

Microsoft Dynamics NAV 2013 W1   
Virtual Machine

Setup Guide

November 2012

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# Introduction

Microsoft Dynamics NAV 2013 is a landmark release, building on a strong product foundation to deliver new levels of customer and partner value through faster, more efficient implementations, compelling new and enhanced application functionality, and unparalleled levels of customer choice on how to deploy and access the solution.

The ‘Microsoft Dynamics NAV 2013 W1 VM’ is designed to allow you to demonstrate the features and functionality of Dynamics NAV 2013 W1 in a live environment, utilizing a single PC or laptop computer. The virtual machine contains Microsoft Dynamics NAV 2013 W1 (RTM build), Microsoft SharePoint Server 2010, Microsoft Office 2010 and other products. Refer to [Chaper 6](#_Overview_of_the_1) for an overview of the installed software.

Note that Microsoft Dynamics NAV 2013 W1 VM is not time bombed, but instead built on evaluation copy of Windows Server 2008 R2. The evaluation period for Windows Server 2008 R2 is 180 days, and you will be able to extend, or “rearm”, it for the same period three times. The count down for evaluation period will start when you run the image for the first time and activate it. See more information about rearming in chapter Windows Rearm.

The ‘Microsoft Dynamics NAV 2013 W1 VM’ will work on both Windows 8 PRO as well as Windows Servers with Hyper-V. While offering you multiple advantages, the use of Hyper-V images needs preparation. Refer to the Whitepaper “Best Practices for Using Hyper-V as a Demonstration Platform” and other Hyper-V resources for the hardware requirements and guidelines for working with Hyper V. These resources are available under **Documentation and Resources** at [https://mbs.microsoft.com/partnersource/deployment/methodology/vpc/nav2013r2](https://mbs.microsoft.com/partnersource/deployment/methodology/vpc/nav2009r2)

To get started – import the VM into Hyper-V in Windows 8 Pro or Windows Server – connect the networks – upload your personal license and you are ready to present.

For best experience you might need to connect to the VM using Remote Desktop – it will give you easier access to use local folders on your computer to get your own fob-files and it scales better on the screen.

This document contains all you need to know.

# How to run Microsoft Dynamics NAV 2013 W1 VM on Windows 8 or Windows Server Host

Client Hyper-V is the same computer virtualization technology that was previously available only in Windows Server. In Windows 8 Pro, the technology is now built into the non-server version of Windows, often called the “desktop” version because it does not run on server-class hardware.

This makes it possible to host the VM on a regular windows 8 box – without the need to install a separate demo box.

To enable Client Hyper V in Windows 8 please look into this document: <http://technet.microsoft.com/en-us/library/hh857623.aspx>

To get going you need to import the virtual machine, setup the networks and then connect.

## Import a virtual machine

|  |  |
| --- | --- |
| Instruction | Screenshot |
| 1. Open Hyper-V Manger on your PC. In order to do this click Start, then in the Search box start typing “hyper-v” and click Hyper-V Manager in the results list 2. Click Yes to allow the program to make modifications. |  |
| 1. In Hyper-V Manager in the Actions pane, click Import Virtual Machine. |  |
| 1. In the Import Virtual Machine window, browse to the folder Microsoft Dynamics NAV 2013 and click Import. |  |
| When importing, you can decide whether to import a copy or a clone (the “move or restore” option). If you import a copy, the virtual machine ID changes. The virtual machine ID is a [GUID](http://en.wikipedia.org/wiki/Guid) that Hyper-V generates automatically for each virtual machine. This unique ID is used to distinguish one virtual machine from another. For the most part, the virtual machine ID is never displayed in the Hyper-V user interface. If you import a clone, nothing changes; the same virtual machine ID is used.  Under most circumstances, you should import a copy. This is especially important if the imported copy is going to be the base of multiple virtual machines. Using a clone can cause conflicts if more than one clone is active on the same Hyper-V host and/or network.  Note that if you select the option to duplicate all files, all files are copied to the default location defined in Hyper-V (C:\Users\Public\Documents\Hyper-V\Virtual Hard Disks). |  |

## Set up a private virtual network

The private virtual network will serve to connect the two virtual machines, Microsoft Dynamics NAV 2013 W1 VM.

|  |  |
| --- | --- |
| Instructions | Screenshots |
| 1. In Hyper-V Manager, click **Virtual Network Manager** or **Virtual Switch Manager (Windows 8)** |  |
| 1. In the Virtual Network Manager, under **Create virtual network**, click **Internal**. 2. Click **Add**. |  |
| 1. In the **Name**, type **vInternal** 2. Click **OK**. |  |
| 1. In the Hyper-V Manager, right-click **Microsoft Dynamics NAV 2013 VM**, and then click **Settings**. |  |
| 1. Under **Add Hardware,** select **Network Adapter** and click **Add.** 2. From the drop down menu select **vInternal** 3. Click **OK**. |  |

## Set up an external virtual network (Internet access)

You need Internet connection to activate Windows on the image. You also need Internet access for Virtual Earth and Weather Control Add-ins.

In order to have an Internet connection on the image you need to set up an external virtual network and then assign it to a virtual machine. This subsection explains how to do this. It is assumed you are using a wired access to the Internet. You should avoid using wireless external networks if a wired network is available, since they are not directly supported by Hyper-V. If you want to use a wireless network, refer to the resources provided in the end of this subsection.

**Use external networks only when absolutely necessary!**The potential problems of external networks include issues with duplicate domains on the same network.

Below it is described how to set up an external virtual network and then assign it to a virtual machine.

|  |  |
| --- | --- |
| Description | Screenshots |
| 1. In Hyper-V Manager in the **Actions** pane, click **Virtual Network Manager** or **Virtual Switch manager** |  |
| 1. In the Virtual Network Manager, under **Create virtual network**, click **External**. 2. Click **Add**. 3. In the **Name** text box, type a name for the new virtual network. 4. Under **Connection type,** ensure **External** selected and click the drop down. 5. Select the host Network Adapter that has Internet access. 6. Click **OK**. |  |
| 1. Right-click the virtual machine for which you want to enable the Internet access, and then click **Settings**. |  |
| 1. Under **Add Hardware,** select **Network Adapter** and click **Add.** |  |
| 1. From the drop down menu select the virtual network that you have just created. 2. Click **OK**. |  |
| Additional configuration might be needed based on your current network situation. Those could include configuring a proxy, providing a DNS address, or using a static IP.  Please refer to the following resources for more information about the networking with Hyper-V:   * Microsoft Dynamics Hot Topic: Working with Hyper-V Virtual Machines * Whitepaper “Best Practices for Using Hyper-V as a Demonstration Platform” * Hyper-V on TechNet   These resources are available under **Documentation and Resources** at <https://mbs.microsoft.com/partnersource/deployment/methodology/vpc/nav2013>. | |

## Start and connect to a virtual machine

|  |  |
| --- | --- |
| Instructions | Screenshots |
| 1. In Hyper-V Manager select the virtual machine you want to start. 2. Right-Click, select **Start** to start Windows on the virtual machine. 3. Click **Connect** to open the virtual machine. |  |
| 1. To login to virtual machine you can use the profile of **Administrator, Susan and Charlie**. The password to all profiles is **pass@word1** |  |

# 

# New Licensing Model

With Microsoft Dynamics NAV 2013 W1 VM we are not using the time-bombing technology, but instead we have installed an evaluation version of Windows Server 2008 R2. The evaluation period for Windows Server 2008 R2 is 180 days, and you are given 10 extra days in the beginning to activate the image. During these 10 days you should activate Windows via Internet. After that you are given 180 days to use the image. You will be able to extend, or “rearm”, the evaluation period three times, which gives you in total 720 days + 40 days for activation. The count down for the evaluation period starts once you activate Windows.

The subsections 3.1 and 3.2 explain how to activate Windows and “rearm” the image. Subsection 3.3 is about the Diff Disks.

For more information on licensing model, activation, rearming and diff disks visit the “Microsoft Dynamics Hot Topic – Introduction to Hyper-V Demo Environment” at <https://www.livemeeting.com/cc/emea/view?id=PDTRJ9&role=attend&pw=SD5HY8>. Start the recording at 42:27.

## Windows Activation

When you run the virtual machine for the first time or first time after the “rearm”, you should activate Windows within 10 days.

|  |  |
| --- | --- |
| Description | Screenshots |
| 1. In order to activate Windows, click **Start**, and then right-click **Computer**. 2. Under **Windows activation** click **Activate Windows** **now**. Follow the wizard to complete the activation.   **Note** that you need to have Internet Connection on the image to activate the Windows over internet. Refer to [Section 2.3](#_Set_up_an_1) for guidelines on how to configure Internet access. |  |
| Once you have activated Windows, you have 180 days to use the image. After these 180 days, you should run the rearm command to extend the evaluation period. Refer to [Section 3.2](#_3.2._Windows_Rearm) for instructions. | |

## Windows Rearm

Once you have activated Windows you are given 180 days of evaluation period. After 180 days are over, you can extend the evaluation period for the same number of days – maximum three times. The section below shows how to “rearm” Windows and provides several useful commands to track the remaining number of days and rearms.

|  |  |
| --- | --- |
| Description | Screenshots |
| 1. Click Start, and then click Command Prompt. 2. Type slmgr.vbs -dli, and then press ENTER to check the current status of your evaluation period. 3. To reset the evaluation period, type slmgr.vbs –rearm, and then press ENTER. 4. Restart the computer. |  |
| **Best Practice:**  It is recommended that you do all your customization on the virtual machine during your first evaluation period (first 180 days), and then you run rearm command, shut down the machine and save it. The benefit of this is that you can start your image again whenever you want it, it can be in a week, a month or more, but once you start the image again, you have 190 days ahead of you. To the contrast with the time-bomb technology you were bind to a specific date when the VM expires.  **Commands to track remaining number of days and “rearms”:**   1. To see when the current evaluation period ends, in Command Prompt on the image type **slmgr.vbs /xpr** 2. To see the remaining number of evaluation days and “rearms”, in Command Prompt on the image type **slmgr.vbs /dlv** | |

# Microsoft Dynamics NAV license upload

There is already a demo license on the image that allows you to use it for demonstration purposes only. This license does not give the rights to make any changes to the Dynamics NAV 2013 through the Object Designer. If you intend to make such changes, you must upload your personal license with proper rights. Read more about Microsoft Dynamics NAV licenses at <https://mbs.microsoft.com/partnersource/documentation/howtoarticles/navbusinessconcepts.htm>

The rest of the section describes the steps on how to upload the personal license to Dynamics NAV 2013.

|  |  |
| --- | --- |
| Instructions | Screenshots |
| 1. Copy the license to the virtual machine. 2. In Dynamics NAV 2013 Development environment Client, click **License Information** in the **Tools** menu. |  |
| 1. In the License Information window, click **Upload** button, and then choose the path to your personal license. |  |
| 1. Open the database and the company in the **File** menu. |  |
| 1. Click **Change** button, and then choose again the path to the license. |  |

# Several Ways to connect to the demo environment

# Using Remote Desktop

|  |  |
| --- | --- |
| Using remote desktop enables you to benefit from extra capabilities which are not possible using Hyper-V manager client window. These capabilities are using external hard disks and optimal video resolution. In order for you to use remote desktop you have to launch Remote Desktop connection (mstsc.exe) using the internal network adapters ip address. |  |

# Using a local installation of the Microsoft Dynamics NAV WinClient connecting to the Microsoft Dynamics NAV Server in the Virtual machine

Another possibility is to install the Microsoft Dynamics NAV WinClient on your physical machine.   
With that you can showcase the personal productivity capabilities from your client PC like Windows 8 and Office integration.

To enable this you should have your physical machine and your virtual machine in the same domain.

Another possibility is to connect the client over a WAN described in this walkthrough: <http://msdn.microsoft.com/en-us/library/gg502476.aspx>

# Overview of the installed software

The list below provides an overview of what is installed on each of the Virtual Machine.   
For a complete list, you should refer to the Control Panel > Programs.   
For the list of installed add-ins refer to the [“Installed Add-ins”](#_Installed_Add-ins_1).

|  |  |
| --- | --- |
| Virtual Machine | Installed Software |
| Microsoft Dynamics NAV 2013 W1 VM | Microsoft Dynamics NAV 2013  Windows Server 2008 R2  Microsoft Office 2010  Microsoft Visio 2010  Microsoft Lync 2010 (client)  Microsoft SharePoint Server 2010  Microsoft SQL Server 2008 R2  Microsoft Visual Studio 2010 SP1  Jet Reports Express for Microsoft Dynamics NAV  Jet Express Report Player  Zetadocs Express for Microsoft Dynamics NAV 2013 |

# Modifications to the demo install

## Activated modules

The following additional software is installed in the Microsoft Dynamics NAV 2013 W1 VM:

* Microsoft Dynamics NAV Portal Framework
* Webclient
* Zetadocs
* Jetreports
* Outlook presence control

### Microsoft Dynamics NAV Portal Framework

Microsoft Dynamics NAV Portal Framework for Microsoft SharePoint 2010 is a web-based application framework for developing Microsoft Dynamics NAV solutions for Microsoft SharePoint 2010 applications. You can use Microsoft Dynamics NAV Portal Framework for Microsoft SharePoint 2010 to give users access to data in Microsoft Dynamics NAV 2013 from SharePoint websites by displaying pages and reports

|  |  |
| --- | --- |
| Description | Screenshots |
| The Microsoft Dynamics NAN 2013 VM has a demo portal created  At this portal we enabled:   * An item catalog combining structured Microsoft Dynamics NAV 2013 information and linked unstructured data like product leaflets, functional Specs, photos, etc… * Microsoft Dynamics NAV 2013 Timesheet functionality * Approval functionality on purchase orders * A collection of Microsoft Dynamics NAV Sales information * The ‘My Customers’ page * The ‘My Quotes’ page * The ‘My Sales orders’ page * The ‘Items’ page * The ‘Contacts’ page   You can open the portal by going to this location: <http://Localhost> |  |
|  | |

### Web client

The Microsoft Dynamics NAV Web client enables users to access Microsoft Dynamics NAV data over the Internet. From an Internet browser, users can view and edit data from a user-friendly interface, which resembles the Microsoft Dynamics NAV Windows client

|  |  |
| --- | --- |
| Description | Screenshots |
| You can open up the Microsoft Dynamics NAV 2013 Web client by opening this page <http://Localhost:8080> |  |

### Zetadocs Express

Zetadocs Express for Microsoft Dynamics NAV is a [downloadable](http://www.equisys.com/products/zetadocs_for_NAV/expressfulfilment.html) document management module for NAV, available at no additional cost to users using the windows client who are on a Business Ready Enhancement Plan.   
It is the result of a collaboration between Microsoft and Equisys to provide Microsoft Dynamics NAV 2013 & NAV 2009 customers the additional value of integrated document management using SharePoint

|  |  |
| --- | --- |
| Description | Screenshots |
| The document management functionality from ZetaDocs express can be used in several pages, one example is the sales order page |  |
| For more information on ZetaDocs Express visit <http://www.equisys.com/zetadocs/en/zetadocs-express.htm> | |

### JetReports Express

Jet Reports Express for Microsoft Dynamics NAV is an integrated reporting solution for Microsoft Dynamics NAV 2009 and NAV 2013, giving NAV users a simple way to create high-impact reports.

|  |  |
| --- | --- |
| Description | Screenshots |
| The Microsoft Dynamics NAV 2013 W1 VM is configured with the latest version of JetReports Express.  This configuration includes:   * The JetReports Add-in for Microsoft Excel * The Report player with sample reports |  |
| For more information on JetReports Express visit <http://jetexpress.jetreports.com> | |

### Outlook Presence Control

|  |  |
| --- | --- |
| Description | Screenshots |
| 1. On the virtual machine, click **Start** > **All Programs** > **Microsoft Lync**. 2. Log on to Microsoft Lync with a valid Lync username/ email.   **Note:** you can use Office 365 account to sign in to Microsoft Lync. For information about obtaining a subscription and setting up the virtual machine to work with Office 365, please refer to the [Sub-section 7.1.6.1 “Setting up Microsoft Office 365 Account”](#_Setting_up_Microsoft) below. |  |
| 1. In Microsoft Dynamics NAV, open the Customer card – Fasttab **communication**.   In the **communication** field select the contact person from the customer. |  |
| 1. In Microsoft Lync, use the email you have provided on the customer Card.   **Note:** make sure you can see the presence of the contact you have added in Microsoft Lync, then you will be able to see the presence on the Sales Order list. |  |
| 1. The Presence Control is added to Sales Order list. |  |
| 1. Open the sale order list. 2. Select an order with a customer which have an online contact person 3. Hover over the **Communicate** fieldon the **Customer Details** FactBox.   From the pop-up menu, you have different ways to communicate with the person - via e-mail, instant messaging or call. |  |

### Setting up an Office 365 account

|  |  |
| --- | --- |
| Description | Screenshots |
| Go to <http://www.microsoft.com/en-us/office365/online-software.aspx> to get subscription for Microsoft Office 365 for Small Businesses.  Log in to Microsoft Office 365 at <http://portal.microsoftonline.com>.  On the Start page at https://portal.microsoftonline.com/Default.aspx, under **Start here,** click **Set up now** to set up your computer to work with Microsoft Office 365. |  |
| Click **Set Up** to setup and configure your desktop apps. |  |
| Start Microsoft Lync 2010.  Click the **Tools** button, and then in the **Personal** tab click **Advanced**.  In the Advanced Connection Settings window, click **Manual Configuration**.  Enter the following values:  **Internal server name or IP address:** sipdir.online.lync.com:443  **External server name or IP address:** sipdir.online.lync.com:443  Click **OK** twice.  Sign in to Microsoft Lync with the Microsoft Office 365 account. |  |
| **Note**, that external communication (communication with contacts outside your Office 365 organization) is enabled by default. Unless you disable it, users in your organization can communicate with users in other companies if those organizations also have external communications enabled. Note that the instant messaging is supported only with selected Windows Live domains. You can find the complete list of these domains, as well as instructions on how to enable or disable external communication and change Lync Online user settings at <http://onlinehelp.microsoft.com/en-us/Office365-smallbusinesses/ff652563.aspx#BKMK_enable_or_disable_external_communicationson>. | |

# 

# Configured Profiles and Password

Configured user profiles

* ADMINISTRATOR IT Manager
* SUSAN Sales Order Processor
* CHARLIE President

Password to all profiles: pass@word1 (use Shift + 2 for @).

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