

Installation Guide

Perfion Version 2.3

Perfion

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Introduction

In this guide you will find a step by step installation.

First part gives you an overview over the full installation and setup.

Second part gives you the information needed to have Perfion up and running - the foundation:

- Pre-requisites
- Perfion Database installation
- Perfion Application installation
- Perfion Database connection setup
- License management
- User administration

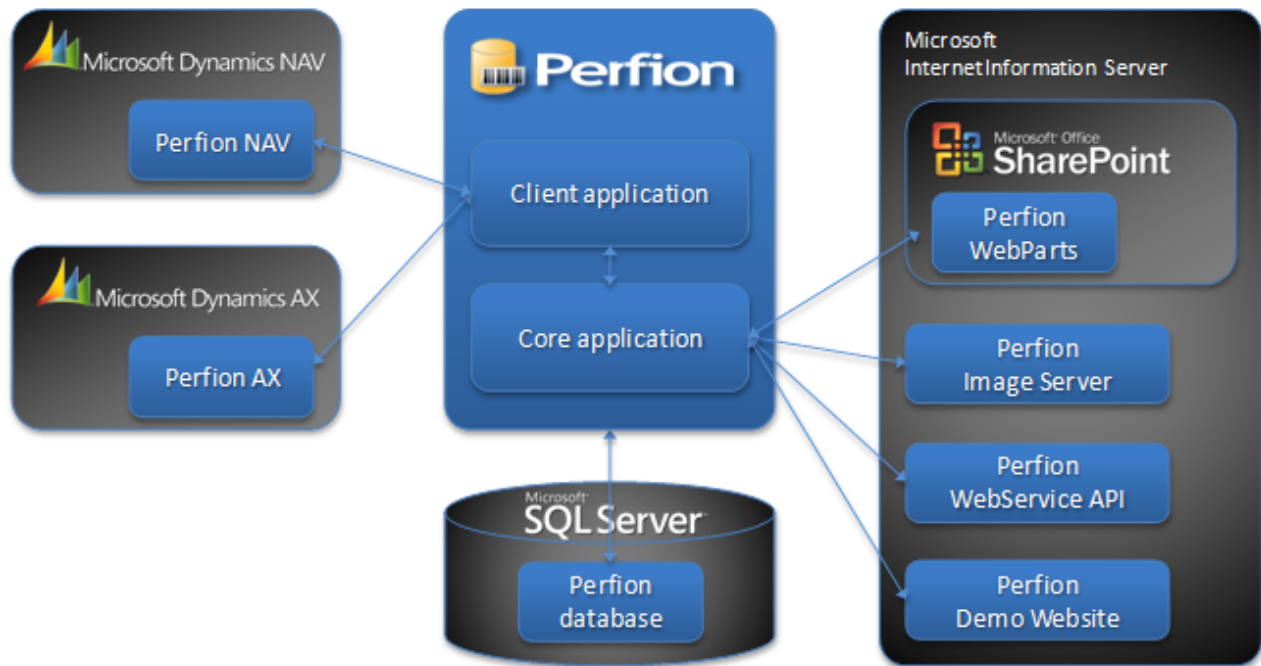
Related documentation:

Perfion Administration Guide

Perfion Configuration Guide

Overview

When you have completed a full installation and setup, you will have a Perfion setup as depicted below:



Installation package

Not all parts are necessary to install and setup. For that reason the installation package to Perfion contains foundation and Add-on installations:

1. Foundation:
 - Perfion database installation
 - Perfion application installation (Core and Client application)
2. Add-on

Perfion foundation

Follow the steps described below for installation and setup of Perfion foundation:

1. Ensure all pre-requisites are done. See "Pre-requisites" on page 4
2. Run the Perfion database installation. During installation select demo data if this is to be included in the database. See "Perfion database installation" on page 5
3. Run the Perfion application installation. See "Perfion application installation" on page 8
4. Start Perfion and complete the database connection setup. See "Perfion database connection setup" on page 10
5. Load the license file. When you open Perfion you will be prompted for a license file. See "License Management" on page 14
6. Last step is to create a user. See "User administration" on page 16

Pre-requisites

The following pre-requisites are required for you to install the foundation - Perfion database and Perfion application

	Installation	Pre-requisites
Foundation	Perfion database	SQL Server 2005
Foundation	Perfion application	Microsoft .Net 2.0 Framework

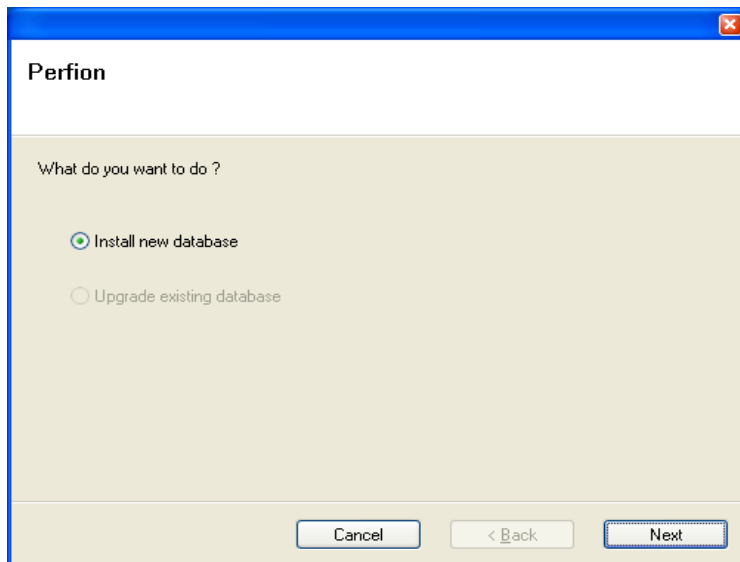
Perfion database installation

The Perfion database requires a running SQL Server before you can install it.

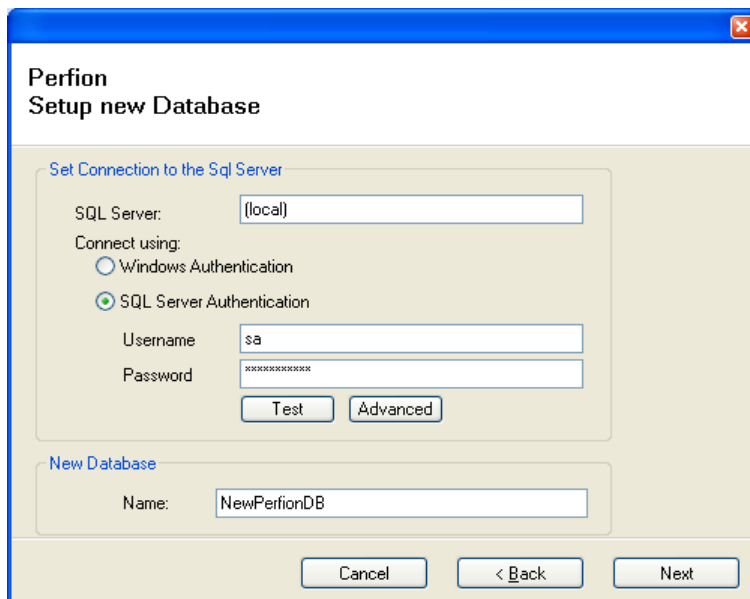
Steps to install Perfion database.

1. Make sure the installation files are copied to the same server as the SQL server: The database installation contains 2 files: Perfion.DBInstaller x.x.exe and Perfion.dll
2. Run the setup package named Perfion.DBInstaller x.x.exe. The following install wizard will appear

3. Select Install new database and click **Next**



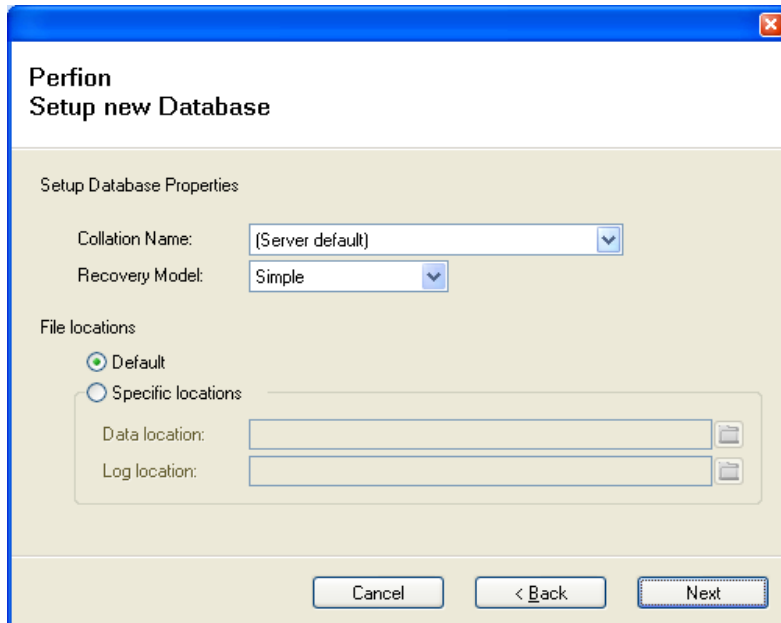
The following dialog appears :



4. Name the Microsoft SQL Server instance on which you want to install the new Perfion database. If required you may enter user name and password for the SQL Server.

Best Practice: Connect using SQL Server Authentication

5. Enter the name you want to use for the new Perfion database, and click **Next**. The following dialog appears:

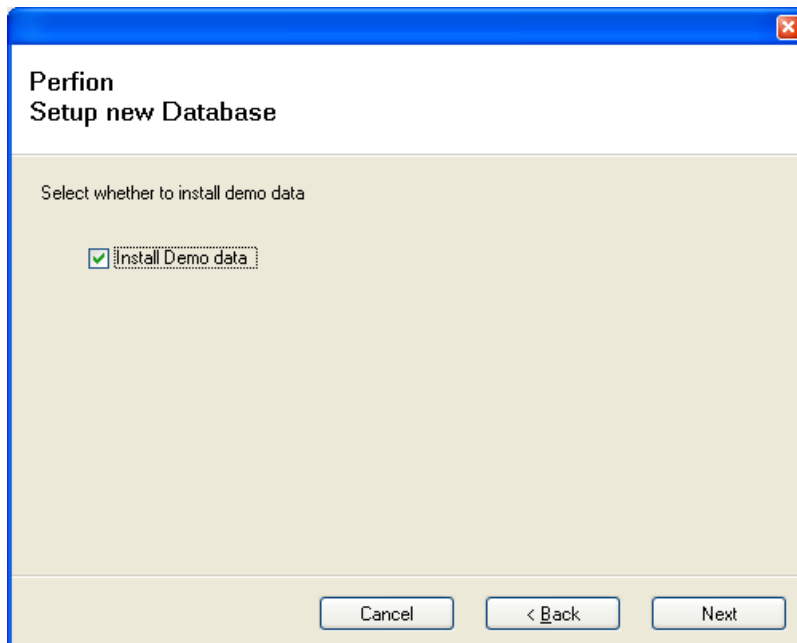


The dialog box is titled "Perfion Setup new Database". It contains the following fields and options:

- Setup Database Properties:**
 - Collation Name:** A dropdown menu with "(Server default)" selected.
 - Recovery Model:** A dropdown menu with "Simple" selected.
- File locations:**
 - Default:** A radio button that is selected.
 - Specific locations:** A radio button that is unselected. Below it are two text boxes:
 - Data location:** An empty text box with a folder icon to its right.
 - Log location:** An empty text box with a folder icon to its right.

At the bottom of the dialog are three buttons: "Cancel", "< Back", and "Next".

6. On this dialog you can specify additional details about, the recovery model to use, the location of the SQL Server data and the log files for the database. Please refer to the SQL Server Books Online documentation for further information about this topic. Click **Next**.



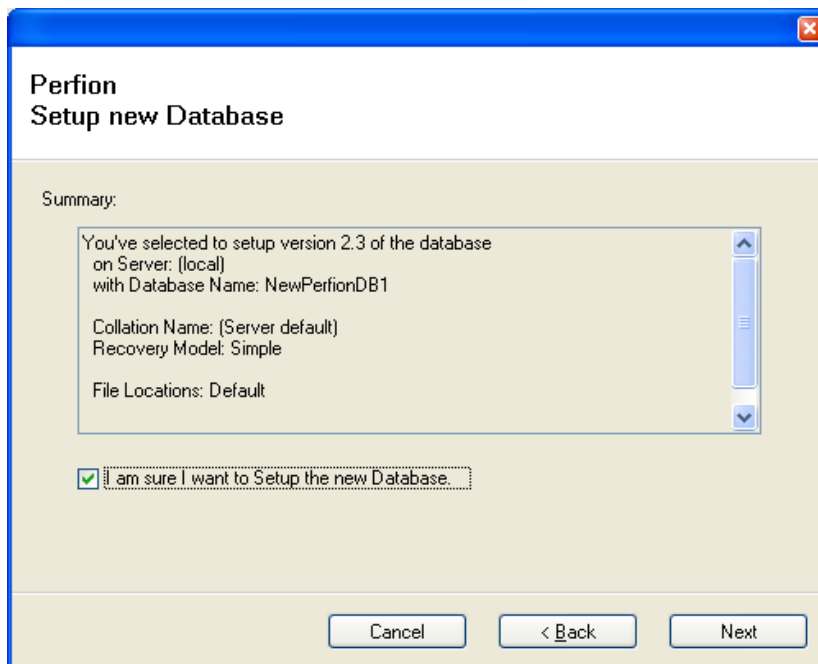
The dialog box is titled "Perfion Setup new Database". It contains the following field and option:

- Select whether to install demo data:**
 - Install Demo data:** A checkbox that is checked.

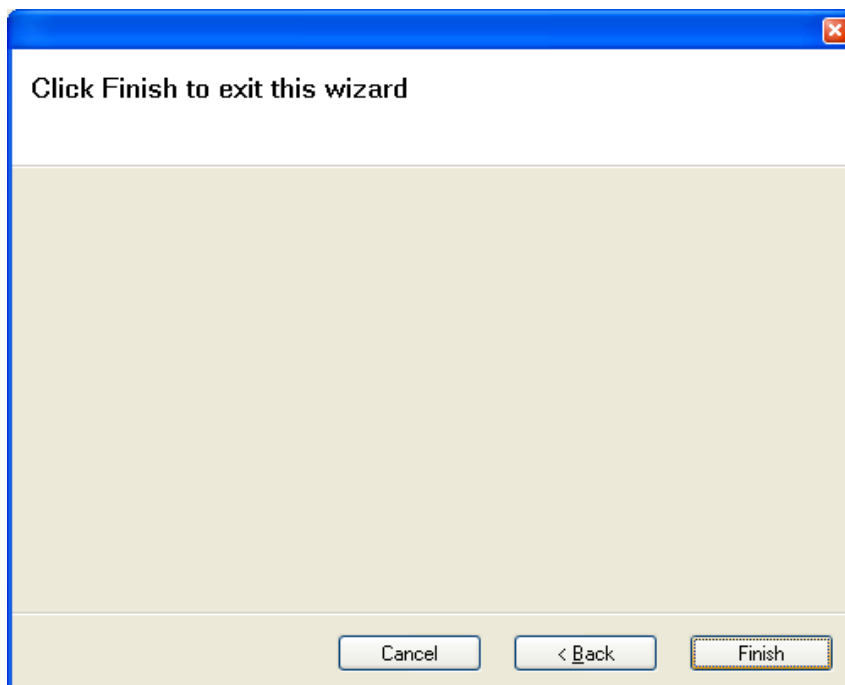
At the bottom of the dialog are three buttons: "Cancel", "< Back", and "Next".

7. If you want to install demo data, check **Install Demo data**.

8. Click **Next** and the following dialog appears with a summary of the chosen installation options.



9. If the chosen installation options are correct check **I am sure I want to Setup the new Database** and click **Next** on this dialog to perform the actual installation.

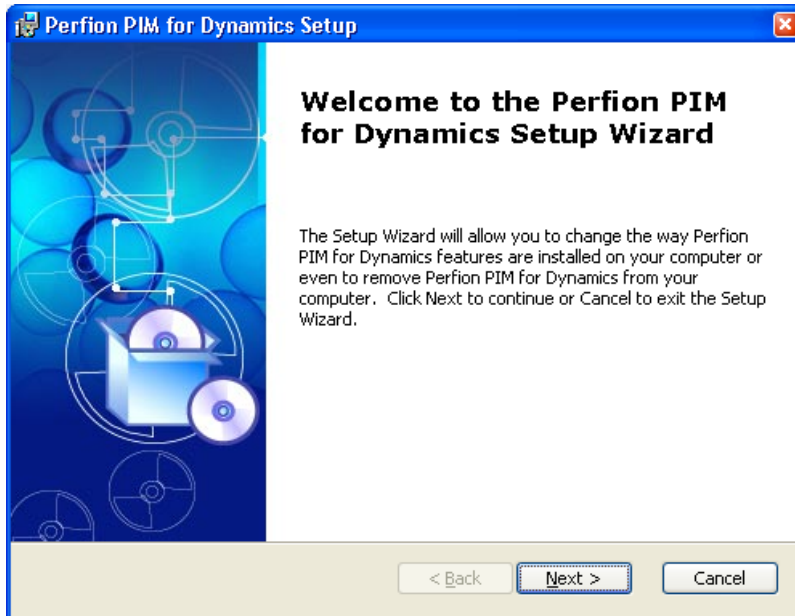


You have successfully installed the Perfion Database, click **Finish**.

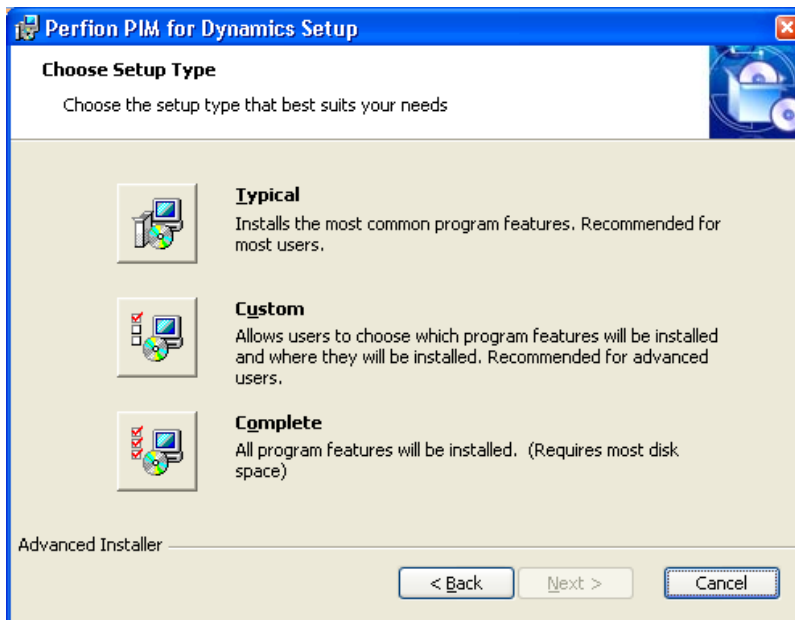
Perfion application installation

Steps to install the Perfion application.

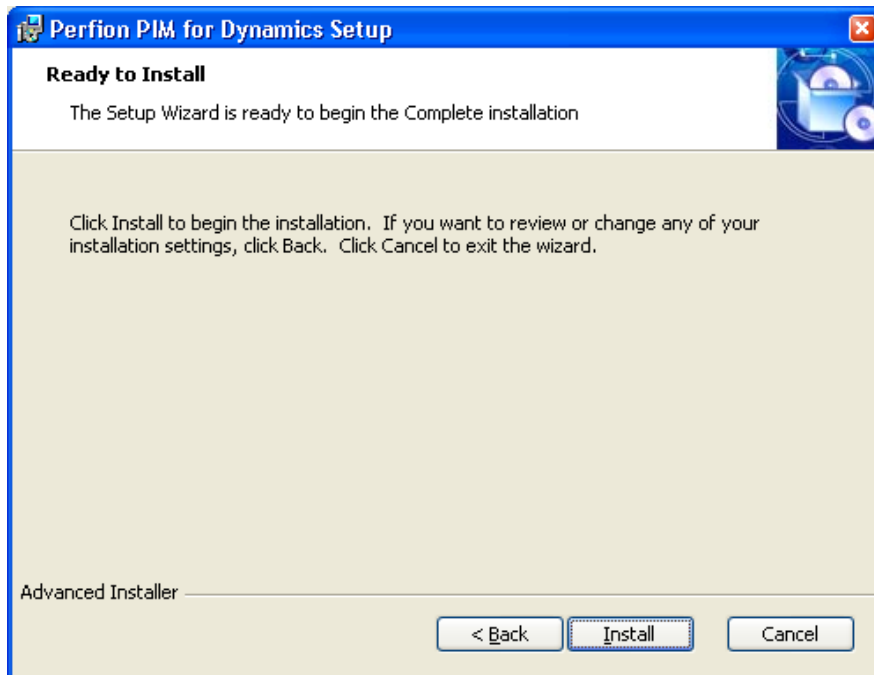
1. Run the setup package named Perfionx.x.xxxx.msi. The following install wizard appears:



2. Click **Next**.

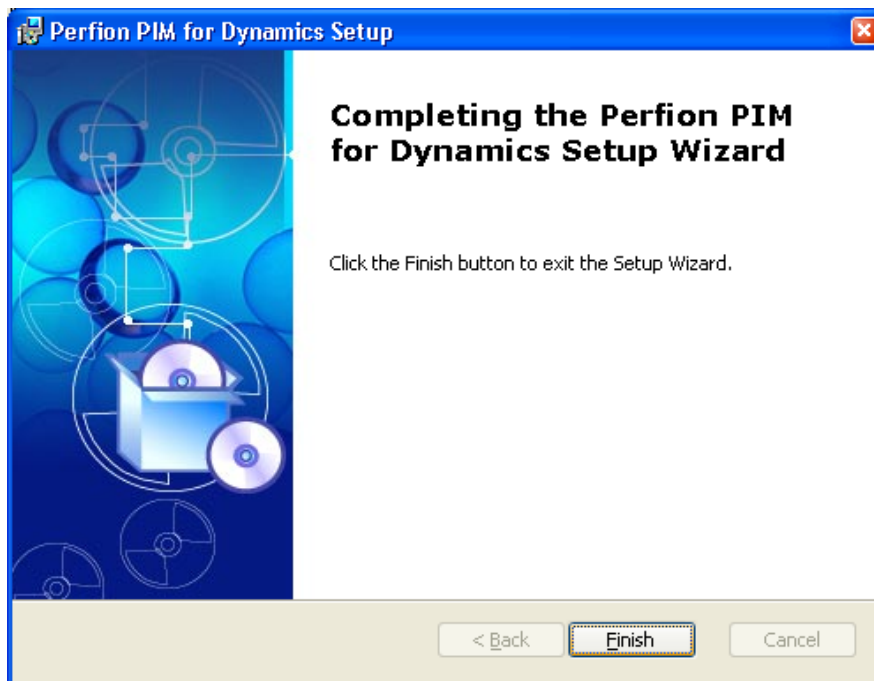


3. Select **Complete** and the Ready to Install dialog opens:



Perfion is now ready to be installed.

4. Click **Install** to begin the installation



The installation is complete, you have successfully installed Perfion.

5. Click **Finish**.

Perfion database connection setup

Connection profiles

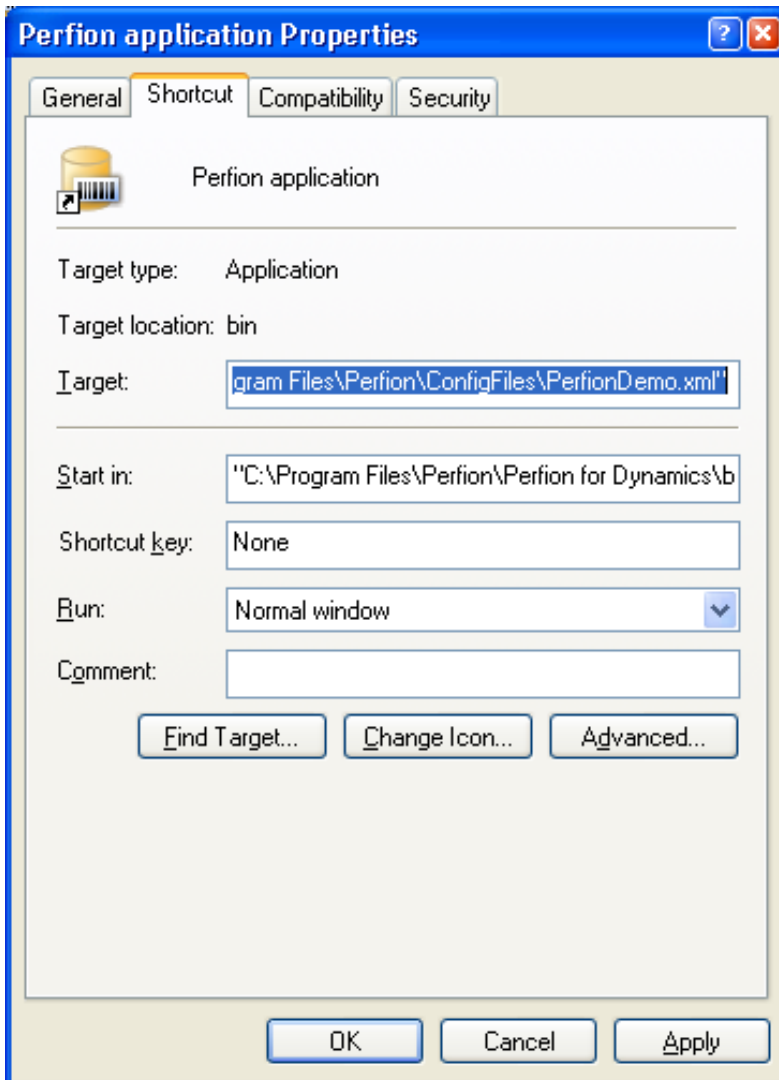
The Perfion application can be configured with a Client Configuration file. A Client Configuration file holds information about which database the application should connect to. This information is referred to as a connection profile. Perfion can easily change between databases by using different Client Configuration files.

You specify where to store this Client Configuration file in the properties dialog of a shortcut to the Perfion application.

Note: The Perfion application is per default installed in:
C:\Program Files\Perfion\Perfion for Dynamics\Bin\Perfion.exe.

1. Right click on the Perfion application (Perfion.exe), choose Create Shortcut
2. Right click on the Shortcut to the Perfion application, choose Properties.

The following dialog appears:



3. Add an argument after the application path as shown above " -ClientConfig=[path to configuration file]\[name of Client Configuration file]".

Note: There must be a space between the application path and the argument.

EXAMPLE

"C:\Program Files\Perfion\Perfion for Dynamics\bin\Perfion.exe" -Client-Config="C:\Program Files\Perfion\ConfigFiles\PerfionDemo.xml"

If you do not have a Client Configuration file, simply write a filename .xml. The file will automatically be created during your connection configuration. See "Connection configuration" on page 12

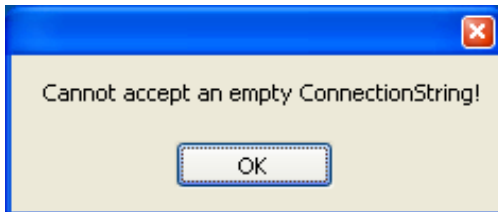
4. Click **OK**.

Connection configuration

When you start up Perfion it will look for a Client Configuration file with a connection profile. If you have specified an argument in the shortcut properties Perfion will use the file specified in the argument, otherwise Perfion will use the ClientConfig.xml in the same directory as the Perfion application.

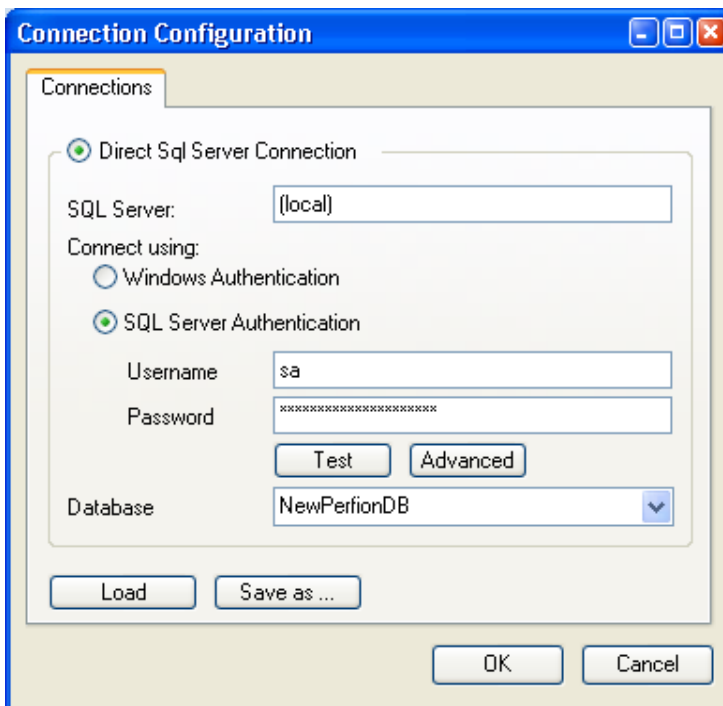
1. Run Perfion by clicking on the shortcut you have just created.

If no Client Configuration file exists you will be prompted to tell Perfion how to connect to a Perfion database:



2. Click **OK**.

The following dialog will appear to setup the connection:



3. If you do **not** have a Client Configuration file and wants to create a new one:
 - a. Name the Microsoft SQL Server instance.
 - b. If required you may enter user name and password for the SQL Server.

Best Practice: Connect using SQL Server Authentication

- c. Click **Test** to check that a successful connection can be made to the database.
- d. Select your Perfion database.
- e. Click **OK**, a Client Configuration file is now created.

If you started Perfion via the shortcut to the Perfion application, the Client Configuration file is created in the directory as specified in the -ClientConfig argument. If you started the Perfion.exe directly the Client Configuration file is created in the same directory as the application.

4. If you already have a Client Configuration file you want to save:
 - a. Click **Load**, an open file dialog appears.
 - b. Select your Client Configuration file and click **Open**. Your Connection Configuration dialog is updated with the connection profile.
 - c. Click **Cancel** if you only want to view the connection profile or Click **OK** if you want to save.

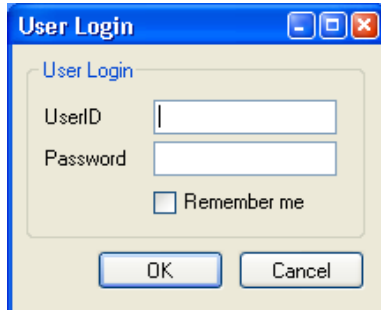
If you clicked OK, the Client Configuration file is now saved with the updated connection profile.

If you started Perfion from the shortcut to the Perfion application, the Client Configuration file is saved in the directory as specified in the -ClientConfig argument. If you started the Perfion.exe directly the Client Configuration file is saved in the same directory as the application.

5. When you have saved your connection configuration, the user login dialog appears and you are ready to load your Licence file. For more information see "License Management" on page 14.

License Management

The first time you run Perfion and after you have saved the connection configuration the user login dialog appears:

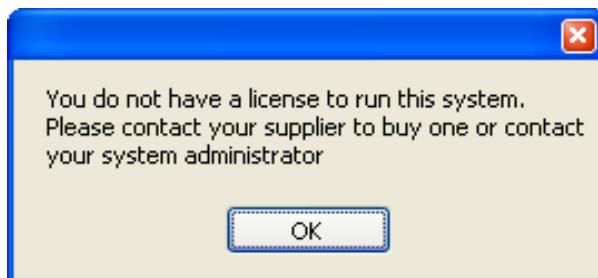


1. Enter "Admin" in the UserID field.

The user "Admin" is pre-configured with administration privileges in Perfion.

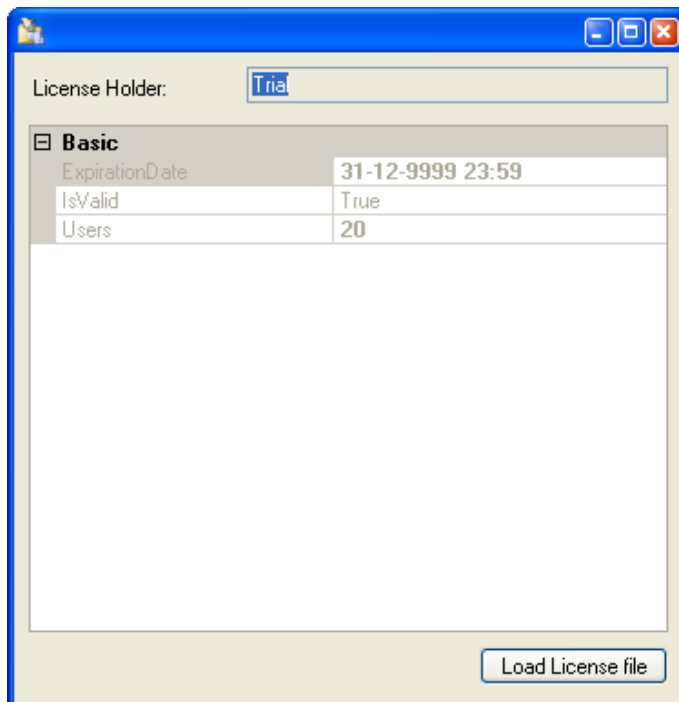
2. Click **OK**.

The following window appears:



3. Click **OK**.

The License dialog opens:



A License file is an electronically signed document that contains a number of license codes with information about which features are available, how many users are allowed etc.

A license must be loaded into the Perfion database before anyone can use the Perfion application.

1. Click **Load License file** and select the License file you have received.
2. Click **Open** to load and display the License details on the dialog.
3. Close the License dialog.
The Perfion application opens.

User administration

When the Perfion database is accessed for the very first time only the user named 'Admin' is defined, with Administrator privileges, and with no password.

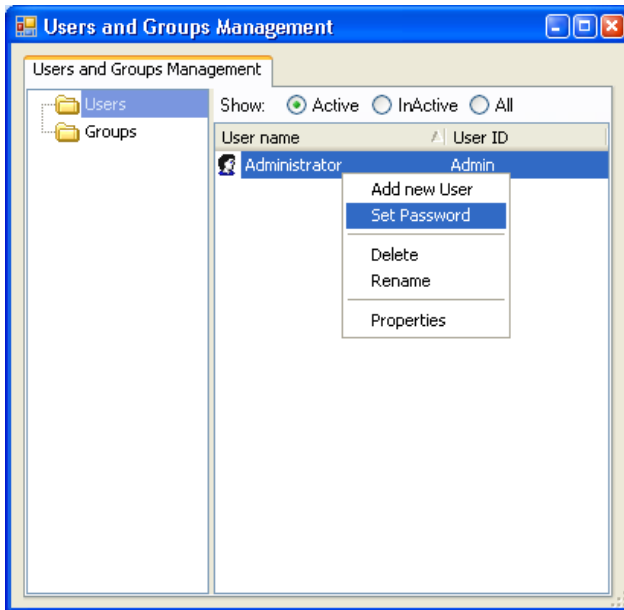
This means that you need to use this User name to initially access the Perfion database.

The first thing you should do is to set a password for the Admin user.

Next step for you is to create users. If you will be using Perfion integrated with Axapta and Navision, the username in Perfion and Axapta/Navision must be identical.

Set Password

1. Open the Users and Groups Management form, **Administration > Users & Groups Management**. You have to have the administrator privileges to open it.



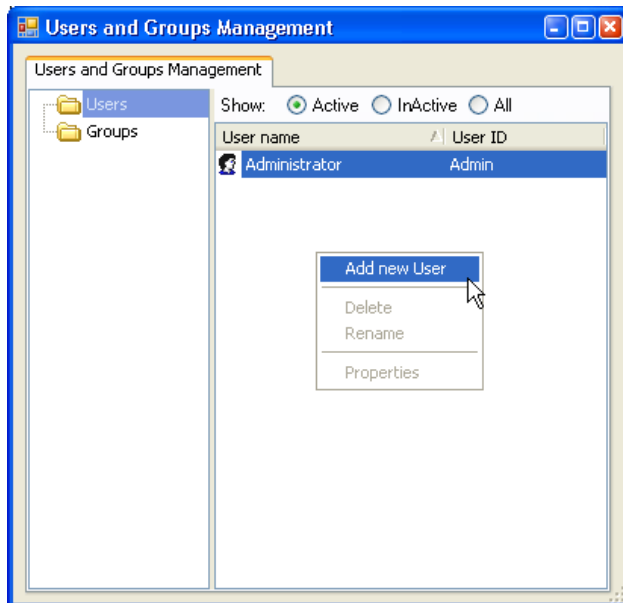
2. Right click on the Administrator.
3. Select **Set Password**. The following dialog opens:



4. Enter **new Password**.
5. **Confirm** your new password.
6. Let the last Confirm Password be empty, as the user Admin is created with no password.
7. Click **OK**.

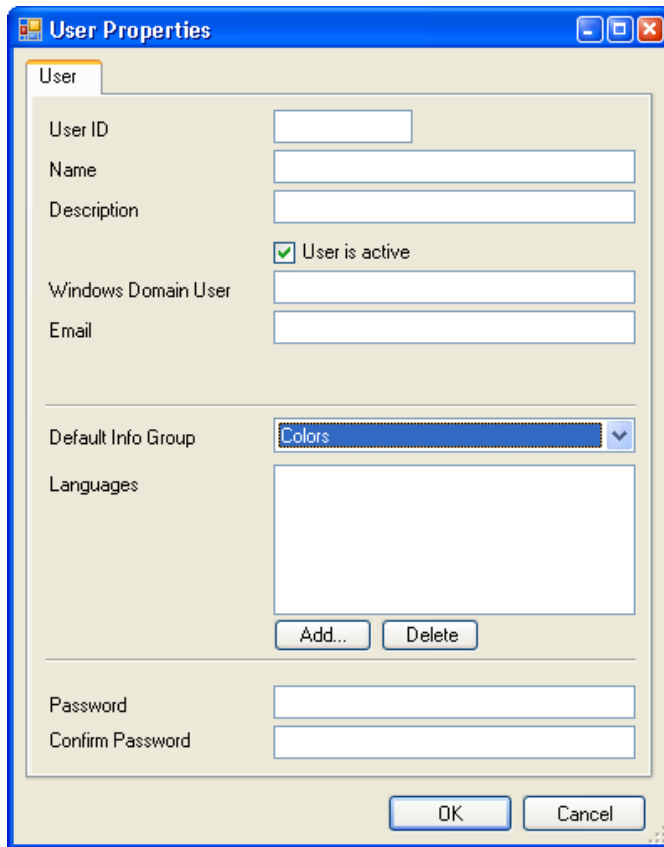
Create User

1. Open the Users and Group Management form **Administration > Users and Group Management**.



In this form it is possible to add new or edit existing users and groups, and assign users memberships of different groups. It is also possible to rename or delete users from the list.

2. Right click in the list of users.
3. Select **Add new User**. The following form appears:

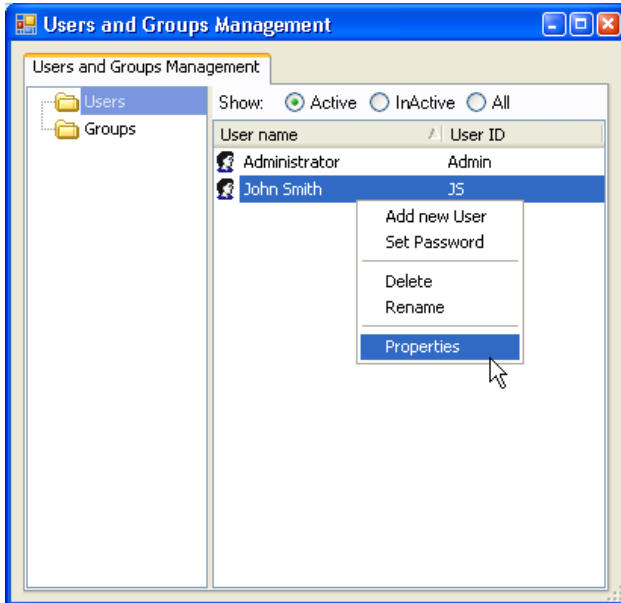
The image shows a Windows-style dialog box titled "User Properties". It has a tab labeled "User". The dialog contains several input fields: "User ID", "Name", "Description", "User is active" (a checked checkbox), "Windows Domain User", "Email", "Default Info Group" (a dropdown menu showing "Colors"), "Languages" (a list box), "Add..." and "Delete" buttons, "Password", and "Confirm Password". At the bottom are "OK" and "Cancel" buttons.

1. Enter **User ID** (Use the same ID as in Axapta/Navision).
2. Enter **Name** and (optional) description.
3. Enter a **Windows Domain User** ID.
4. In the **Default Info Group**, you select which information group to be shown when you open/edits a product (Edit item)
5. **Languages**.
 1. Click **Add...** A list with languages appears.
 2. To select a language mark the language and press return or double click on the language. To select another language. Click **Add...** again.
 3. **Delete**. Deletes the selected language
6. Enter a **Password**: This is not a mandatory step.
7. **Confirm** your password, if password entered.
8. Click **OK**.

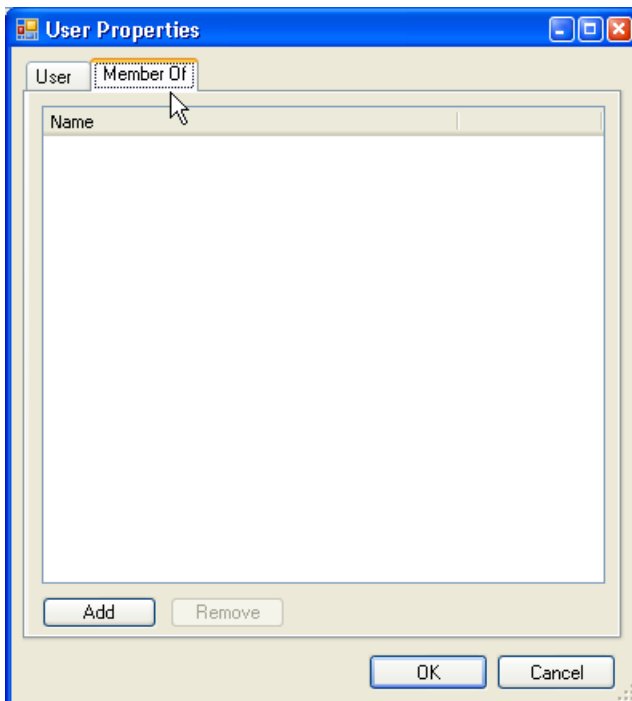
Now you have created a user, next step is to add the user to a Group.

Add User to a Group

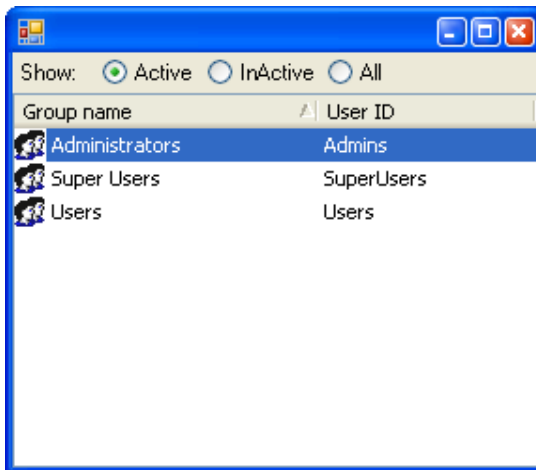
1. Mark the user you have just created and right click:



2. Select **Properties** and the user properties dialog opens.
3. Select the tab **Member Of** and the following form appears:



4. Click Add and a list of Groups appears:



5. Select a group by double clicking or marking the group and press enter.
The privileges of a user or a group are defined in the Information Group Management and in the Section Designer. For more information refer to Perfion Configuration Guide.
6. Click **OK** in the User Properties window.
The user is now member of the group selected. For more information of users and group management refer to Perfion Configuration Guide.