

The logo for Infor F9, with 'Infor' in a dark blue font and 'F9' in a larger, bold, dark blue font. The background of the entire page is a light blue color with a pattern of white line-art icons representing various business and technology concepts such as buildings, charts, a car, a stethoscope, and a graduation cap.

Infor F9

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 www.f9.com:

- Installed
 - **User Guide** PDF
 - **Help** (*.CHM)
 - **Sample Reports** (*.xlsx)
- Online
 - **Release Notes** PDF
 - **What's New** PDF
 - [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 www.f9.com. 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 style="list-style-type: none"> • ODBC Datapump • F9 Integration Manager (F9IM) • File Maintenance Utilities (FMU32) 	Integration software to refresh GL balances from the source ERP database to F9 Professional's reporting database.
Action 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: <http://www.f9.com/system-requirements>

Third-party software requirements

All F9 products require the following:

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

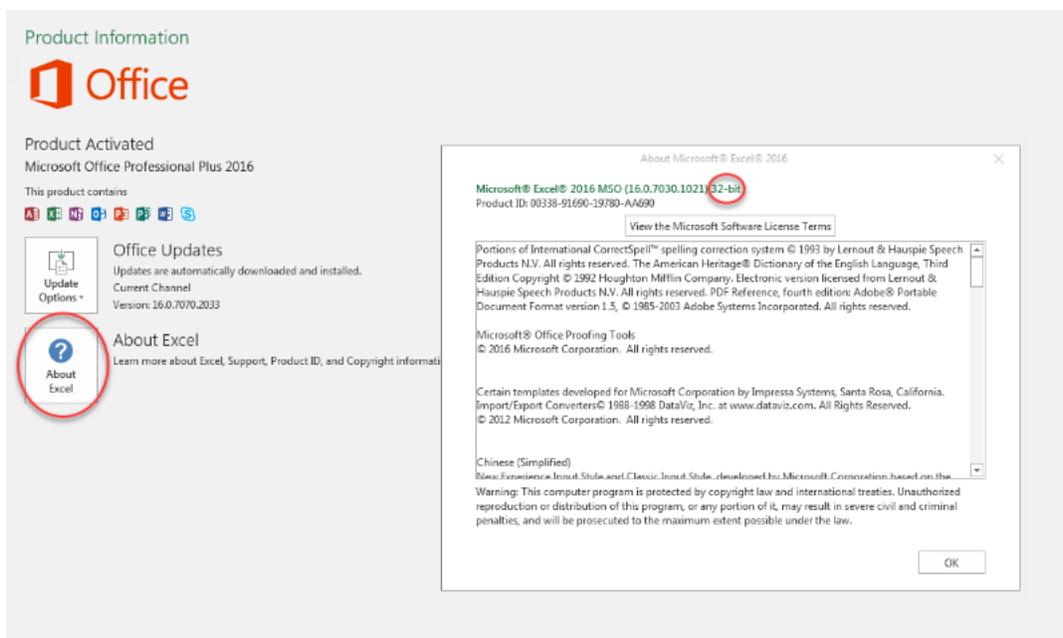
Pre-installation steps

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: <http://www.f9.com/f9-downloads>.

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.

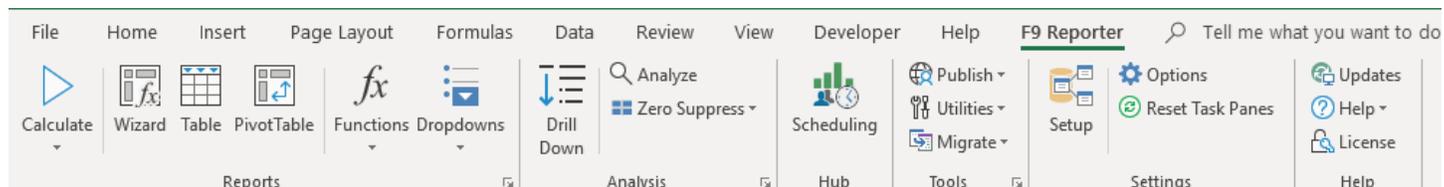
General Steps:

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

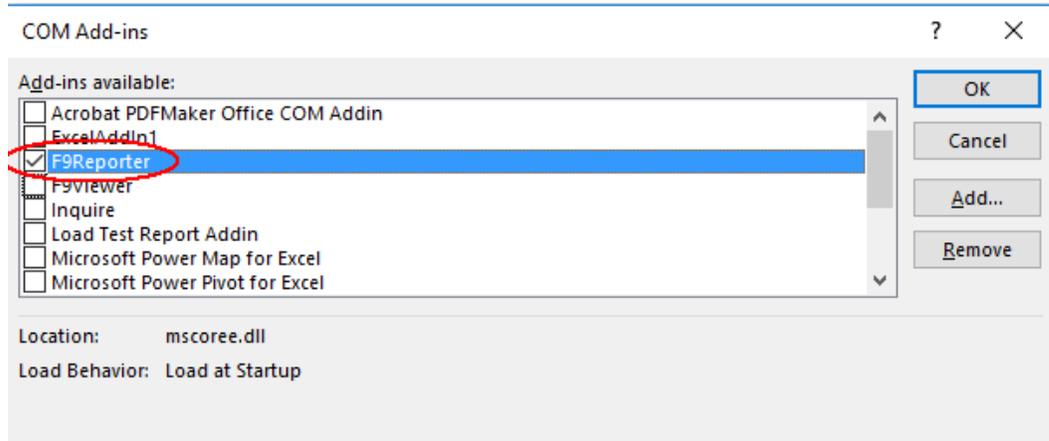
F9 Report Writer is an Excel Add-In and this section includes steps to allow F9 to load.

Steps:

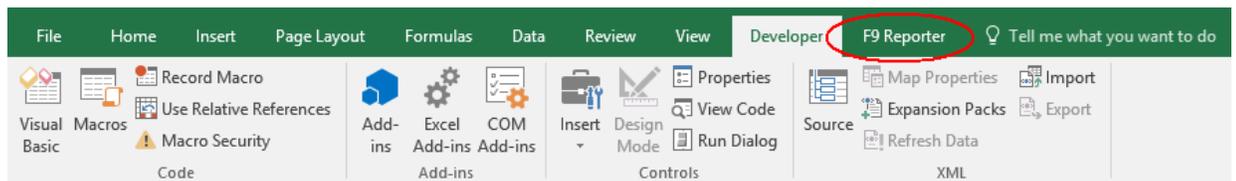
1. One-time step: **Run Excel as an Administrator:**
 - a. Open **Windows Explorer**
 - b. Find to **Excel.exe** in Program Files, example: C:\Program Files\Microsoft Office\Office15
 - c. **Right-click** on **Excel.exe**, select **Run as Administrator**
2. Check to see if F9 appears in the Excel Ribbon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

Manage: COM Add-ins Go...

- c. Select **F9Reporter** and click **OK**.



4. F9 should now be attached as:



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:

- [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 [section](#))
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 www.f9.com, 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 <https://inforf9.flexnetoperations.com/flexnet/operationsportal/logon.do>.

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 [switching from Standalone license to Cloud Server license](#), 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

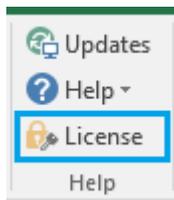
has to be activated using new **Activation ID** or **Cloud Server ID** provided in Entitlement email at the time of purchasing V6.5.

Changing License Model

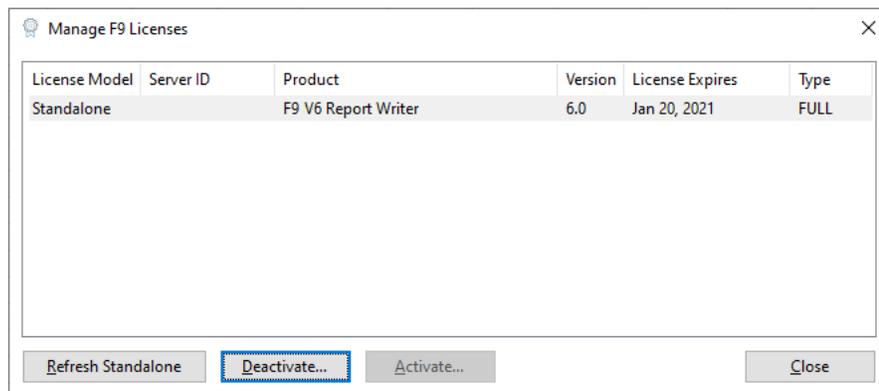
Switching from **Standalone License** to **Cloud License** model is a two step process: Step 1: Deactivate Standalone License and Step 2: Activate Cloud License.

STEP 1 - Deactivate Standalone License:

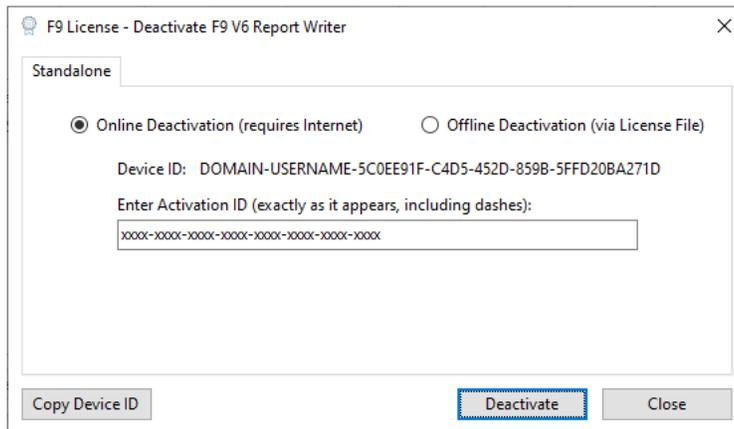
1. Open **Excel**
2. From the **F9 Ribbon**, click **License**



3. **Manage F9 Licenses** displays:



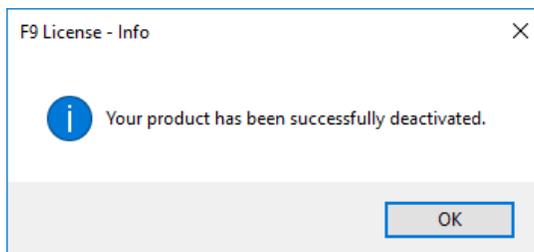
4. Select your product and click **Deactivate**
5. Copy/paste or enter your **F9 Activation ID**
6. Deactivation Mode: **Online** (recommended)



7. Ensure this computer can connect to the **Internet**

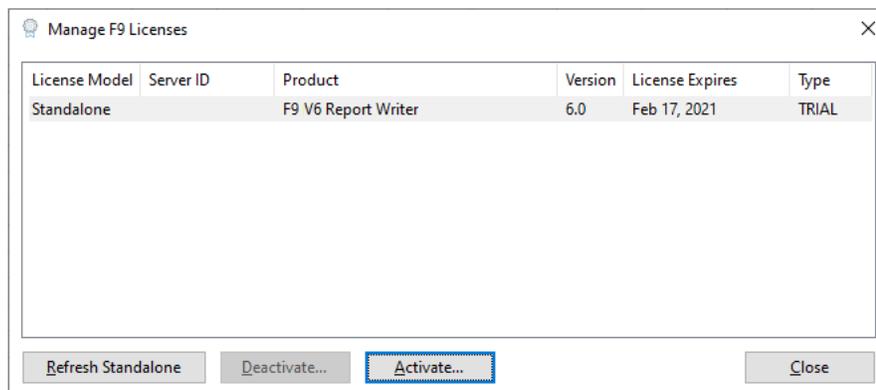
8. Click **Deactivate**

9. If successful, a message displays:



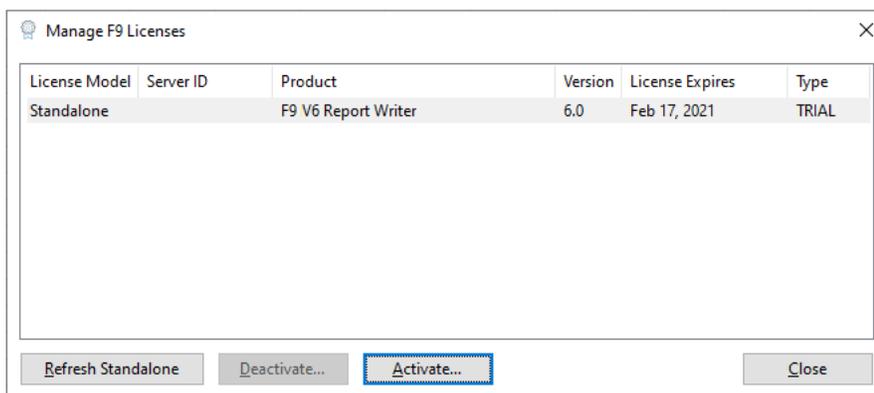
11. Click **OK**

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

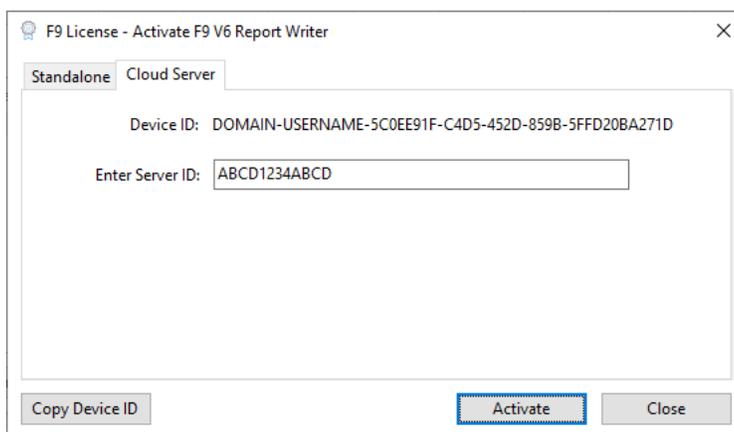


STEP2 - Activate Cloud Server License:

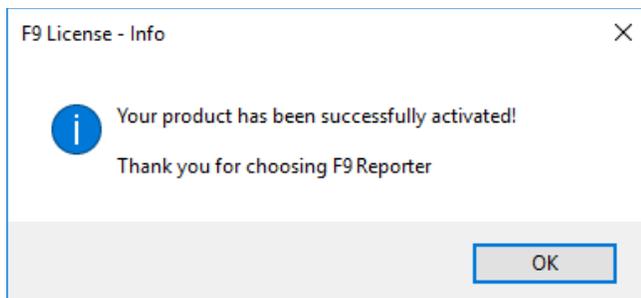
1. Select your product and click **Activate**



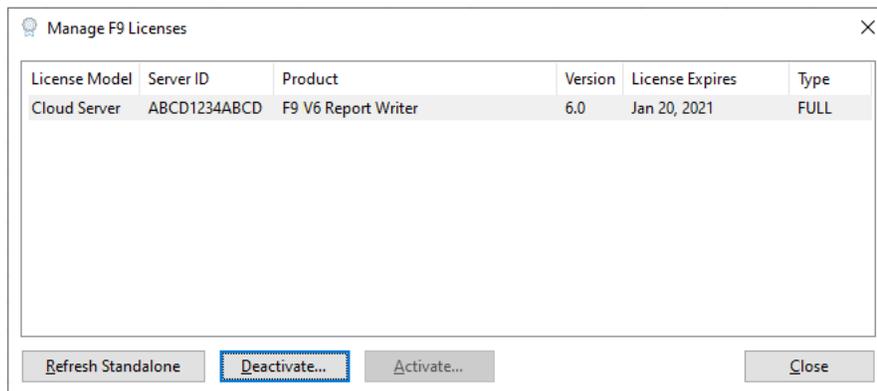
2. Select **Cloud Server** tab
3. Enter your Cloud Server ID (Example: ABCD1234ABCD)



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



11. Click **OK**



The screenshot shows a window titled "Manage F9 Licenses" with a close button (X) in the top right corner. Inside the window is a table with the following data:

License Model	Server ID	Product	Version	License Expires	Type
Cloud Server	ABCD1234ABCD	F9 V6 Report Writer	6.0	Jan 20, 2021	FULL

Below the table are four buttons: "Refresh Standalone", "Deactivate..." (highlighted with a blue border), "Activate...", and "Close".

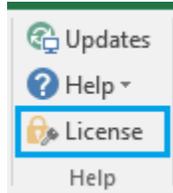
12. F9 License Manager will show that the F9 product is fully activated

Standalone License

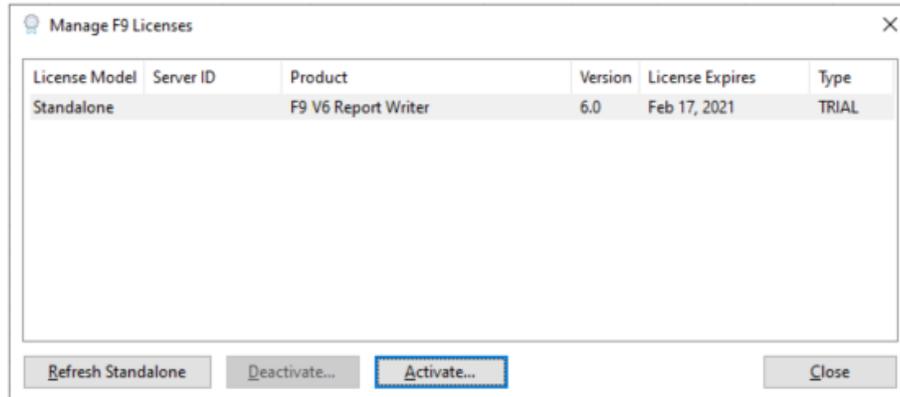
Activate

Steps to Activate **Online**:

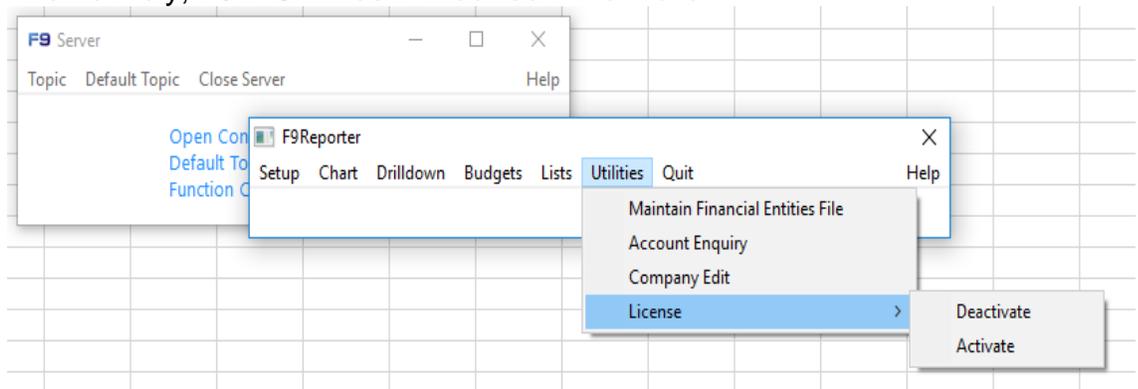
1. Open **Excel**
2. **F9 Ribbon > License**



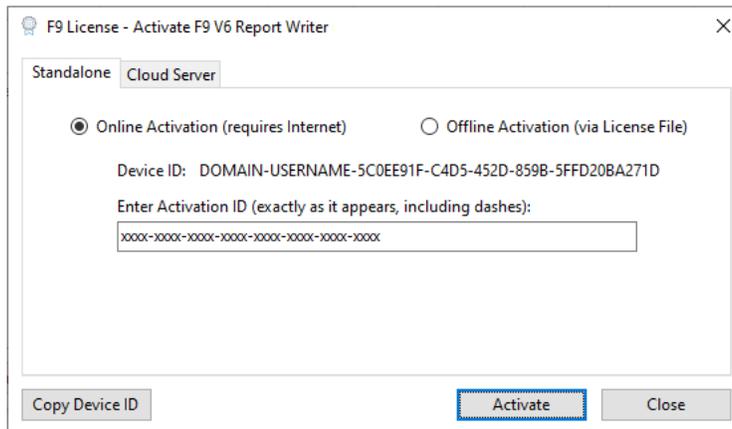
3. The **Manage F9 Licenses** dialog will open.



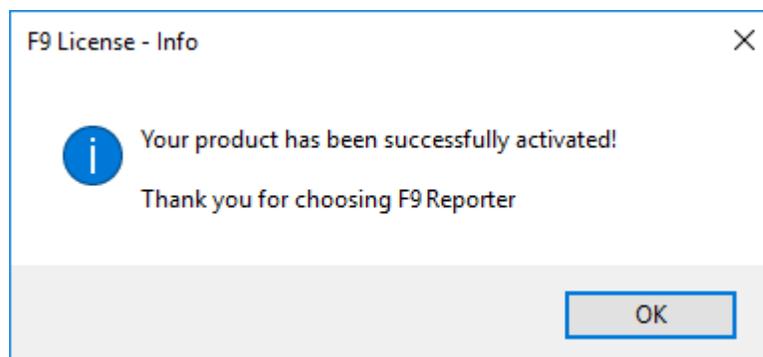
4. Select the F9 product and click **Activate**
5. Alternatively, **F9 > Utilities > License > Activate**



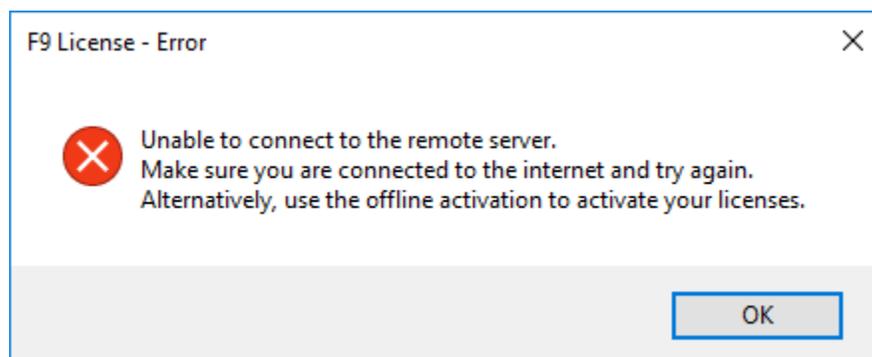
6. Copy/paste or enter your **F9 Activation ID**
7. Activation Mode: **Online** (recommended)



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:

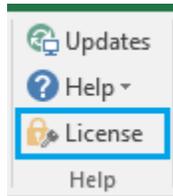


12. Click **OK**

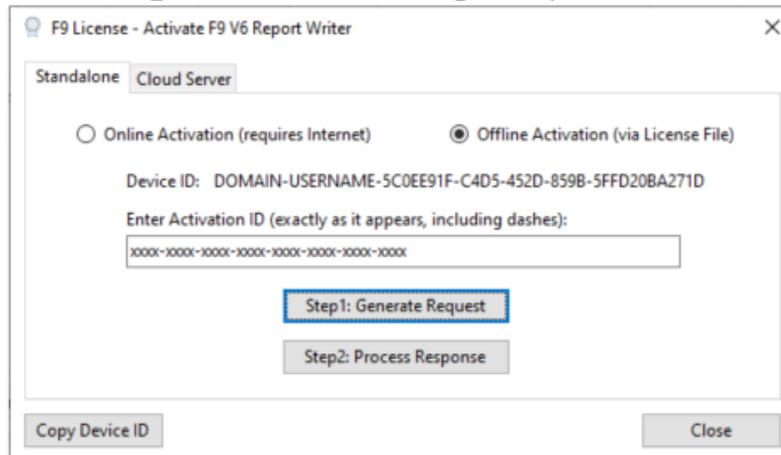
Steps to Activate **Offline**:

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://infor9.flexnetoperations.com/flexnet/deviceservices>, perform the next set of steps to manually activate

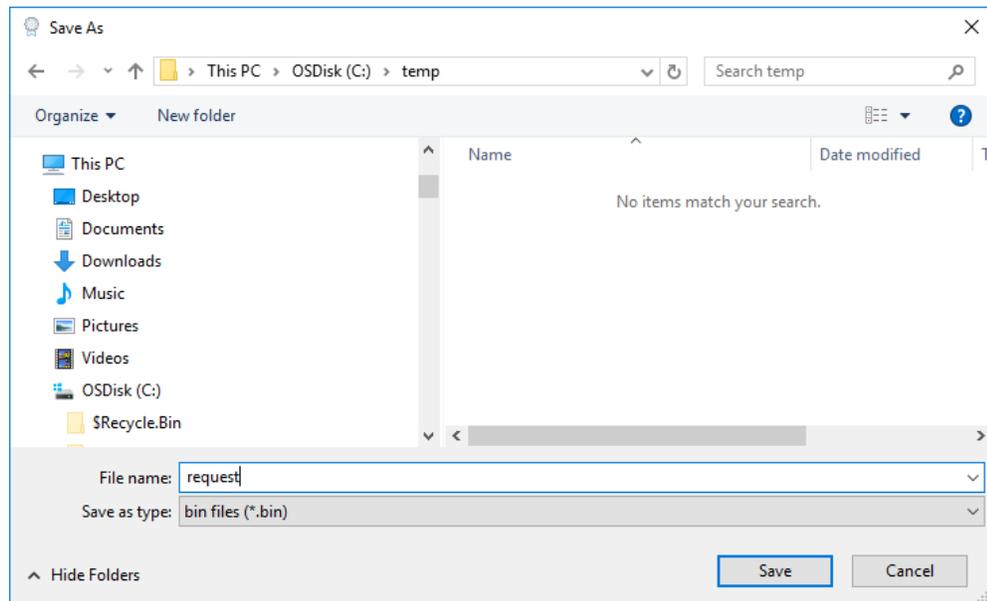
1. Open **Excel**
2. **F9 Ribbon > License**



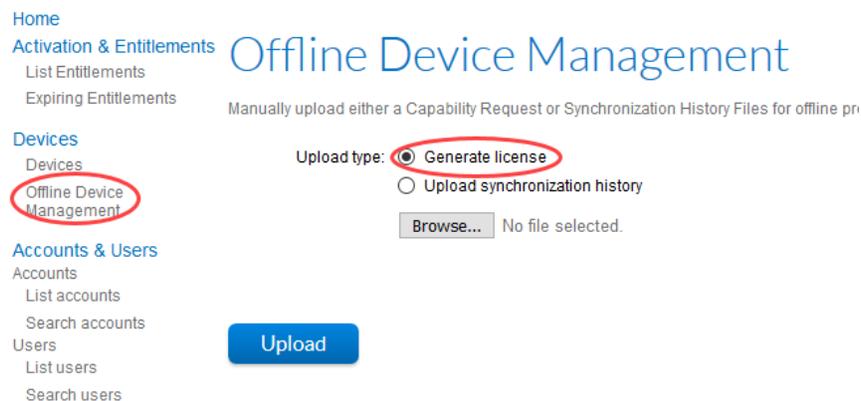
3. The **Manage F9 Licenses** dialog will open.



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

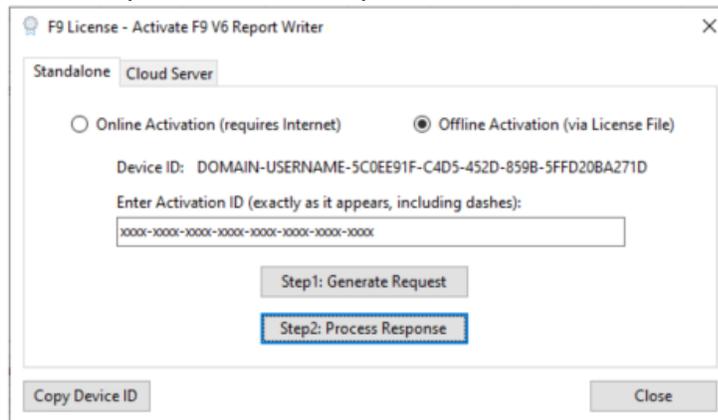


6. Click **Save**
7. **Copy** the saved **.bin file** to a shared location and go to a computer with internet access
8. Login to the **Customer Portal**:
<https://infor9.flexnetoperations.com/flexnet/operationsportal/logon.do>
10. On the left side under **Devices**, select **Offline Device Management**
11. Select **Generate License as Upload Type**
12. **Browse** to the saved **.bin file**, click **Upload**

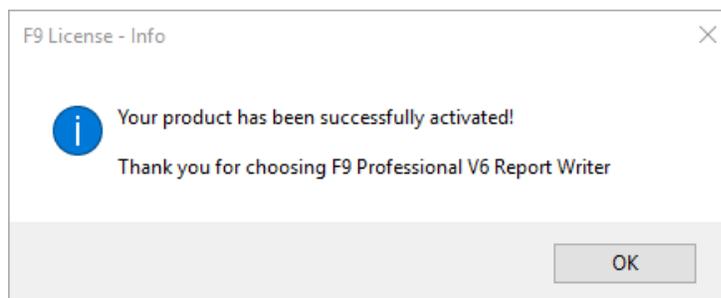


13. A message to download the license will appear

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



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



19. If activation fails, [contact F9 Technical Support](#)

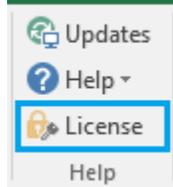
Refresh

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.

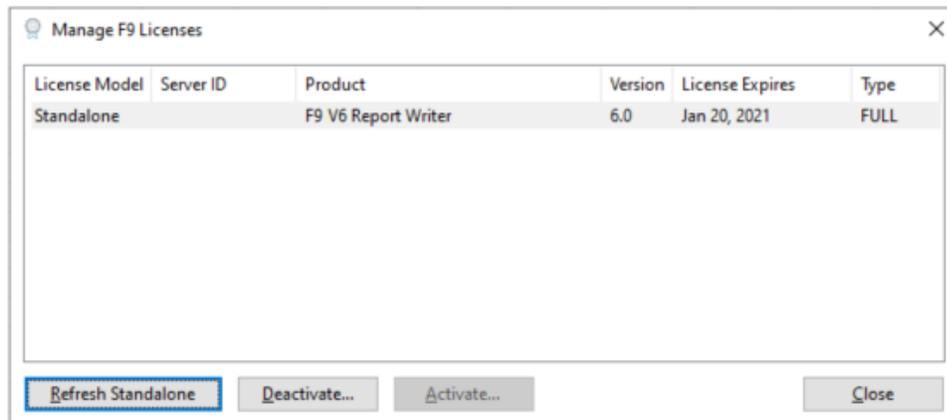
In addition, F9 is periodically checking the License Portal for validity of the installed licenses. For computers with an internet connection, the check is done automatically. For computers without internet connection, users will have to perform steps related to: **Offline Refresh** when applicable.

Steps:

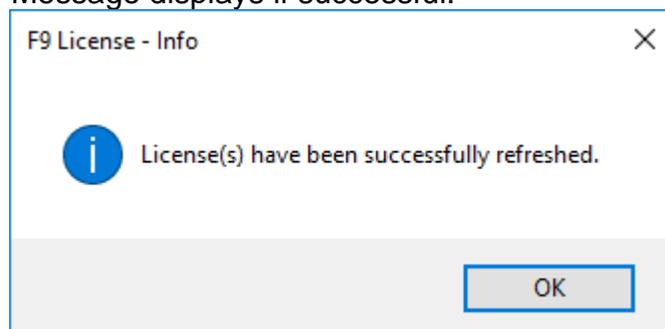
1. Open **Excel**
2. **F9 Ribbon > License**



3. Click **Refresh**



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.

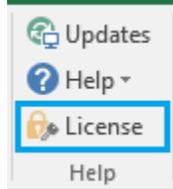
To move your license, the running copy of F9 must first be deactivated.

Before you begin:

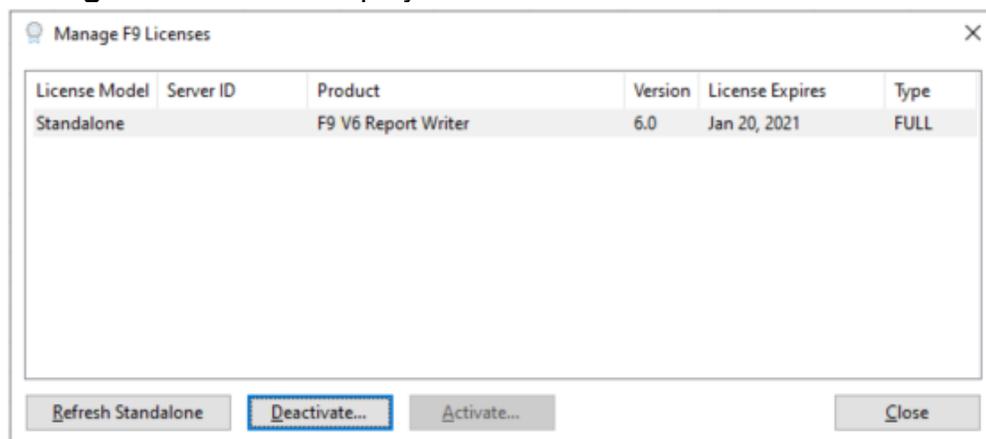
- Ensure you have your **F9 Activation ID** provided at time of purchase. You can also lookup the key details from the Customer Portal: <https://inforf9.flexnetoperations.com/flexnet/operationsportal/logon.do>

Steps:

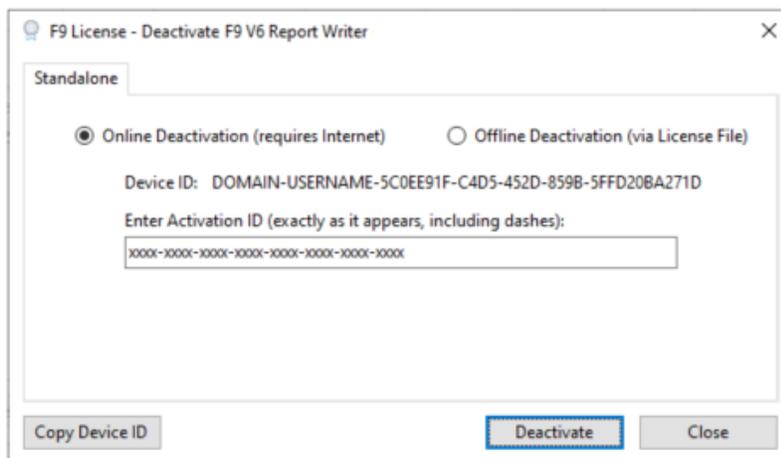
1. Open **Excel**
2. **F9 Ribbon > License**



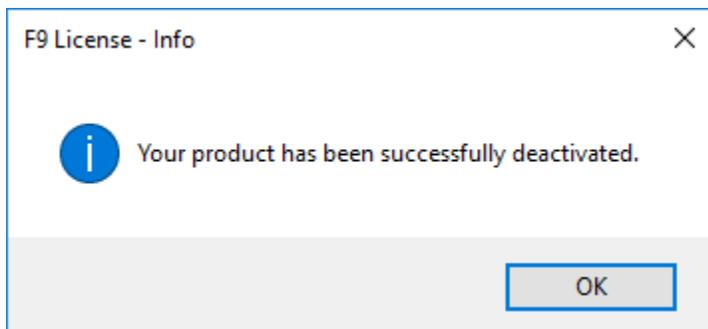
3. **Manage F9 Licenses** displays:



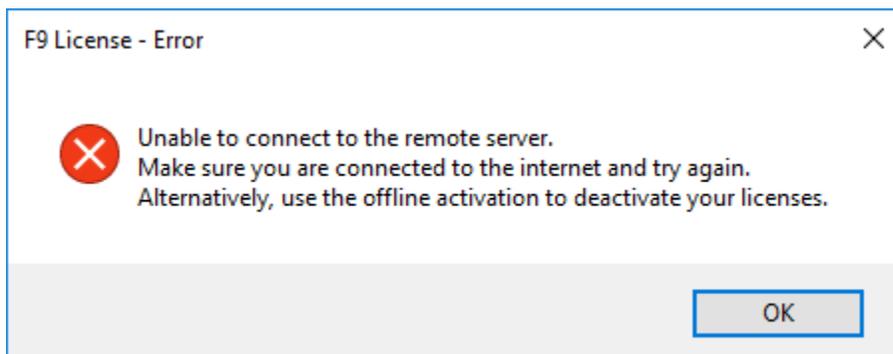
4. Select your **F9 product** and click **Deactivate**
5. Enter your **F9 Activation ID**
6. Deactivation Mode: **Online** (recommended)



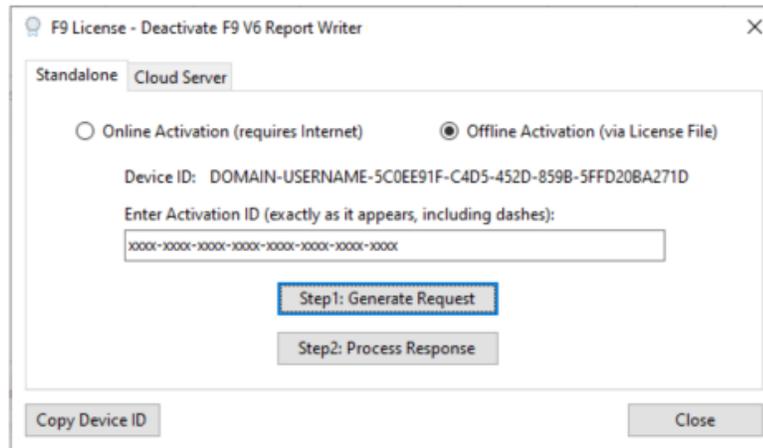
7. Ensure this computer can connect to the Internet
8. Click Deactivate
9. If successful, a message displays:



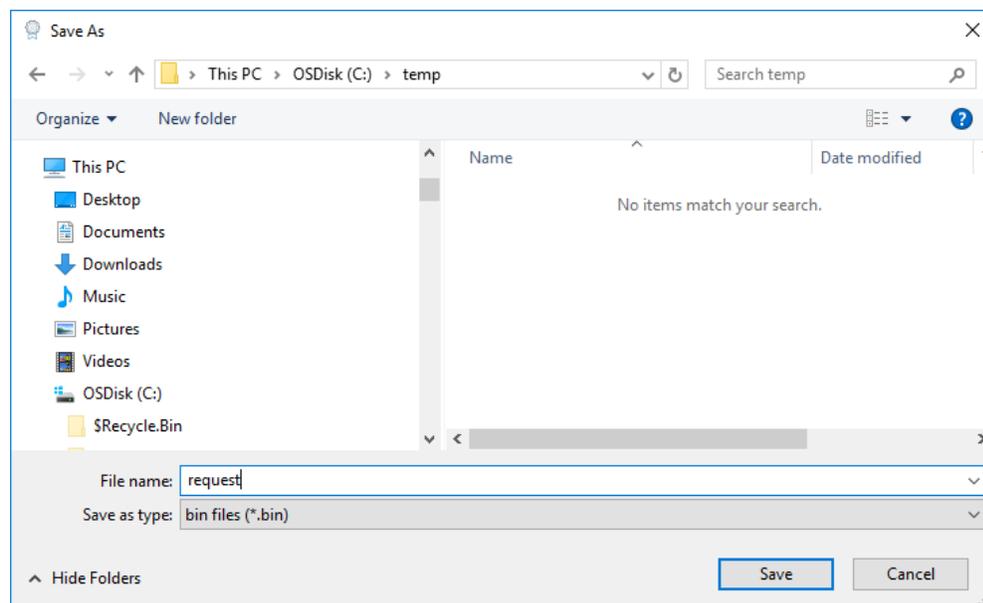
10. If a failure, an error displays:



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



13. Follow these steps if no Internet or your company firewall or proxy restricts access to <https://infor9.flexnetoperations.com/flexnet/deviceservices>
14. Click **Step 1: Generate Request**
15. Browse to a temp folder on your computer



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**:
<https://infor9.flexnetoperations.com/flexnet/operationsportal/logon.do>
19. Under Devices, select **Offline Device Management**
20. Select **Generate License** as **Upload Type**
21. Browse to the saved **.bin** file
22. Click **Upload**

infor F9 Licensing
powered by Flexera's Software Monetization

Home
Activation & Entitlements
List Entitlements
Expiring Entitlements

Offline Device Management

Manually upload either a Capability Request or Synchronization History Files for offline processing.

Devices
Devices
Offline Device Management

Accounts & Users
Accounts
List accounts
Search accounts
Users
List users
Search users

Upload type: Generate license
 Upload synchronization history

Browse... No file selected.

Upload

23. A message to download the license will appear

infor F9 Licensing Portal
powered by Flexera's Software Monetization Platform

Home
Activation & Entitlements
List Entitlements
Expiring Entitlements

Devices
Devices
Offline Device Management

Accounts & Users
Accounts
List accounts
Search accounts
Users
List users
Search users

License has been generated successfully, please click [here](#) to download the new license.

Offline Device Management

Manually upload either a Capability Request or Synchronization History Files for offline processing. The application

Upload type: Generate license
 Upload synchronization history

Browse... No file selected.

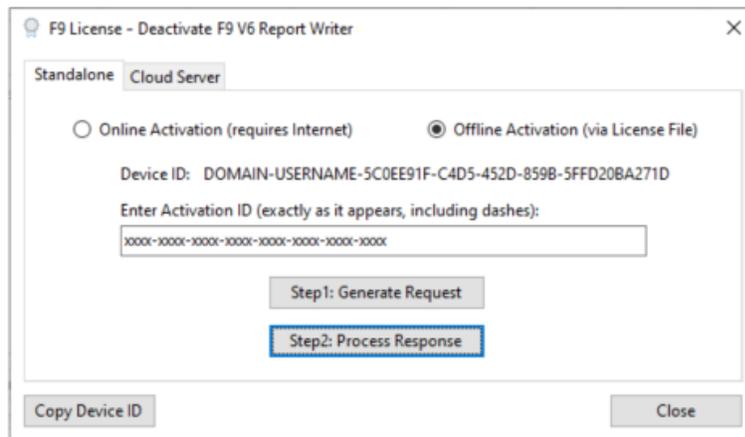
Upload

24. Save the **.bin** file

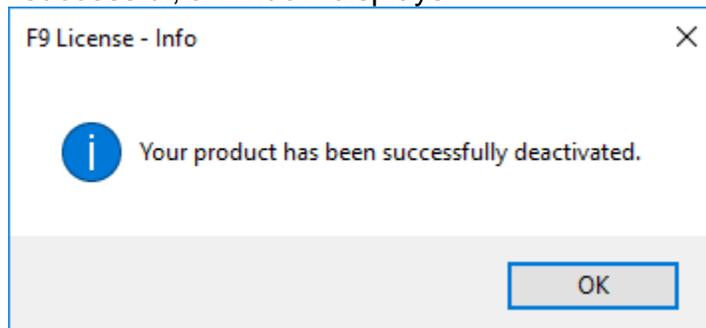
25. **Copy** the new **.bin** file to the shared location

26. Return to the F9 machine with License Deactivate open

27. Click **Step2**: Process Response



28. If successful, a window displays



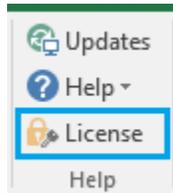
29. If activation fails, [contact F9 Technical Support](#)

Manually Deactivate

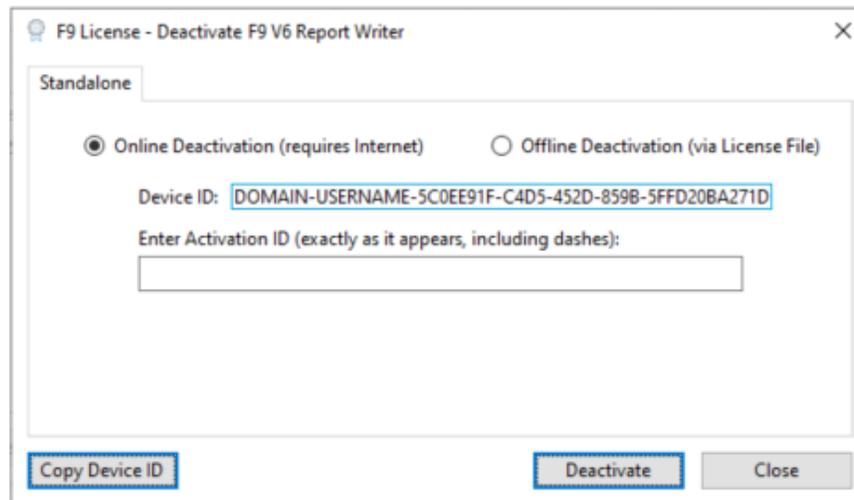
If an F9 product license cannot be deactivated using the above process, this section provides another technique.

Steps:

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



3. **Deactivate** window



4. Copy the **Device ID**
5. Login to Customer Portal:
<https://infor9.flexnetoperations.com/flexnet/operationsportal/logon.do>
6. Click **Devices**, or you can also Search by **Device name**

Home

Activation & Entitlements

- List Entitlements
- Expiring Entitlements

Devices

- Devices**
- Offline Device Management

Accounts & Users

- Accounts
 - List accounts
 - Search accounts
- Users
 - List users
 - Search users

Results for Device name: F9S* [Clear](#)

Devices

4 Results

Name	ID
F9ServerTS	F9ServerTS-F9DP-0F8BF000406F1-E690C3DC (STRING)
F9ServerTS	F9ServerTS-F9DP-0F8BF000306F2-E690C3DC (STRING)

7. Click on the **Device ID** to deactivate



Home
Activation & Entitlements
List Entitlements
Expiring Entitlements

Devices
Devices
Offline Device Management

Accounts & Users
Accounts
List accounts
Search accounts

Users
List users
Search users

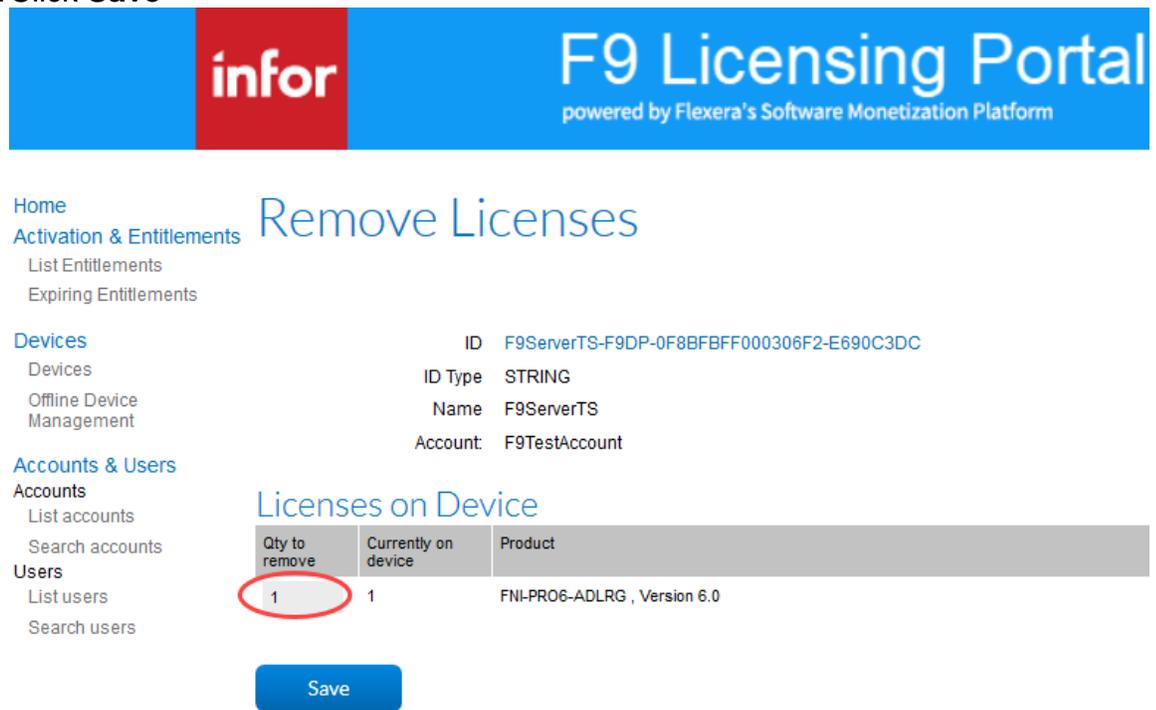
View Device

View Action

Device Details

ID : F9ServerTS-F9DP-0F8BFBFF000306F2-E690C3DC
Name : F9ServerTS
Site Name : F9ServerTS
Status : ACTIVE
Series : FLX_CLIENT_SERIES
Model : FLX_CLIENT
Account : F9TestAccount (F9 Test Account)
Vendor Dictionary : (None)

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



Home
Activation & Entitlements
List Entitlements
Expiring Entitlements

Devices
Devices
Offline Device Management

Accounts & Users
Accounts
List accounts
Search accounts

Users
List users
Search users

Remove Licenses

View Action

Licenses on Device

ID : F9ServerTS-F9DP-0F8BFBFF000306F2-E690C3DC
ID Type : STRING
Name : F9ServerTS
Account : F9TestAccount

Qty to remove	Currently on device	Product
1	1	FNI-PRO6-ADLRG , Version 6.0

Save

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

The screenshot shows the infor F9 Licensing Portal interface. At the top, there is a blue header with the 'infor' logo and the text 'F9 Licensing Portal powered by Flexera's Software Monetization Platform'. Below the header, a light green notification bar contains a green checkmark icon and the text 'Licenses successfully removed.', which is circled in red. The main content area is titled 'View Device' and 'Device Details'. On the left, there is a navigation menu with categories: Home, Activation & Entitlements (List Entitlements, Expiring Entitlements), Devices (Devices, Offline Device Management), and Accounts & Users (Accounts: List accounts, Search accounts; Users: List users, Search users). Below the navigation, there are 'View' and 'Action' buttons. The 'Device Details' section displays the following information:

ID :	F9ServerTS-F9RW-0F8BF000306F2-E690C3DC
Name :	F9ServerTS
Site Name :	
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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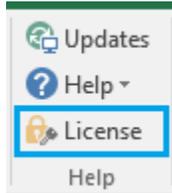
Cloud License

Activate

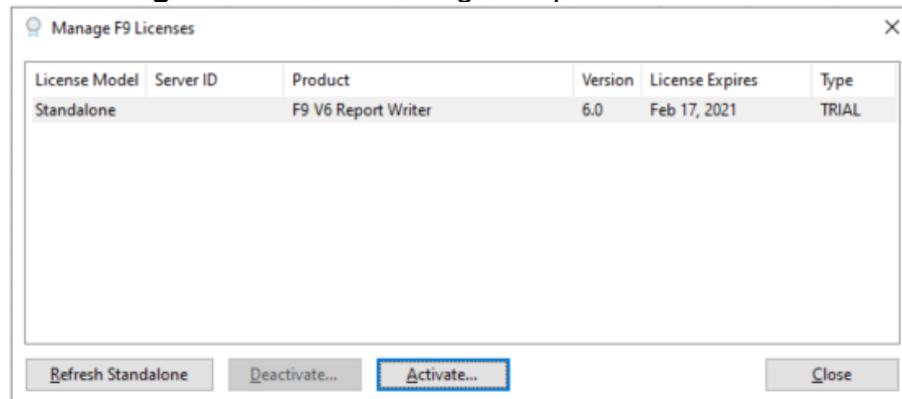
An F9 product license on a particular machine should be activated with a FlexNet Cloud Server only one time. Any user running F9 on an already activated machine does not have to activate again. Simply running F9 will check out a license from FlexNet Cloud Server and closing F9 will release the license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

Steps:

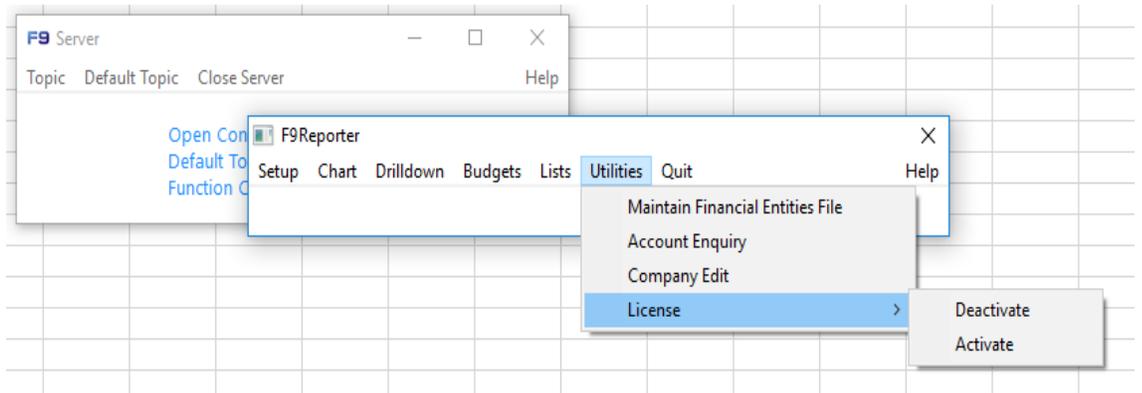
1. Open **Excel**
2. **F9 Ribbon > License**



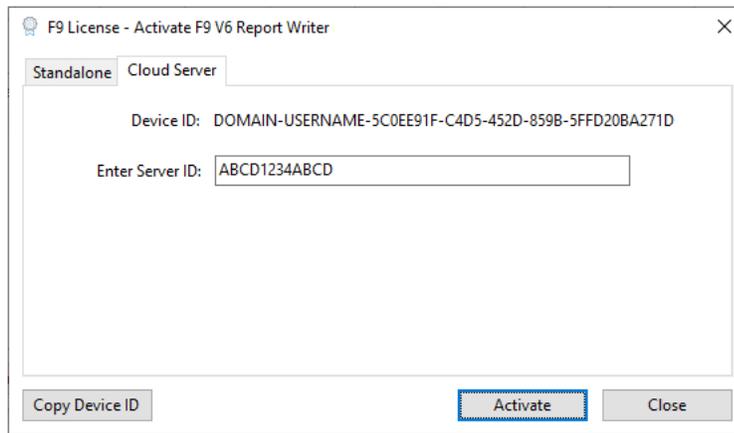
3. The **Manage F9 Licenses** dialog will open.



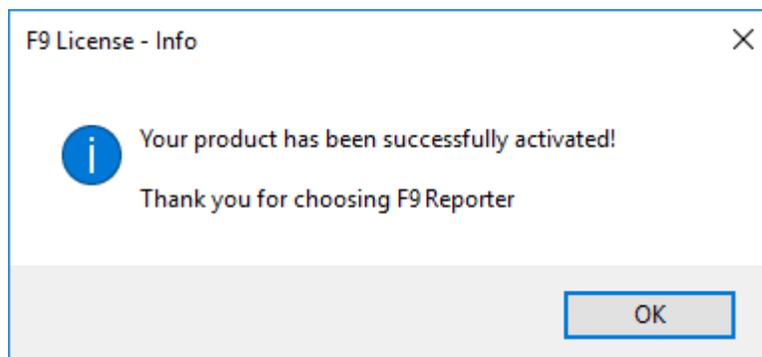
4. Select the F9 product and click **Activate**
5. Alternatively, **F9 > Utilities > License > Activate**



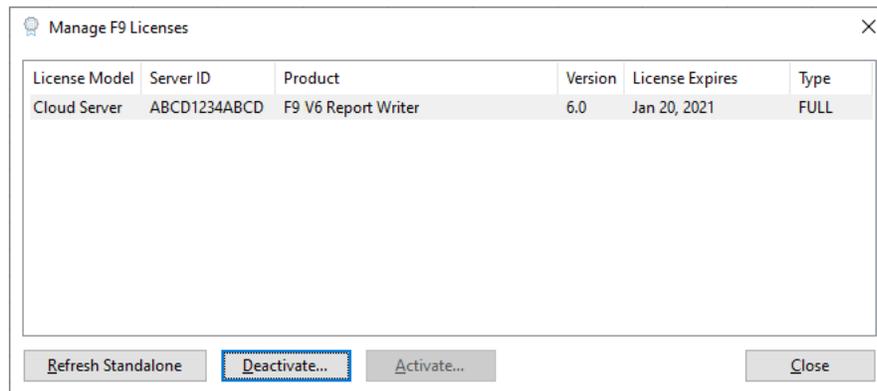
- 6. Select Cloud Server tab
- 7. Copy/paste or enter your **F9 Cloud Server ID**



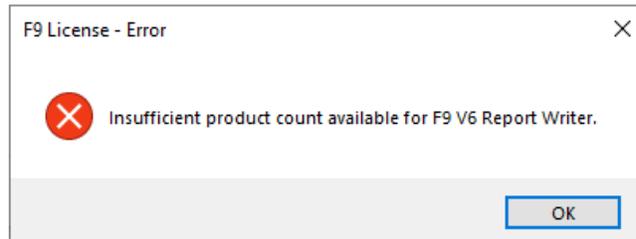
- 8. Ensure this computer can connect to the **Internet**
- 9. Click **Activate**
- 10. If successful, a message displays:



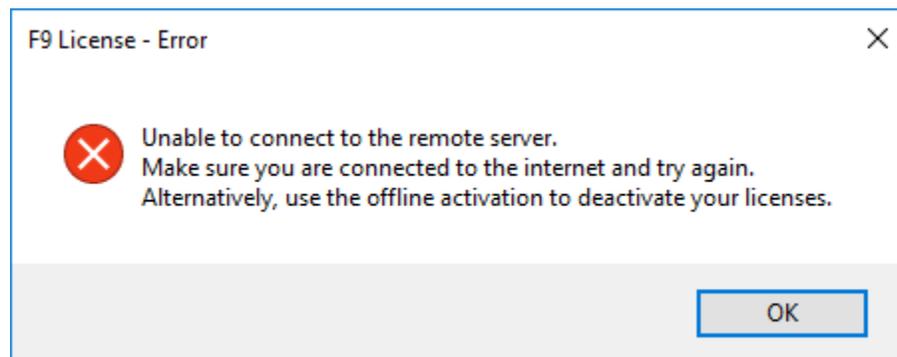
- 11. Click **OK**



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

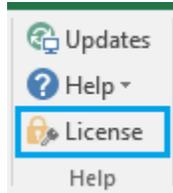
Change Cloud Server

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

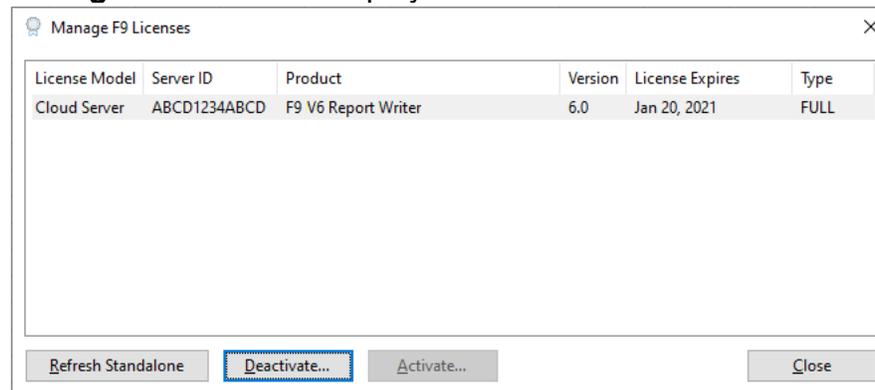
The easiest way is for all users to close the F9 application, then from each machine where F9 is installed, only one user should open F9 and perform the following two STEPS.

STEP 1 - Deactivate Existing Cloud Server ID:

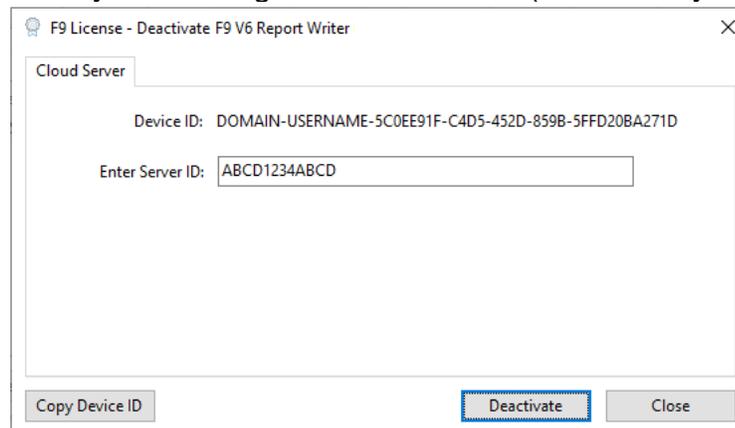
1. Open **Excel**
2. **F9 Ribbon > License**



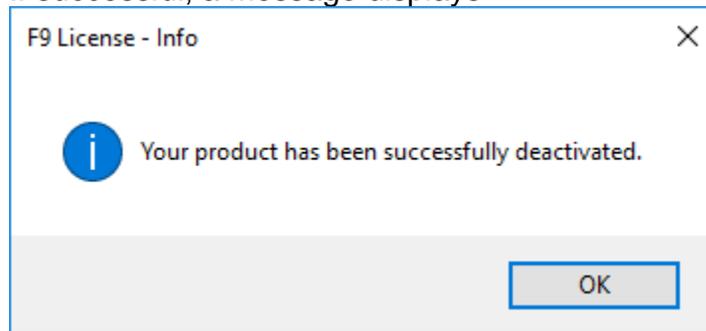
3. **Manage F9 Licenses** displays



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

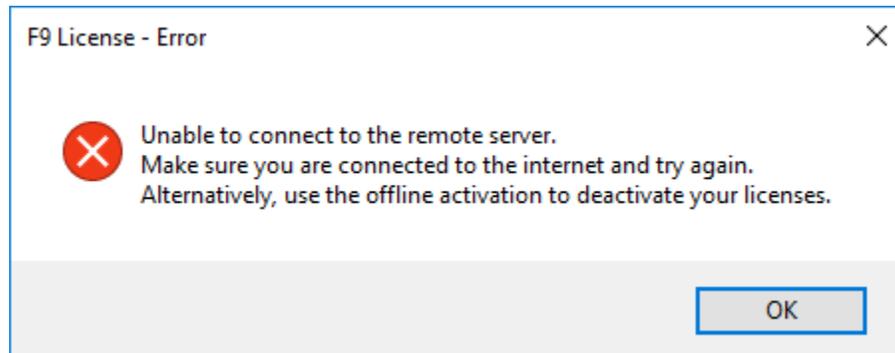


6. Click **Deactivate**
7. If successful, a message displays



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

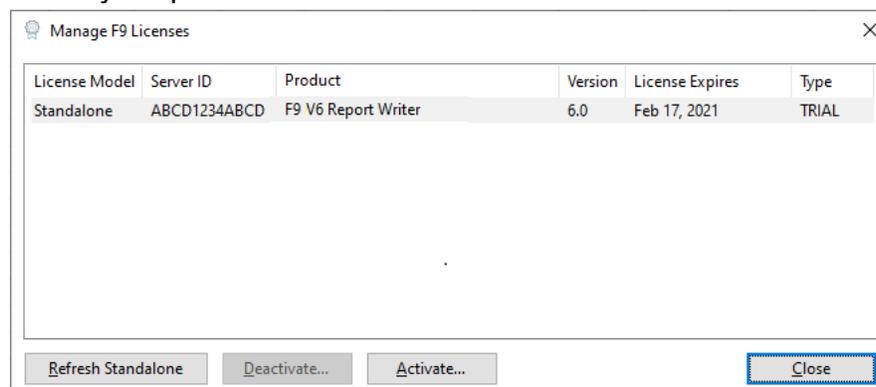
Note: If F9 cannot connect to the site that authenticated the F9 product license, activation will fail, or in case of a failure when an internet connection is not available, an error displays:



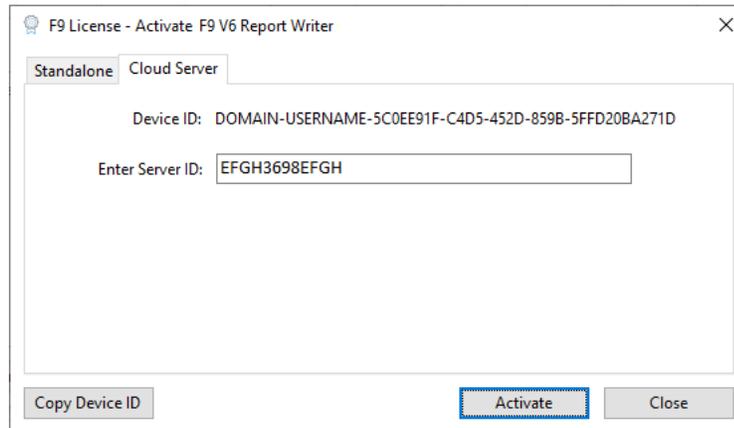
In this case, make sure your organization firewall or proxy has access to <https://inforf9.compliance.flexnetoperations.com/instances/{ServerID}/request>

STEP 2 - Activate Existing Cloud Server ID:

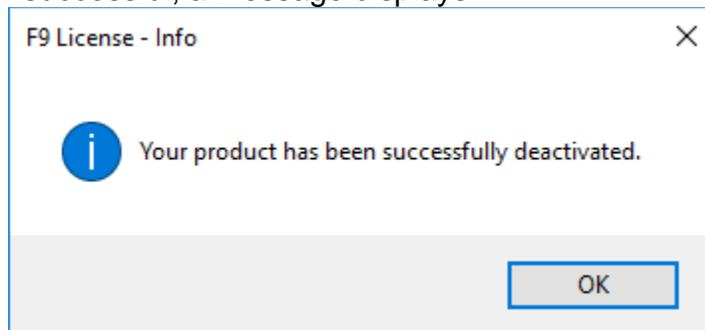
1. Select your product and click **Activate**



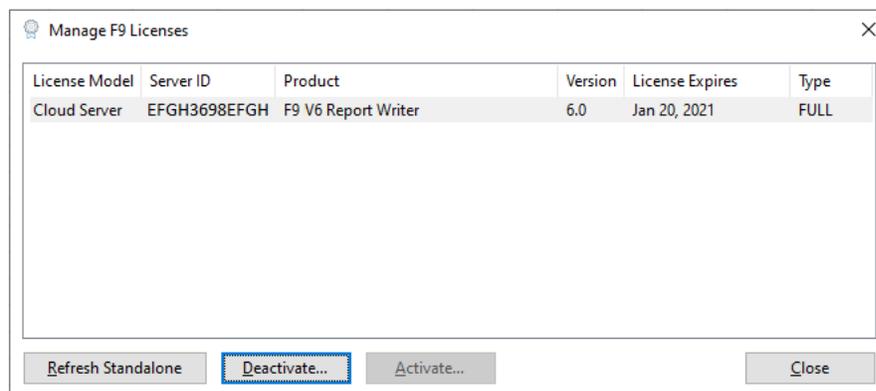
2. Enter existing **Cloud Server ID** (alternatively it will be pre-populated)



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

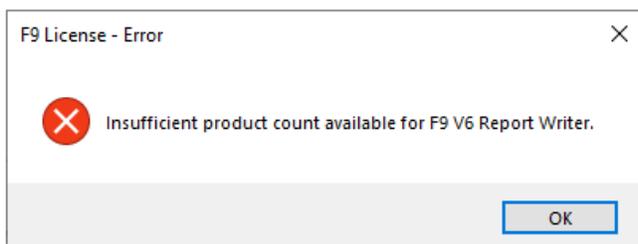


5. Click **OK**

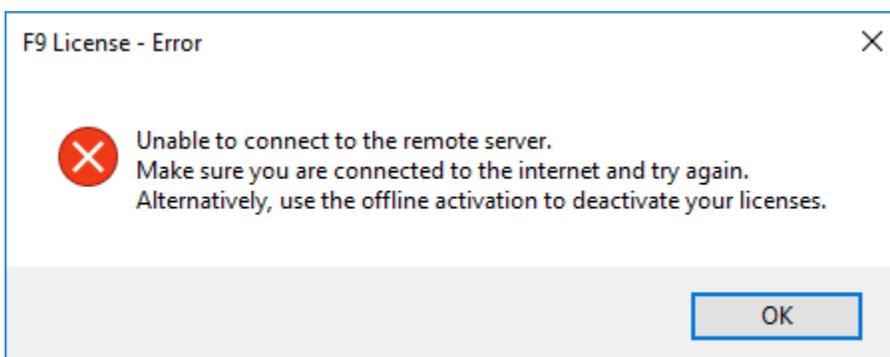


6. F9 product is fully activated

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:



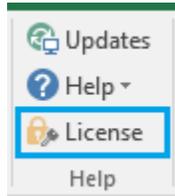
In this case, make sure your organization firewall or proxy has access to <https://inforf9.compliance.flexnetoperations.com/instances/{ServerID}/request>

Deactivate

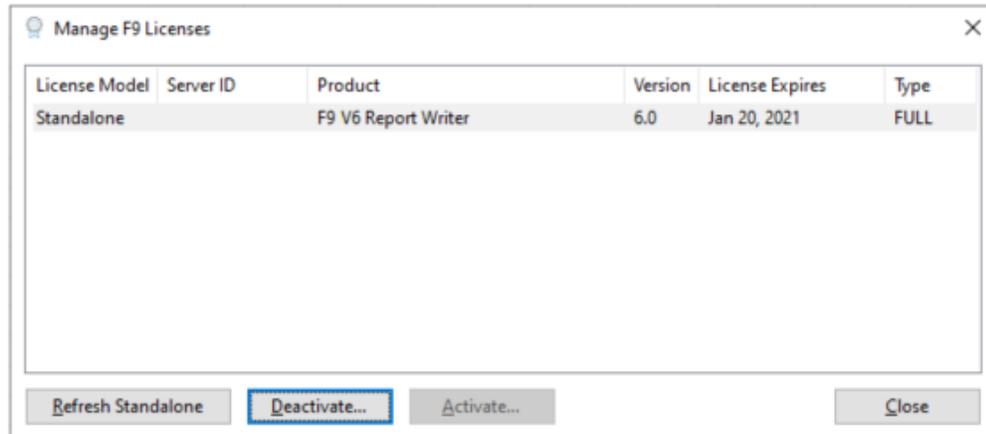
If the Cloud License Server ID must be deactivated, all the licenses currently in use should be returned first. Before a license can be activated on new hardware, the running copy of F9 must first be deactivated.

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.

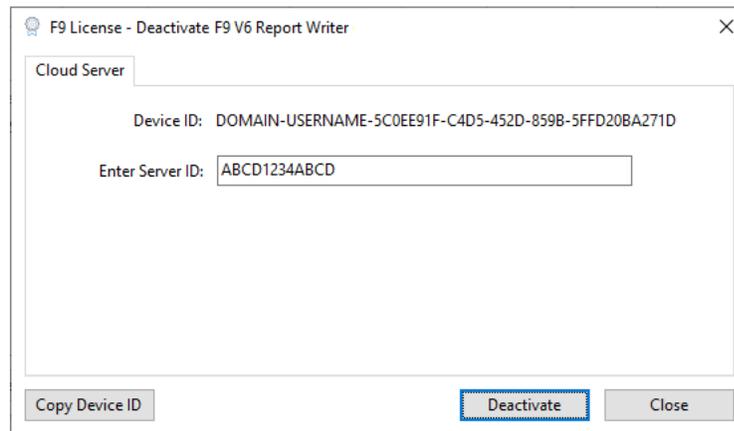
1. Open **Excel**
2. **F9 Ribbon > License**



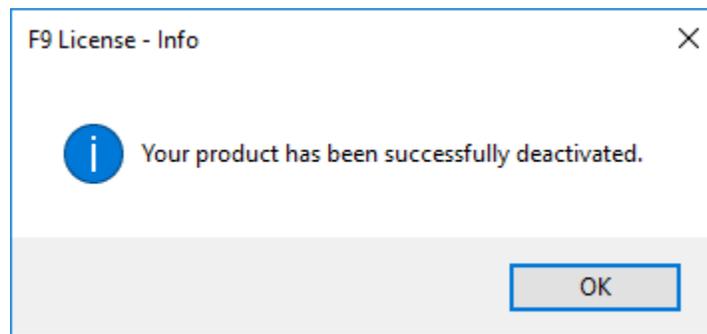
3. **Manage F9 Licenses** displays:



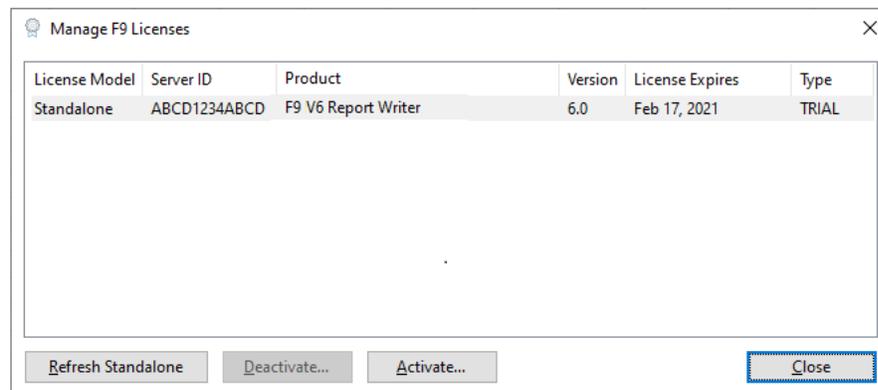
4. Select your **F9 product** and click **Deactivate**
5. Copy/paste or enter your **Cloud Server ID** (alternatively it will be pre-populated)



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

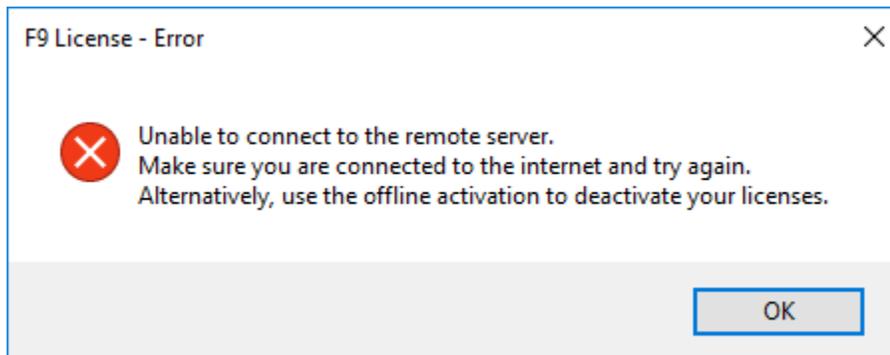


9. Click **OK**



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://infor9.compliance.flexnetoperations.com/instances/{ServerID}/request>

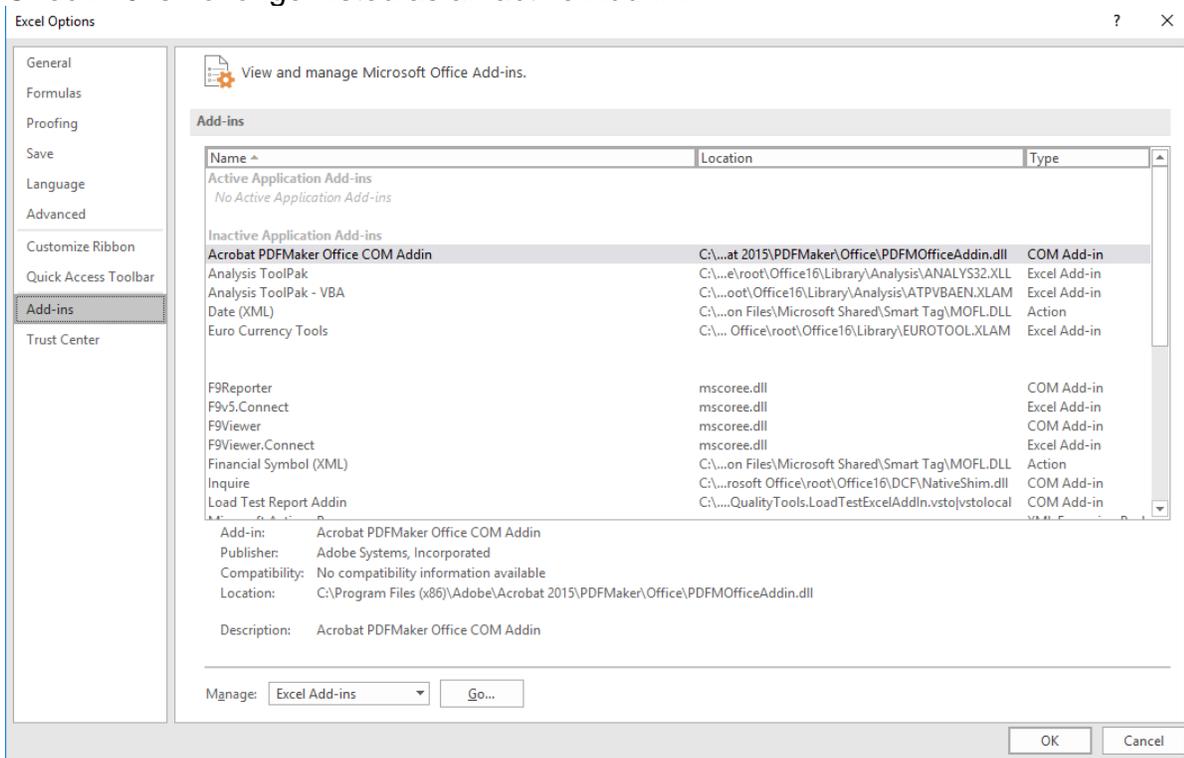
Top

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**
- 
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:



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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.

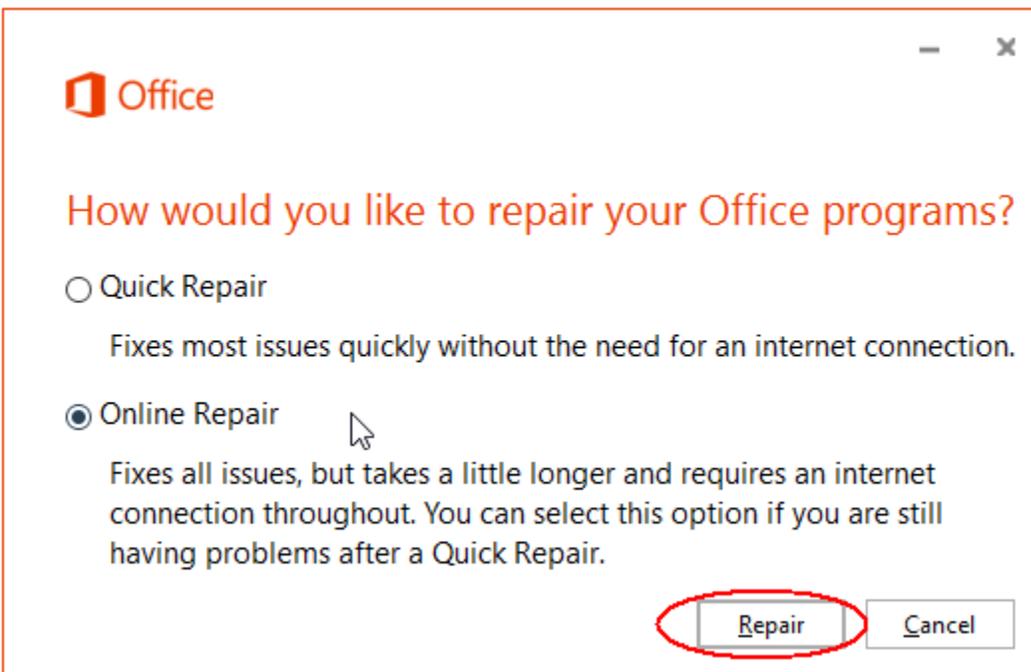
Appendix A: troubleshooting

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**:

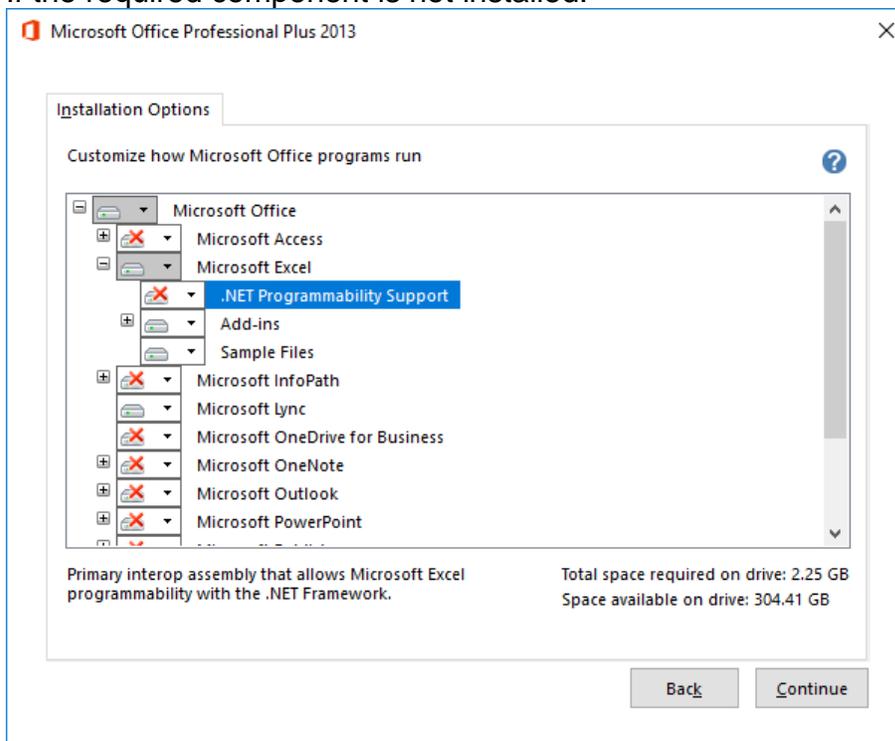


- a. Select **Online Repair**
 - b. Click **Repair**
 - c. Once completed, run **Excel** and see if F9 attaches successfully.
4. If **Full Installation**:
 - a. Select **Add or Remove Features**

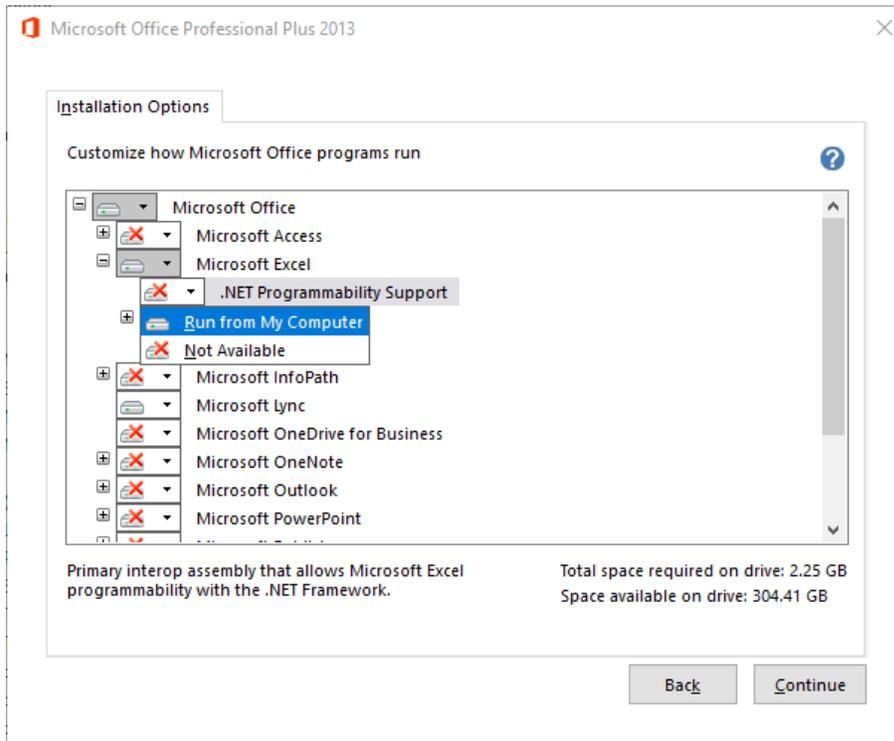


- b. Click **Continue**
- c. Tab **Installation Options**, expand **Microsoft Office Excel**
- d. **.NET Programmability Support**

If the required component is not installed:

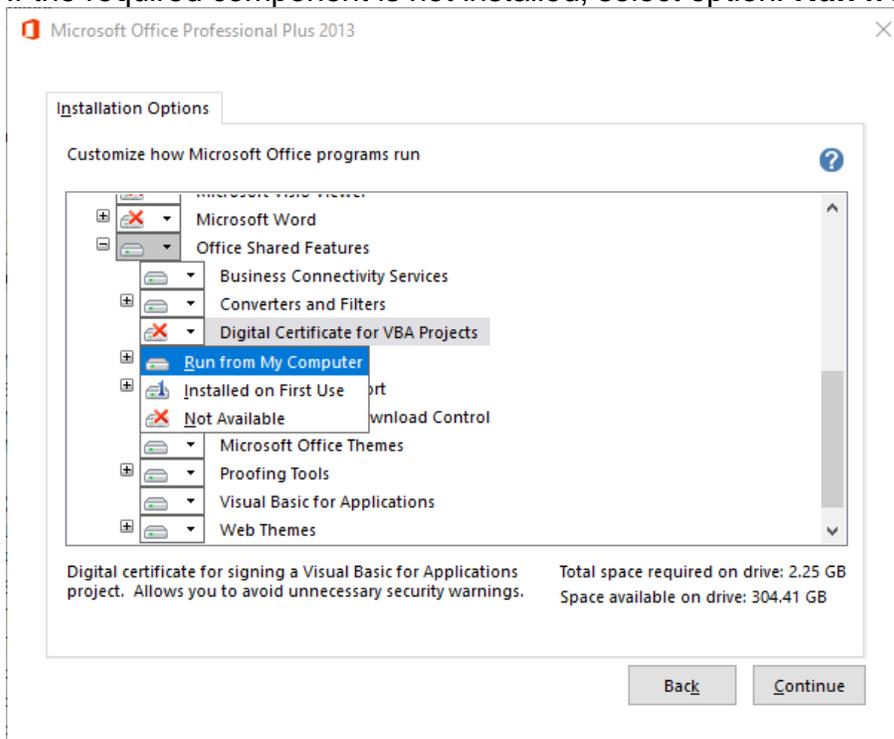


- e. Click the dropdown arrow for **.NET Programmability Support**
- f. Select: **Run from My Computer**



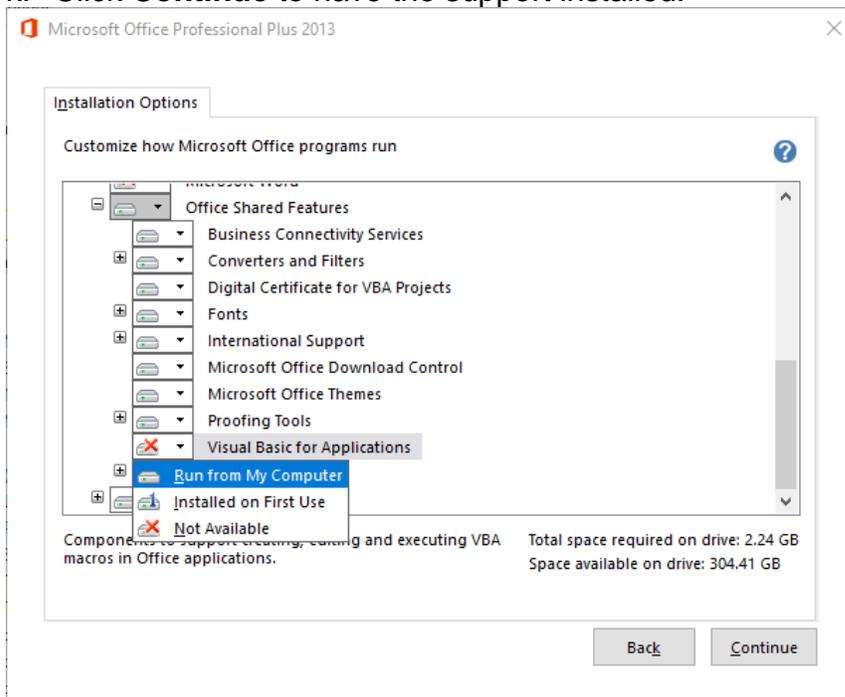
- g. Expand **Office Shared Features**.
- h. Click on **Digital Certificates for VBA Projects**.

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



- i. 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.



l. Once completed, **run Excel** and see if F9 attaches successfully

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.

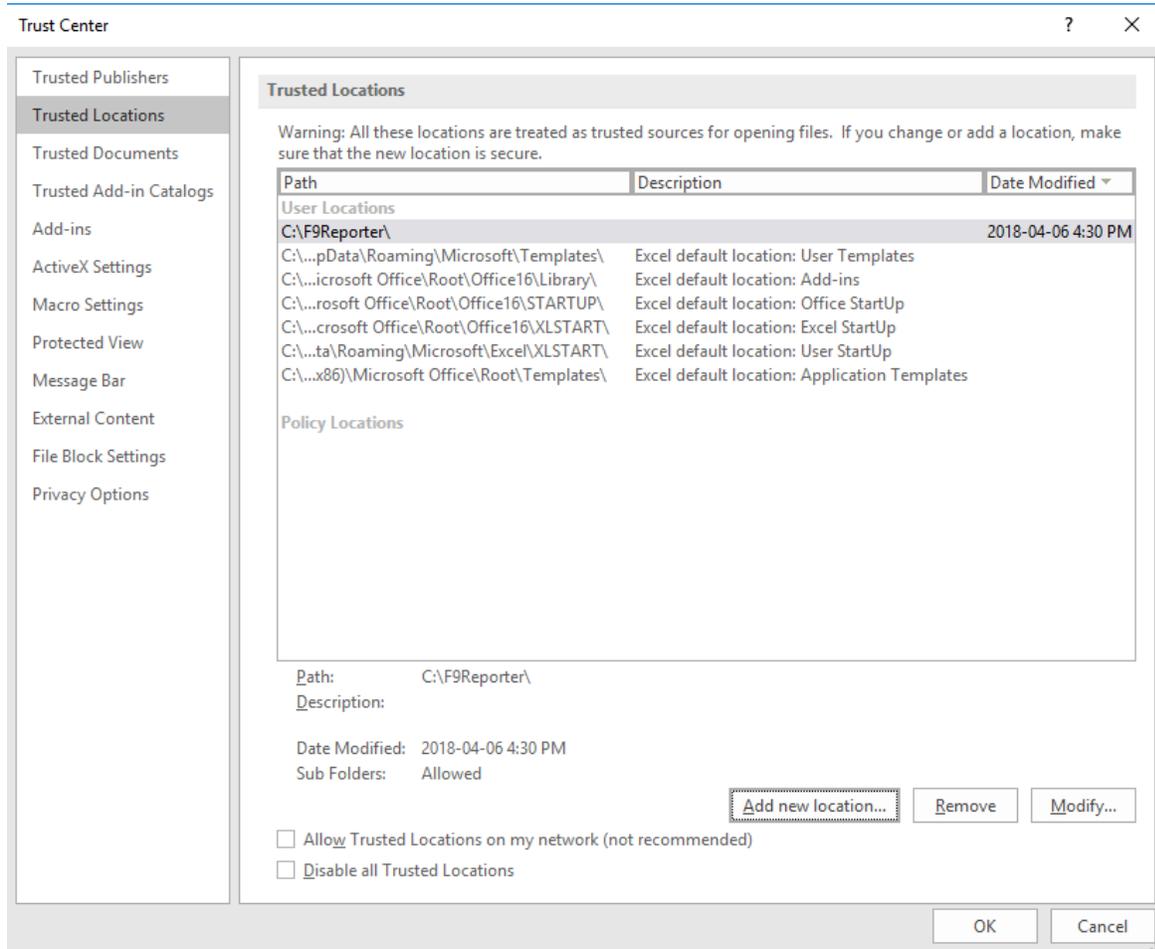
Please check the following to address permissions.

Trusted Locations:

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

Steps:

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

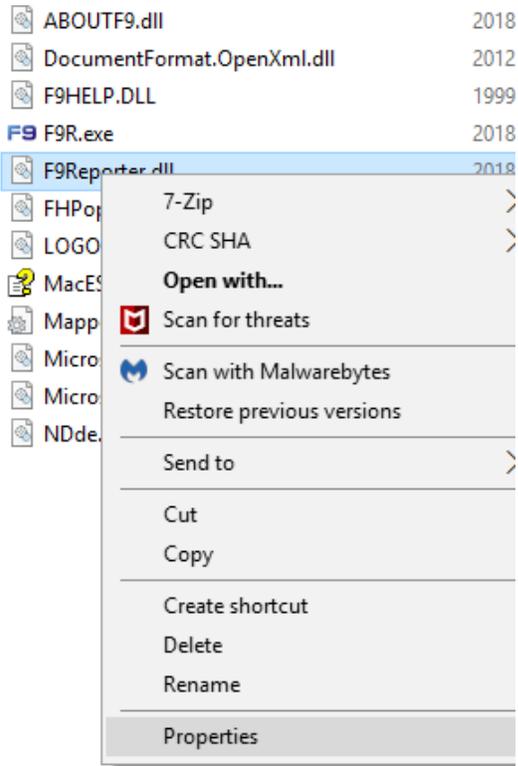


F9 Digital Signature:

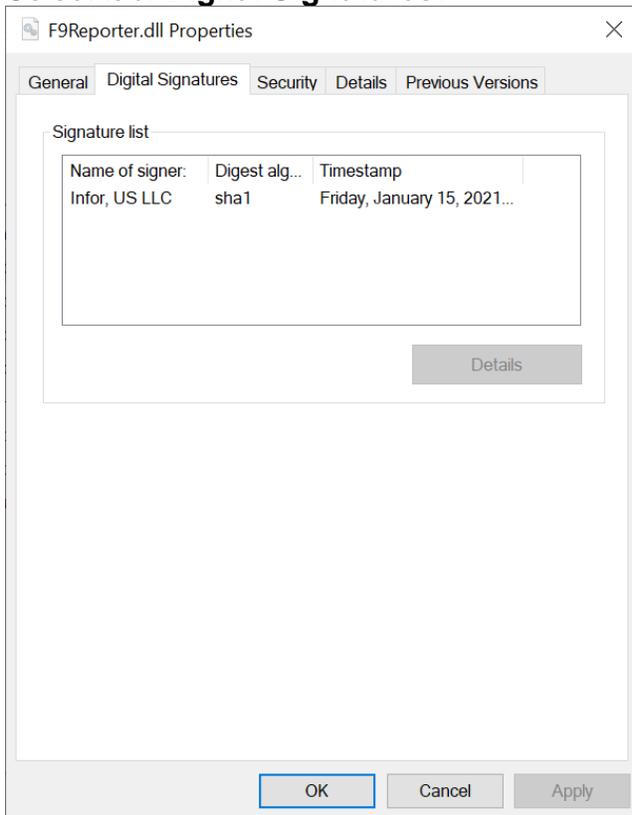
Install the F9 digital signature to then use the Excel Trusted Publisher settings.

Steps:

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



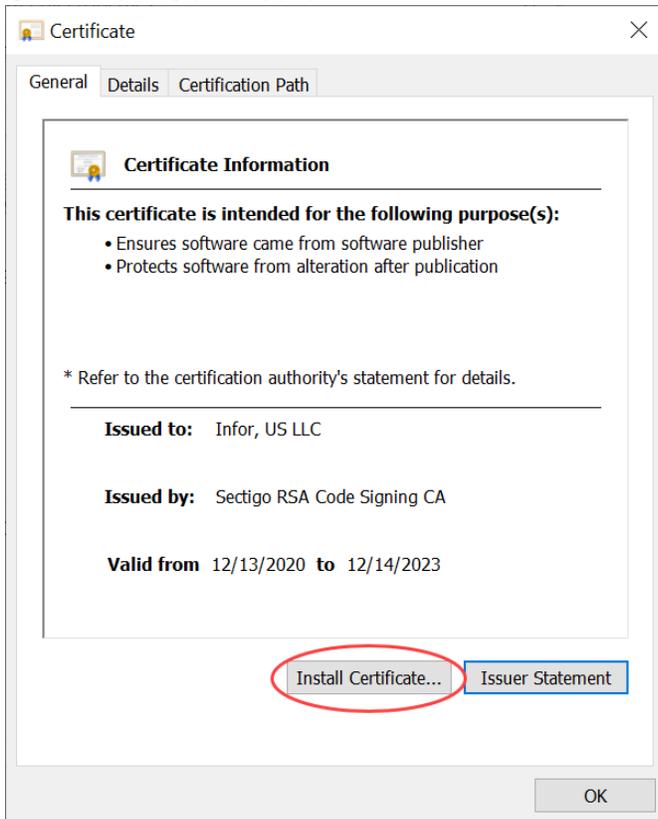
5. Select tab: **Digital Signatures:**



6. Click **Details**

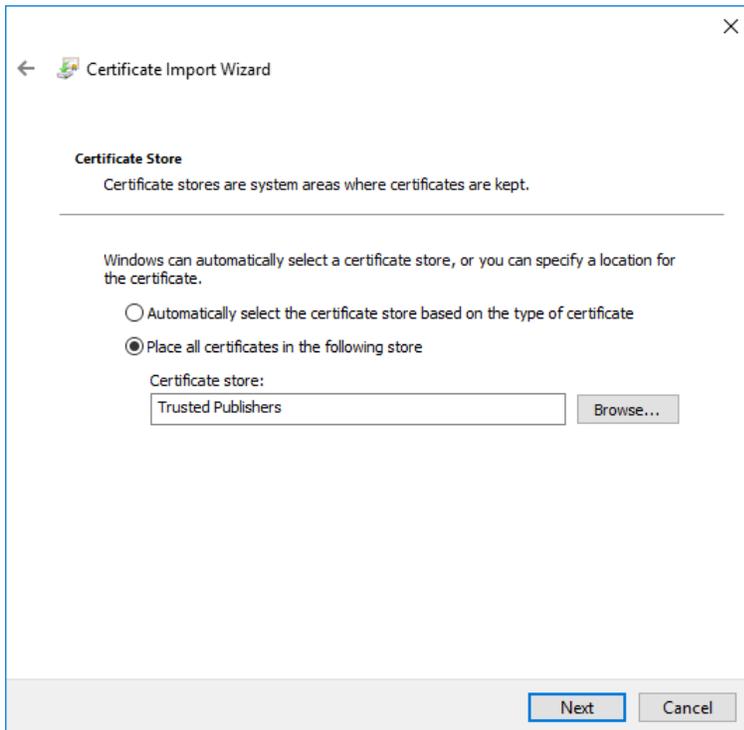


7. Click **View Certificate**



8. Click **Install Certificate...**

9. Certificate Import Wizard: **Local Machine**

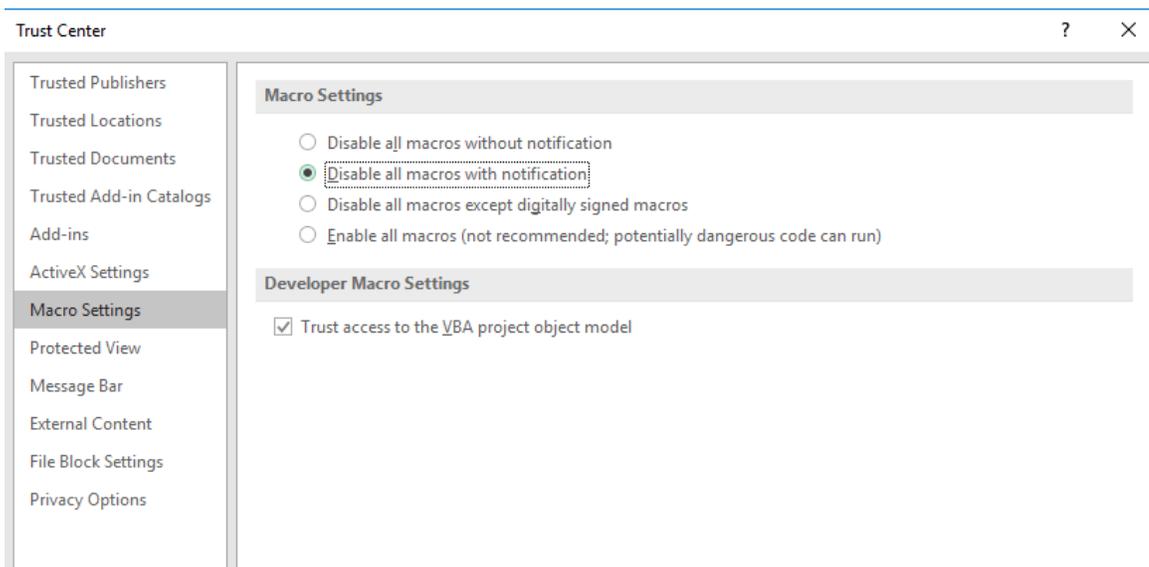


- 10. Place all certificates: **Trusted Publishers**
- 11. Click **Finish**

Macro Settings:

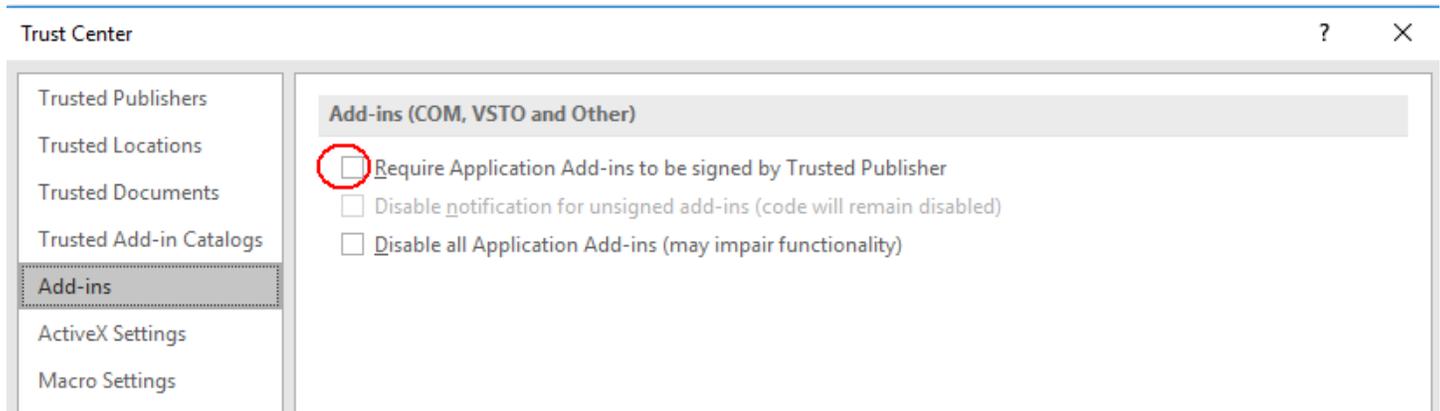
It is not recommended to change **Macro Settings** to Enable All Macros.

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



Attach F9 as a Trusted Publisher:

Trusted Center:

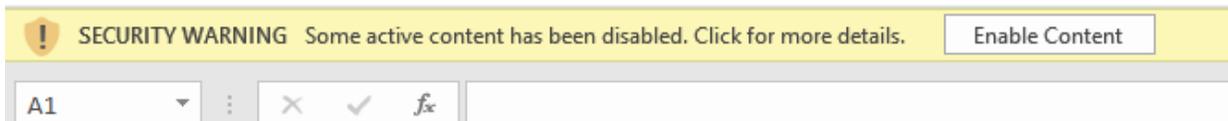


Note:

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

Steps:

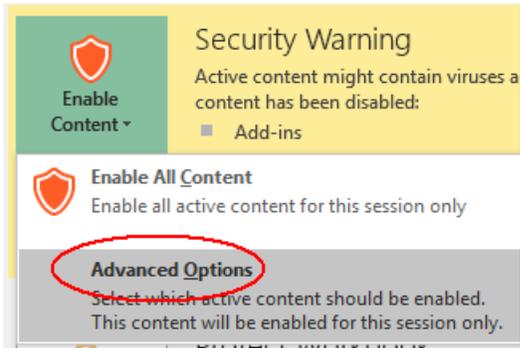
1. Click **Require Application Add-Ins to be signed by Trusted Publishers**.
2. **Close Excel**
3. **Run Excel** again and you should see F9 attach.
4. A security **warning** will display:



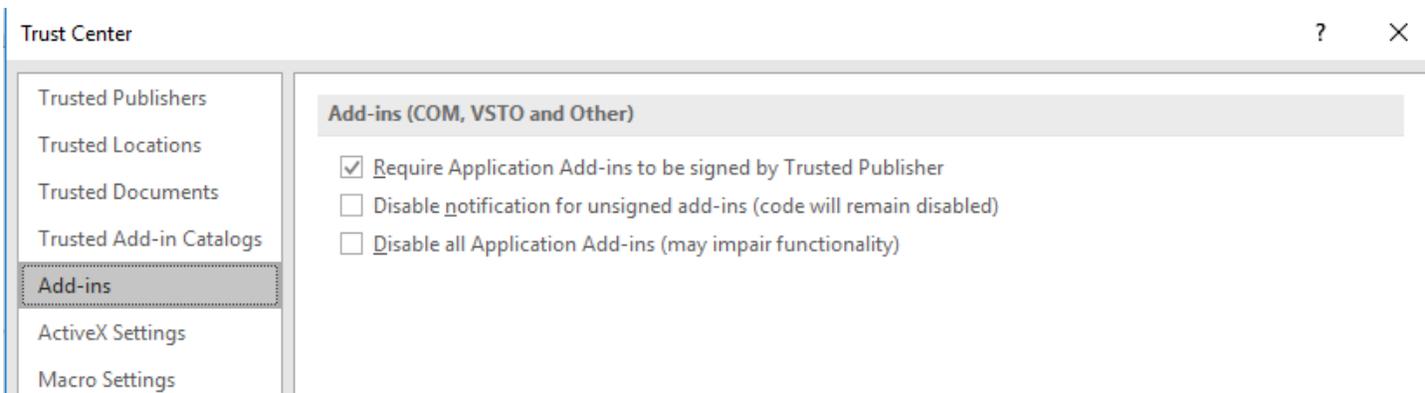
5. Select **“Click for more details”**.



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



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**:



11. Close **Excel**.

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