schedule Automatic Data Update

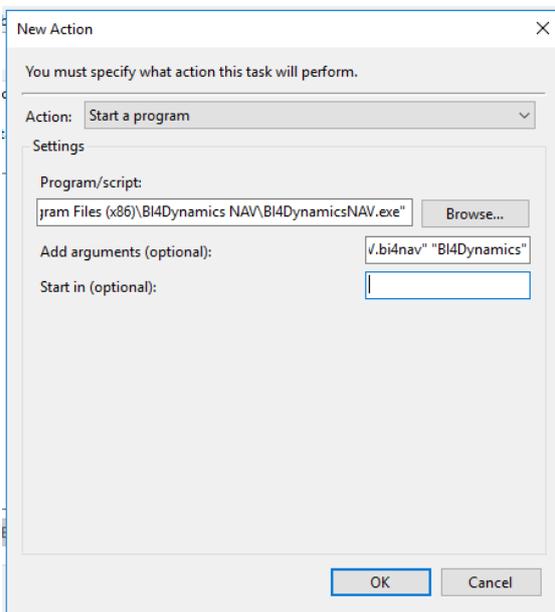
To schedule the automatic data update the Windows Task Scheduler can be used.

1. Open Task Scheduler and select **Create Task...**
2. On **General** tab enter **Name** and **Description**. Select the user account with administrator permissions and select **Run with highest privileges**.

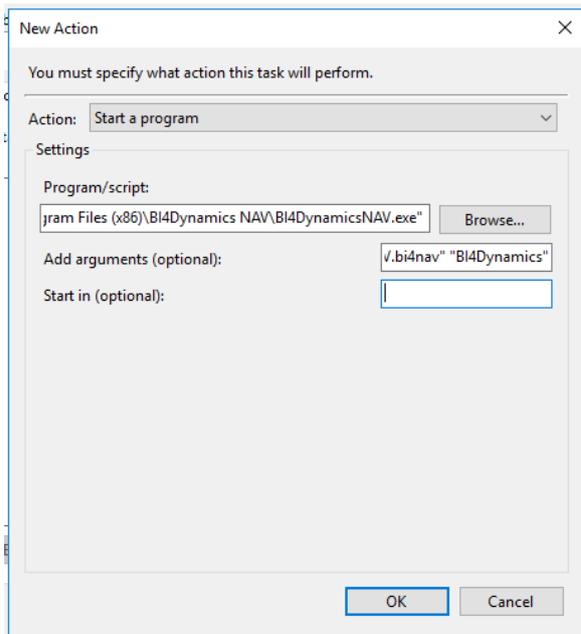


If the **Do not store password** is checked, please uncheck it.

3. On **Triggers** tab define a trigger to start the task. Select **New...** with Begin the task: **On a schedule** and select **Daily** and set the date and time.



4. On **Actions** tab define the program to run when the task is started. Select **New...** with Action: **Start a program** and enter the following settings:
Program/script: "Application"
Add arguments: "Instance" "Process Flow"



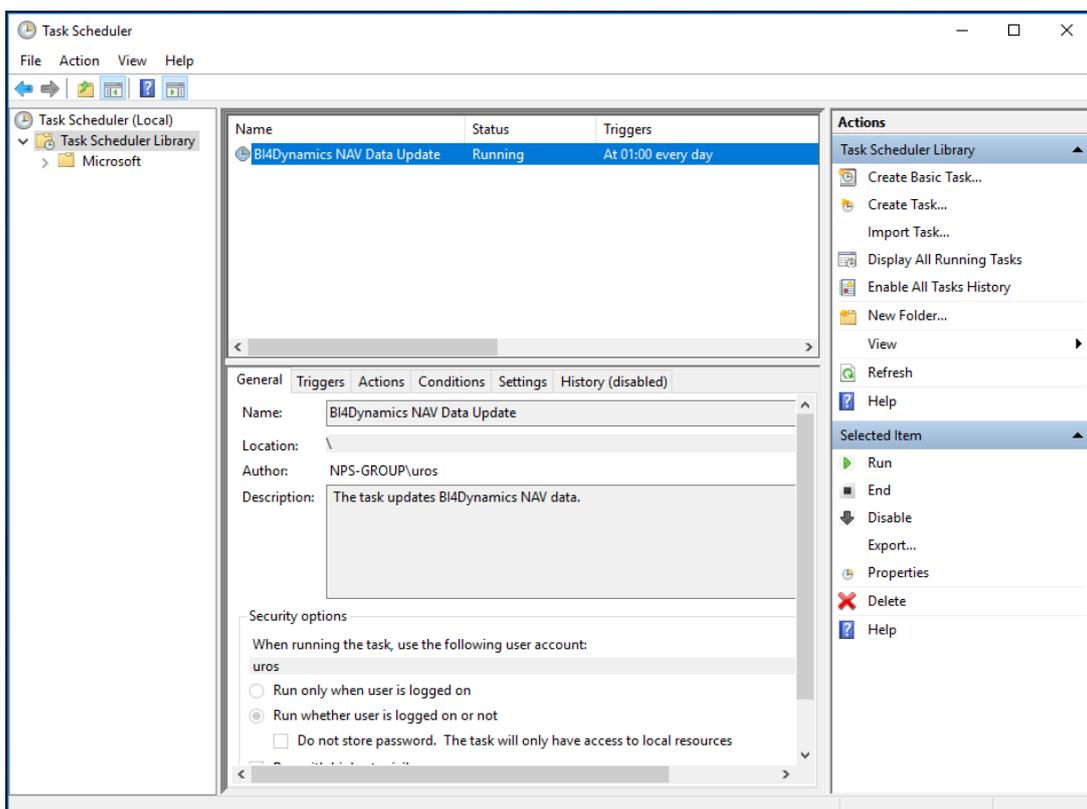
Example:

Program/script: "C:\Program Files (x86)\BI4Dynamics NAV\BI4DynamicsNAV.exe"

Add arguments: "C:\Program Files (x86)\BI4Dynamics NAV\BI4NAV\BI4NAV.bi4nav" "BI4Dynamics"

5. When you confirm the task created with **OK**, you will have to enter the password which will be used to run the application.

- Note: The application has to be started under the user with administrator permissions (Run as Administrator).



2.4. Deleting instance

1. Open the instance you would like to delete by clicking **File** and selecting the instance in the list on the right.
2. Click **File > Delete**.
3. Click **Yes** to confirm the action.

IMPORTANT! When deleting an instance, the Data Warehouse will be deleted.

Note: BI4Dynamics Instance folders and the log file are not removed during the delete process.

2.5. Uninstalling BI4Dynamics

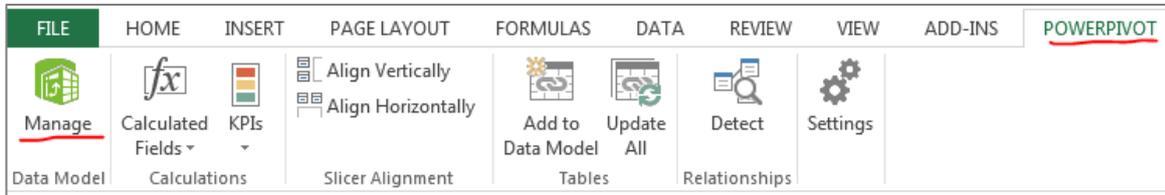
1. Click **Start > Settings > Control Panel**.
2. Click **Add or Remove Programs**.
3. From the list of installed programs, select **BI4Dynamics**.
4. Click **Remove**.
5. Follow the instructions on screen.

IMPORTANT! User files will not be removed when uninstalling the solution.

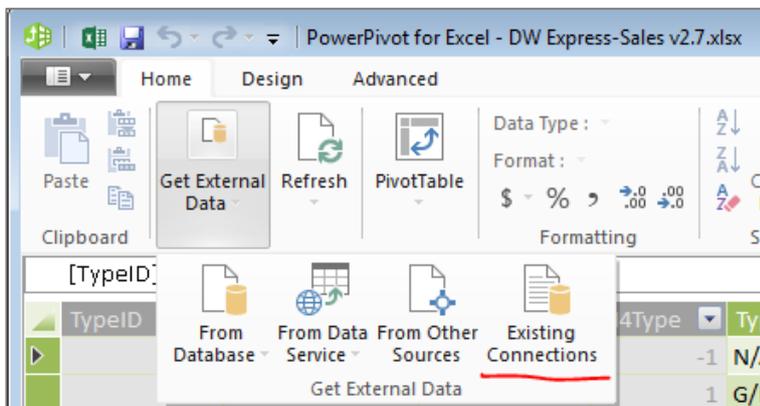
3. CONECTING REPORTS

3.1. Excel Reports

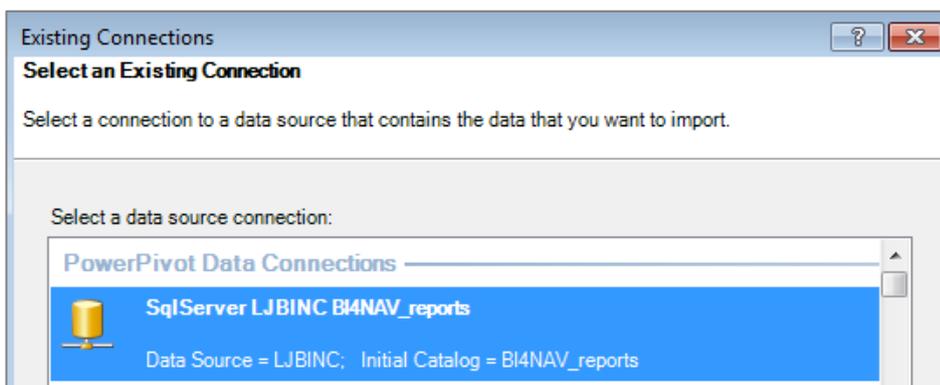
1. **Download** and **Open** Prebuilt reports
2. Click **PowerPivot tab** → **Manage**



3. In Manage window, **Home** tab → **Get External Data** → **Existing Connections**



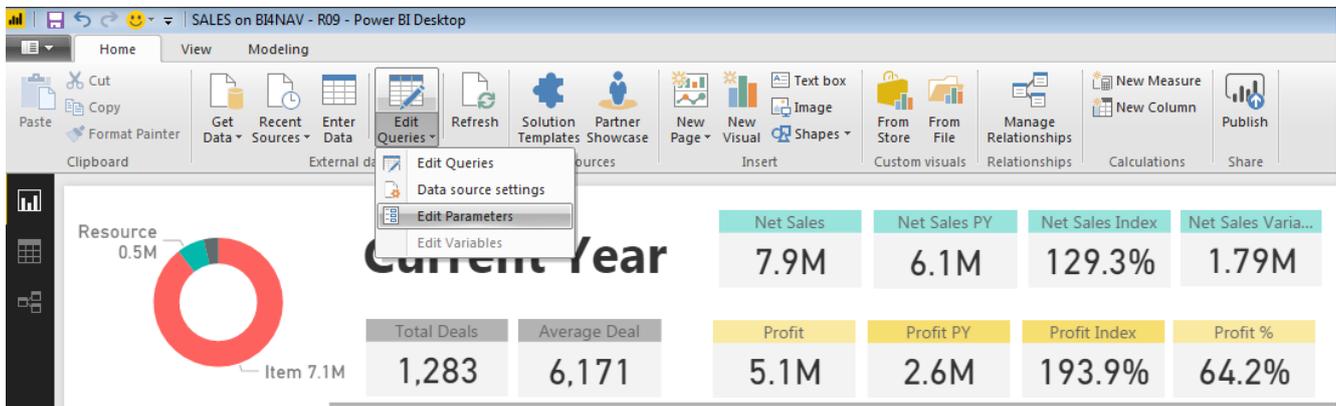
4. Select the existing PowerPivot Data Connection → **Edit**



5. Choose **Server name** and **Database name** from the dropdown menu and click **Save**
6. In Manage window, click **Refresh**

3.2. PowerBI Reports

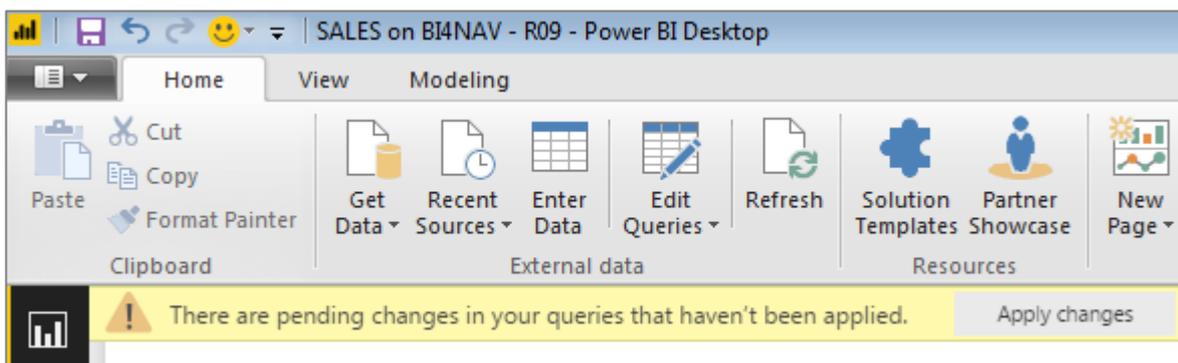
1. **Download** and **Open** Prebuilt reports
2. Click **Edit Queries** → **Edit Parameters**



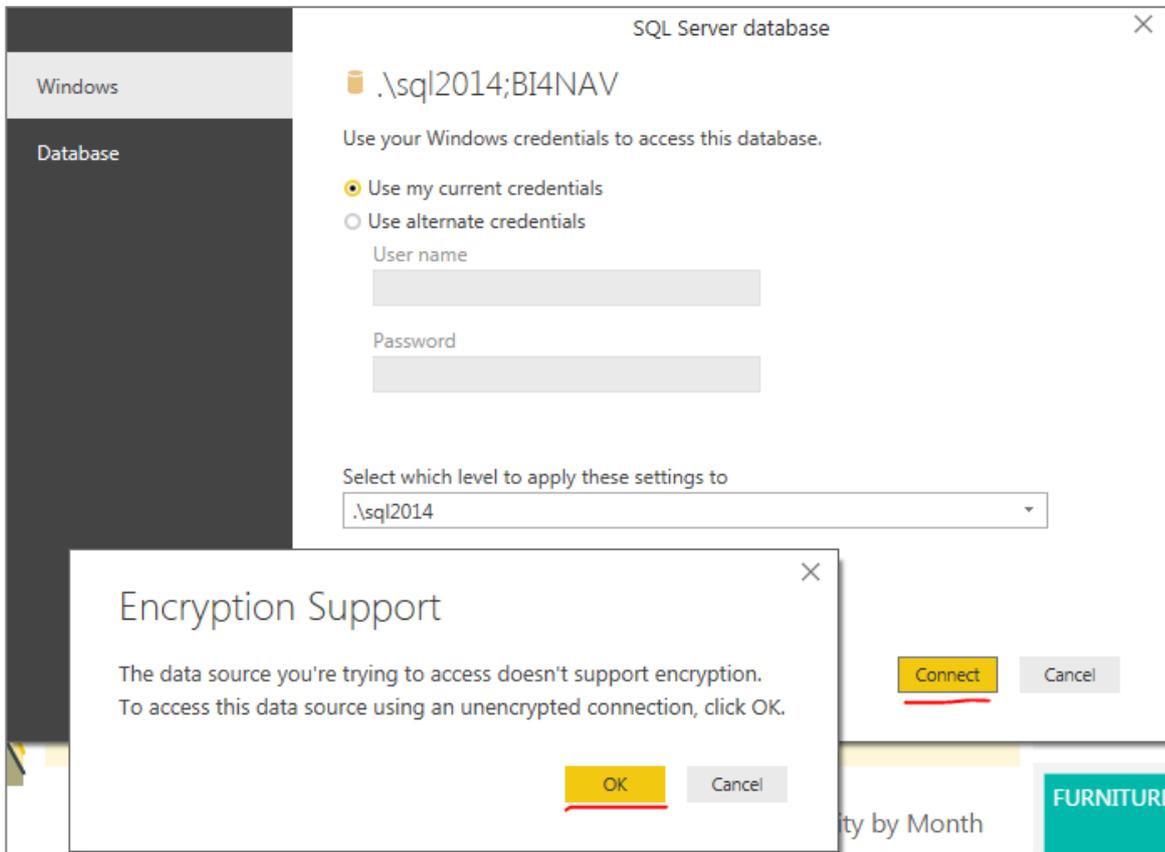
3. Enter **SQL Server name** and BI4Dynamics **Database name** and click **OK**



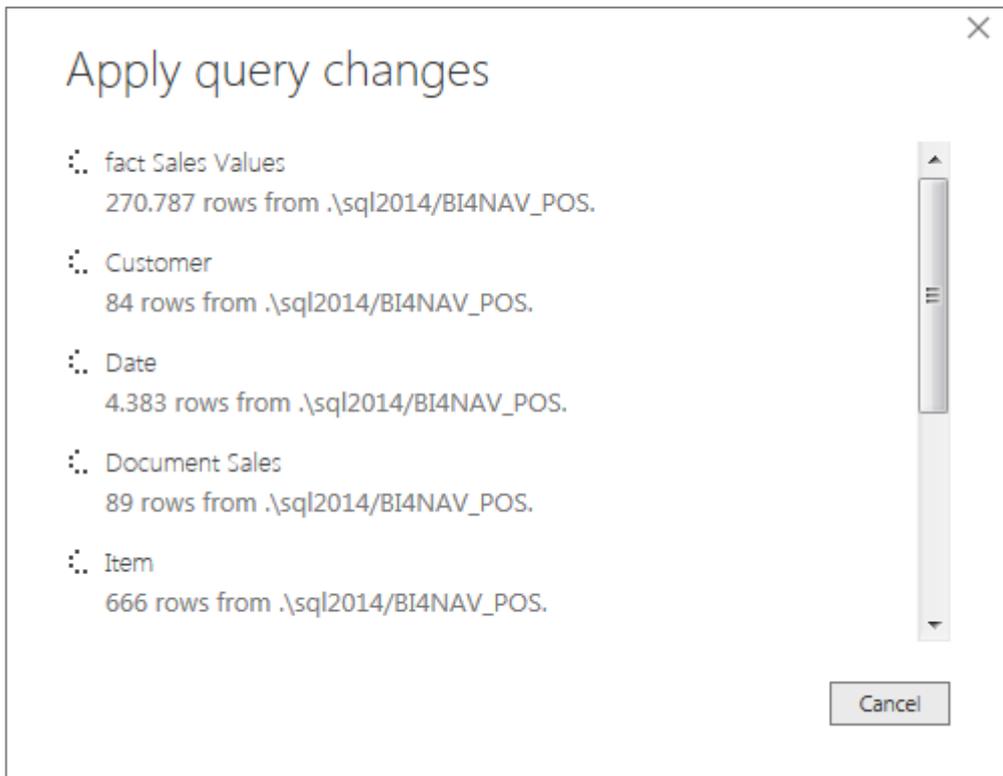
4. Click **Apply Changes**



5. On the next two windows, click **Connect** ad **OK**.



6. Wait for the **PowerBI** to import the data



7. Start using **BI4Dynamics** predefined **PowerBI** reports