

Installation



TABLE OF CONTENTS

Preface	vii
CHAPTER 1: Introduction	1-1
Installation Prerequisites	1-1
Understanding the FACTS Directory Structure	1-2
Understanding the FACTS Authorization Code Sheet	1-4
Understanding FACTS Security	1-6
Understanding SSI_BASE Environment Variable.....	1-8
Quick Guide to Setting SSI_BASE Variables	1-9
Understanding WindX and the pvxhost script	1-10
Technical Insight: Alternative WindX Configurations.....	1-12
Additional Resources and Documentation.....	1-15
CHAPTER 2: Installing FACTS in UNIX Environments.....	2-1
Things to know before you begin.....	2-1
Installing FACTS.....	2-2
Process overview	2-2
Server installation.....	2-2
Setting up INSTALL menu programs.....	2-4
Sales Order and Purchase Order Entry Options	2-7
Terminal configuration	2-7
Creating terminal drivers	2-7
Resolving keyboard issues	2-7
Creating keyboard maps	2-7
Disadvantages of user-specific keyboard configuration files.....	2-8

Post Installation Options	2-9
Installing WindX on PC clients.....	2-10
Things to know before you begin.....	2-10
To install WindX on PC clients	2-11
Bitmap Synchronization	2-13
Printers, drivers and link files.....	2-14
Make a list of required printers	2-14
Creating printer drivers.....	2-14
Creating link files.....	2-17
SMF940: Setting up Printer F/M in FACTS.....	2-18
Technical Insight: Troubleshooting printer issues in UNIS.....	2-19
 CHAPTER 3: Upgrading FACTS on UNIX Systems	3-1
Upgrading from FACTS 6.06 or prior.....	3-2
Before you begin	3-2
Installation procedures	3-2
Before you allow users to sign into FACTS	3-4
Sales Order and Purchase Order Entry Options	3-4
Bitmap Synchronization	3-4
Upgrading from FACTS 6.07	3-5
Before you begin.....	3-5
Installation procedures	3-5
Systems with custom modes	3-6
Sales Order and Purchase Order Entry Options	3-7
Bitmap Synchronization	3-7
Upgrading from FACTS 7.0	3-8
Before you begin.....	3-8
Installation procedures	3-8

Systems with custom mods	3-9
Sales Order and Purchase Order Entry Options	3-10
Bitmap Synchronization	3-10
CHAPTER 4: Installing FACTS on Windows/NT/2000 Systems.....	4-1
Things to know before you begin.....	4-1
Installing FACTS.....	4-2
Process overview	4-2
Server installation.....	4-3
Configuring programs on the FACTS INSTALL menu	4-5
Sales Order and Purchase Order Entry Options	4-8
After Installation Options.....	4-9
Installing WindX on PC clients.....	4-10
Things to know before you begin.....	4-10
To install WindX on PC clients	4-11
Bitmap Synchronization	4-13
Printers, drivers and link files.....	4-14
Make a list of required printers	4-14
Creating printer drivers.....	4-14
Creating link files.....	4-17
SMF940: Setting up Printer F/M in FACTS.....	4-18
Technical Insight: Accessing Windows Printers in ProvideX	4-19
Troubleshooting Tips	4-23
CHAPTER 5: Upgrading FACTS on NT/2000 Systems.....	5-1
Upgrading from FACTS 6.06 or prior.....	5-2
Before you begin	5-2
Installation procedures	5-3
Before you allow users to sign into FACTS	5-4

Sales Order and Purchase Order Entry Options	5-5
Bitmap Synchronization	5-5
Upgrading from 6.07	5-6
Before You Begin	5-6
Installation procedures	5-6
Systems with custom modes	5-8
Sales Order and Purchase Order Entry Options	5-8
Bitmap Synchronization	5-8
Upgrading from FACTS 7.0	5-9
Before you begin	5-9
Installation procedures	5-9
Systems with custom mods	5-10
Sales Order and Purchase Order Entry Options	5-10
Bitmap Synchronization	5-11
CHAPTER 6: Installing General Report Writer	6-1
Before you begin	6-1
Installing General Report Writer on UNIX	6-1
Installing General Report Writer on NT/2000	6-2
Configuring General Report Writer	6-3
CHAPTER 7: Installing Uniform	7-1
Before you begin	7-1
Installing Uniform in UNIX	7-2
Installing Uniform in NT/2000	7-2
Configuring Uniform	7-3
Configuring FACTS to use Uniform	7-3
CHAPTER 8: Installing VSI-FAX and FaxLink	8-1
Note: Refer to the <i>Getting Started with VSI-FAX</i> manual for additional information	
Before you begin	8-1

UNIX System Requirements	8-2
NT/2000 System Requirements.....	8-2
Installing VSI-FAX server side.....	8-2
Installing VSI-FAX on PC clients.....	8-3
FaxLink Configuration in FACTS.....	8-3
 CHAPTER 9: Configuring the ICVerify/FACTS Integration	9-1
Setting up credit card handling for voice authorization.....	9-1
Credit card processing with voice authorization.....	9-2
Credit card processing with ICVerify.....	9-3
Configuring FACTS to work with ICVerify.....	9-3
Working with automatic credit card transactions.....	9-4
Using the Process Pending Transactions program	9-5
 CHAPTER 10: Installing Clippership.....	10-1
Before you begin	10-2
What is Clippership?.....	10-2
How does the FACTS/Clippership integration work.....	10-2
System requirements.....	10-3
Installation process overview	10-3
Installing Clippership on attended and single-user stations.....	10-4
Installing TracerX attended and single-user stations	10-5
Configuring attended and single-user workstations.....	10-5
Loading the TracerX attended or single user project.....	10-5
Logon setup	10-6
User Profile setup	10-7
System setup.....	10-8
Left Screen setup.....	10-8
Peripheral setup	10-11
Creating custom functions	10-11
Creating toolbar buttons for custom features.....	10-14

Setting up a UPS carrier account	10-16
Installing the Clippership polling station	10-17
Installing TracerX on the polling station.....	10-18
Configuring the Clippership polling station	10-18
Loading the TracerX polling project	10-18
Logon setup	10-19
User Profile setup	10-19
Left Screen setup.....	10-21
Error handling.....	10-22
Setting up the FACTSET custom function	10-22
Setting up a UPS carrier account	10-24
Configuring FACTS.....	10-25
Ship Via F/M.....	10-25
Warehouse F/M.....	10-26
Terminal F/M (single-user setups only)	10-27
Clippership FAQs	10-28
CHAPTER 11: Installing ODBC	11-1
Overview	11-1
Product limitations/exclusions	11-1
Installing ODBC.....	11-2
Updating the Data Dictionary in FACTS	11-2
Installing the ProvideX ODBC driver (version 2.13)	11-2
Configuring your data source.....	11-3
Aliases for FACTS data files.....	11-4
Standards for creating aliases	11-4
Importing vs. linking.....	11-5
Connecting to FACTS data from ODBC-compliant applications	11-5
Editing NOMADS Data Dictionary Utility for normalized files	11-6
Editing MMDD.ini for non-normalized files	11-6

Some common errors and troubleshooting tips 11-6

External sort files 11-7

Additional resources 11-8