FINPACK Vault – Educator version

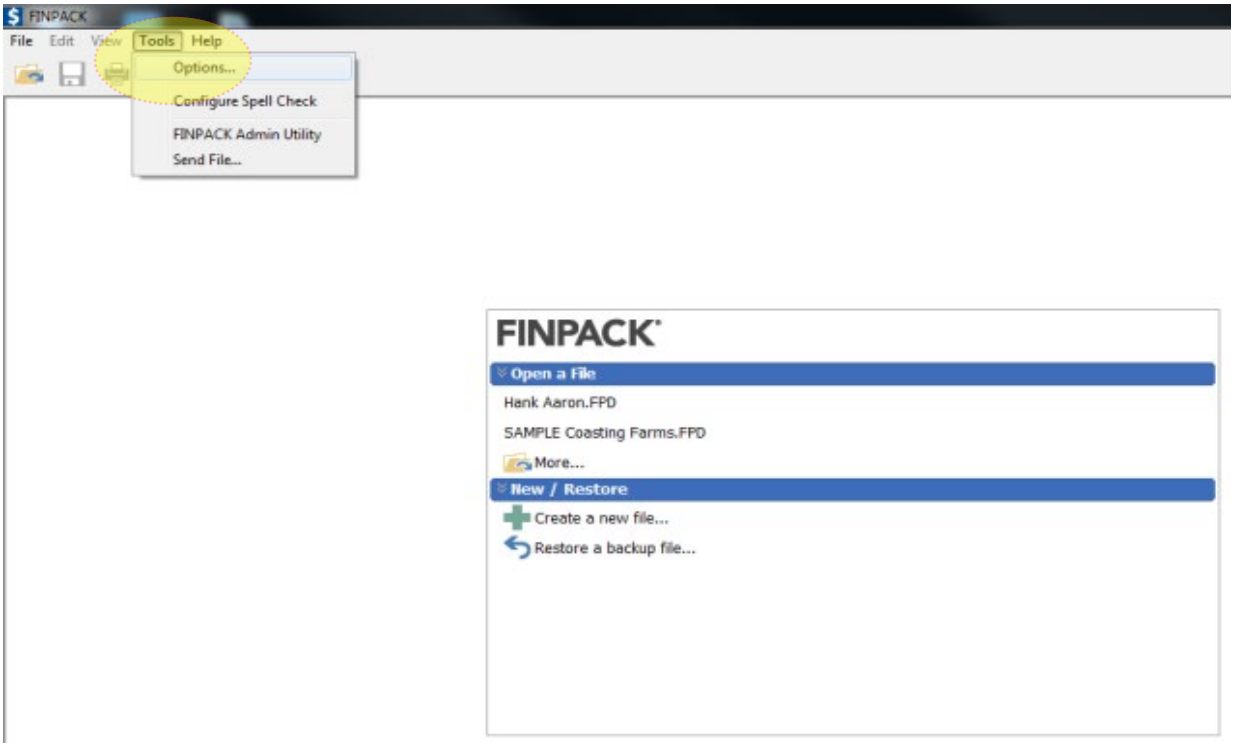
This version of the FINPACK Vault allows for Farm Business Management educators to synchronize their local versions of FINPACK files with what is stored in the Vault.

There are two important steps for FINPACK to work with the Vault. In addition, there is a section at the end of this document explaining how to change your Vault password.

1. Connecting to the Vault.
2. Saving FINPACK file changes to the Vault.

1. Connecting to the Vault

1.1. Make sure you have a good connection to the internet. To activate the FINPACK Vault, go to Tools/Options as shown below.



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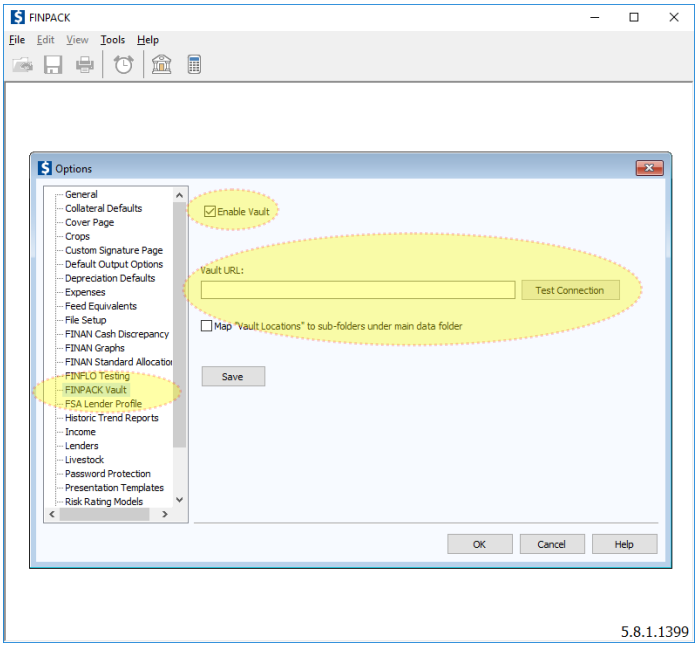
1.2. From the list of options, select FINPACK Vault. Click on the “Enable Vault” checkbox and enter the “Vault URL” of **fpvault.umn.edu.** Leave the “Map “Vault Locations” to sub-folder under main data folder” checkbox unchecked.



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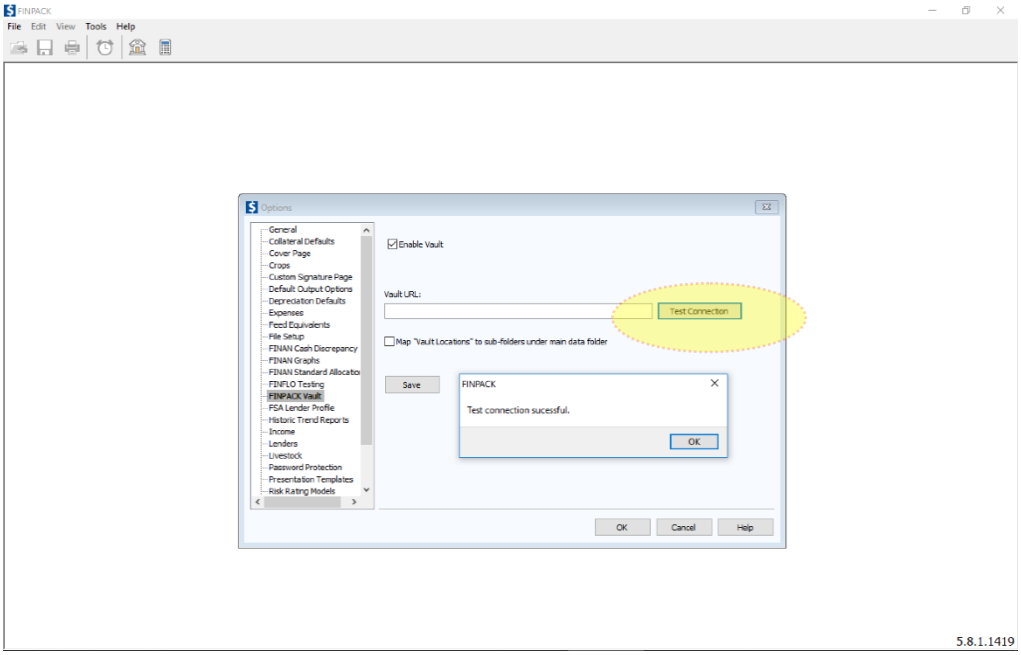
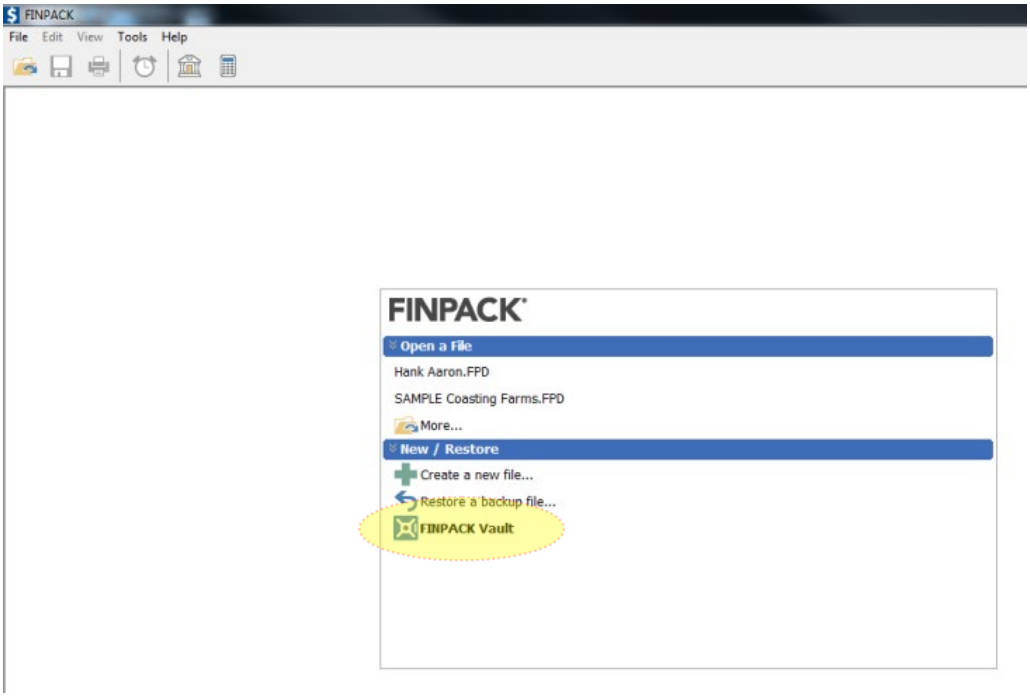
1.3. Click “Test Connection” to make sure you can connect to the vault server. On a successful connection you will receive a message “Test connection successful.” Click “Save” to save the Vault connection setting. Click “OK” to exit the Options window.



1.4. Close and open FINPACK again. You will now see “FINPACK Vault” under the New/Restore menu.



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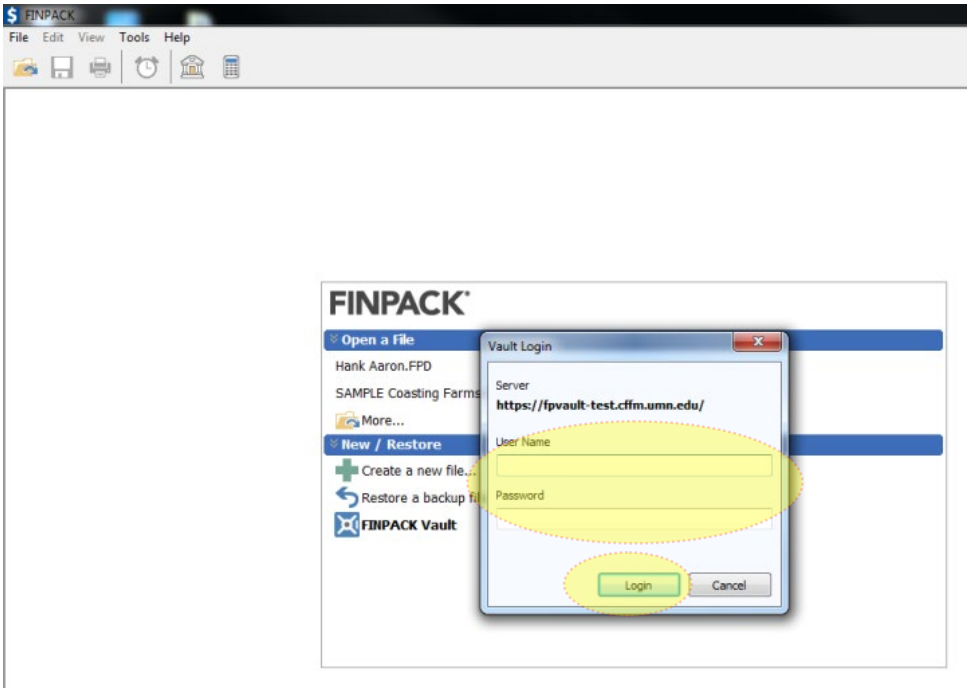
1.5. Click on “FINPACK Vault”. This will open the Vault Login window, allowing you to connect to the Vault server. Enter the user name and password provided to you and click “Login”.



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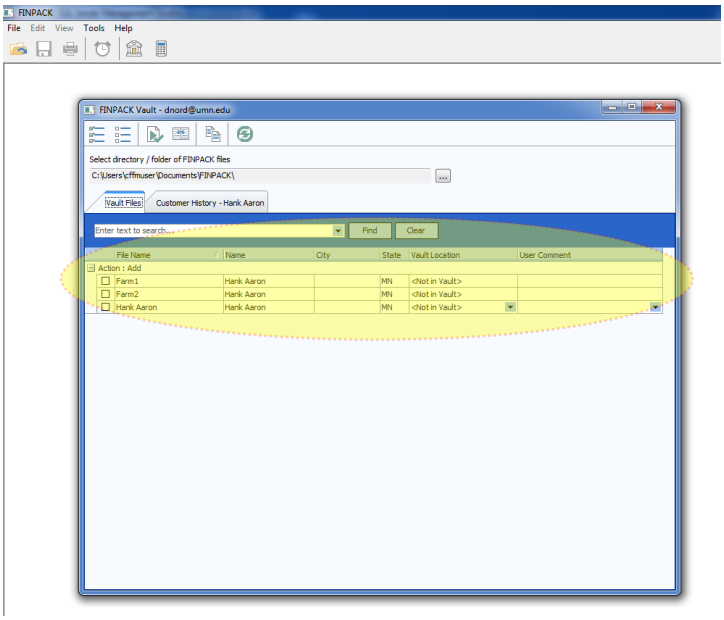
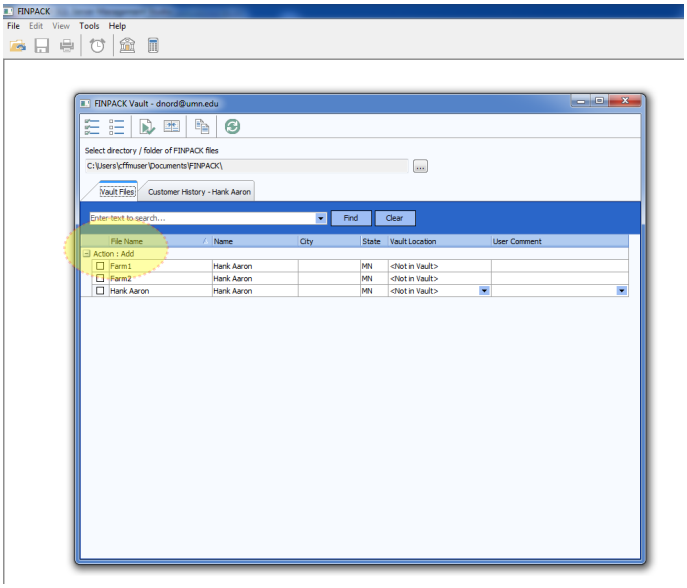
2. Saving FINPACK file changes to the Vault

2.1 After connecting to the FINPACK Vault, the next window will show a list of FINPACK files. By default, it will set "directory/folder of FINPACK files" to your default FINPACK data file path. The path can be changed by clicking the box with the 3 dots, highlighting the desired folder, then clicking "Select Folder", which will list that folder's FINPACK files in the grid.



2.2 If a file has not yet been added to the Vault, its status will show as "Add". Select the files that you want to add to the Vault by clicking the checkbox next to each file. For each file selected, make sure to select the Vault Location for that file. Next, click the "Sync" button from the main tool bar to add the selected files to the Vault.



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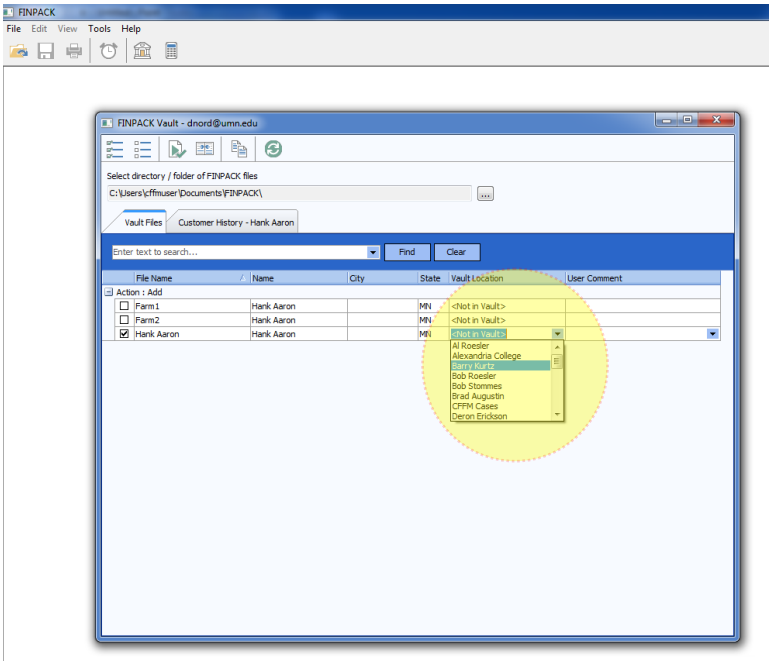
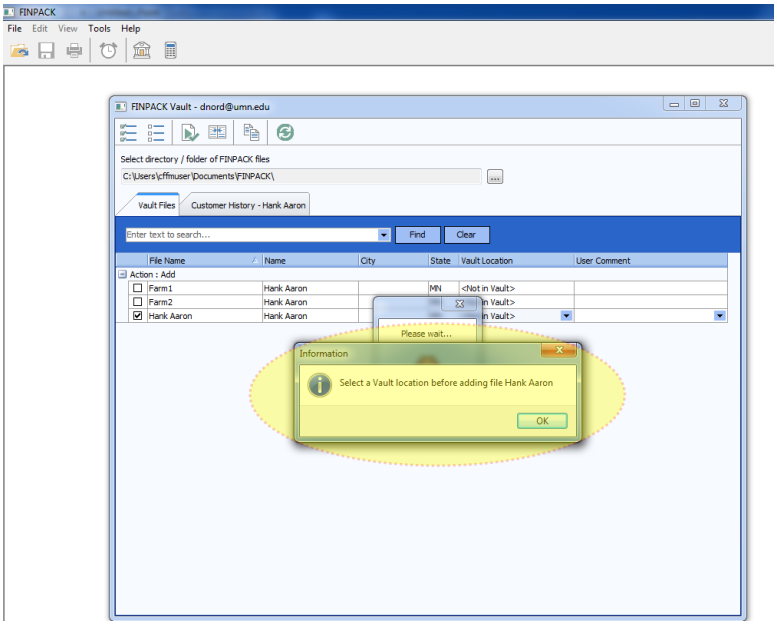
2.3. The window below shows how to select the Vault Location. This column will list all the locations you can access. For most users, there will be only one location to select.



2.4. If no location is selected and you attempt to sync the files, you will get a message reminding you to select the Vault Location before you can add or check in a file.



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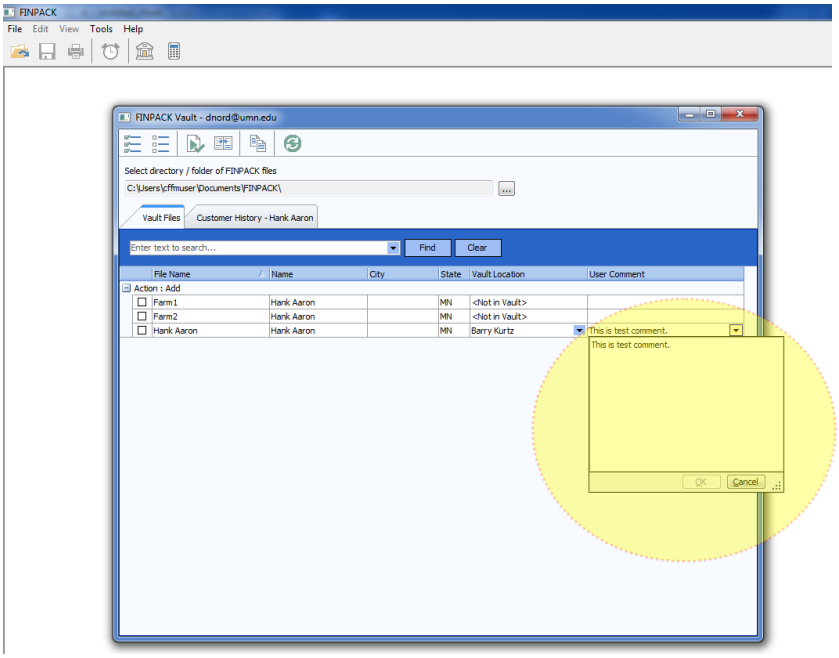
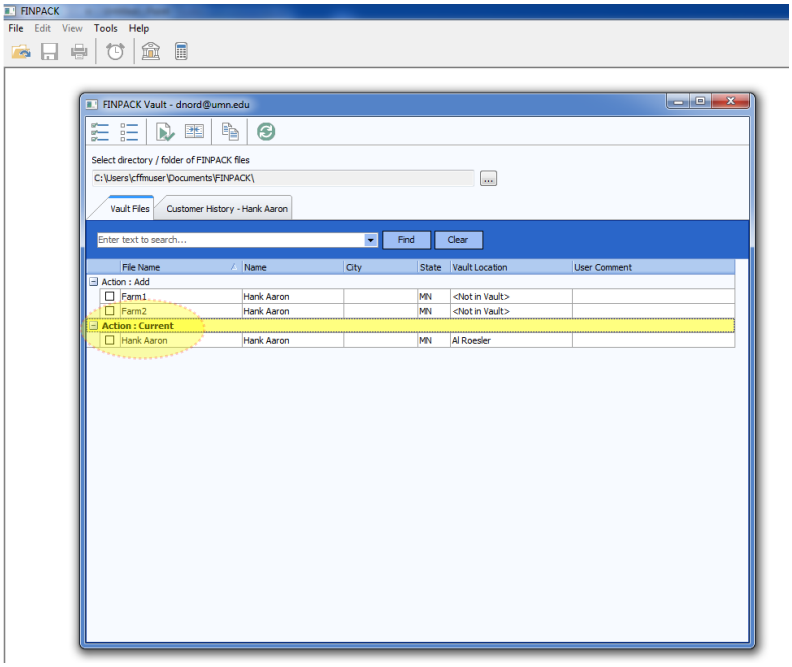
2.5. Every time you save a file to the Vault, you can insert comments as show below.



2.6. Once a file is saved to the Vault, its status will change to "Current" indicating that a local file is the same as that in the vault.



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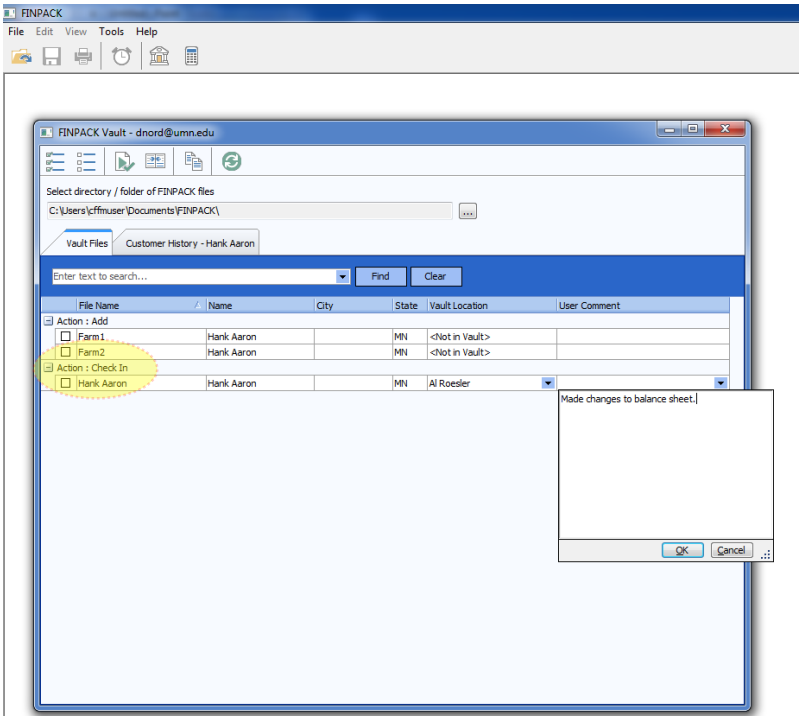
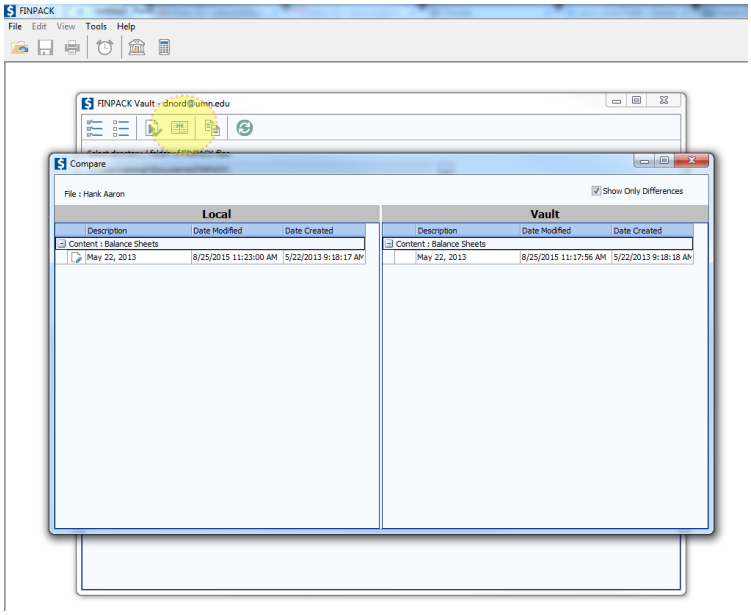
2.7. A FINPACK file can be opened from the Vault by double-clicking on the row. Once a FINPACK file is changed, its status will change in the Vault to "Check-In", indicating that the file has been changed and it can be checked in to the Vault.



2.8 Local changes can be compared with what is in the Vault by selecting the file and clicking the "Compare Changes" button from the tool bar. This will open a comparison list showing the changes between the Local and the Vault copies of the file.



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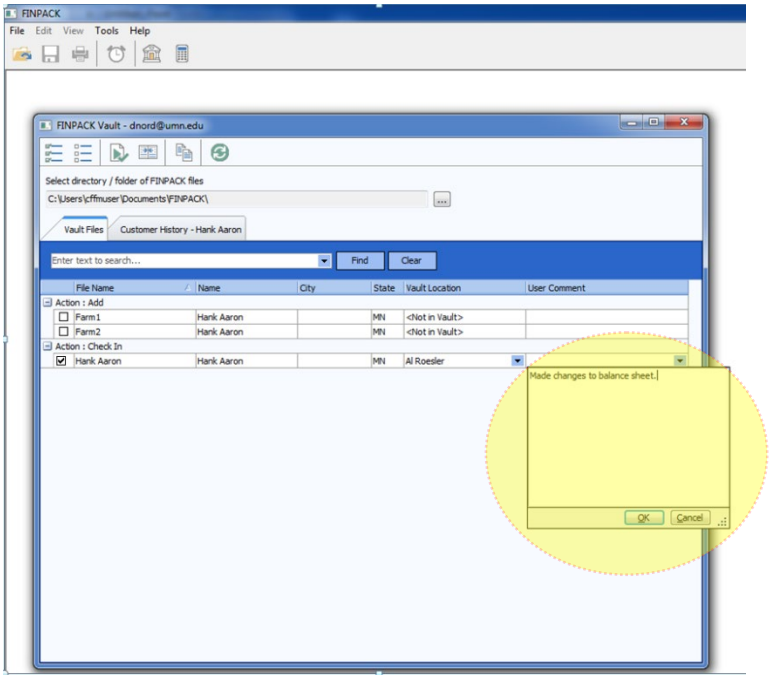
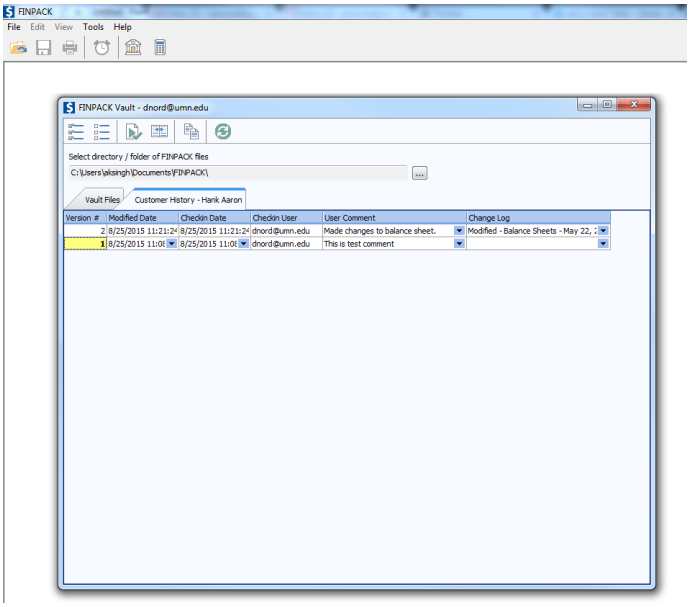
2.9. Once you are ready to check in your changes, select the file in the grid, insert notes in the Comments section (optional, but useful), and click the "Sync" button from the tool bar.



2.10. You can see all the changes made to a file by selecting that file on the "Vault Files" tab and then clicking on "Customer History" tab.



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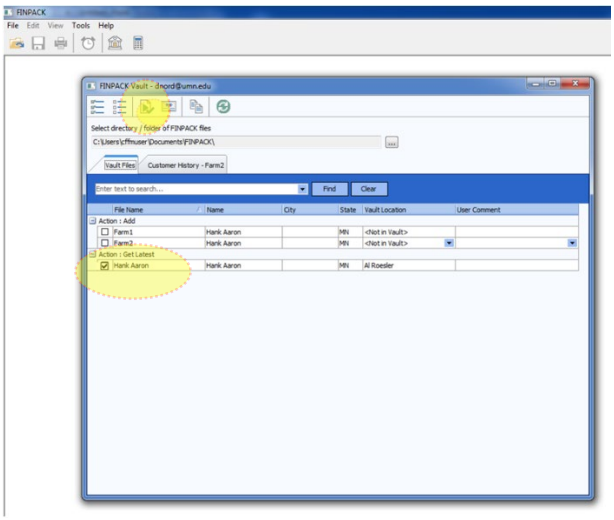
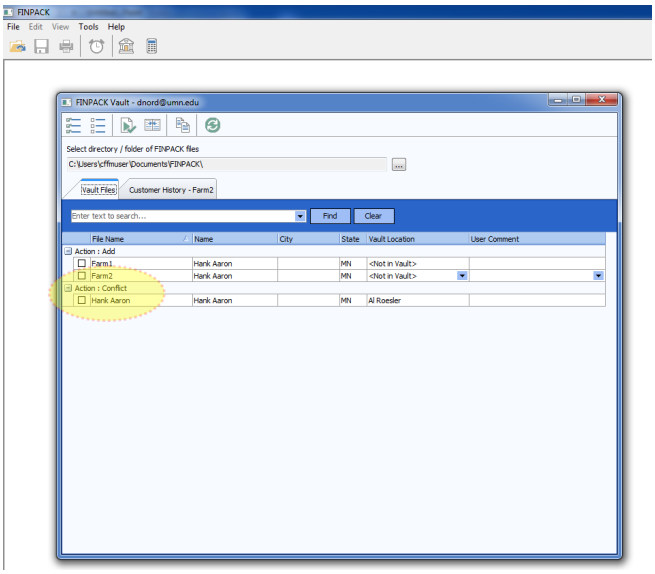
2.11. If another user has made changes to a file, the status will be “Get Latest”, indicating that there is a more recent copy of the file compared to the local folder. You will see the same status if the file is not present in the selected path. To get the vault copy of that file, simply select it by checking the accompanying check box and clicking the “Sync” button .



2.12. In the unusual case that a file is changed by multiple users at the same time, the Vault will accept the file from whoever checks in first. The next user will see the file status as “Conflict.” In this case, the user has to manually resolve the conflict. To resolve the conflict, first copy the local file to a location where you can do manual merging. Next, delete the file from the original location. When you open the vault again, the status will be “Get Latest.” Select the file and click the “Sync” button . This will bring the changes from the vault that was checked in by another user. This file can be copied to a new location with a new name and then merged. You may need to use the FINPACK Import tool to import parts of one file into the other. Next, copy the merged file back to the original location. When you refresh the vault, you will see the status changed to “Check In.” You can now save the file to the Vault. **Note:** The Vault will make sure that a file is not checked-in (saved) to the Vault unless you get the latest copy from the Vault first.



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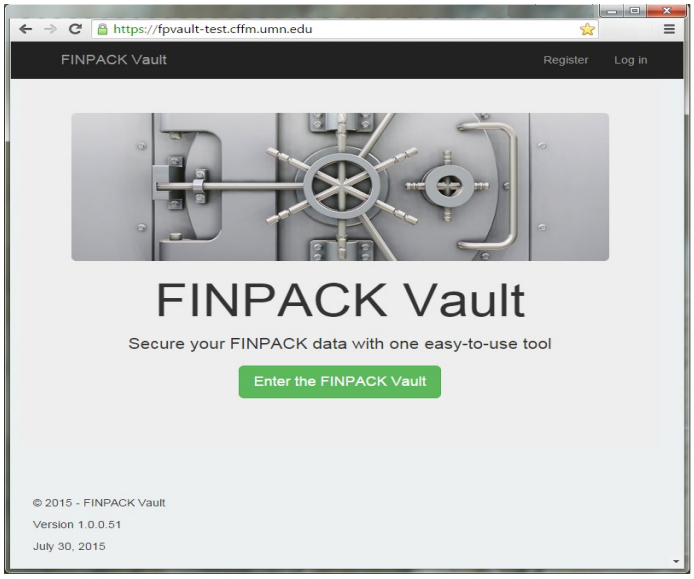
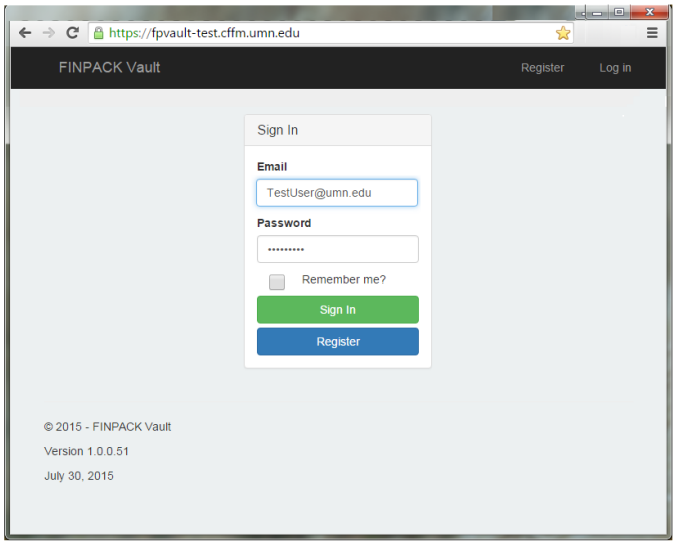
3. Change your Vault password.

3.1. Go to the website https://fpvault.-test.cffm.umn.edu to login to FINPACK Vault.



3.2. Login with the initial login ID and password provided to you.



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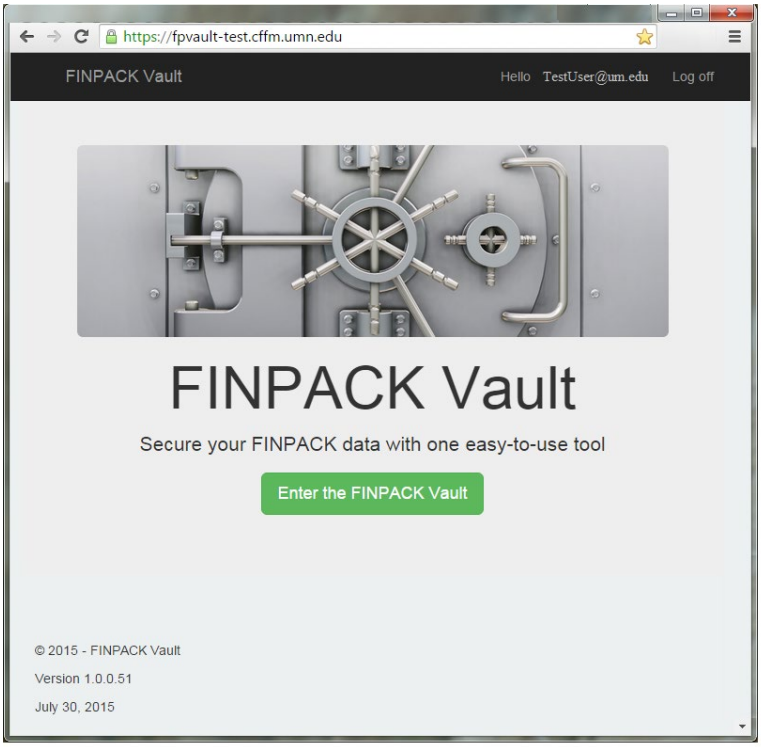
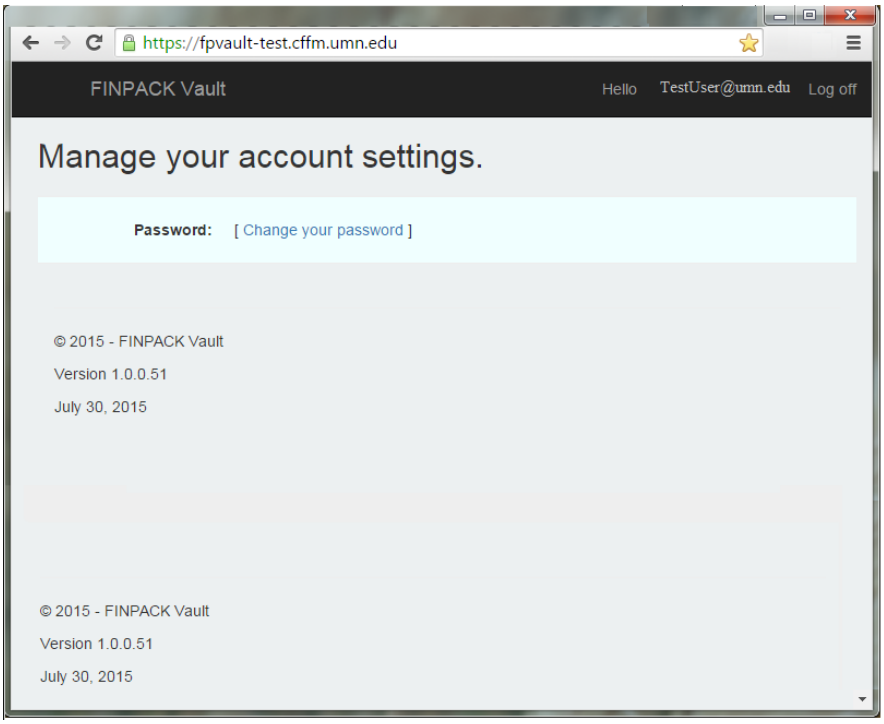
3.3. Once you are logged in, you will see the user name you logged in with in the upper right-hand corner of the screen. Click on the user name to change the password



3.4. Below is the screen that allows you to change your password. Click on "Change your password"



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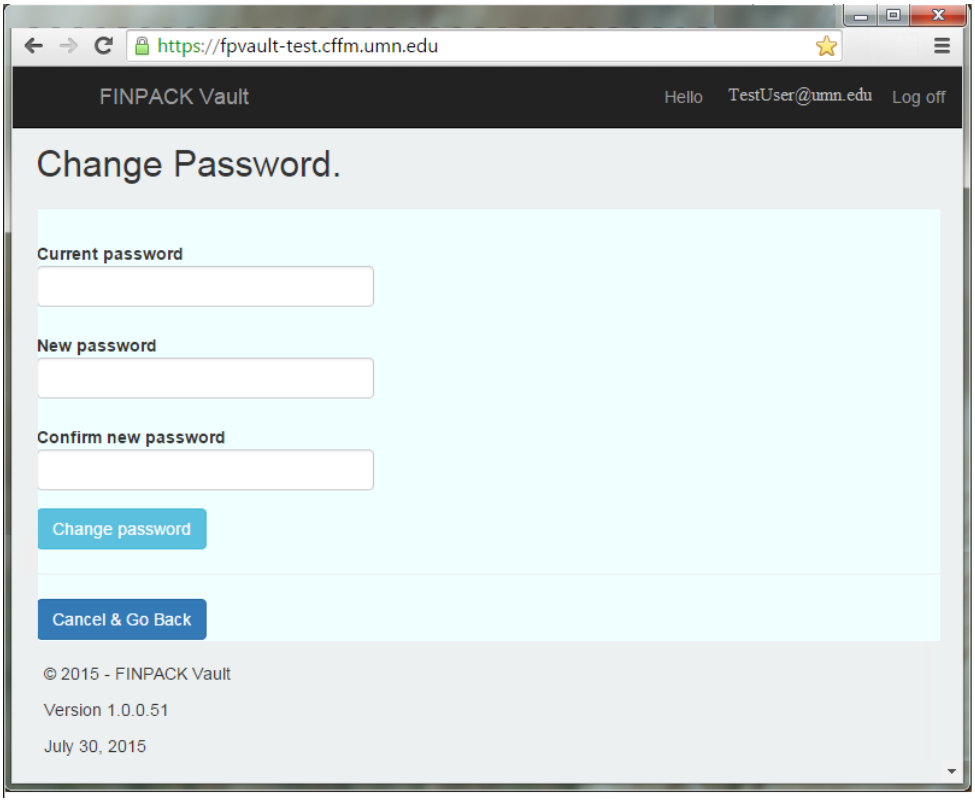
3.5. You will now see an option to change your password. Enter your current password along with the desired password, then click “Change Password” to make the change.



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