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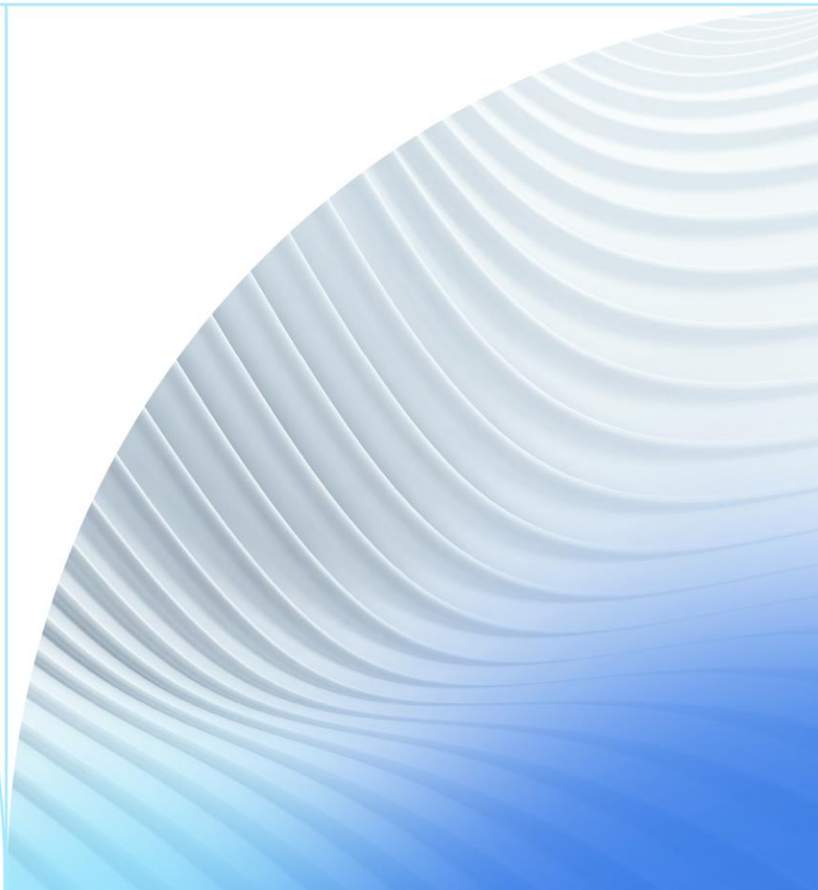
Financial Performance

PROFITstar, PROFITability, PROFITstar Suite, and PROFITstar Portfolio

Release 2018

Installation Guide

For Clients Moving From the 2012 Version to 2018



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Before You Begin

Introduction

This document contains detailed instructions for users who need to install the SQL version of PROFITstar and convert their current 2012 data to work with the 2018 version of the software. If needed, other installation guides are also available:

- If you are installing PROFITstar for the very first time, refer to the instructions found at http://profitstarhelp.jackhenry.com/dev/2018NewInstall.pdf.
- If you are already running a SQL version of PROFITstar (2014 or later) and need to upgrade to 2018, see the installation instructions at http://profitstarhelp.jackhenry.com/dev/2018NoConversionInstall.pdf.

PROFITstar utilizes a three-part architecture comprised of the SQL Server, the Profitstar Server, and the Profitstar Client. We provide the installers for the Profitstar Server and Client, but do not install the SQL Server.

- **SQL Server** – It is expected that the PROFITstar program will have its own instance of SQL. PROFITstar 2012 data cannot be converted to 2018 without a SQL Server instance on a server machine that meets the defined SQL Server machine requirements.

  During the Profitstar Server installation the program will verify whether an instance of SQL Server is already installed on the targeted server. If not, the installer will add a few steps to determine if it should install SQL Express.

  > **TIP** If your institution will be using SQL Express, you should also download and install SQL Server Management Studio (SSMS), from:
  >
  > https://docs.microsoft.com/en-us/sql/ssms/download-sql-server-management-studio-ssms?view=sql-server-2017
  >
  > This is a separate and free software installation. SSMS 17.x will work with any older versions of SQL Server and is useful for problem solving and other purposes.

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- **Profitstar Server** – This software can, but does not need to be, installed on the same server machine as the SQL Server.
- **Profitstar Client** – The Profitstar Client installation is run on each PC used to access PROFITstar data.

Remember that for all types of installations, the person actually installing the software must have Administrator rights and the user used to connect to the targeted SQL server must be a member of the **sysadmin** role (just for installation-related processes).

"PROFITstar" is used throughout this guide as a generic name for the family of products that includes PROFITstar, PROFITability, and Profitstar Suite.

System Requirements

The server and client machines, on which the Profitstar Server and Client applications will be installed, need to meet the requirements defined in the 2018 System Requirements document, which can be found at:

http://profitstarhelp.jackhenry.com/dev/CurrentSysReq.pdf

Things to Be Aware of Before Beginning the 2018 Installation

When is the sysadmin Server Role required?

When installing new versions of the software, converting 2012 data to 2018, or upgrading the program on client machines, the user used to connect to the targeted SQL server must be a member of the **sysadmin** role.

When such installations, conversions, or upgrades are complete and users can connect to the database from their client machines, then the server role can be reverted to **public**—until the next time that an installation and upgrade is necessary.

What Database-Level Role is necessary to run the software?

The user used by the Profitstar service must be a member of the **db_owner** role.

What Are the Hardware Sizing Recommendations?

Significantly improved performance may be achieved by following our new hardware recommendations:

http://profitstarhelp.jackhenry.com/dev/HardwareRecommendations.pdf

Additional Technical Resources

Refer to the Appendix for links to the most recent System Requirements and Installation Guides.

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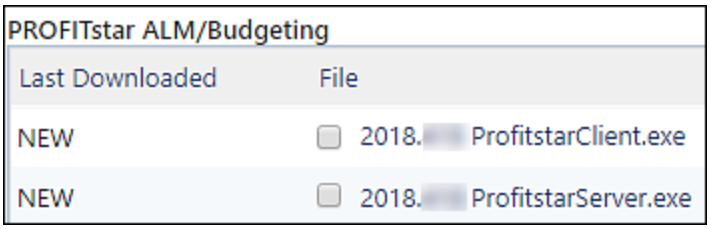
PROFITstar 2012 to PROFITstar 2018 Installation Checklist

1. Review the system requirements and the installation and data conversion prerequisites.
2. Locate your product key, if necessary.
3. Download the latest 2018 installation files from the For Clients portal (*Tools/Administration > JHA Downloads*).



4. Ensure all end users are out of PROFITstar 2012 before performing this upgrade.
5. Back up your 2012 data.
6. Close the 2012 program.
7. Verify that the institution has a SQL Server instance already installed, on a server machine that meets the defined SQL Server machine requirements, before proceeding with the Profitstar Server and Client installations.
8. Make sure that the user used to connect to the targeted SQL server is a member of the **sysadmin** role (just for installation-related processes). In addition, the person running the Profitstar installations must have Administrator rights.
9. Install the 2018 Profitstar Server on the same server as Advantage and launch the data conversion utility.

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10. Run the data conversion utility to create a SQL database on the desired server.

    NOTE You may not need to fill out all the data conversion utility fields.

    - PROFITstar/PROFITability data directory – Browse to the data location.
    - PROFITstar Portfolio data directory – Browse to the data location, or leave blank if you do not have Portfolio.
    - SQL Server computer name – Enter the name of the SQL server.
    - SQL Server database name – Enter the name that will appear in SQL and in the dropdown for the PS database.

11. Install the 2018 Profitstar Client on your server/work stations.
12. Downgrade the server role to **public**.
13. Confirm that users can connect to the database from their client machines.

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Server Prerequisites

Microsoft® SQL Server® Prerequisites

It is expected that the PROFITstar program will have its own instance of SQL. PROFITstar 2012 data cannot be converted to 2018 without a SQL Server instance on a server machine that meets the defined SQL Server machine requirements.

During the Profitstar Server installation the program will verify whether an instance of SQL Server is already installed on the targeted server. If not, the installer will add a few steps to determine if it should install SQL Express.

> **TIP** If your institution will be using SQL Express, you should also download and install SQL Server Management Studio (SSMS), from:
>
> https://docs.microsoft.com/en-us/sql/ssms/download-sql-server-management-studio-ssms?view=sql-server-2017
>
> This is a separate and free software installation. SSMS 17.x will work with any older versions of SQL Server and is useful for problem solving and other purposes.

If the institution needs to obtain other SQL Server licenses, the ProfitStars Sales team can provide this software at a competitive price.

Once SQL Server is installed, the following SQL Server Services are required and must be set to start automatically:

- Database Engine
- SQL Server Browser

SQL Server & Profitstar Server on Different Machines

LANs

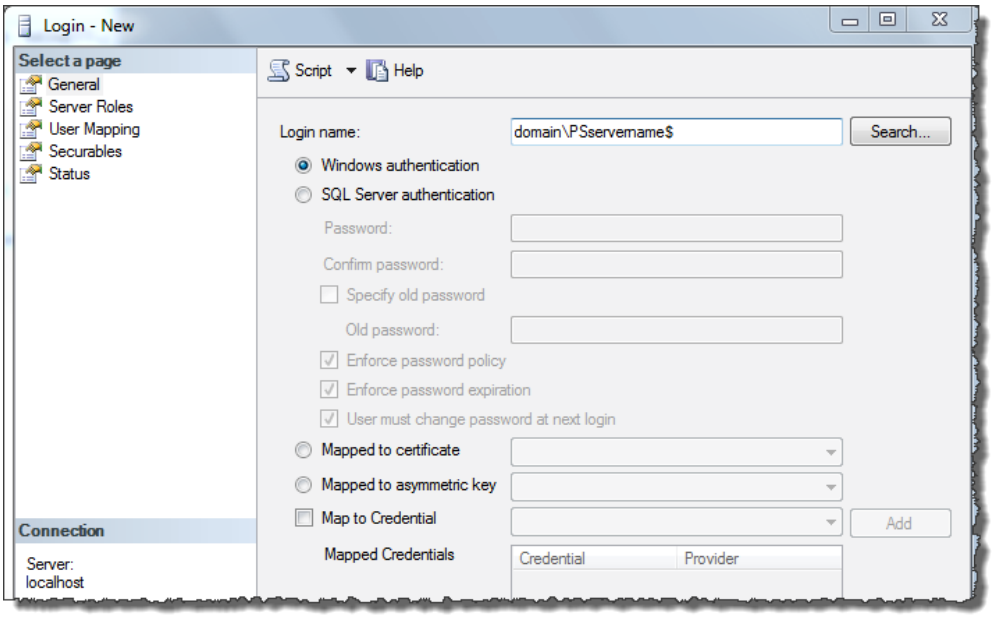
The Profitstar Server and the SQL Server can be installed on different machines. If this is done, both machines should still be on the same Local Area Network.

New Login Name

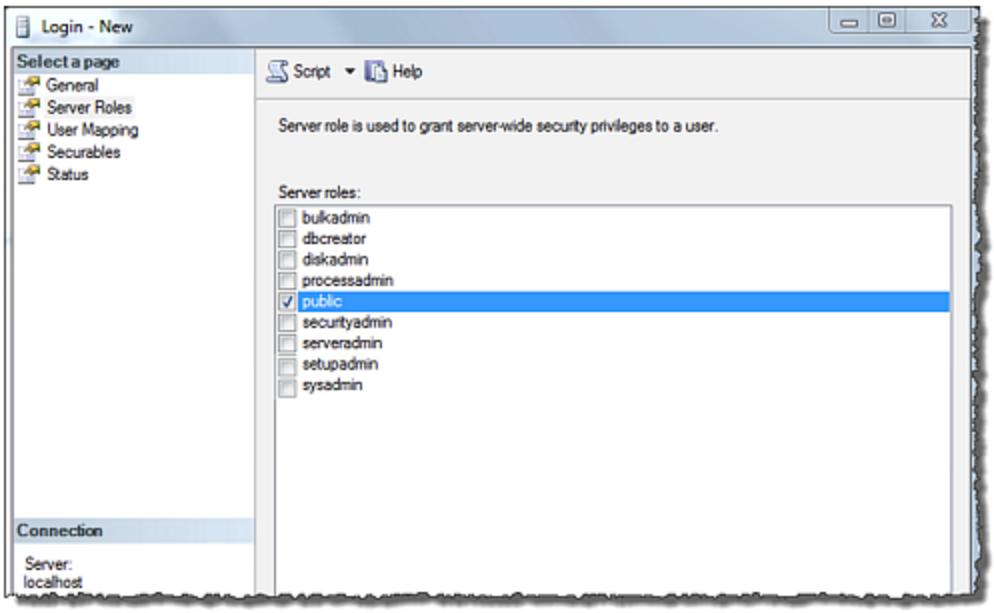
In addition, before running the Profitstar Server Installation and the data conversion, it is necessary to create a new login on the SQL Server (*Security > New > Login*).

When creating this login, the name of the server on which the Profitstar Service will reside is used as the **Login name**.

Standard naming conventions are used: **Domain name** \ **Server name**, followed by the **$** symbol. Using the **Search** button is not recommended since the appropriate server may not appear in the Active Directory.



This login name also needs to be assigned the **public** Server Role.



Creating a new login name with these settings gives the Profitstar Service authority to access the SQL Server.

SQL Server & Profitstar Server on the Same Machine

Built in Login

When the SQL Server and Profitstar Server reside on the same machine, the NT AUTHORITY\SYSTEM login needs to be assigned the **public** Server Role.

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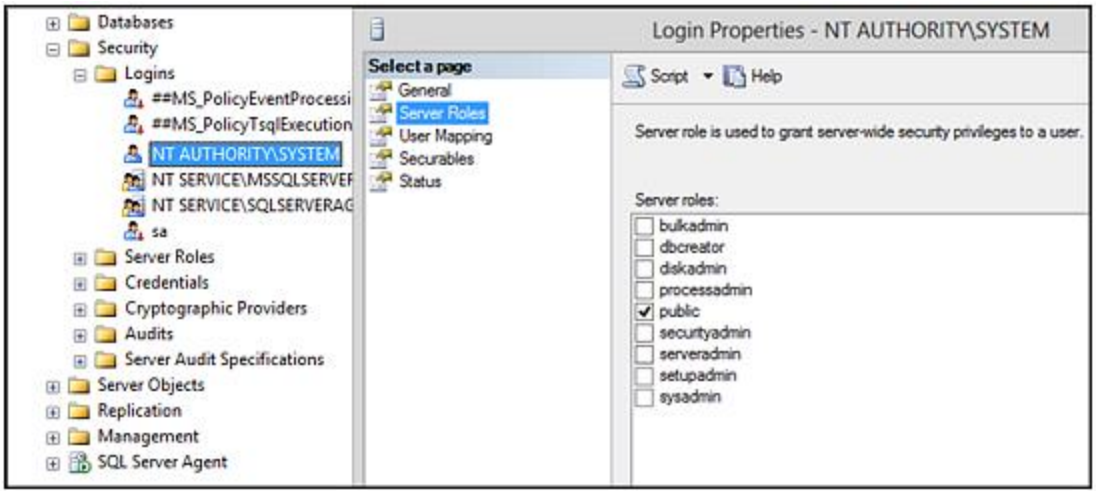

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Memory Usage

The default configuration for SQL Server is to use all the memory on the server machine. However, if the PS Service is running on the same machine as SQL Server, it is recommended that the maximum server memory value be set to half the available memory.

For example, if the machine has 8 GB of memory, set it to 4096 (4 GB); or, if it has 4 GB of memory, set it to 2048 (2 GB).

WANs and LANs

- **Recommendations concerning WANs and LANs** – WAN environments are not supported. For best performance, the Profitstar Server should be housed on the same Local Area Network as the Profitstar Client machines.
- **Cloud/Hosted SQL Servers** – Cloud/Hosted SQL servers are not supported. For best performance, a Local Area Network is the best solution.

Additional Server-Related Issues

The Profitstar Server must be installed on a PC that meets the defined Profitstar Server machine requirements. The Profitstar Server service relieves the client PCs of some of the heavier data processing duties. Be aware of the following:

- **Person Installing the Software Needs Administrator Rights** – Since the installation programs for the Profitstar Server and Profitstar Client perform admin functions, it is required that the person installing the software have Administrator rights.
- **The Server Install Needs to be Performed on the Profitstar Service Machine** – Remote installation of the Profitstar Server is not permitted (e.g., via a network or mapped drive).

- **All Client PCs Must Have a Way to Connect to the Server Machines** – The use of PROFITstar with a "single-user license," for PCs that are not always physically connected to the corporate network, is not supported. The Profitstar Server component must be installed on a server machine running one of the approved Windows Server operating systems and client PCs will need to have a way to connect to it: via a Local Area Network, VPN, or a Remote Desktop connection.
- **Non-Windows Operating Systems** – Non-Windows operating systems—such as Novell Netware and Linux—are not supported.

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Other Prerequisites

Microsoft® .NET Framework, Version 4.5

Microsoft .NET Framework, version 4.5, must be installed on the computers that will run the Profitstar Server and Profitstar Client programs. The .NET software is not required for the SQL Server machine, if it is on a separate computer.

If .NET Framework, version 4.5, files are not detected on a machine being targeted by the Profitstar Server or Profitstar Client installations, the program will attempt to download the necessary files from Microsoft's website.

If any of the server or client machines do not allow a connection to the internet, the .NET Framework files will need to be downloaded on another PC and then manually installed on the appropriate machines.

The .NET Framework files are available on the Microsoft website and can be downloaded from the following URL:

http://www.microsoft.com/en-us/download/details.aspx?id=30653

Configuring Firewall Software

If firewall software is used to protect the server machine, it must be configured to allow incoming connections on ports **20925** and **20927**, using the **TCP** protocol. The Profitstar Server utilizes these ports to satisfy and manage client requests for data used by PROFITstar and its related software products.

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Other Firewall Considerations for Client PCs

Certain actions in PROFITstar require access to specific ports and URLs. You may need to add this information to your firewall filter lists:

- **Downloading the current month's Key Rates** – PROFITstar uses port **80**, with the **TCP** protocol. URL: http://profitstarhelp.jackhenry.com/keyrates/keyrates.prn
- **Checking for Updates** – PROFITstar uses port **80**, with the **TCP** protocol. URL:http://profitstarhelp.jackhenry.com/dev/CurrentVersion.txt
- **Downloading the current month's CECL rates** – CECL uses https, which is usually port **443**. URL: https://prod.profitstarsfps.com
- **Using Cloud Email** – URL: https://www.profitstarbudgetmanager.com/
- **Connecting to Budget Manger** – During the Budget Manager Export or Import processes, PROFITstar uses port **80** (http:) for text and **443** (https:) for secure connections. URL: https://www.profitstarbudgetmanager.com/

  In addition, institutions that utilize a proxy server and integrated authentication may have to add a rule on their proxy server to allow the PS.exe and PA.exe files to connect to the Budget Manager URL.

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Conversion Prerequisites

Issues to Check for Before Attempting to Upgrade 2012 Data

Existing 2012 PROFITstar users, who are installing 2018 for the first time, should perform several checks before beginning the 2018 installation and data conversion:

- **What-If models** – Any unnecessary What-Ifs should be identified and deleted before running the conversion. Doing this will significantly reduce both the time needed to convert the data and the size of the resulting SQL Server database.

  NOTE This is not a conversion-stopping issue.

- **Non-Global Charts** – If the chart setup in your models is not global, a workaround will be required before ratio values will be available in suborganizations, following the data conversion. (To check the **All chart setup is global** setting, go to *Setup > Preferences > Model Setup tab*.)

- Refer to the Post-Conversion Considerations section of this document for the workaround instructions.

  NOTE This is not a conversion-stopping issue.

- **Data Version** – If the institution is currently running pre-2012 PROFITstar data, the data will need to be updated to any released version of 2012 before it can be converted to 2018.

  If the conversion process stops because of this prerequisite requirement, it will be necessary for the 2018 Profitstar Client and Server programs to be uninstalled and for the 2012 Profitstar Client and Server programs to be installed. Reverting to a 2012 version of the program is required so that the PROFITstar data can be upgraded before the data conversion is rerun.

- **Duplicate Account Handles** – Before converting, the institution should verify that no duplicate account handles exist in the data. Since the 2012 program scans the PROFITstar data for this problem, the Chart Error Detection report should be consulted to verify that this is not an issue.

  If duplicate account handles are found, prior to conversion, the issue will need to be fixed in all affected models, before proceeding.

  If the conversion process stops because of this prerequisite requirement, it will be necessary for the 2018 Profitstar Client and Server programs to be uninstalled and for the 2012 Profitstar Client and Server programs to be reinstalled. Reverting to a 2012 version of the program is required so that this blocking issue can be fixed.

  Contact a client services analyst if assistance is needed.

- **Advantage Database Server** – The conversion process must be able to connect to this server to convert the 2012 data. Therefore, the Profitstar Server must be installed on the machine where the 2012 data and Advantage Server currently reside.

  If the Advantage service is not running on the machine where the 2012 data resides, the conversion will fail.

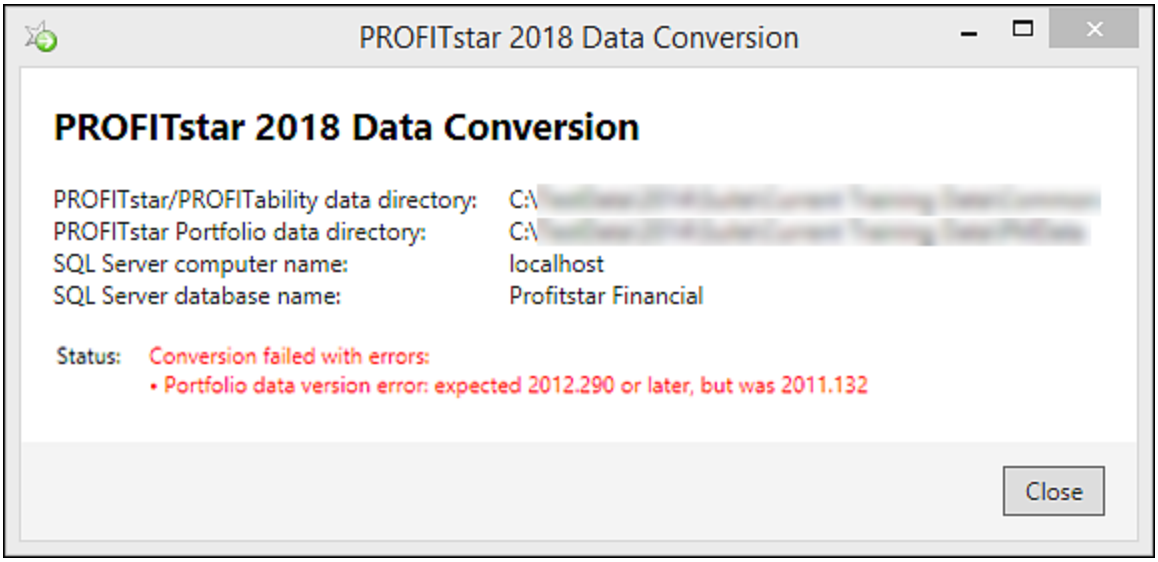
- **64-Bit Server Machine** – If the 2012 data is on a 32-bit server, the data and Advantage will have to be moved to a 64-bit server before running the Profitstar Server installation and the data conversion.

- **Mapped Drives Are Not Allowed (for Optimizer Clients)** – The conversion process will fail if mapped drives are used in the data directory paths and the system detects that the PROFITstar/PROFITability data is used to publish to Optimizer.

- **New Login Name Required on the SQL Server** – If the SQL Server and the Profitstar Server will reside on different machines, the name of the server that will host the Profitstar Service should be used as this Login name. See page 4.

- **Only a Member of the Sysadmin Role Can Perform the Data Conversion** – The user used to run the data conversion needs to be a member of the *sysadmin* role on the SQL Server that is the target of the conversion.

If the conversion stops because of one of these prerequisite conditions, the conversion program will display a message explaining the reason for the failure.



It is strongly recommended that you check for all potential blocking issues *before* attempting to upgrade from a 2012 version to 2018.

For a detailed description of how to perform the data conversion, refer to Steps 12 and 13.

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Preliminary Installation Steps

Existing clients, upgrading from PROFITstar 2012 to 2018, should perform the following steps.

Steps 1 – 6

1. **Introduction**

   Review the PROFITstar 2018 installation checklist.

   The Profitstar Server needs to be installed on a server that meets the defined Profitstar Server machine requirements, while the Profitstar Client installation must be run on each PC used to access PROFITstar data.

2. **Verify the System Requirements**

   Review the system requirements and verify that the computers on which the software will be installed meet these requirements.

   The 2018 System Requirements document can be found at:

   http://profitstarhelp.jackhenry.com/dev/CurrentSysReq.pdf

3. **Locate your Product Key**

   If you will be installing 2018 on the same client PCs that were previously used to run PROFITstar and if there have been no changes to the institution's licensed products, then you will not need to provide a product key during the Profitstar Client installation process.

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If, however, you will be installing to one or more new machines, or if the institution has changed its licensed products, you will need a Product Key to unlock the products that your institution is currently licensed to install.

The Product Key is entered in the first step of the Profitstar Client Installer. (Step 15) If you do not have this institution-specific information, please contact your client services analyst at 800-356-9099.

4. **Know the Location of the Current Data & the Instance Name of the SQL Server**

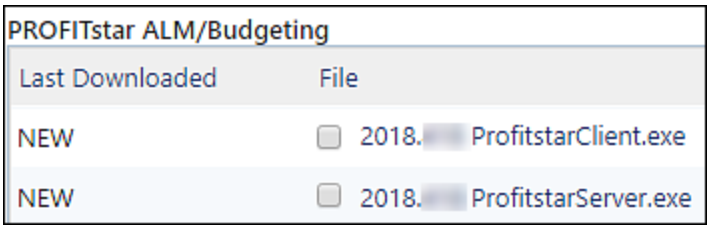
   If you are an existing client, installing 2018 for the first time and needing to convert the institution's data, you will need to install the Profitstar Server on the machine where the 2012 data and Advantage Server currently reside. In addition, you will need to know the instance name of the SQL Server where the new database will be created. (Step 13)

5. **Installation Rights**

   The person installing the Profitstar Server service must have Administrator rights.

6. **Installing from Downloaded Files**

   Download the latest 2018 installation files from the For Clients portal (*Tools/Administration > JHA Downloads*).



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Profitstar Server Installation

Steps 7 – 11

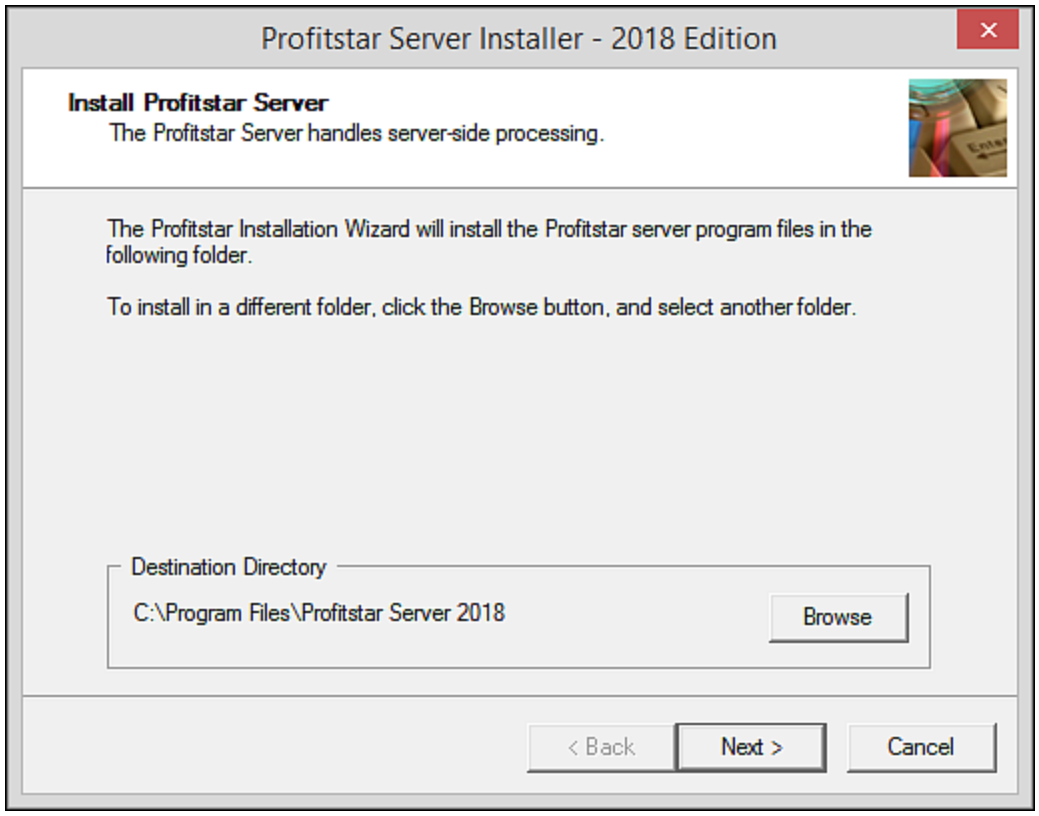
7. **Install Profitstar Server**

   When installing from a downloaded file, use the *2018.xx ProfitstarServer.exe* file to launch the server installation.

   Before beginning the installation, remember that:

   - The user used to run the server and client installations, as well as the 2012 data conversion, must be a member of the **sysadmin** role on the SQL Server instance dedicated to Profitstar. When the installations and conversion are complete, the server role can be reverted to **public**.
   - The person installing the software needs Administrator rights.
   - Remote installation of the Profitstar Server is not permitted.
   - For the 2012 data conversion:
     - The Profitstar Server must be installed on the machine where the 2012 data and Advantage Server currently reside. (Following the data conversion, the 2018 Profitstar Server can be uninstalled on the old server, and then installed on a preferred server, if necessary.)
     - If the 2012 data is on a 32-bit server, the data and Advantage will have to be moved to a 64-bit server before running the Profitstar Server installation and the data conversion.
     - Make sure that you have checked for other potential blocking issues *before* attempting to upgrade from a 2012 version to 2018.

The first step asks you to specify a path for the Profitstar Server installation.



For performance reasons, the Profitstar Server and the SQL Server may be installed on different machines.

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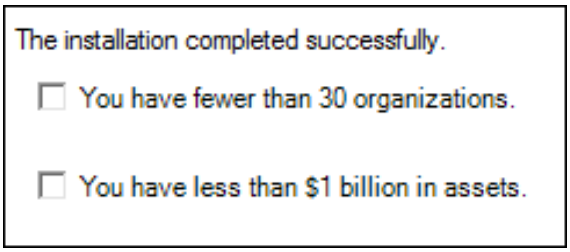
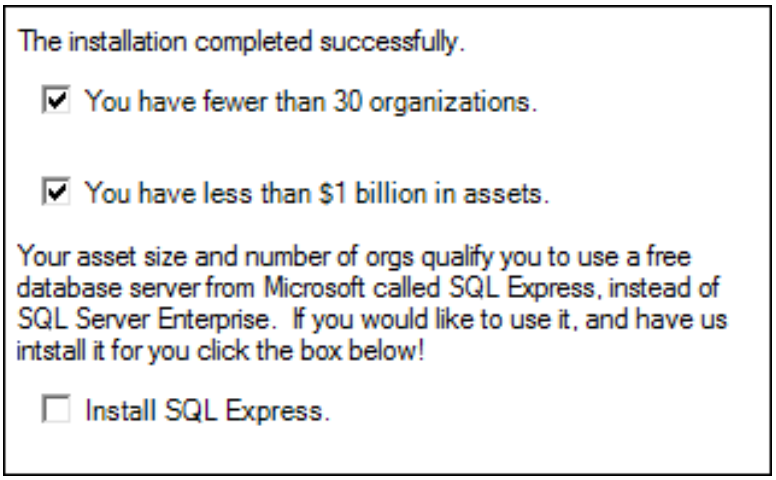
8. **SQL Express**

During the Profitstar Server installation, the program will determine if an instance of SQL Server is already installed on the targeted server. If it is, the installer will progress to the screen shown in Step 9. If not, the installer will display two statements.

Select the statements that are true for your institution.



If you select both, then additional information is displayed.



Select the **Install SQL Express** check box if you want to proceed with the SQL Express installation. When you click **Next** at the bottom of the page, the SQL Express installation will run, without any intervention required.

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The SQL Express installer installs a database engine that supports up to 10 GB per database.

TIP If your institution will be using SQL Express, you should also download and install SQL Server Management Studio (SSMS), from:

https://docs.microsoft.com/en-us/sql/ssms/download-sql-server-management-studio-ssms?view=sql-server-2017

This is a separate and free software installation. SSMS 17.x will work with any older versions of SQL Server and is useful for problem solving and other purposes.

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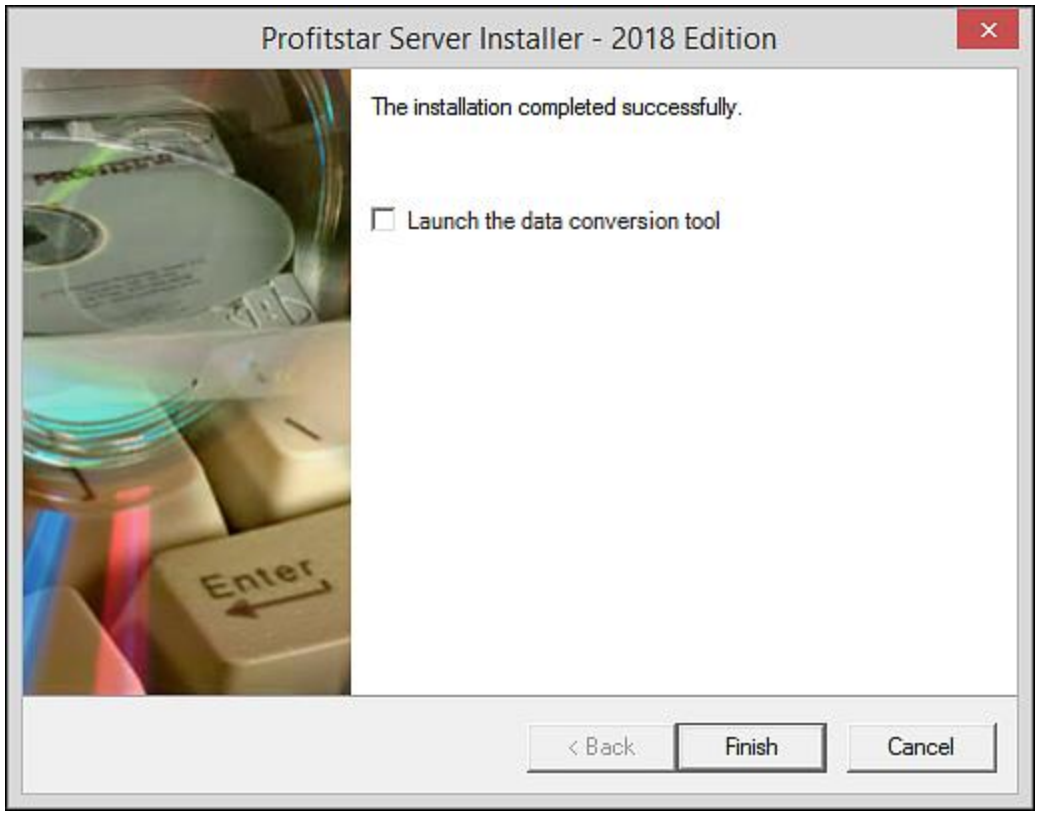
9. **Server Components Installed**

   Following the installation of the Profitstar server, you will see a completion message.

   To convert the institution's 2012 PROFITstar data, verify that the **Launch the data conversion tool** check box is selected and click the **Finish** button. This will open the Profitstar 2018 Data Conversion tool. (Step 13)



   The **Launch the data conversion tool** option will be selected by default if the installation program detects that PROFITstar data has not been converted.

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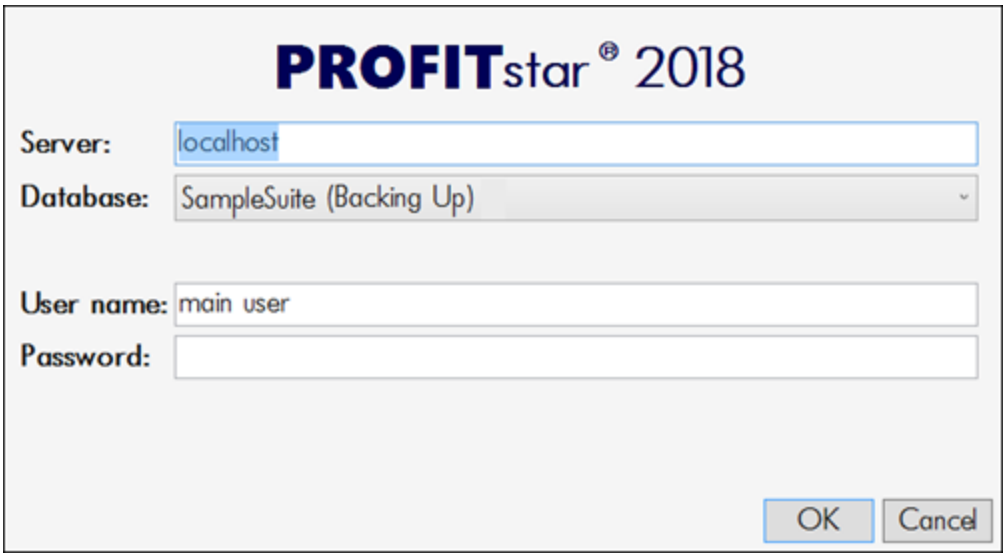
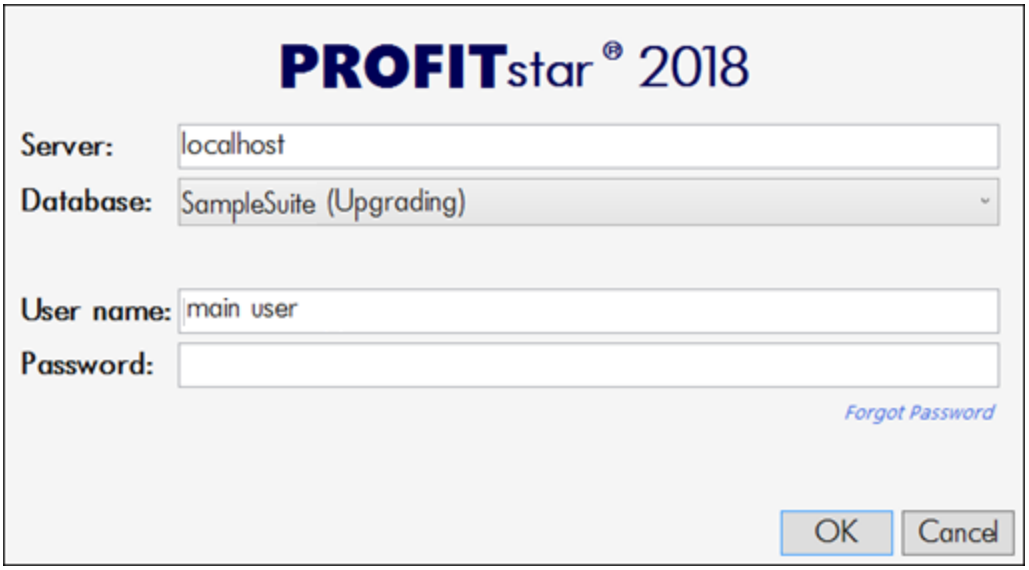
10. Database Backup and Upgrade

When an updated version of the Profitstar Server is installed, a backup of your SQL database is automatically created.



Following this, your data is upgraded.



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These once-per-installation processes can require some time to complete. Factors such as code changes, network speed, and database size all influence how long the backup and upgrade will take.

NOTE Following the 2018 installation, the automatic updating of all configured databases may take a long time, because of the code changes introduced in this release. As a result, large institutions may want to run the 2018 installations late in the day or in the evening.

If you attempt to log into the product immediately after completing the server and client installations, you may see the "(Backing Up)" or "(Upgrading)" messages next to the name of the database, in the Login screen. The act of logging in does not cause this database activity. Rather, these messages tell you what the Profitstar service is doing to your data and indicate why you are not permitted to log in.

You will need to wait until these processes are done—indicated when the parenthetical messages are removed.

11. Optimizer Considerations

For institutions that publish PROFITstar/PROFITability data to the Optimizer product:

- The Profitstar Web Services for Optimizer web application may be installed on the same server that is running the Profitstar Server service, or on a separate server.
- While the Profitstar Web Services component must be kept in sync with the current Profitstar Server version, the Profitstar Web Services for Optimizer installation may be run before or after the Profitstar Server installation.

Data Conversion

Steps 12 – 13

12. Preparing to Convert Data

The PROFITstar 2018 Data Conversion program is designed to be run after a SQL Server instance is in place and after the Profitstar Server has been installed.

As shown in Step 9, the conversion program can be opened from Profitstar Server Installer. If necessary, it can also be launched from the server machine's Windows Start menu.

Profitstar Server Installer

Windows Start Menu

NOTE Before beginning the conversion process, it is important to make sure that the pre-conversion checklist, on page 9, has been thoroughly reviewed.

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13. Running the PROFITstar 2018 Data Conversion

The information that needs to be entered here is:

a. The location of the existing PROFITstar or PROFITability data directories. Use a UNC path to point to the 2012 data found in a **Common**, **PS**, or **PA** folder.

   i.e., **\\server1\psdata\common**

b. The location of the existing PROFITstar Portfolio data directory. Use a UNC path to point to the 2012 data found in a **PMData** folder.

   i.e., **\\server1\psdata\pmdata**

   (The **PROFITstar Portfolio data directory** field can be left blank if the institution is not licensed for this add-on product.)

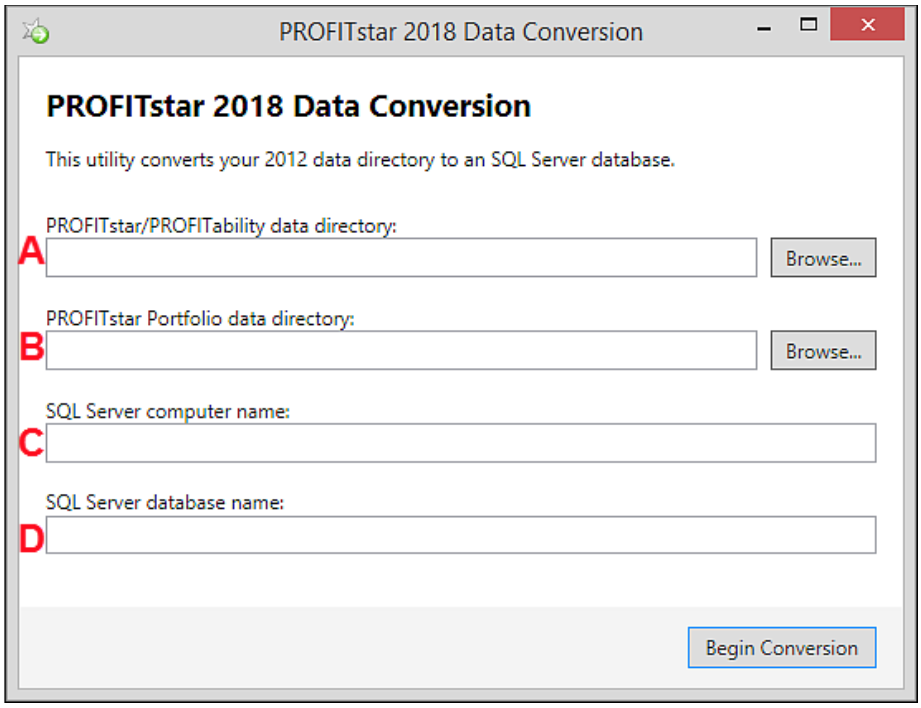
c. The name of the SQL Server where the data will reside after the conversion.

   i.e., **SQLSever**

d. The name chosen for the new database. The name should not contain any spaces. (An existing database name should not be used.)

   i.e., **Profitstar**

   The PROFITstar database is created at the database default location specified in the SQL Server's properties.



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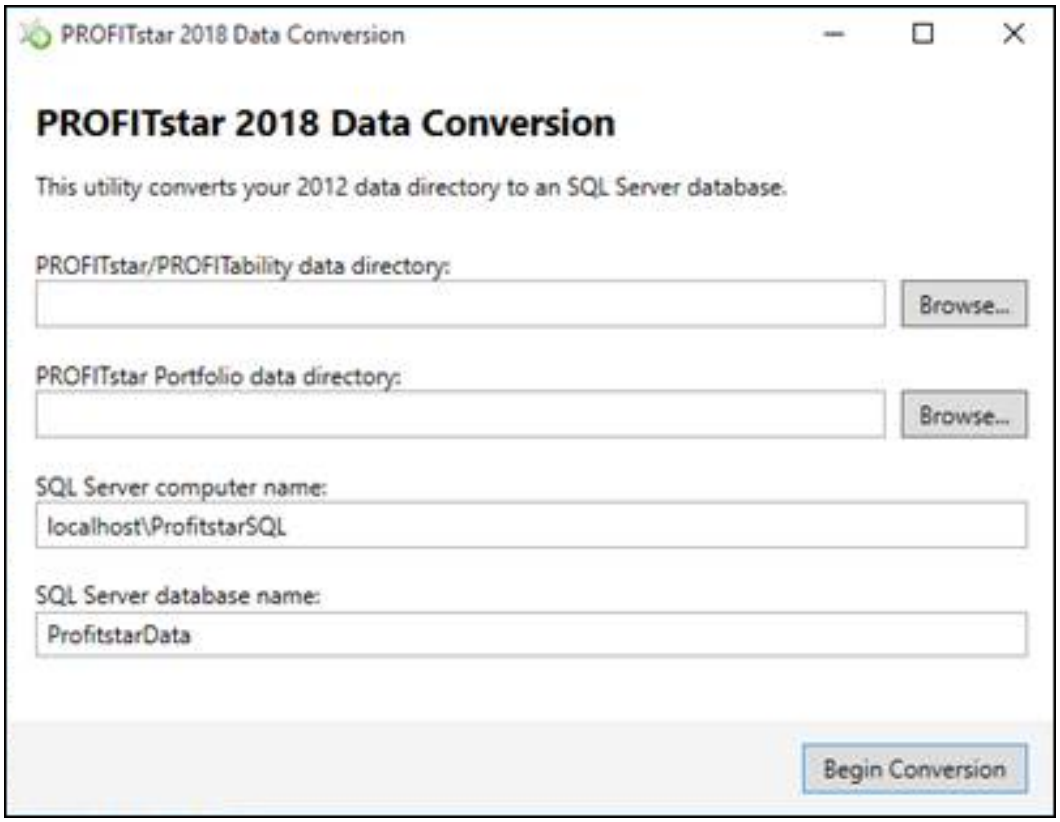
Running the 2012 Data Conversion After Installing SQL Express

If you run the Data Conversion utility at the end of the server installation, and you installed SQL Express during the installation process (Step 8), the **SQL Server computer name** (loacalhost\ProfitstarSQL) and the **SQL Server database name** (ProfitstarData) will be automatically filled in for you.



The default values can be changed.

NOTE Remember that the user used to run the data conversion must be a member of the **sysadmin** role on the SQL Server that is the target of the conversion. When the conversion (and the rest of the installation and upgrade steps) is complete, the server role can be reverted to **public**.

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It is important to understand that the conversion process reads the data and specific files found in a Common, PS, or PA directory and converts this information to tables residing in a database on the SQL server. Following the conversion, the Common, PS, or PA directories are no longer used by the program.

NOTE The conversion process reads, but does not modify, the Common, PS, or PA data.

PROFITstar data conversion can be a lengthy process if the institution's dataset is large. Close the **PROFITstar 2018 Data Conversion** screen when the data is successfully converted.

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Client Installation

Steps 14 – 17

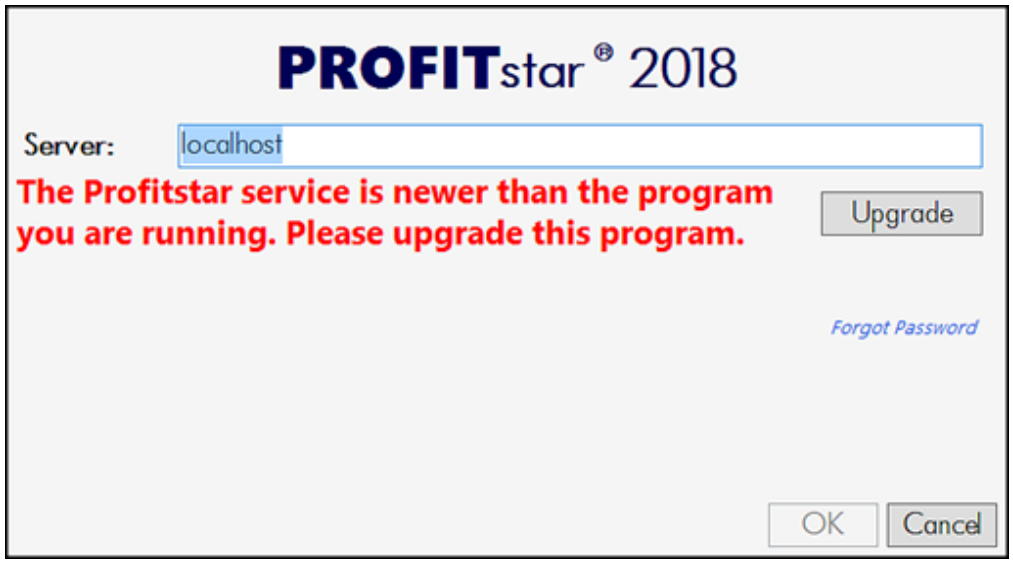
14. Client Installation

The client installation should be run when:

- You are currently installing to the Profitstar Server machine and PROFITstar will be run on this PC.
- You are installing the program files for PROFITstar on each PC that will be used to access the data.

When installing from a downloaded file, use the *2018.xx ProfitstarClient.exe* file to launch the client installation.

NOTE After the first installation of the Profitstar Client program on client PCs, users will subsequently be able to perform upgrades from their Login screens, whenever the Profitstar Server is upgraded.



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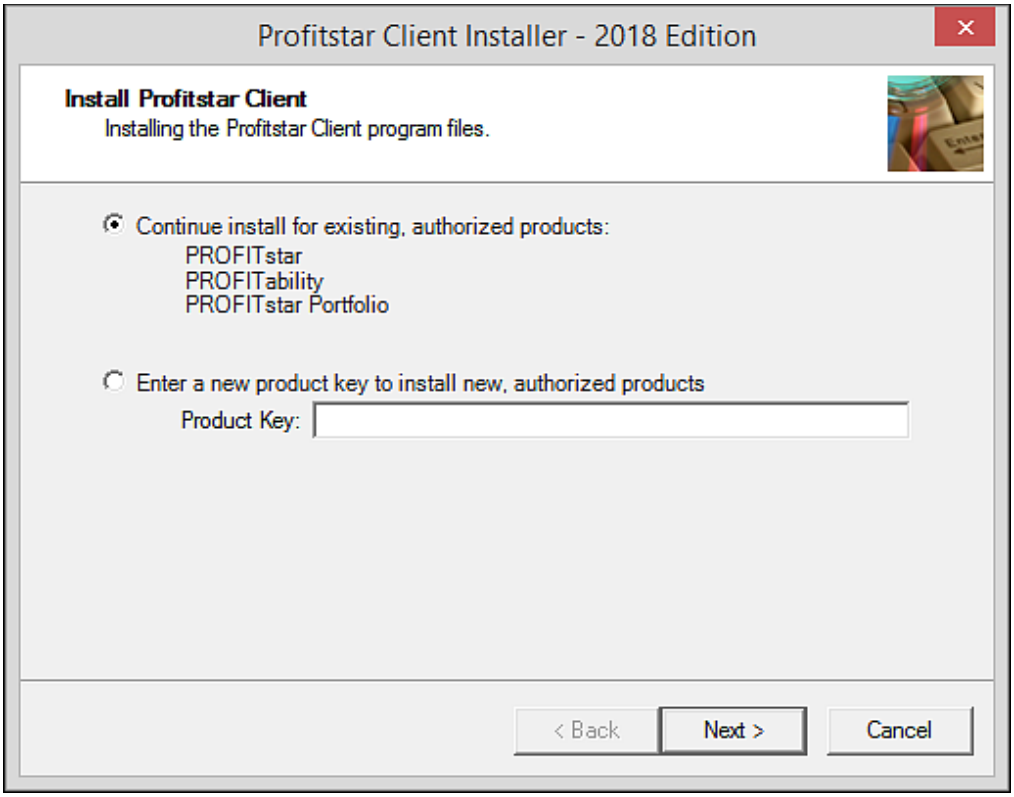
15. Install Profitstar Client (1)

Remember that for all types of installations, the person installing the software must have Administrator rights.

If you are installing 2018 on a client PC that was previously used to run PROFITstar and if there have been no changes to the institution's licensed products, then you will not need to provide a product key during the Profitstar Client installation. If the correct authorized products are displayed under the first radio button, then click **Next** to proceed.

If, however, you are installing to a new machine, or if the institution has changed its licensed products, you will need to enter your institution's Product Key. The key controls which program files will be installed on the current computer.

If you do not have this institution-specific information, please contact your client services analyst at 800-356-9099.



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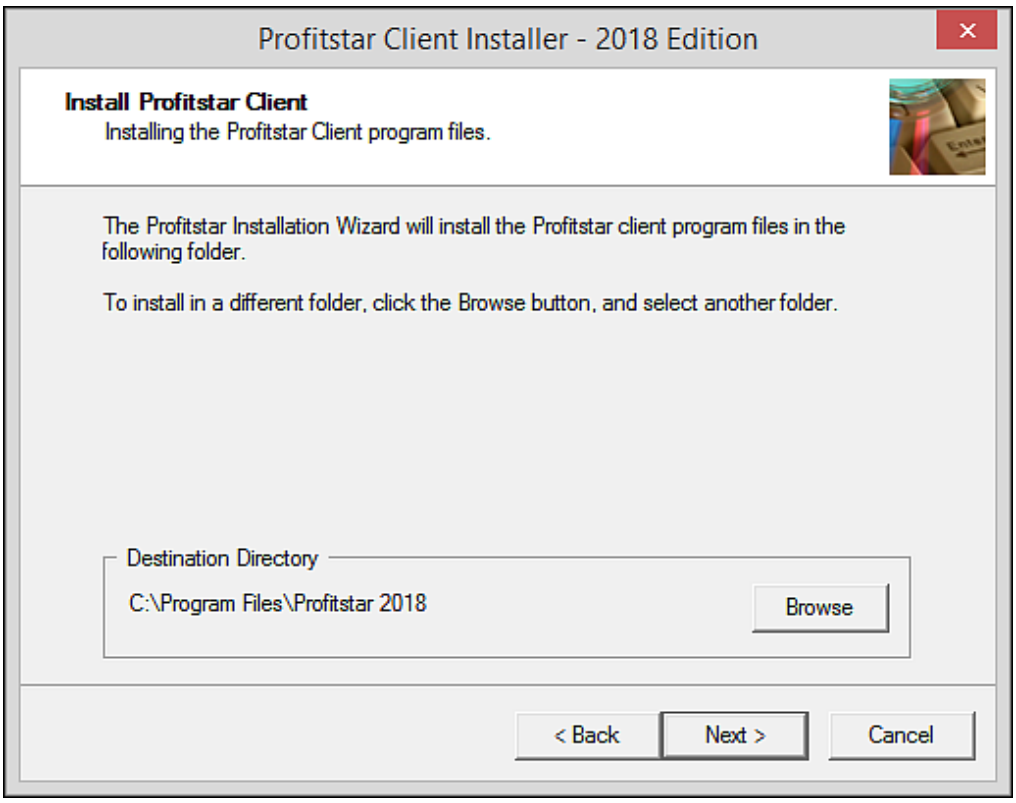
16. Install Profitstar Client (2)

The **Destination Directory**, shown at the bottom of the screen, can be modified by clicking the **Browse** button and selecting a different folder.



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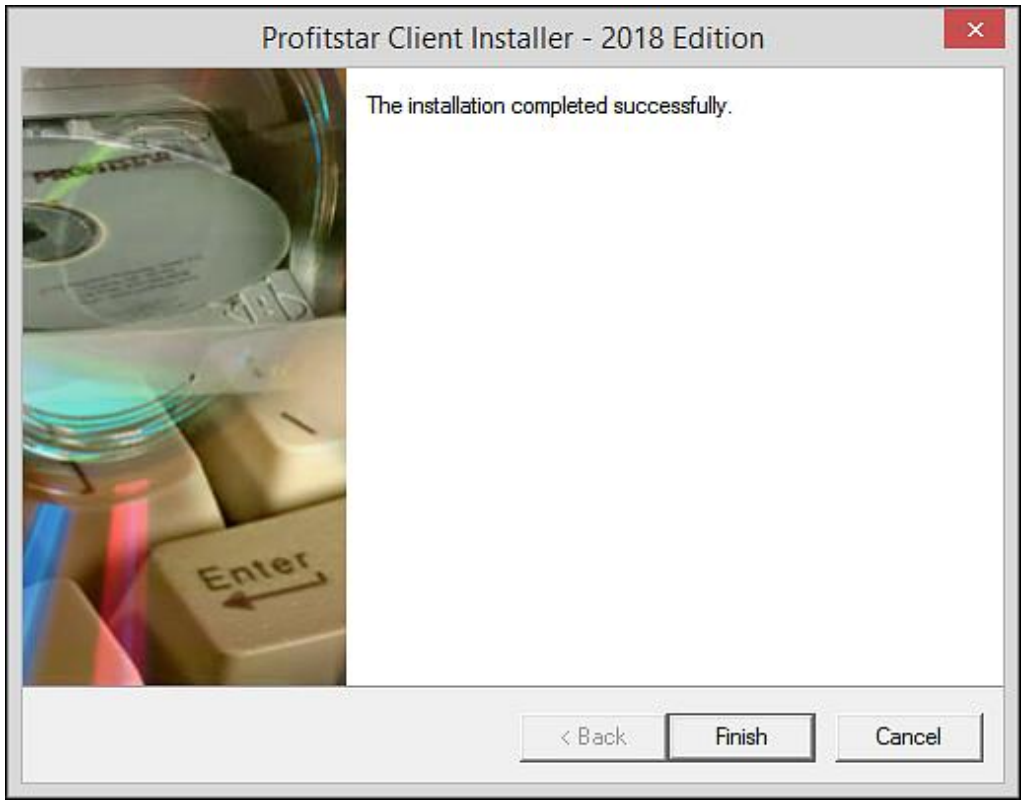
17. Client Components Installed

Following the installation of the Profitstar Client components, you will see a completion message. Click the **Finish** button.



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Final Considerations

Logging into PROFITstar

When the Profitstar Client and Server installations are complete, and the PROFITstar data is converted, users will be ready to log into the program.

NOTE if you attempt to log into the product immediately after completing the server and client installation processes, it may be necessary to wait until the program finishes upgrading the database. You will know that the upgrade is not yet finished if you see "(Upgrading)" next to the name of the database, in the Login screen.

Depending on the programs installed on a user's PC, either the **ps.exe** (for PROFITstar) or the **pa.exe** (for PROFITability) file, found in the **Profitstar 2018** folder, can be used to open the Login screen. PROFITstar and/or PROFITability shortcuts can also be found in the Windows Start menu.

When the Login screen appears, the following information needs to be entered:

- **Server** – This is the Profitstar Server computer name, which may or may not be the same as the SQL Server computer name.

  NOTE A Fully Qualified Domain Name or IP address may also be used in the Server field.

- **Database** – The name of the Profitstar database, which was assigned during the data conversion process, is entered here.

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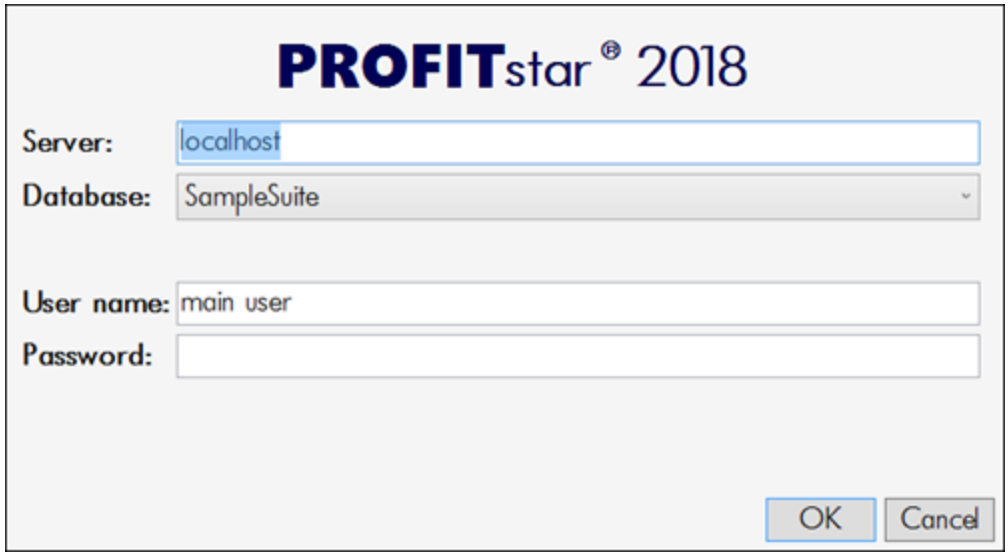
- **User name** – If User Permissions were previously set up, the user will need to enter a User name.

  NOTE For datasets in which User Permissions were not previously defined, during the data conversion, a system-generated Security Administrator user, called "Main User," is added. When other Security Administrators and Standard Users are created, the system-generated user can be deleted.

- **Password** – If a password is associated with the user, it is entered here.



Once a user has successfully logged into PROFITstar or PROFITability, the Login screen will remember the Server, Database, and User Name information the next time the user launches the program on the same PC.

Post-Conversion Considerations

What About the Common, PS, or PA Directories?

It is important to understand that the conversion process reads the data and specific files found in a Common, PS, or PA directory and converts this information to tables residing in a database on the SQL server. Following the conversion, the Common, PS, or PA directories are no longer used or backed up by the program.

Before deleting the directory that contains your 2012 data, you should consider what to do with several important folders:

- **Backup** – If your 2012 data was only backed up from within PROFITstar, then you might want to retain your most recent full backup files, for a while.
- **DLFiles** – In 2012, download files were often stored with your data, in a folder such as C:\PSData\Common\DLFiles. Now, however, with PROFITstar and PROFITability data stored in a Microsoft SQL Server database, there is no longer a way to store these files with your data.

  If you were using the **DLFiles** folder to store these files in the past, you will need to decide upon a new location in which to save and store them. In addition, since files and folders are not included in SQL Server database backups of PROFITstar, you may want to store these files on a drive at your institution that is periodically backed up for disaster recovery purposes. When you run the update in PROFITstar or PROFITability, you will need to specify a new file path in the Download Setup properties.
- **Reports** – If any old reports that exist in the Common, PS, or PA **Reports** folder are still needed by your institution, you are encouraged to store these files on a drive at your institution that is periodically backed up for disaster recovery purposes data.

  In addition, 2012 reports that are saved to file, in a location such as Libraries\Documents, are not included in SQL Server database backups of PROFITstar. You will need to decide where these reports should be stored and if they need to be backed up.

Missing Ratio Values Following Conversion

If you have models with non-global charts and if you are not seeing ratio results in your suborganizations, follow these steps to restore the values:

1. In an affected model and suborganization, go to *Setup* > *Ratios*.
2. In any ratio, make a change, such as to the Account Level setting, and click **OK** to save. (If you change the setting back to its original state, click **OK** again.) Doing this for one ratio will restore all the ratio values in the current organization.
3. Repeat this process for each suborganization in the current model.
4. Repeat steps 1 through 3 in any other model with non-global charts.

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Appendix – Related Links

PROFITstar®, PROFITability®, Profitstar Suite™, PROFITstar® Portfolio

The most current version of these installation instructions

http://profitstarhelp.jackhenry.com/dev/2018DataConversionInstall.pdf

Installation instructions for existing 2014 through 2017 clients

http://profitstarhelp.jackhenry.com/dev/2018NoConversionInstall.pdf

Installation instructions for new clients

http://profitstarhelp.jackhenry.com/dev/2018NewInstall.pdf

System requirements

http://profitstarhelp.jackhenry.com/dev/CurrentSysReq.pdf

Hardware recommendations

http://profitstarhelp.jackhenry.com/dev/HardwareRecommendations.pdf

Release notes

http://profitstarhelp.jackhenry.com/dev/2018ReleaseNotes.pdf

PROFITstar's Hosted Budget Manager

System requirements

http://profitstarhelp.jackhenry.com/dev/CurrentBudgetManagerSysReq.pdf

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