

FINPACK[®]

Installation & Getting Started



Center for Farm
Financial Management



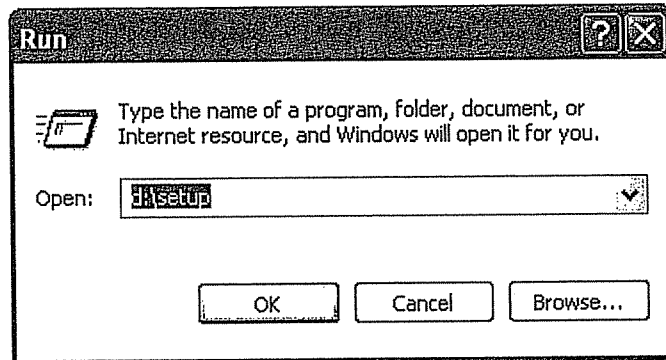
UNIVERSITY OF MINNESOTA

The purpose of this guide is to help you install and begin using FINPACK. **For additional assistance, click the *Getting Started* option from the FINPACK Help menu, or call Technical Support at 800-234-1111.**

Installation

To install FINPACK, insert the CD into the drive and the setup program will automatically start.

To manually begin the installation program, place the CD in the appropriate drive. Press the *Start* button and click *Run*. Enter the drive in which you placed the CD and type setup as shown below.



Installation Options

1. Select United States / Canada or International. The international installation provides metric units of measure.

2. The installation program allows you to select one of the following setup options:

Install FINPACK on my Computer

This is the standard setup option for most professional and personal version installations.

Install FINPACK on a Network

Select this to install FINPACK onto a network server. This option is for network system administrators to set up FINPACK for a multi-user environment.

Install Trial Version

This option will install a 30-day trial version to allow you to test-drive FINPACK.

Browse This CD

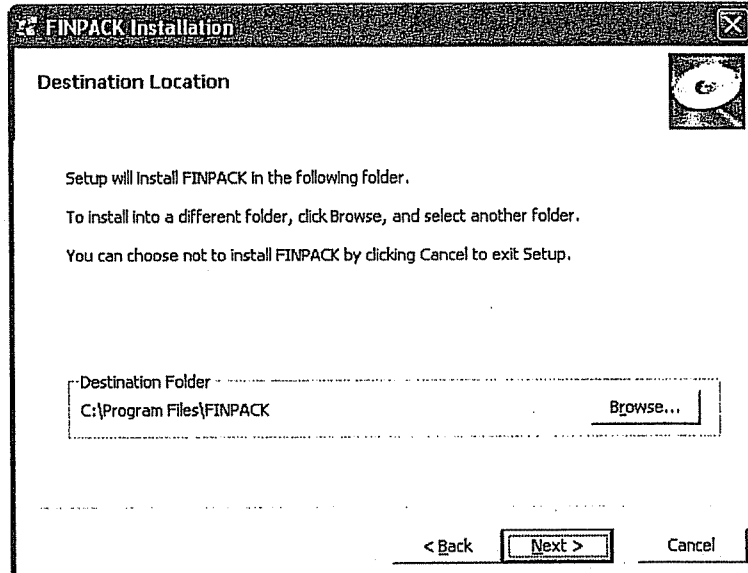
View the contents of the FINPACK CD.

Install FINPACK on my Computer

Click the *Install FINPACK on my Computer* option. You will be asked to enter a serial number. Your serial number is displayed on the back of the CD sleeve.

As you follow the installation instructions, you will be asked to enter your name, business, and state/province. The name and business entered here will be displayed on printed output. The name is required. A business name is optional, but recommended if you are installing the Professional or Lender Version. You must select the state or province in which you will be using FINPACK.

Select the folder where FINPACK will be installed. The default folder is C:\Program Files\FINPACK. To install FINPACK into a different folder, click *Browse*.



FINPACK Network Setup

FINPACK has a setup procedure designed specifically for installation on a network. The network install requires that you have supervisor or administrative rights on your network. The installation is a two step process.

Step 1 - Install FINPACK on the File Server

The setup will ask you for a serial number located on the back of the CD sleeve. Next, the setup will ask for your state or province. The selection of state or province controls the setup of crops, income and expenses. Finally, setup will ask you for the location on your network where FINPACK will be installed. The default folder is FINPACK. Click Browse to choose the appropriate network drive. At this time you may change the folder name if you wish. The users will need read/write/create/modify permissions to the network directory in which FINPACK is installed.

Step 2 - Setup FINPACK on the Workstations

At each workstation, run NETSETUP in the FINPACK directory on the network. This installs FINPACK Workstation which sets up icons and makes the necessary settings to establish the workstation as a FINPACK "Client." Workstation setup will ask you to enter your name and business name. Business name is optional but should be included if you are installing FINPACK Professional or FINPACK for Lenders. FINPACK workstation does not put any files in Windows directories.

Registering FINPACK

Upon completion of the installation, you will need to register FINPACK within a 14-day period. This can be done over the Internet (recommended), via an email request or by phone.

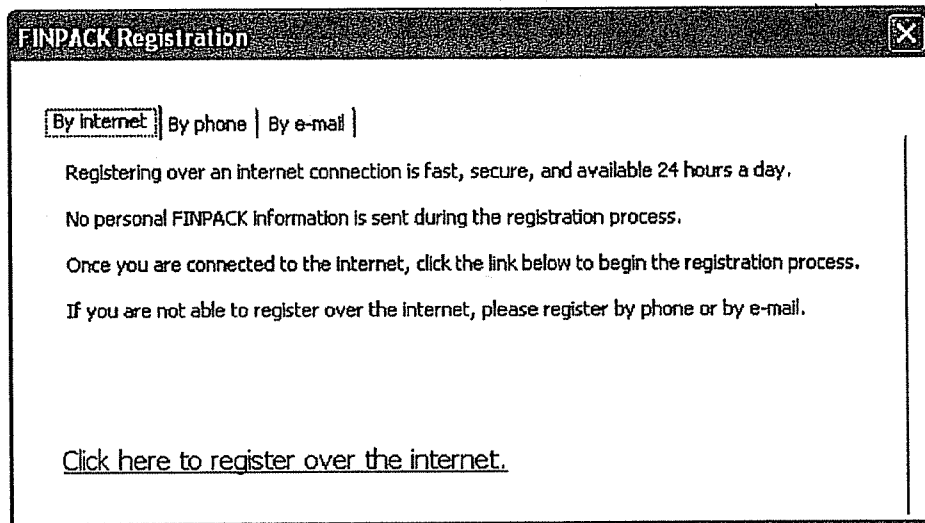
Until you have registered FINPACK, you will be reminded each time you start the program until the end of the registration grace period of 14 days. If you do not register within this time frame, data file access will be limited to "read-only" mode.

Note: If you have multiple licenses of FINPACK, you will need to consider how the registration you are attempting will use those licenses. If you choose to register via the internet, which is recommended, your license holdings will be displayed and you will be prompted to indicate if the current registration is using all or less than all of the available licenses. The ability to choose how you will use your license count is designed to provide flexibility as you configure the use of FINPACK within your operation, business or institution.

If you choose to register over the **Internet**, you will be connected to a secure server to transfer your serial number and a unique machine key to CFFM. A release code is passed back to your computer, automatically registering FINPACK. This process normally takes just a few seconds to complete.

To register FINPACK via **email** click the email button. Your serial number and machine key will be inserted automatically. Next, click the button to copy the information to a clipboard. Finally, paste the information into a new email composition and send it to finpack@umn.edu. A support representative will respond with the release code.

If you opt to register over the telephone, call the toll-free number provided. A support representative will ask for your serial number and machine key, then provide you with the release code. Simply enter the release code in the designated box and the registration process is complete.



Getting Started

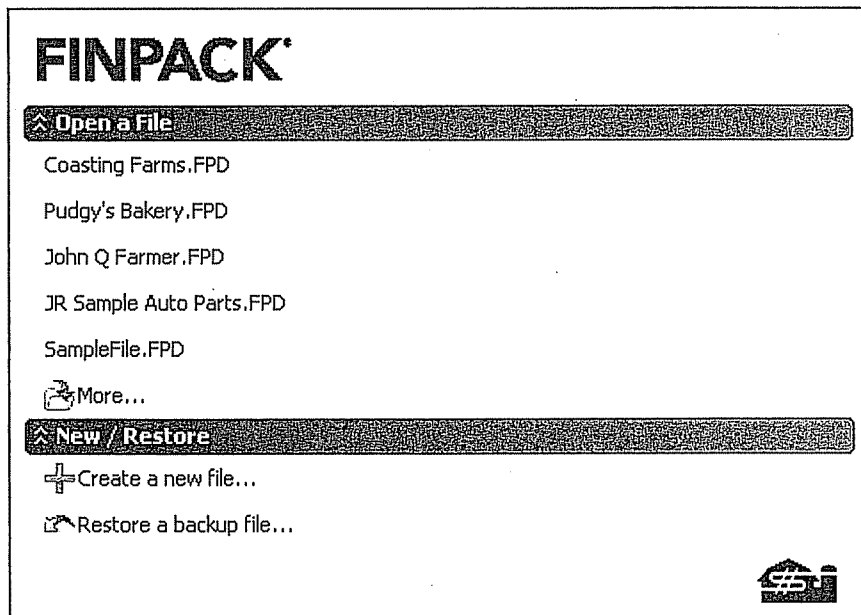
To start FINPACK, click the icon on your Windows desktop. If you did not choose to place the icon on the desktop, click *Start*, go to Programs, and then select FINPACK from the menu.



Converting old Data files (previous versions)

The previous version of FINPACK used data files with an FPX extension (Sample.FPX). In this version there is a new format and the new data files will have an extension of FPD (Sample.FPD). If you need to convert a data file from a previous version of FINPACK, you can start the conversion process by selecting *File + Convert* from the FINPACK menu. For more information there is a File Conversion document on your FINPACK CD. Click Browse this CD from the FINPACK install menu. PLEASE READ THIS DOCUMENT CAREFULLY.

Create or Open File

When you first open FINPACK, a box appears (see figure below) that allows you quick and easy access to existing FINPACK data files plus the ability to create new files and restore backups.

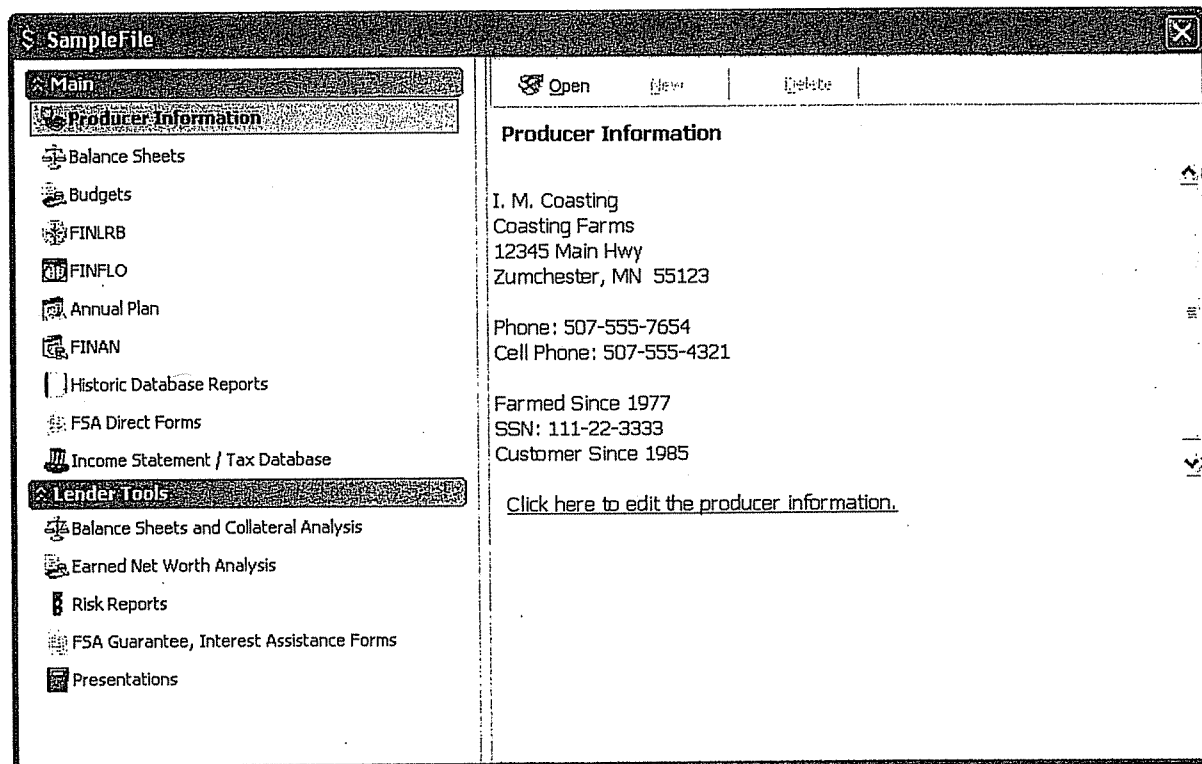


Recently worked on files are listed first and can be opened by clicking them. To access your default data folder where you can select from your full list of files, click  More... . To create a new file, click  Create a new file...

For other file options, click *File* from the FINPACK menu.

FINPACK Components

The FINPACK file navigator box, as shown below for an Ag file, is similar to the Windows Explorer file browser. FINPACK components are on the left, and contents of the selected component are in the box to the right.



When a FINPACK component is selected, existing data sets for that component will be displayed in the contents box. You can either press *New* or highlight an existing balance sheet, plan, or analysis and press *Open* from the file navigator box tool-bar.

You can also use the right click button on the mouse to perform many of your tasks. For example, if you use the right click button to click a Balance Sheet, you will have a number of options including *Open*, *New* (to create a blank balance sheet or copy the selected balance sheet), or *Delete* (to remove the selected balance sheet). The right click button can also be used to rename a plan or analysis.

Input/Output Guides

Each FINPACK component has Input and Output Guides displayed on the left side of the screen that list the available sections. Clicking an item on the Guides will move you immediately to that section. These Guides can be turned on and off by selecting View from the menu-bar.

To move a single screen, press the *Previous* or *Next* button at the bottom of the screen.

Help

By now you may need Help. The FINPACK User's Manual is fully incorporated in the Help system. Click *Help* on the menu to access the Help contents or index. Here is where you can also access specific help on Getting Started using FINPACK. You can also ask specific questions on frequently performed tasks within FINPACK by selecting *How Do I* from the Help menu.

To view specific Help from anywhere within FINPACK press F1.

The Tool Bar

The FINPACK tool bar provides quick access to the most commonly used features.



Loan Calculator: FINPACK's loan calculator provides both amortized and fixed principal payment calculators. You can view or print a loan's payment schedule and paste the repayment schedule into your balance sheet and plans.



Calculator: A calculator, similar to a hand held calculator, is available on the tool bar.



Preview: Click *Preview* and you will be able to quickly view the screen output. When viewing output, the button will change to an input button. Click it to return to data input.



Detail: Detail allows a specific description or an itemized list behind a general entry item. Press the *Detail* button or press F3 to access detail for individual entries.



Notes: In data entry, notes allow you to annotate your input with special information or explanations. Notes always appear at the end of your printed output.



Pattern: Used in FINFLO for added convenience and speed when entering monthly distributions for the timing of expenses.



Toggle: Used in FINFLO and FINAN to "toggle" between different data entry modes such as *distribution factors* versus *dollars* in FINFLO related operating expenses, or *allocation percentages* versus *dollars* in FINAN livestock enterprise analyses allocated expenses.

About The FINPACK CD

The FINPACK CD contains a number of useful items that are not part of the installation process. By using *the Browse This CD* option on the FINPACK install menu, or a file browser, you can access the CD's full contents which includes:

FORMS Folder - Print blank FINPACK forms using Acrobat Reader.

DRIVERS Folder - This folder contains items that assist CFFM technical support staff in solving conflicts between FINPACK and related software, and older operating systems.