

# Remote Computing with Financial Navigator

Personal computers have long been recognized as effective means of storing information, calculating numbers and printing reports. Now, they are becoming a powerful way to communicate. One of the new forms of communication is remote computing. This allows a user to use his or her PC to communicate directly with another PC. Also, it allows two users to combine communications with the use of other capabilities of the computer.

This technology has been around for many years and is now becoming more widely used. It is ideal for use with Financial Navigator in those situations where you want two PCs to "talk to each other."

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## What is Remote Computing?

Remote computing is a combination of technology and a way of performing certain types of work.

**Definition**

Remote computing is the technique of using a telephone line to connect two computers at two different locations so that a user at one computer can operate functions, view data, and make changes on the other computer.

Remote computing is not to be confused with other forms of PC communication, which are now becoming widespread. Other means, such as financial data services, email, the Internet, and the World Wide Web use a PC and a phone line, but are very different from remote computing. These forms use another computer to provide various levels of service to the PC user who is calling. The service may access specific data such as stock market prices, which is commercially available. Another possible service is electronic mail.

With remote computing, there is no other computer service involved. One PC uses a normal phone line to call the other PC directly. No other computer system is involved. No other services are available except what the two users can perform.

Because it uses computers and telephone lines, remote computing would be considered part of the much talked about "Information Superhighway."

**Terminology**

There are a few terms that you may not have used before. Remote computing requires two computers that are designated as:

- **Host Computer** — This is the computer on which the operations are being performed.
- **Remote Computer** — This computer is accessing the Host Computer and sending it instructions for the Host computer to run. Typically, the Remote Computer initiates the session by calling into the Host Computer. The Remote Computer can be either sending or receiving data files.

**How It Works**

Remote computing uses a combination of software and communications technologies. The modem and phone line provide the connection for the computers to communicate with each other. The most sophisticated part is the way the two software applications work together. Financial Navigator runs the same as it does on a single machine. The remote computing software runs in the background and causes the screens on the Host Computer to also appear on the Remote Computer. It causes the keystrokes that are entered on the Remote Computer to execute commands in the Financial Navigator, which is running on the Host Computer.

Most importantly, you should realize that the best part of remote computing part is that . . .

**You don't have to know how it works —  
just how to do it!**

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## Why Use Remote Computing?

Remote computing is a powerful tool that can radically change the way in which you handle several aspects of your work.

- **Implement the "virtual office" concept** — You can perform all of your computer-based work anywhere. You simply need to have access to a telephone line and a computer capable of doing remote computing. You can send or receive information.
- **Avoid travel** — The professional can provide hands-on immediate services to clients. No travel time required.
- **Work from multiple locations without the disadvantages** — Users with more than one office or an office in the home can access information from wherever they are. No need to travel to the client's house or office to have current information.
- **Access information at any time** — Users on the road can access information on any office computer or network system. They can do this 24 hours a day, 7 days a week. They can access from their homes or from anywhere in the world.
- **Keep up to date precisely** — Family offices can keep family members up to date without the need for the family member to come into the office or use overnight delivery.

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## Most Common Uses of Remote Computing

Currently, Financial Navigator users rely on remote computing most frequently to:

- **Provide technical support** — If one user has a problem or a question about a particular situation, a consultant at another location can log on to the computer with the problem. That way the consultant can see exactly what the user with the problem sees. Also, the consultant can often fix the problem with the data without the user having to know how to do it.
- **Transfer data files** — Often a user would like to use a file that is stored on a computer located somewhere else. Using remote computing, a user can access the necessary computer and copy the file over the telephone line to his or her own PC.

In the future, as communication lines are able to handle more information faster, remote computing will be used to provide services that have normally been conducted only in connection with a face-to-face meeting. Those include:

- Personalized instruction.
- Financial services consulting.

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## What Equipment Is Needed

The hardware and software requirements are simple.

- **Computers** — At least two or more computers. The computers need to be powerful enough to run Financial Navigator and the communications software at the same time. Because two applications are running at the same time, Financial Navigator will run slower than it does when it is running by itself. For good responsiveness you will want a machine with a Pentium processor and at least 16 MB of RAM.
- **Modems** — All computers need to be equipped with modems. For acceptable performance, these should be modems operating at 14,400 baud rate, preferably 28,800 or higher.
- **Software** — Special communications software that performs remote computing. This software needs to be installed on any computer performing remote computing. There are several commercial products available to perform this function. Later in this section we illustrate the use of a product called pcANYWHERE32® distributed by Symantec. You can also perform these functions with a communications component that is part of Microsoft Windows 95/98.

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## Installation and Setup

You begin using remote computing just like any other new application that requires hardware and software. You must:

- Connect the modem.
- Install the remote computing software.
- Set up the software to work with your computer and modem.
- Make several decisions regarding security issues
- Enter your choices into the option menus.

This process must be completed on both computers that will be used for the remote computing session.

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## Conducting a Remote Computing Session

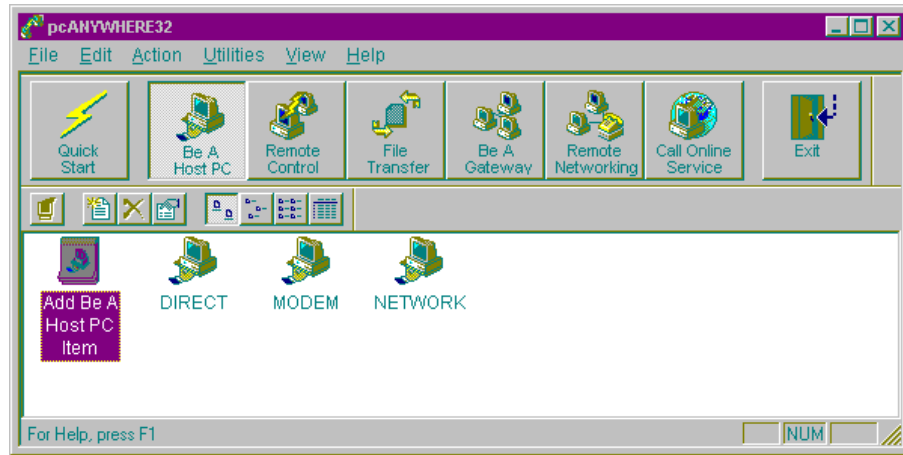
To use this technology, you need to understand the following steps of a remote computing session:

- Adjusting the set up, if necessary, and preparing to initiate the session. These steps must be done on both computers.
- Waiting for a call (Host Computer).
- Dialing out (Remote Computer).
- Connecting the computers.
- Conducting your activity on the remote computer.
- Signing off.

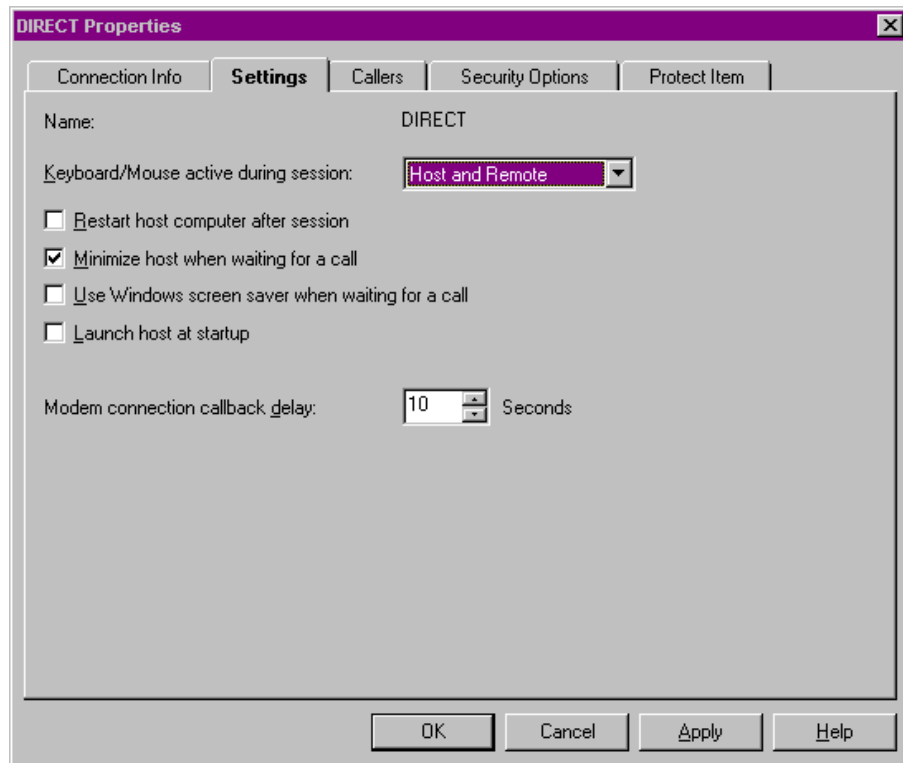
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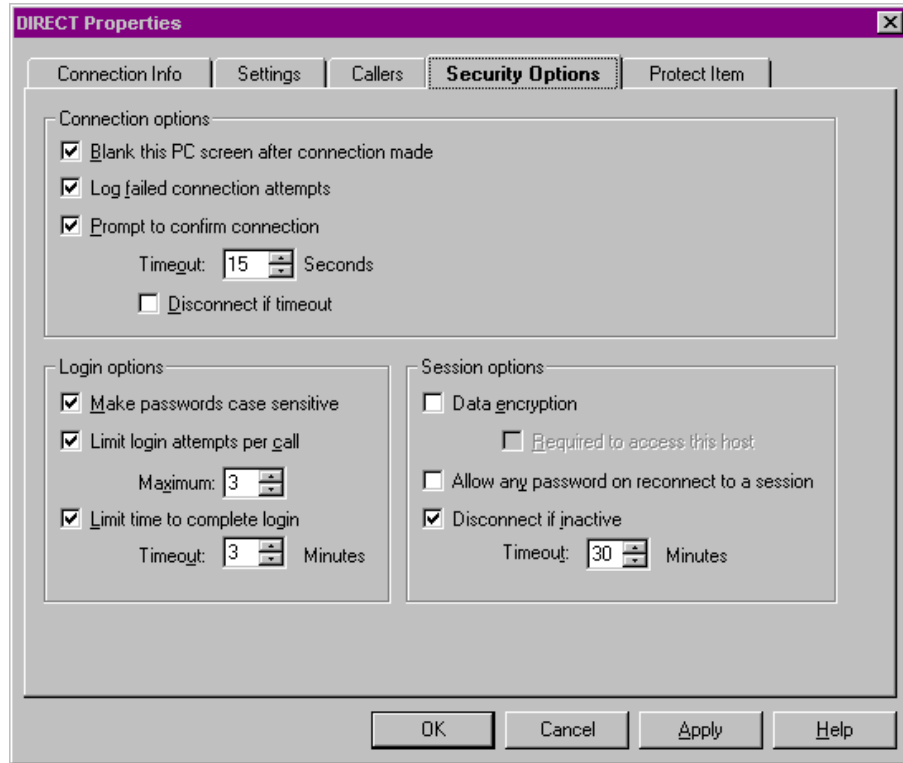
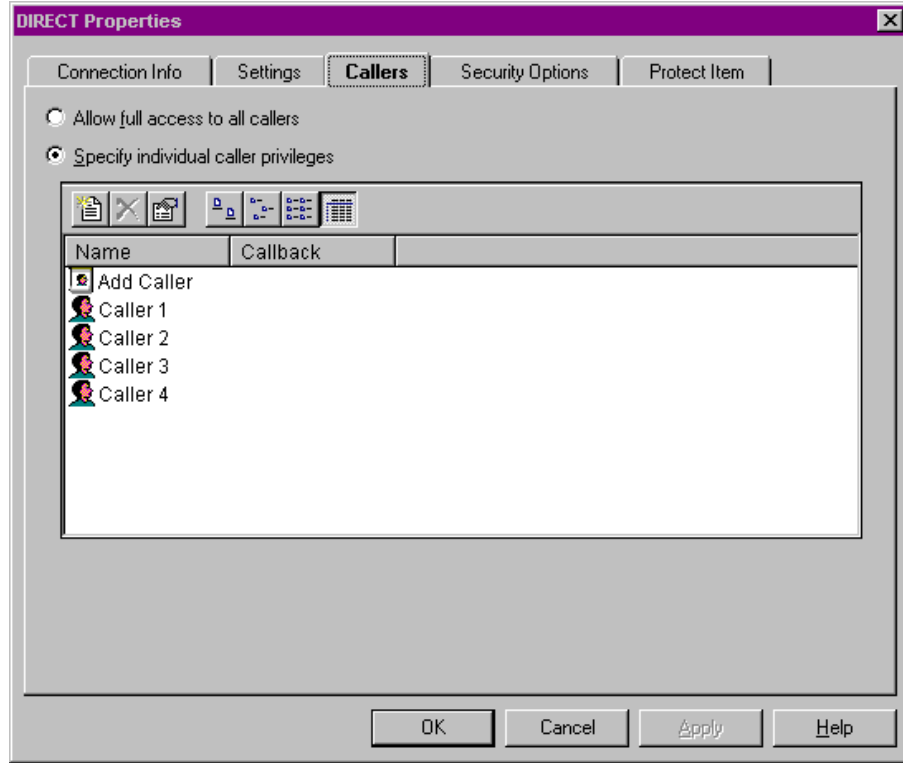
### **Host Computer**    *To set up and run the Host Computer:*

1. Start **pcANYWHERE32**.
2. Select the **Be a Host PC** button. The screen appears as follows:



3. Set or check the control and security options. Right-click the appropriate icon and select **Properties**.  
- Or -  
Double-click the **Add Be a Host PC Item** icon. Follow the setup instructions to create new settings.
4. Make the appropriate selections for control and security of the Host Computer. In pcANYWHERE32, some of the options appear as follows:





Select options appropriate to your control needs and security concerns. Select **OK**.

5. Double-click the icon or select **File | Wait for Connection**. The program now waits for any incoming calls.

## Remote Computer

*To set up and connect from a Remote Computer:*

1. Start **pcANYWHERE32**.
2. Select the **Remote Control** button.
3. Set or check the control and security options. Right-click the appropriate icon and select **Properties**.

- Or -

Double-click the **Add Remote Control Item** icon. Follow the setup instructions to create new settings.

4. Make the appropriate control and security selections for connecting to the Host Computer. In pcANYWHERE32, some of the options appear as follows:

Select options appropriate to connecting to the Host Computer. Select **OK**.

5. Double-click the icon or select **File | Connect**. The Remote Computer initiates the call to the Host Computer. If you have not entered a telephone number and other login information, the system prompts you for them when necessary.

**Operation** Remote operation of the host or the remote computers allows for:

- Running Financial Navigator on the host computer from the remote computer. This is no different than operating Financial Navigator on your own computer.
- Sending messages to the person at the other PC. This is called chatting.
- Transferring files from one computer to the other. This sends files between the computers much like copying files from one folder to another on your own computer.

**Ending the Session** To end the session, the user on the remote computer simply terminates the call. Select the appropriate command in your communications software.

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## Security Issues with Remote Computing

Some users are hesitant to use remote computing out of concern that something could happen to their financial information.

Here are some safeguards:

- **Passwords** — Both pcANYWHERE32 and Financial Navigator have password features that allow users to limit access to the Host Computer and data files. Additionally, pcANYWHERE32 allows you to assign different passwords to different remote users.
- **Wait for Connection mode** — The Host Computer must be ready to accept an incoming call. If pcANYWHERE32 is not running or not in Wait for Connection mode, a remote user cannot access the Host Computer. The host user can start pcANYWHERE32 when he or she allows access to a particular remote user.

**How to Reach Us**

**Information and Sales:** ..... 800 468-FNFN (3636)  
**Fax:** ..... 650 962-0730  
**Web site:** ..... [www.finnav.com](http://www.finnav.com)  
**E-mail:** ..... [customerservice@finnav.com](mailto:customerservice@finnav.com)  
**Technical Support:** ..... 650 962-8510  
**Hours:** ..... Monday - Friday 7:30 a.m. - 4:30 p.m. PT  
**Business Address:** ..... 254 Polaris Ave  
..... Mountain View, CA 94043  
**Telephone:** ..... 650 962-0300

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