

F9SetupAccessTo

# Installation Guide

For F9 Report Writer Version 6

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# About this guide

This document describes the steps to configure and administer an installation of F9.

## Intended audience

These release notes are intended for technical users to install a new F9 product or to upgrade to a later release. Typically, these steps are performed only once.

## **Related documents**

Product documentation is installed with your F9 application; additional resources can be found from <u>www.f9.com</u>:

- Installed
  - User Guide PDF
  - Help (\*.CHM)
  - Sample Reports (\*.xlsx)
- Online
  - o Release Notes PDF
  - What's New PDF
  - o F9 Resources

# **Contacting Infor**

If you have questions about Infor products, go to Infor Support Portal at http://support.infor.com.

If we update this document after the product release, we will post the new version on <u>www.f9.com</u>. We recommend that you check this website periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

## Install overview

This guide includes steps to install **F9 Report Writer** which can be installed on either a local Windows desktop or Windows Server.

Additional modules may also be installed depending on the products purchased for F9, the entire suite includes:

All Products	Description		
F9 Report Writer	Rich reports authoring, calculation, and in-depth analysis.		
F9 Viewer	Reports viewing, calculation, analysis, and drill down.		
F9 Scheduling Hub	Centralized reports generation, calculation, publishing, and distribution.		
F9 Professional – Only	Description		
Integration Module (one-of): <ul> <li>ODBC Datapump</li> <li>F9 Integration Manager (F9IM)</li> <li>File Maintenance Utilities (FMU32)</li> </ul>	Integration software to refresh GL balances from the source ERP database to F9 Professional's reporting database.		
Actian PSQL	Database Management Software for F9's reporting database(s).		
User Account Security	Optional to restrict user access to F9 Professional's reporting databases by filters such as: account segments, years, types.		

**Note**: To install any of the above listed products (apart from F9 Report Writer), refer to its specific install documentation.

# Requirements

For the complete and up-to-date list of the F9 system requirements, please see: <u>http://www.f9.com/system-requirements</u>

### Third-party software requirements

All F9 products require the following:

- Office Excel 2013 or above
- .Net Framework 4.5 and above

# **Pre-installation steps**

## **Check Excel version**

Before downloading the F9 Report Writer install media, it is important to know what type of Excel is installed (32-bit or 64-bit) to correctly install F9.

Steps:

- 1. Run Excel
- 2. Click File + Options
- 3. Click About Excel
- 4. Note if your Excel is 32-bit or 64-bit



### **Download F9**

If this is the **first time** you have installed F9 Report Writer, please follow the instructions provided from your purchase which is located in an **email from Infor**.

For F9 **30-day trial** software as well as the **latest updates**, F9's install media can be located at: <u>http://www.f9.com/f9-downloads</u>.

Steps:

- 1. Go to F9 installation media location
- 2. Select correct file(s) for bit-ness (32-bit or 64-bit to match your Excel)
- 3. **Download** local copy
- 4. If the media has extension (.ISO):
  - a. Mount the image (example: Use Virtual Clone Drive)
    b. F9 install will then have extension \*.exe

# Installation

Once the F9 media has been downloaded to a local folder, the installation is fairly automated to complete.

General Steps:

- 1. Select install file (.exe)
- 2. Right-click run-as administrator
- 3. Click **Next** through steps
- 4. **Close** once complete

### F9 Professional-only:

• Refer to document: **F9 Administrator Guide PDF** to complete installation and configuration of all the technical components.

# **Post-install tasks**



There are three steps to have F9 running for a local user which include:

- Set folder rights
- Attach F9 to Excel
- Connect to data

Once F9 is properly loaded, we recommend users refer to the listed related documents.

## Administrator – set folder rights

### **Optional - Assign Modify Rights to F9 folder**

This is required if you intend to create financial entity files in the F9 folder. This type of file is used to group together account segments into F9 entities and is something you may or may not use. As an administrator, you may want to choose a location other than the default F9 application folder; users must have to modify rights to that location.

Steps:

- 1. Using **Windows Explorer**, right-click the **C:\F9Reporter** folder
- 2. Click **Properties**
- 3. Select the tab: Security
- 4. Select the User
- 5. Click **Modify** and then **Apply**
- 6. Repeat for all users on the machine who will be using F9

## Administrator - attach F9 to Excel

F9 Report Writer is an Excel Add-In and this section includes steps to allow F9 to load.

Steps:

- 1. One-time step: Run Excel as an Administrator:
  - a. Open Windows Explorer
  - b. Find to Excel.exe in Program Files, example: C:\Program Files\Microsoft Office\Office15
  - c. Right-click on Excel.exe, select Run as Administrator
- 2. Check to see if F9 appears in the Excel Ribbon as a Tab; if so, F9 is attached and you can go to <u>Step 3: F9 Setup</u>
- 3. If F9 is <u>not</u> displayed in the Excel Ribbon:
  - a. Select **Tab**<sup>File</sup>, and then click **Options** | **Add-Ins**.
  - b. At the bottom of the window, choose **COM Add-Ins** and click on **Go...** button:

M <u>a</u> nage:	COM Add-ins	•	<u>G</u> o

c. Select F9Reporter and click OK.

COM Add-ins		?	×
Add-ins available: Acrobat PDFMaker Office COM Addin ExcelAddIn1 F9Reporter Inquire Load Test Report Addin Microsoft Power Map for Excel Microsoft Power Pivot for Excel	<b>^</b>	Car <u>A</u> d <u>R</u> en	oK ncel d nove
Location: mscoree.dll Load Behavior: Load at Startup			

### 4. F9 should now be attached as:

File	Home	Insert	Page Layo	out	Formulas	Data	Rev	view	View	Develo	oper	F9 Reporter	Q	Tell me what y	you want to do
Visual Basic	Macros	cord Macr e Relative acro Secur	o References ity	Add- ins	Excel Add-ins	COM Add-ins	Insert	Design Mode	📰 Prop Q View	erties Code Dialog	Source	Map Proper	ties <b>'acks</b> a	🚮 Import ि्र Export	
	Co	de			Add-ins			Cor	ntrols			XML			

- 5. Next time a regular user starts Excel, F9 will attach automatically. There is no need to run as an Administrator.
- 6. If F9 still is not loading, refer to: CheckOfficeSettings.

### **Connect to data**

Please follow steps in the following document:

o F9SetupAccessToData.PDF

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# **Updating the installation**

Updates are a two-step process where first the application is un-installed and then you install the latest software release. All your user connection details and software defaults will be retained.

Steps:

- 1. Uninstall F9 (following these steps here)
- 2. **Download** the install media (see this <u>section</u>)
- 3. Run-as Administrator the F9 install program
- 4. Accept defaults
- 5. **Close**
- 6. Open Excel
- 7. F9 should auto-attach

For more detailed information on steps to download your F9 update from <u>www.f9.com</u>, refer to **F9 Ribbon > Updates**.

# **Uninstalling the product**

With F9 Report Writer, it is easy to uninstall the product by following the steps listed.

Steps:

- 1. Close Excel
- 2. If F9 is installed on a **Server**:
  - a. Ensure all F9 users exit Excel
- 3. Control Panel > Programs > F9 Reporter > Uninstall
- 4. Follow steps provided
- 5. Close once uninstalled
- 6. Windows Explorer > \F9Reporter folder
- 7. Zip any remaining user-created files and subfolders (as your backup)

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# **License** activation

## License overview: Standalone vs. Cloud License

When F9 is first installed, it operates in 30-day trial mode with full functionality. It can be activated any time during the trial period or after the trial expires.

After purchasing F9 you will get an email from the FlexNet portal with one or more **Activation IDs** or **Cloud Server IDs**, depending on type of F9 license purchased. FlexNet is third party software and services that are incorporated in the F9 Licensing solution.

There are two types of F9 license:

- **Standalone License**: "Node-locked" license, is a single license that is assigned to a single machine:
  - It is recommended for users that will use F9 consistently on the same hardware
  - The activation process will create a Device ID based on user login and hardware. A given F9 license activation is associated with a particular user and machine. Different users who login to the same machine can start F9's 30-day trial but will need individual licenses to use the product
  - **Standalone License activation** can be done in a number of ways including: **online, offline, or manually**
- **Cloud Server License**: "Floating" license, is hardware independent and is activated on a FlexNet Cloud Server:
  - It is recommended for environments with Load balancing or virtual machines that are instantiated and brought down frequently. Another scenario could be switching between an office PC and a home laptop
  - Cloud Server License requires a permanent internet connection on the device where the F9 product is installed
  - Every machine where F9 is installed needs to be activated only one time. Each time a user runs an F9 product a license is checked out from the pool of licenses on the FlexNet Cloud Server. When F9 is closed the license is released back to the pool of licenses on the FlexNet Cloud Server
  - If F9 is running continuously, by default, each consumed license will expire after 1 day. This was designed for a license to be released in case

of a hardware failure, or if F9 was left running without the user closing the session

- Number of concurrent F9 users can't exceed the quantity of licenses purchased for the specific Cloud License Server
- Users have access to the F9 Licensing Portal where they can find their Served Devices currently using F9 seats
- Cloud Server License activation can ONLY be done online

## **License Scenarios**

F9 License Manager can be used to activate, deactivate or move an active license to new hardware from within the F9 product user interface.

Alternatively, managing licenses can be done from F9 Licensing Customer Portal <u>https://inforf9.flexnetoperations.com/flexnet/operationsportal/logon.do</u>.

Before you begin:

 Ensure you have your F9 Activation ID or Cloud Server ID provided in the email at time of purchase. You can also lookup the key details from the Customer Portal:

https://inforf9.flexnetoperations.com/flexnet/operationsportal/logon.do

 Ensure that your organization whitelist following network blocks: IPv4

Production: 64.14.29.0/24 Disaster Recovery: 64.27.162.0/24

IPv6 Production: 2620:122:f001:1163::/64 Disaster Recovery: 2620:122:f001:1163::1/128

# **Migrating License to Version 6.5**

If customer is moving from **F9 V6.0** to F9 V6.5, an activated product will continue to operate using the existing activated standalone license. In the case of <u>switching from Standalone license to Cloud Server license</u>, the standalone license must be deactivated, and the Cloud Server license has to be activated.

In the case of moving from **F9 V5.5** to F9 V6.5, ALL current V5.5 products have to be first deactivated and then uninstalled. After installing V6.5, the new product

has to be activated using new **Activation ID** or **Cloud Server ID** provided in Entitlement email at the time of purchasing V6.5.

## **Changing License Model**

Switching from **Standalone License** to **Cloud License** model is a two step process: Step 1: Deactivate Standalone License and Step 2: Activate Cloud License.

### **STEP 1 - Deactivate Standalone License:**

- 1. Open Excel
- 2. From the F9 Ribbon, click License



### 3. Manage F9 Licenses displays:

👰 Manage F9 Li	censes						×
License Model	Server ID	Product		Version	License Expires	Туре	
Standalone		F9 V6 Report V	/riter	6.0	Jan 20, 2021	FULL	
<u>R</u> efresh Stand	lalone <u>D</u> ead	tivate	<u>A</u> ctivate			<u>C</u> lose	

- 4. Select your product and click **Deactivate**
- 5. Copy/paste or enter your F9 Activation ID
- 6. Deactivation Mode: Online (recommended)

P F9 License	e - Deactivate F9 V6 Report Writer		×
Standalone			
Or	nline Deactivation (requires Internet)	Offline Deactivation (via Lice	nse File)
	Device ID: DOMAIN-USERNAME-5C0E	E91F-C4D5-452D-859B-5FFD20BA271	D
	Enter Activation ID (exactly as it appears	s, including dashes):	
	XXXX-XXXX-XXXX-XXXX-XXXX-XXXX-XXXX		
Copy Devic	e ID	Deactivate	Close

- 7. Ensure this computer can connect to the Internet
- 8. Click Deactivate
- 9. If successful, a message displays:

F9 License - Info	×
Your product has been successfully deactivate	d.
OK	

### 11. Click OK

12. F9 License Manager will show that the F9 product is back on Trial

🤗 Manage F9 Li	censes					×
License Model	Server ID	Product		Versi	on License Expires	Туре
Standalone		F9 V6 Repo	ort Writer	6.0	Feb 17, 2021	TRIAL
<u>R</u> efresh Stand	lalone <u>D</u> ea	tivate	<u>A</u> ctivate			<u>C</u> lose

### **STEP2 - Activate Cloud Server License:**

1. Select your product and click Activate

🖗 Manage F9 Li	icenses						×
License Model	Server ID	Product		Version	License Expires	Туре	
Standalone		F9 V6 Report Write	er	6.0	Feb 17, 2021	TRIAL	
							_
<u>R</u> efresh Stand	lalone	<u>D</u> eactivate <u>A</u> e	tivate			<u>C</u> lose	

### 2. Select Cloud Server tab

3. Enter your Cloud Server ID (Example: ABCD1234ABCD)

P9 License - Activate F9 V6 Report Writer	×
Standalone Cloud Server	_
Device ID: DOMAIN-USERNAME-5C0EE91F-C4D5-452D-859B-5FFD20BA271D	
Enter Server ID: ABCD1234ABCD	
Copy Device ID Close	

- 4. Ensure this computer can connect to the Internet
- 5. Click Activate
- 6. If successful, a message displays:

F9 License - Info	×
Your product has been successfully activated! Thank you for choosing F9 Reporter	
ОК	]

11. Click OK

cense model	Server ID	Product	Version	License Expires	Туре
loud Server	ABCD1234ABCD	F9 V6 Report Writer	6.0	Jan 20, 2021	FULL

12. F9 License Manager will show that the F9 product is fully activated

## **Standalone License**

### Activate

Steps to Activate **Online**:

- 1. Open Excel
- 2. F9 Ribbon > License



### 3. The Manage F9 Licenses dialog will open.

👷 Manage F9 Li	censes				×
License Model	Server ID	Product	Version	License Expires	Туре
Standalone		F9 V6 Report Writer	6.0	Feb 17, 2021	TRIAL
Refresh Stand	lalone	Deactivate <u>A</u> ctivate			<u>C</u> lose

4. Select the F9 product and click Activate

### 5. Alternatively, F9 > Utilities > License > Activate

Open Con Default To Function C  Setup Chart Drilldown Budgets Lists Utilities Quit Help Maintain Financial Entities File Account Enquiry Company Edit License Deactivate Activate	F9 Server Topic Default Topic Close Server	-		× Help					
Account Enquiry Company Edit License Deactivate Activate	Open Con F9Reporter Default To Function C	Drilldown	Budgets	Lists	Utilities Ma	Quit intain Finar	ncial Entities File	× Help	
License > Deactivate Activate					Acc Co	ount Enqu mpany Edit	iry		
					Lic	ense		>	Deactivate Activate

- 6. Copy/paste or enter your F9 Activation ID
- 7. Activation Mode: Online (recommended)

P F9 License	- Activate F9 V6 Report Writer		×
Standalone	Cloud Server		
) On	line Activation (requires Internet)	Offline Activation (via License File)	
	Device ID: DOMAIN-USERNAME-5C	0EE91F-C4D5-452D-859B-5FFD20BA271D	
	Enter Activation ID (exactly as it appe	ars, including dashes):	
	0000-0000-0000-0000-0000-0000-0000	x	
Copy Device	: ID	Activate Close	

- 8. Ensure this computer can connect to the Internet
- 9. Click Activate
- 10. If successful, a message displays:



11. If a failure, an error displays:



12. Click OK

Steps to Activate Offline:

**Note**: If the computer where you are installing F9 does not have internet access, or if your company fire wall/proxy restricts access to

https://inforf9.flexnetoperations.com/flexnet/deviceservices, perform the next set of steps to manually activate

1. Open Excel

### 2. <u>F9 Ribbon > License</u>

🚱 Updates
? Help ▼
😥 License
Help

### 3. The Manage F9 Licenses dialog will open.

F9 License	- Activate F9 V6 Report Writer	
Standalone	Cloud Server	
⊖ On	line Activation (requires Internet) <ul> <li>Offline Activation (via License</li> </ul>	File)
	Device ID: DOMAIN-USERNAME-5C0EE91F-C4D5-452D-859B-5FFD20BA271E	)
	Enter Activation ID (exactly as it appears, including dashes):	
	X000-X000-X000-X000-X000-X000-X000X	
	Step1: Generate Request	
	Step2: Process Response	
Copy Device	e ID C	lose

- 4. Click Step 1: Generate Request
- 5. Browse to a temp folder on your computer

Save As							×
← → • ↑ 📘	> This PC > OSDisk (C:) > te	mp		√ Č	Search temp		٩
Organize 🔻 Ne	w folder						?
💻 This PC		^	Name	^		Date modified	T
E. Desktop		1		No items m	atch your searc	h.	
Documents							
Music							
Pictures							
Videos							
SDisk (C:)							
Skecycle.Bir	1	<b>*</b> ·	<				>
File name:	request						~
Save as type:	bin files (*.bin)						~
∧ Hide Folders					Save	Cancel	

- 6. Click Save
- 7. **Copy** the saved **.bin file** to a shared location and go to a computer with internet access
- 8. Login to the **Customer Portal**: <u>https://inforf9.flexnetoperations.com/flexnet/operationsportal/logon.do</u>
- 10. On the left side under **Devices**, select **Offline Device Management**
- 11. Select Generate License as Upload Type
- 12. Browse to the saved .bin file, click Upload

ir	nfor	F9 Licensing powered by Flexera's Software Monetization
Home Activation & Entitlements List Entitlements Expiring Entitlements Devices Offline Device Management Accounts & Users Accounts	Offline Manually upload eith Upload typ	Device Management her a Capability Request or Synchronization History Files for offline pro Generate license O Upload synchronization history Browse No file selected.
List accounts Search accounts Users List users Search users	Upload	

13. A message to download the license will appear

í	nfor	F9 Licensing Portal powered by Flexera's Software Monetization Platform
Home Activation & Entitlement	License has be	en generated successfully, please cl <mark>ock <u>here</u> to g</mark> ownload the new license.
List Entitlements Expiring Entitlements	Offline [	Device Management
Devices Offline Device Management	Manually upload either Upload type:	a Capability Request or Synchronization History Files for offline processing. The applicati
Accounts & Users Accounts List accounts Search accounts Users List users Search users	Upload	Upload synchronization history Browse No file selected.

- 14. Copy the new .bin file to the shared location
- 15. Return to the F9 machine with License Activate open

### 16. Click Step2: Process Response

tandalone	Cloud Server	
O Or	line Activation (requires Internet)	Offline Activation (via License File)
	Device ID: DOMAIN-USERNAME	-5C0EE91F-C4D5-452D-859B-5FFD20BA271D
	Enter Activation ID (exactly as it a	ppears, including dashes):
	30001-3000001-30001-30001-30001-30001-30001-30001-300000000	2000(
	Step1: Ge	nerate Request
	Step2: Pro	ocess Response

- 17. Browse to the saved .bin file
- 18. If successful, a window displays



19. If activation fails, contact F9 Technical Support

### Refresh

This section includes steps to retrieve and update all activated F9 product licenses with your latest status and properties. For example, if you purchased F9 as a Term license, you can check your renewal date.

In addition, F9 is periodically checking the License Portal for validity of the installed licenses. For computers with an internet connection, the check is done automatically. For computers without internet connection, users will have to perform steps related to: **Offline Refresh** when applicable.

Steps:

- 1. Open Excel
- 2. <u>F9 Ribbon > License</u>



#### 3. Click Refresh

🍚 Manage F9 Li	censes						$\times$
License Model	Server ID	Product		Version	License Expires	Туре	
Standalone		F9 V6 Report V	Vriter	6.0	Jan 20, 2021	FULL	
<u>R</u> efresh Stand	alone <u>D</u> ea	ctivate	<u>A</u> ctivate		[	<u>C</u> lose	

4. Message displays if successful:



### Deactivate or Transfer

A given F9 product license, once purchased, is connected to its hardware and current environment. From time to time, it may be necessary to transfer an active license to new hardware and this functionality is made available within F9.

To move your license, the running copy of F9 must first be deactivated.

Before you begin:

 Ensure you have your **F9 Activation ID** provided at time of purchase. You can also lookup the key details from the Customer Portal: <u>https://inforf9.flexnetoperations.com/flexnet/operationsportal/logon.do</u>

Steps:

- 1. Open Excel
- 2. <u>F9 Ribbon > License</u>



#### 3. Manage F9 Licenses displays:

Manage F9 L	icenses					
License Model	Server ID	Product		Version	License Expires	Туре
Standalone F9 V6 Report Writer 6.0		6.0	6.0 Jan 20, 2021	FULL		

- 4. Select your F9 product and click Deactivate
- 5. Enter your F9 Activation ID
- 6. Deactivation Mode: Online (recommended)

Online Deactivation (requires Internet)     Offline Deactivation (via License File)     Device ID: DOMAIN-USERNAME-5C0EE91F-C4D5-452D-859B-5FFD20BA271D     Enter Activation ID (exactly as it appears, including dashes):     xoox-xoox-xoox-xoox-xoox-xoox-xoox	Vo Report Writer		
Online Deactivation (requires Internet)     Offline Deactivation (via License File)     Device ID: DOMAIN-USERNAME-5C0EE91F-C4D5-452D-859B-5FFD20BA271D     Enter Activation ID (exactly as it appears, including dashes): <a>xxxxx-xxxx-xxxx-xxxx-xxxx-xxxx</a>			
Device ID: DOMAIN-USERNAME-5C0EE91F-C4D5-452D-859B-5FFD20BA271D Enter Activation ID (exactly as it appears, including dashes): xxxxx-xxxx-xxxx-xxxx-xxxx-xxxx-xxxx-x	n (requires Internet)	Offline Deactivation (via License File	
Enter Activation ID (exactly as it appears, including dashes):	MAIN-USERNAME-5C0EE91F-0	4D5-452D-859B-5FFD20BA271D	
1000X-1000X-1000X-1000X-1000X-1000X-1000X	n ID (exactly as it appears, inclu	ding dashes):	
	000K-X000K-X000K-X000K		
			_

- 7. Ensure this computer can connect to the Internet
- 8. Click Deactivate
- 9. If successful, a message displays:



10. If a failure, an error displays:



- 11. Click OK
- 12. Deactivation Mode: Offline

Standalone	Cloud Server	
() Or	line Activation (requires Internet)	<ul> <li>Offline Activation (via License File)</li> </ul>
	Device ID: DOMAIN-USERNAME-5C0	EE91F-C4D5-452D-859B-5FFD20BA271D
	Enter Activation ID (exactly as it appea	rs, including dashes):
	X000X-X000X-X000X-X000X-X000X-X000X-X000X	
	Step1: Genera	te Request
	Char 2, Day 199	2

- 13. Follow these steps if no Internet or your company firewall or proxy restricts access to <a href="https://inforf9.flexnetoperations.com/flexnet/deviceservices">https://inforf9.flexnetoperations.com/flexnet/deviceservices</a>
- 14. Click Step 1: Generate Request
- 15. Browse to a temp folder on your computer

🖗 Save As							×
← → * ↑ <mark> </mark>	$\rightarrow$ This PC $\rightarrow$ OSDisk (C:) $\rightarrow$ ten	np		√ Ū	Search temp		٩
Organize 🔻 Ne	w folder					=== -	?
💻 This PC		^	Name	^		Date modified	1
📃 Desktop				No items mate	ch your search	n.	
🚆 Documents							
👆 Downloads							
👌 Music							
Pictures							
📑 Videos							
🏪 OSDisk (C:)							
\$Recycle.Bir	ı ,	v -	<				>
File name:	request						~
Save as type:	bin files (*.bin)						~
∧ Hide Folders					Save	Cancel	

- 16. Type a file name and click **Save**
- 17. Copy the saved **.bin** file to a shared location and go to a computer with internet access
- 18. Login to the **Customer Portal**: <u>https://inforf9.flexnetoperations.com/flexnet/operationsportal/logon.do</u>
- 19. Under Devices, select Offline Device Management
- 20. Select Generate License as Upload Type
- 21. Browse to the saved .bin file
- 22. Click Upload

ín	for	F9 Licensing powered by Flexera's Software Monetization
Home Activation & Entitlements List Entitlements Expiring Entitlements	Offline [ Manually upload either	Device Management
Devices Devices Offline Device Management	Upload type	Generate license     Upload synchronization history      Browse No file selected
Accounts & Users Accounts List accounts Search accounts Users	Upload	
List users Search users	- prodd	

### 23. A message to download the license will appear

í	nfor F9 Licensing Porta powered by Flexera's Software Monetization Platform
Home Activation & Entitlemen	License has been generated successfully, please click <u>here</u> to download the new license.
Expiring Entitlements	Offline Device Management
Devices Offline Device	Manually upload either a Capability Request or Synchronization History Files for offline processing. The applica
Accounts & Users Accounts List accounts	Upload type:  Generate license Upload synchronization history Browse No file selected.
Search accounts Users List users	
Search users	Upload

- 24. Save the **.bin** file
- 25. Copy the new .bin file to the shared location
- 26. Return to the F9 machine with License Deactivate open
- 27. Click Step2: Process Response

Standalone	Cloud Server		
On	line Activation (requires Internet)	Offline Activation (via License File)	
	Device ID: DOMAIN-USERNAME-	5C0EE91F-C4D5-452D-859B-5FFD20BA271D	
	Enter Activation ID (exactly as it ap	ppears, including dashes):	
	x000x-x00xx-x00xx-x00xx0x-x00x-x00x-x00x-x00x-x00xx0x-x00xx0x0x-x00xx0x-x00xx0x0x-x00xx0x-x00xx0x0xx0x	000X	
	x00x-x00x-x00x-x00x-x00x-x00x-x00x-x00	nerate Request	

### 28. If successful, a window displays

F9 License - Info			
Your product has been successfully deactivated.			
ОК			

29. If activation fails, contact F9 Technical Support

### Manually Deactivate

If an F9 product license cannot be deactivated using the above process, this section provides another technique.

Steps:

- 1. Open Excel
- 2. F9 Ribbon > License



3. **Deactivate** window

F9 License	- Deactiva	te F9 V6 Report Writer		×
Standalone				
On	line Deactiv	ation (requires Internet)	Offline Deactivation (via License	File)
	Device ID:	DOMAIN-USERNAME-5C0E	E91F-C4D5-452D-859B-5FFD20BA271D	
	Enter Activ	ation ID (exactly as it appear	s, including dashes):	
Copy Device	ID		Deactivate Clos	se

- 4. Copy the Device ID
- 5. Login to Customer Portal: https://inforf9.flexnetoperations.com/flexnet/operationsportal/logon.do
- 6. Click **Devices**, or you can also Search by **Device name**

ir	nfor	F9 Licens	sing Portal Monetization Platform
Home Activation & Entitlements	Results for Device name: F	'9S* <u>Clear</u>	
List Entitlements Expiring Entitlements Devices Devices	Devices		
Management	Name	*	D
Accounts & Users	F9ServerTS		F9ServerTS-F9DP-0F8BFBFF000406F1-E690C3DC (STRING)
List accounts	F9ServerTS		F9ServerTS-F9DP-0F8BFBFF000306F2-E690C3DC (STRING)
Search accounts Users List users Search users			

7. Click on the Device ID to deactivate

í	nfor	F9 Licensing Portal powered by Flexera's Software Monetization Platform
Home Activation & Entitlements List Entitlements Expiring Entitlements	, View Devi	се
Devices Devices Offline Device Management	View CAction	
Accounts & Users Accounts List accounts	ID Name	: F9ServerTS-F9DP-0F8BFBFF000306F2- E690C3DC : F9ServerTS
Search accounts Users List users	Site Name	
Search users	Series	FLX_CLIENT_SERIES
	Account Vendor Dictionary	: F9TestAccount (F9 Test Account) : (None)

- 8. Under Action, click Remove Licenses
- 9. Type a number in the Quantity to remove field under Licenses on Device
- 10. Click Save



11. A message that the License was successfully removed will appear

	infor	F9 Licensing Portal powered by Flexera's Software Monetization Platform
Home Activation & Entitlem List Entitlements Expiring Entitlements	Licenses successf View Dev	
Devices Devices Offline Device Management	View	n 💌
Accounts & Users Accounts	Device Details	
Search accounts Users	ID	: F9ServerTS-F9RW-0F8BFBFF000306F2- E690C3DC
List users	Name	F9ServerTS
Search users	Site Name	91
	Status	: ACTIVE
	Series	: FLX_CLIENT_SERIES
	Model	: FLX_CLIENT
	Account	F9TestAccount (F9 Test Account)
	Vendor Dictionary	: (None)

Note:

- Once F9 has been deactivated on a given machine, it will no longer run and the trial basis will not restart.
- If you wish to re-install F9 on the original PC, you can re-purchase F9 as described above with the original Serial number and thus not transfer to new hardware.

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## **Cloud License**

### Activate

An F9 product license on a particular machine should be activated with a FlexNet Cloud Server only one time. Any user running F9 on an already activated machine does not have to activate again. Simply running F9 will check out a license from FlexNet Cloud Server and closing F9 will release the license back to the pool of available licenses.

Steps:

- 1. Open Excel
- 2. <u>F9 Ribbon > License</u>



### 3. The Manage F9 Licenses dialog will open.

Manage F9 Li	icenses				
License Model	Server ID	Product	Version	License Expires	Туре
Standalone		F9 V6 Report Writer	6.0	Feb 17, 2021	TRIAL

- 4. Select the F9 product and click Activate
- 5. Alternatively, F9 > Utilities > License > Activate

F9 Server Topic Default Topic Close Server	_		× Help					
Open Con F9Report Default To Setup Cha	ter Int Drilldown	Budget	s Lists	Utilities	Ouit		×	1
Function C				Ma Ac Co	iintain Finar count Enqui mpany Edit	ncial Entities File iry		
				Lic	ense		>	Deactivate

### 6. Select Cloud Server tab

### 7. Copy/paste or enter your F9 Cloud Server ID

💮 F9 License - Activate F9	9 V6 Report Writer	×
Standalone Cloud Serve	er	
Device ID:	DOMAIN-USERNAME-5C0EE91F-C4D5-452D-859B-5FFD20BA271D	
Enter Server ID:	ABCD1234ABCD	
Copy Device ID	Activate Close	

8. Ensure this computer can connect to the Internet

#### 9. Click Activate

10. If successful, a message displays:



### 11. Click OK

Manage F9 Li	icenses				
icense Model	Server ID	Product	Version	License Expires	Туре
loud Server	ABCD1234ABCD	F9 V6 Report Writer	6.0	Jan 20, 2021	FULL

**Note:** In the case of an insufficient number of the product's seats remaining, an error displays:



**Note:** If F9 cannot connect to the site that authenticated the F9 product license, activation will fail, or in case of a failure when an internet connection is not available, an error displays:



In this case, make sure your organization firewall or proxy has access to <a href="https://inforf9.compliance.flexnetoperations.com/instances/{ServerID}/request">https://inforf9.compliance.flexnetoperations.com/instances/{ServerID}/request</a>

### **Change Cloud Server**

In case the Cloud License Server ID must be changed, ALL the licenses currently in use should be returned first.

The easiest way is for all users to close the F9 application, then from each machine where F9 is installed, only one user should open F9 and perform the following two STEPS.

### STEP 1 - Deactivate Existing Cloud Server ID:

- 1. Open Excel
- 2. F9 Ribbon > License



### 3. Manage F9 Licenses displays

🖗 Manage F9 Li	censes						
License Model	Server ID	Product		Version	License Expires	Туре	
Cloud Server	ABCD1234ABCD	F9 V6 Report Writer		6.0	Jan 20, 2021	FULL	
			_				_
Refresh Stand	lalone <u>D</u> ead	tivate <u>A</u> ctivate				<u>C</u> lose	

- 4. Select your product and click Deactivate
- 5. Enter your existing **Cloud Server ID** (alternatively it will be pre-populated)

P F9 License	- Deactivate	F9 V6 Report Writer	Х
Cloud Server			
	Device ID:	DOMAIN-USERNAME-5C0EE91F-C4D5-452D-859B-5FFD20BA271D	
Ente	er Server ID:	ABCD1234ABCD	
Copy Device	ID	Deactivate Close	

#### 6. Click **Deactivate**

7. If successful, a message displays



- 8. Click OK
- 9. Your product license will be back on trial

**Note:** If F9 cannot connect to the site that authenticated the F9 product license, activation will fail, or in case of a failure when an internet connection is not available, an error displays:



In this case, make sure your organization firewall or proxy has access to <a href="https://inforf9.compliance.flexnetoperations.com/instances/{ServerID}/request">https://inforf9.compliance.flexnetoperations.com/instances/{ServerID}/request</a>

### **STEP 2 - Activate Existing Cloud Server ID:**

1. Select your product and click Activate

🖗 Manage F9 Li	icenses						×
License Model	Server ID	Product		Version	License Expires	Туре	
Standalone	ABCD1234ABCD	F9 V6 Report Writer		6.0	Feb 17, 2021	TRIAL	
			•				
Refresh Stand	lalone <u>D</u> ead	tivate <u>A</u> ctiv	ate			<u>C</u> lose	

2. Enter existing Cloud Server ID (alternatively it will be pre-populated)

🖗 F9 License - Activate F	9 V6 Report Writer	×
Standalone Cloud Serve	er	
Device ID:	DOMAIN-USERNAME-5C0EE91F-C4D5-452D-859B-5FFD20BA271D	
Enter Server ID:	EFGH3698EFGH	
Copy Device ID	Activate Close	

- 3. Click Activate
- 4. If successful, a message displays

, <u> </u>	
F9 License - Info	×
Your product has been successfully deactivated.	
ОК	

5. Click OK

🖗 Manage F9 Li	censes					Х
License Model	Server ID	Product	Version	License Expires	Туре	
Cloud Server	EFGH3698EFGH	F9 V6 Report Writer	6.0	Jan 20, 2021	FULL	
Refresh Stand	lalone <u>D</u> eac	tivate <u>A</u> ctivate			<u>C</u> lose	

6. F9 product is fully activated

Note: In case of insufficient number of the product's seats, an error displays:



**Note:** If F9 cannot connect to the site that authenticated the F9 product license, activation will fail, or in case of a failure when an internet connection is not available, an error displays:



https://inforf9.compliance.flexnetoperations.com/instances/{ServerID}/request

### Deactivate

If the Cloud License Server ID must be deactivated, all the licenses currently in use should be returned first. Before a license can be activated on new hardware, the running copy of F9 must first be deactivated.

The easiest way is for all users to close their F9 application, then from each machine where F9 is installed, only one user should open F9 and perform the deactivation STEPS.

#### 1. Open Excel

### 2. F9 Ribbon > License



#### 3. Manage F9 Licenses displays:

Manage F9 Li	icenses					
License Model	Server ID	Product		Version	License Expires	Туре
standalone	andalone		Writer	6.0	Jan 20, 2021	FULL

- 4. Select your F9 product and click Deactivate
- Copy/paste or enter your Cloud Server ID (alternatively it will be prepopulated)

Cloud Server		
Device ID:	DOMAIN-USERNAME-5C0EE91F-C4D5-452D-859B-5FFD20BA271D	
Enter Server ID:	ABCD1234ABCD	

- 6. Ensure this computer can connect to the Internet
- 7. Click Deactivate
- 8. If successful, a message displays:



9. Click OK



10. F9 product is back on trial

**Note:** If F9 cannot connect to the site that authenticated the F9 product license, activation will fail, or in case of a failure when an internet connection is not available, an error displays:



In this case, make sure your organization firewall or proxy has access to https://inforf9.compliance.flexnetoperations.com/instances/{ServerID}/request

Тор

# **Detaching from Excel**

This is an optional step where you unload F9 from Excel; this also stops F9 from auto-attaching each time Excel starts.

Steps:

- 1. Open Excel
  - a. Windows Explorer
  - b. Locate Excel.exe (example: C:\Program Files\Microsoft Office\Office15)
  - c. Right-click + Run As Administrator
- 2. Excel File > Options
- 3. COM Addins and Go

M <u>a</u> nage:	COM Add-ins	-	<u>G</u> o
------------------	-------------	---	------------

- 4. Uncheck F9 Reporter and OK
- 5. If installed on a Server, repeat this steps for each F9User:
  - a. Excel File > Options
  - b. Excel Add-ins and Go
  - c. Uncheck F9v5.Connect and OK
- 6. Check F9 is no longer listed as an active Add-in:

Excel Options			r X
General	View and manage Microsoft Office Add-ins.		
Formulas			
Proofing	Add-ins		
Save	Name 🔺	Location	Type 🔺
Language	Active Application Add-ins		
Advanced	No Active Application Add-ins		
Customiza Pibbon	Inactive Application Add-ins		
Customize Ribbon	Acrobat PDFMaker Office COM Addin	C:\at 2015\PDFMaker\Office\PDFMOfficeAddin.dll	COM Add-in
Quick Access Toolbar	Analysis ToolPak	C:\e\root\Office16\Library\Analysis\ANALYS32.XLL	Excel Add-in
A 11 1	Analysis ToolPak - VBA	C:\oot\Office16\Library\Analysis\ATPVBAEN.XLAM	Excel Add-in
Add-Ins	Date (XML)	C:\on Files\Microsoft Shared\Smart Tag\MOFL.DLL	Action
Trust Center	Euro Currency Lools	C:\ Office\root\Office16\Library\EURO100L.XLAM	Excel Add-in
	F9Reporter F9V5.Connect F9Viewer.Connect Financial Symbol (XML) Inquire Load Test Report Addin Add-in: Acrobat PDFMaker Office COM Addin Publisher: Adobe Systems, Incorporated Compatibility: No compatibility information available Location: C:\Program Files (x86)\Adobe\Acrobat 2015\PDFMaker\Office Description: Acrobat PDFMaker Office COM Addin Mgnage: Excel Add-ins <u>Go</u>	mscoree.dll mscoree.dll mscoree.dll C:\on Files\Microsoft Shared\Smart Tag\MOFL.DLL C:\or Soft OfficeYoot\Office16\DCF\NativeShim.dll C:\QualityTools.LoadTestExcelAddIn.vsto/vstolocal	COM Add-in Excel Add-in Excel Add-in COM Add-in COM Add-in COM Add-in
		F	
			OK Cancel

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# Contact us

### Locations:

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Infor F9

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### **Other Offices**

Infor Global Solutions has offices in many major centers around the world. <u>www.infor.com</u>

#### **Technical Support, North America**

Web: <u>www.support.infor.com</u> Email: <u>support@f9.com</u>

Tel: +1 888 284-4232

Please include your contact information, accounting system and F9 version information in your email or voice mail. The F9 version information can be found by going to the F9 Ribbon in Excel, section Help and About F9.

# **Appendix A: troubleshooting**

# **Check Office settings**

If for any reason, F9 is not able to attach to Excel, review this section as a next step.

Steps:

- 1. Close Excel
- 2. Control Panel
  - a. Programs and Features
  - b. Select Microsoft Office
  - c. Click Change
- 3. If Click-to-Run Installation:

– ×
How would you like to repair your Office programs?
<ul> <li>Quick Repair</li> <li>Fixes most issues quickly without the need for an internet connection.</li> </ul>
Online Repair Fixes all issues, but takes a little longer and requires an internet connection throughout. You can select this option if you are still having problems after a Quick Repair.
<u>R</u> epair <u>C</u> ancel

- a. Select Online Repair
- b. Click Repair
- c. Once completed, run **Excel** and see if F9 attaches successfully.

#### 4. If Full Installation:

a. Select Add or Remove Features



- b. Click Continue
- c. Tab Installation Options, expand Microsoft Office Excel
- d. .NET Programmability Support

If the required component is not installed:

Microsoft Office Professional Plus 2013	
Installation Options	
Customize how Microsoft Office programs run	0
□ 🕞 👻 Microsoft Office	^
🗉 🎿 👻 Microsoft Access	
🖻 📻 👻 Microsoft Excel	
💉 🚽 .NET Programmability Support	
🗄 📼 🔻 Add-ins	
Sample Files	
🗉 赵 🔻 Microsoft InfoPath	
Microsoft Lync	
Microsoft OneDrive for Business	
🗏 🇻 Microsoft OneNote	
🗄 🇻 Microsoft Outlook	
	~
Primary interop assembly that allows Microsoft Excel	Total space required on drive: 2.25 GB
programmability with the .NET Framework.	Space available on drive: 304.41 GB
	Bac <u>k</u> <u>C</u> ontinue

- e. Click the dropdown arrow for .NET Programmability Support
- f. Select: Run from My Computer

nstallation Options	
Customize how Microsoft Office programs run	0
E - Microsoft Office	^
🗉 🗻 🔻 Microsoft Access	
🗏 🚍 🔻 Microsoft Excel	
.NET Programmability Support	
🕒 👝 Run from My Computer	
🚵 Not Available	
🗉 🇻 Microsoft InfoPath	
Microsoft Lync	
Microsoft OneDrive for Business	
🗉 🇻 Microsoft OneNote	
🗉 赵 🔻 Microsoft Outlook	
🗉 🇻 🔹 Microsoft PowerPoint	2
	÷
Primary interop assembly that allows Microsoft Excel	Total space required on drive: 2.25 GE
programmability with the inclination work.	Space available on drive: 304.41 GB

- g. Expand Office Shared Features.
- h. Click on Digital Certificates for VBA Projects.

If the required component is not installed, select option: Run from My Computer.

I <u>n</u> stallation Options					
Customize how Mic	rosoft Office progra	ms run			?
🗄 🧭 🔻 Mie	crosoft Word				^
🗆 🚍 👻 Off	fice Shared Features	;			
	Business Connectiv	ity Services			
± 📻 🔻	Converters and Filt	ers			
<u>×</u> -	Digital Certificate fo	or VBA Projects			
🗉 📻 <u>R</u> un	from My Computer				
🗉 🛃 Insta	illed on First Use	ort			
送 <u>N</u> ot	Available	wnload Control			
- <b>-</b>	Microsoft Office Th	emes			
	Proofing Tools				
	Visual Basic for App	olications			
• 🚍 🔻	Web Themes				~
Digital certificate fo	r signing a Visual B	asic for Application	s Total space r	equired on dri	ve: 2.25 GI
project. Allows you	to avoid unnecessa	ry security warning	Is. Space availa	ble on drive: 30	04.41 GB

- i. Click on the arrow for Visual Basic for Applications.
- j. If not installed, select option: Run from My Computer.



### k. Click Continue to have the support installed.

## **Excel security settings**

Additional security may be necessary for some users. In this case, you may experience warnings or problems attaching F9 Report Writer as a non-administrator.

Please check the following to address permissions.

### **Trusted Locations:**

Note: You can also add the F9 folder to Trusted Locations.

Steps:

- 1. Open Excel and Tab
- 2. Click Trust Center, then Trust Center Settings
- 3. Click on Trusted Locations, then Add New Location and browse to the F9 folder

rust Center			?
Trusted Publishers	Trusted Locations		
Trusted Locations		the large state of the state of	and the last of the second second
Trusted Documents	Warning: All these locations are treated as trus sure that the new location is secure.	ited sources for opening files. If you change of	r add a location, make
Trusted Add-in Catalogs	Path	Description	Date Modified 🔻
Add-ins	User Locations		2018-04-06 4-30 PM
ActiveX Settings	C:\pData\Roaming\Microsoft\Templates\	Excel default location: User Templates	2010 04 00 4.5011
Macro Settings	C:\rosoft Office\Root\Office16\STARTUP\	Excel default location: Add-Ins Excel default location: Office StartUp	
Protected View	C:\ta\Roaming\Microsoft\Excel\XLSTART\ C:\ta\Roaming\Microsoft\Excel\XLSTART\	Excel default location: Excel StartUp Excel default location: User StartUp	
Message Bar	C:\x86)\Microsoft Office\Root\Templates\	Excel default location: Application Template	5
External Content	Policy Locations		
File Block Settings			
Privacy Options			
	Dath: C:\EQReporter\		
	Description:		
	Date Modified: 2018-04-06 4:30 PM		
	Sub Folders: Allowed		
		Add new location Rer	move <u>M</u> odify
	Allow Trusted Locations on my network (n	ot recommended)	
	<u>D</u> isable all Trusted Locations		
			OK Cance

### F9 Digital Signature:

Install the F9 digital signature to then use the Excel Trusted Publisher settings.

Steps:

- 1. Close Excel
- 2. Windows Explorer
- 3. Browse to \F9Reporter folder
- 4. Right-click: F9Reporter.dll and Properties



### 5. Select tab: Digital Signatures:

🗟 F9Rep	orter.dll Prop	erties					×
General	Digital Signat	ures	Security	Details	Previous V	ersions	
Signa	ture list						
Nar Info	ne of signer: or, US LLC	Digest sha1	alg 1 F	īmestamļ Ēriday, Jar	o nuary 15, 20	21	
					D	etails	
		[	Ok	(	Cancel		Apply

6. Click **Details** 

Ger	Signat Nan Info	ture list ne of signer: r, US LLC	Dige sha1	Security est alg	Details Fimestamp Friday, Jar	previous Version previous Version previo	ons
	Signat Nan Info	ture list ne of signer: r, US LLC	Dige sha1	est alg 1 F	⊺imestamp ⁼riday, Jar	o nuary 15, 2021	
	Nan Info	ne of signer: r, US LLC	Dige shai	est alg   1 1 F	Fimestamp ⁼riday, Jar	o nuary 15, 2021	
						Detail	S
				Oł	{	Cancel	Apply
lic	k V	iew Ce	rtifi	cate			
<u>,</u>	Certific	cate					
Gen	eral	Details Cer	tificatio	n Path			
		Certificat	e Info	rmation			
	This	certificate i • Ensures sof • Protects sof	i <b>s inter</b> tware c tware fi	nded for t ame from a from alterat	<b>he follov</b> software p ion after p	ving purpose(s oublisher oublication	;):
	* Ref	er to the certi	ification	authority's	s statemer	nt for details.	
		Issued to:	Infor,	US LLC			
		Issued by:	Sectig	jo RSA Coc	le Signing	CA	
		Valid from	12/13/	/2020 <b>to</b>	12/14/20	23	
		Valid from	12/13,	/2020 to	12/14/20 Certificate	23 e Issuer S	tatement

- 8. Click Install Certificate...
- 9. Certificate Import Wizard: Local Machine

🗧 😺 Certificate Import Wizard	×
Certificate Store Certificate stores are system areas where certificates are kept.	
Windows can automatically select a certificate store, or you can specify a location for the certificate.	
O Automatically select the certificate store based on the type of certificate	
Place all certificates in the following store	
Certificate store:	
Trusted Publishers Browse	
Next Cano	el:
Diago all contificator: Tructed Dublichere	

10. Place all certificates: Trusted Publishers

11. Click Finish

### **Macro Settings:**

It is not recommended to change Macro Settings to Enable All Macros.

F9 works properly with **Macro Settings** for: (Default) **Disable all macros** with notification and Disable all macros except digitally signed macros:

Trust Center		?	×
Trusted Publishers	Macro Settings		
Trusted Locations			
Trusted Documents	Disable all macros with notification     Disable all macros with notification		
Trusted Add-in Catalogs	<ul> <li>Disable all macros except digitally signed macros</li> </ul>		
Add-ins	<ul> <li>Enable all macros (not recommended; potentially dangerous code can run)</li> </ul>		
ActiveX Settings	Developer Macro Settings		
Macro Settings	V Trust access to the VRA project object model		
Protected View	This access to the vox project object model		
Message Bar			
External Content			
File Block Settings			
Privacy Options			

### Attach F9 as a Trusted Publisher:

### Trusted Center:

Trust Center		?	×
Trusted Publishers Trusted Locations	Add-ins (COM, VSTO and Other)		
Trusted Documents	<u>Require Application Add-ins to be signed by Trusted Publisher</u> Disable notification for unsigned add-ins (code will remain disabled)		
Add-ins	Disable all Application Add-ins (may impair functionality)		
ActiveX Settings Macro Settings			

#### Note:

- This setting is not required for F9.
- We recommend not changing this before checking with your administrator

Steps:

5.

- 1. Click Require Application Add-Ins to be signed by Trusted Publishers.
- 2. Close Excel
- 3. Run Excel again and you should see F9 attach.
- 4. A security warning will display:

I SECURI	TY WARNING Some active content has been disabled. Click for more deta	ails.	Enable Content	
A1	$\overline{}$ : $\times \checkmark f_{\mathbf{x}}$			
Select "Clie	ck for more details".			
Info				
Enable Content *	Security Warning Active content might contain viruses and other security hazards. The following content has been disabled: Add-ins			

6. Click the arrow from **Enable Content**.

Trust Center Settings Learn more about Active Content

You should enable content only if you trust the contents of the file.



- 7. Select Advanced Option
- 8. Select **Enable all code published with this publisher** and that will add F9 to the Trusted Publishers.
- 9. In the Trust Center under Trusted Publishers, F9 should now be listed.
- 10.In the **Trust Center** window, click on **Add-ins** and make sure that the check box Disable all Application Add-ins is **not checked**:

	Trust Center		?	×
	Trusted Publishers Trusted Locations Trusted Documents Trusted Add-in Catalogs	Add-ins (COM, VSTO and Other)         ✓ Require Application Add-ins to be signed by Trusted Publisher         □ Disable notification for unsigned add-ins (code will remain disabled)         □ Disable all Application Add-ins (may impair functionality)		
11.C	Add-ins ActiveX Settings Macro Settings Close Excel.			

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