

F9 Installation and Configuration

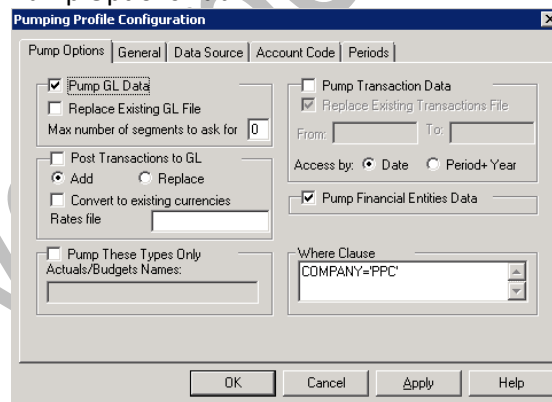
Contents

- F9 Administrator (Server) 2
 - 1. Install Administrator (server) version of F9 2
 - 2. Pervasive Server installed 2
 - 3. Create a SQL user for F9..... 2
 - 4. Create a system ODBC connection 2
 - 5. Run SQL query on the Visual SQL Server 2
 - 6. Copy contents of the F9 Visual Integration folder 2
 - 7. Modify datapump.ini file 2
 - 8. Modify Pumping profiles..... 2
 - 9. Perform Test Datapump 4
 - 10. Run FMU application..... 5
 - 11. Automate Datapump process 5
- F9 Report Writer (Client) 7
 - 1. Install F9 Report Writer on Clients..... 7
 - 2. Install PervasiveSQL Client on clients..... 7
 - 3. Configure F9 clients..... 7

ServerOperations.net

F9 Administrator (Server)

1. **Install Administrator (server) version of F9**
({your_network_drive}:\Software\Infor F9\F9_Professional_V5_Administrator_Big_Pervasive) on a server. We're using {YOUR_F9_SERVER}
2. **Pervasive Server installed** ({your_network_drive}:\Software\Infor F9\PSQL-Server-11.20.013.000-win.exe)
3. **Create a SQL user for F9** and give it Read-Only access to the Visual SQL database(s)
4. **Create a system ODBC connection** (c:\Windows\SysWow64\odbcad32.exe) using user 'f9' pointing to Visual's SQL server.
5. **Run SQL query on the Visual SQL Server** ({your_network_drive}:\Software\Infor F9\F9VISUAL70_27JUN2012\SQLVisual_700-{YOUR_COMPANY_NAME}.sql)
6. **Copy contents of the F9 Visual Integration folder** ({your_network_drive}:\Software\Infor F9\F9VISUAL70_27JUN2012) to the F9v5 application folder (C:\F9V5\pro50_p) on the server
7. **Modify datapump.ini file** (C:\F9V5\pro50_p\datapump.ini)
 - a. Find and replace "MMC" (default company name in file) with "{YOUR_COMPANY_NAME}" (because that's our company name).
 - b. Find all instances of "FN=" and replace folder path with where you want the datapump files to be stored. I'm using "C:\f9data" on {YOUR_F9_SERVER}, which is shared (domain admins and bret are the only users with access to the share)
 - c. Find and replace all instances of "2011" with the current year that is used in Visual
8. **Modify Pumping profiles:**
 - a. Open datapump application (C:\F9V5\pro50_p\datapump.exe)
 - b. Descriptions Profile
 - i. Pump Options Tab



1. Pump GL Data
 2. Pump Financial Entities Data
 3. Where Clause: COMPANY='{YOUR_COMPANY_NAME}'
- ii. General Tab

iii. Data Source tab

1. Enter user ID and password for SQL user created earlier on the SQL server used by Visual

iv. Account Code Tab

1. Number of segments: 2
2. Length of segments: 4,2 (no spaces, signifies first part of account code is 4 characters long, second part is two characters long)
3. Content of Segments: n,n (no space, signifies that both segments are numeric, not alpha-numeric)
4. Key1: 1,2 (no spaces, signifies sorting of codes)

v. Periods Tab

Pumping Profile Configuration

Pump Options | General | Data Source | Account Code | Periods

Number of Periods: These Numbers Are
 Period Start Dates
 Period End Dates

Fiscal Year Defined:
 Period Offset (should generally be 0):

Period Breakdown:

1: 30Dec2012	2: 27Jan2013	3: 24Feb2013	4: 31Mar2013	5: 28Apr2013
6: 26May2013	7: 30Jun2013	8: 28Jul2013	9: 25Aug2013	10: 23Sep2013
11: 27Oct2013	12: 24Nov2013	13: <input type="text"/>	14: <input type="text"/>	15: <input type="text"/>

OK Cancel Apply Help

1. Enter Fiscal Year
2. Enter start date of each fiscal period

vi. Press OK

c. Summary Profile

i. Pump Options Tab

Pumping Profile Configuration

Pump Options | General | Data Source | Account Code | Periods

Pump GL Data
 Replace Existing GL File
 Max number of segments to ask for:

Post Transactions to GL
 Add Replace
 Convert to existing currencies
 Rates file:

Pump Transaction Data
 Replace Existing Transactions File
 From: To:
 Access by: Date Period+Year
 Pump Financial Entities Data

Pump These Types Only
 Actuals/Budgets Names:

Where Clause:

OK Cancel Apply Help

1. Pump GL Data
2. Where Clause: COMPANY='{YOUR_COMPANY_NAME}'

ii. All other tabs are the same as Descriptions profile

d. Transactions Profile

i. Pump Options Tab

Pumping Profile Configuration

Pump Options | General | Data Source | Account Code | Periods

Pump GL Data
 Replace Existing GL File
 Max number of segments to ask for:

Post Transactions to GL
 Add Replace
 Convert to existing currencies
 Rates file:

Pump Transaction Data
 Replace Existing Transactions File
 From: To:
 Access by: Date Period+Year
 Pump Financial Entities Data

Pump These Types Only
 Actuals/Budgets Names:

Where Clause:

OK Cancel Apply Help

1. Pump GL Data
2. Pump Transaction Data
3. Replace Existing Transaction File (this prevents transactions file from growing to be huge)
4. Where Clause: COMPANY='{YOUR_COMPANY_NAME}'

ii. All other tabs are the same as Descriptions profile

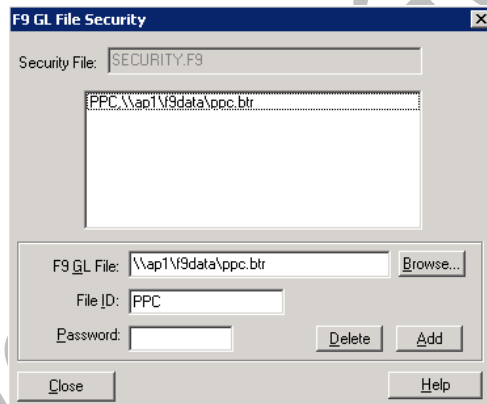
9. **Perform Test Datapump:**

- a. Select a profile and press Start button, this will run the data dump and save the file to the folder you specified

Name	Date modified	Type	Size
PPC.BTR	3/4/2013 2:07 PM	BTR File	20,328 KB
PPC.CMP	3/4/2013 2:07 PM	CMP File	32 KB
PPC.SAD	3/4/2013 2:06 PM	SAD File	388 KB
PPC.TRX	3/4/2013 2:10 PM	TRX File	102,572 KB

10. Run FMU application (C:\F9V5\pro50_p\FMU32.EXE) to define security/connection properties for F9

- a. Security -> Master Password
- b. Master password window will pop up
 - i. Confirm "security.f9" is in security file field
 - ii. Type "F9" (without quotes) in master password, then press verify
- c. Security -> File
 - i. F9 GL File: \\{your_F9_Server}\f9data\{Your_Company_Name}.btr
 - ii. File ID: {YOUR_COMPANY_NAME}
 - iii. Password: leave this field blank
 - iv. Press Add



- v. Close FMU
- vi. Copy the security file you just modified (C:\F9V5\pro50_p\SECURITY.F9) to a network location so it can be used by clients later to connect. I copied it to this path: \\{your_F9_Server}\f9data

11. Automate Datapump process:

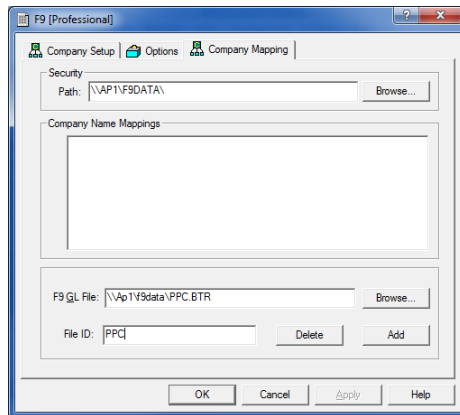
- a. Copy 'F9AllUpdate.bat' and 'F9AllUpdate.ps1' from network ({your_network_drive}:\Software\Infor F9\F9VISUAL70_27JUN2012) to F9 directory on the server's f9 installation directory (C:\F9V5\pro50_p)
- b. Copy 'backup_f9_data.bat' from network ({your_network_drive}:\Software\Infor F9\F9VISUAL70_27JUN2012) to Server's C drive (C:_batch\)
- c. Confirm paths in 'perform_F9_datapump.bat' and 'backup_f9_data.bat' files
- d. Modify 'F9ALLUpdate.bat', remove "pause" from batch file. Save and close
- e. Modify 'F9ALLUpdate.ps1', change all instances of "MMC" to "{YOUR_COMPANY_NAME}". Save and close

- f. Make sure that the Datapump.exe folder path (e.g.: **C:\F9v5**) is listed in the **Windows PATH Environment Variables**
 - i. a. Right click on **My Computer > Properties**
 - ii. b. Choose **Advanced Tab** and click **Environment variables**
 - iii. c. From **System variables**, select **path** and click **Edit**
 - iv. d. Add **C:\F9v5** if is not listed in the variable value list, then click **OK**
- g. Create a batch file to backup the F9 datapump files to alternate location. Schedule that batch file to run each night before the datapump.
- h. Create scheduled task to run 'C:\F9V5\pro50_p\F9ALLUpdate.bat' each night (this task should run nightly at 3:30 am).

ServerOperations.net

F9 Report Writer (Client)

1. **Install F9 Report Writer on Clients** ({your_network_drive}:\Software\Infor F9\F9_Professional_V5_Report_Writer_Big_Pervasive\F9V5PRO50P_32bit.exe) {32-bit for 32-bit office, only use 64-bit if you have 64-bit office installed}
 - a. Use all defaults
2. **Install PervasiveSQL Client on clients** ({your_network_drive}:\Software\Infor F9\PSQL-Client-11.20.013.000-win.x86.exe)
 - a. Use all defaults
3. **Configure F9 clients** to use F9 server
 - a. On client, run f9.exe (C:\F9V5\f9.exe)
 - b. F9 will start minimized, click on it in your taskbar once it appears
 - c. Click on 'Topic' menu
 - d. Click on 'Setup' menu
 - e. Click on 'Company Mappings' tab (just hit OK on any errors that appear)
 - f. In the Security Path field, enter '\\{your_F9_Server}\f9data'
 - g. In the 'F9 GL File' enter '\\{your_F9_Server}\f9data\{YOUR_COMPANY_NAME}.BTR'
 - h. In the 'File ID' field enter '{YOUR_COMPANY_NAME}'
 - i. Click Add



- j. Click on the 'Company Setup' tab, you should now see {YOUR_COMPANY_NAME} as an option
- k. Set the current year and hit OK
- l. Jump for joy, you're done with the configuration of F9!