FINPACK Deployment Options for Lenders

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FINPACK is a stand-alone Windows application that scales easily from individual workstation installations to enterprise-wide network installations. This document describes alternative deployment scenarios and explains FINPACK data storage. Every organization has different IT configurations and resources, and FINPACK runs successfully in each of the deployment options described below.

Deployment Option A: Individual desktop or laptop installation

This option involves installing FINPACK on each user's individual desktop or laptop (**"Install FINPACK on a desktop or laptop"** option in the FINPACK setup instructions).

Deployment Option B: Virtual Server Installation (Citrix, for example)

This option is the most common among lenders and depends on how the organization implements the particular virtual environment (Citrix XenApp, Citrix Application Server, Windows Terminal Server/Remote Desktop Services, etc.). Typically, organizations with this type of infrastructure will create a virtual server, then do a workstation installation on the server (**"Install FINPACK on a desktop or laptop"** option). Then, that particular virtual server is made accessible to the FINPACK users. Although the users are running FINPACK from a server, the virtual environment allows it to be treated the same as a local installation. Access to FINPACK is controlled by the particular virtual environment.

Deployment Option C: Network File Server Installation (Windows server)

This option involves installing FINPACK on a network file server, then creating a shortcut on individual workstations to that network installation. (**"Install FINPACK on a network file server"** option in the FINPACK setup instructions).

The first step of installing to the file server just copies the FINPACK software to a folder on the network. Next, NetSetup.exe, located in the FINPACK folder on the network, is run from each user's workstation. This second step makes a local folder and program shortcuts on each user's workstation, so administrator rights on the workstation are necessary to run NetSetup. The user can then run FINPACK from the workstation, but all program files and data files live on the file server. *The users need read, write, create, and modify rights or permissions to the FINPACK program folder on the network.*

FINPACK Data Storage

FINPACK stores its data in a database format. There is one file per client or customer (e.g., one file for the Jones farm, another for the Smith ranch, etc.), and the file has an FPD extension. A file starts out around 4.5 Mb and grows as data is added. A large file with several years of history may grow greater than 40 Mb. Annual loan presentations, which are word processor RTF data, can be one of the largest components of a data file and could make the file grow larger faster. An average file with 5 years of history without loan presentations is around 7 Mb.

Organizations with several FINPACK users typically create a common network folder or directory to store the FINPACK data files (*.FPD). This common folder is then set as the default data file location within FINPACK. Access rights or permissions for the individual user to the particular common network folder are controlled via the network operating system (Windows, etc.). **It should be noted that in this configuration it is a best practice that the data files and program files need to reside close to each other. They can reside on different drives on the same server, but it is not recommended they be separated by a large physical distance due to network latency issues (i.e. the data in St. Paul and the program files in Minneapolis).**

Some organizations may choose to setup multiple network folders for different groups or branch offices within the organization. For example, the St. Paul branch office may have one data folder on the network and the Minneapolis branch office may have another data folder. This may be for any number of reasons, including security and workflow. Typically, users for a particular group are given full rights (read, write, modify, create, delete) to their common data folder but given limited or no rights to other group's folders. In some situations, particular individuals may be given read-only rights to all data folders. FINPACK detects when a file is read-only (either because of permissions setting or because another user has the file open) and the user is notified that the file will be opened read-only and no changes allowed. Reports can still be generated with a read-only file.

Since the data file permissions and rights are all controlled through the operating system, the IT administrator has the flexibility to configure data file access as it best meets the organization's needs.

Archiving the data files is a matter of backing up the contents of the common network folders. The individual client data files (*.FPD) are all that needs to be backed up.