FINANCIAL NAVIGATOR

Running Financial Navigator on a Network

Many users of Financial Navigator software have multiple employees working with the same information. Therefore, the capability for each user to access the program from his or her computer is imperative. Multiple computers are linked together in order to be able to access the same programs, whether it is Financial Navigator or other software applications, via a computer network.

What Is a Network?

A computer network is a configuration of computers and software connected in order to exchange information. For this discussion, computers are cabled together with a hard-wired or direct cable connection as opposed to a dial-up connection, such as the Internet.

Definitions

A network is made of two basic parts:

- **File server** — A network node for storing programs and data shared by users on a network. The file server usually consists of fixed-disk storage and a CPU. File servers offer operation system-type file and print capabilities, while database servers provide database intelligence such as transaction processing, indexing, logging, security, and so on. In other words, the file server is the main computer that all the other computers are connected to and depend upon.
- **Workstation** — A personal computer connected to the network-by-network hardware and software. In other words, a workstation is one of many computers connected to the network file server. Data that is used by other workstations may reside on a workstation, but the network does not depend on this computer.

There are two basics types of networks:

- **File server network** — This type of network has a dedicated file server. Having a file server with a faster hard drive and more memory (RAM) enhances performance. Novell and Windows NT are examples of file server networks.

- **Peer-to-peer network** — This type of network has no dedicated file server. One computer serves as the file server but is also used as a workstation. Files are shared between the workstations. Performance is degraded by the fact the server is also used as a workstation. Lantastic and Windows for Workgroups (WFW) are examples of peer-to-peer network systems.

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Running FN on a Network

Both the Single-User and Multi-User versions of Financial Navigator can be installed and run on a network. The Single-User version, however, allows only one user to run Financial Navigator at a time. The Multi-User version allows multiple users to run FN at the same time, although only one user can access a single set of data files at a time. Also with the Multi-User version, a user can run a second copy of FN on the same computer. When you start the Financial Navigator for the second time, the message "Financial Navigator is already running. Run second copy of Financial Navigator?" appears. Select **Yes** to start a second copy of FN. With this capability, you can access multiple sets of data files.

Setting Up FN on a Network

Setting Up the File Server

Install the entire FN program (including help files) on the file server. By having the program and help files on the file server instead of each workstation, you can:

- Conserve disk space on the workstations.
- Ensure all users are using the same version FN.
- Quickly upgrade FN software.

To install FN on a network:

1. Follow the same steps as for installing on a stand-alone computer.
2. At the prompt for type of installation, select **Full Installation**.
3. Select the folder on the file server where you want to store the FN program files.
4. Continue the installation until it is complete.

Note: *Other FNI products such as CheckForm Navigator, Navigator Impressions, and Navigator StockWeb must be installed in the same folder as the Financial Navigator program.*

Setting Up a Workstation

Install only the Windows library files (DLL's and Windows registry) and shortcut icons. These files must be located on the workstation for FN to run properly.

To install FN on a workstation:

1. Check to see that Financial Navigator has been installed on the file server and that the workstation is connected to the network.
2. Follow the same steps as for installing on a stand-alone computer.
3. At the prompt for type of installation, select **Workstation Installation**.
4. Select the folder on the file server where the FN program files are located.
5. Continue the installation until it is complete.

> ***Tip:*** *For a faster installation on a large network, copy the contents of all the FN program diskettes to a folder on the network such as* ***F:\|Programs\|Disks\|Fn****. Then run the setup from that folder for each workstation.*

Using Shortcuts and Icons

Shortcuts in Windows 95/98 determine the target program and start folder. The *Target* indicates what program to run and what parameters to use (like on the command line in DOS). *Start in* indicates the current folder. For Financial Navigator, the Start in folder should always be the program folder such as **C:\Fn** or **F:\Programs\Fn**. The target will be the FN program such as **C:\Fn\Fnwin80.exe** or **F:\Programs\Fn\Fnwin80.exe**. The target can also contain the name of the set of data files to open on start-up. The path for the data files is written after the target, as follows:

C:\Fn\Fnwin80.exe C:\Fn\Data.00

Using this method, a separate icon can be created for each frequently used set of data files.

Protecting Data Files on a Network

The FN data files containing the account data for each entity can reside on server for access to all or on the workstation for access only to that workstation. This is assuming no file sharing between workstations. Additionally, most networks can be configured to allow a user to access

and/or update files only in specified directories. The network administrator or supervisor must set these permissions.

The FN password function can also be used to protect data files. You can set a different password for each set of data files. For details on using passwords, see page 69 in the *7.0 Reference Guide*.

Some users maintain a viewing copy of the data and an active working copy of the data. The viewing copy is accessible for anyone who needs to see the data but not enter or change it. The working copy exists in another folder and can only be updated by those who have authority to update the data. The working copy is copied to the viewing copy periodically (at the end of the day or after the bank statement has been reconciled).

Backing Up Data Files

The data files should be backed up regularly in case of a problem such as a hard disk crash, cross-linked clusters, a virus, hardware theft, fire, earthquake, or any other imaginable disaster. Problems will occur, but they can usually be solved. Disaster happens, however, when files are not backed up.

The FN program can be reinstalled. Lost or damaged installation files can be obtained from FNI. Computer components can be replaced. Computer systems can be replaced. But remember:

Your data files do not exist anywhere else in the world, at any price.

The value of your time indicates the need to back up regularly. It takes a few minutes or less to backup your data files. It can take days, weeks, or even longer just to track down all the information (if it still exists) you need just to begin re-entering your financial information.

Creating a Backup Rotation

You should back up your data files as often as necessary to ensure your productivity. For example, back up daily to a diskette. At the end of each month, back up to a different diskette. At end of the year, back up the data to a different diskette for each year.

For the daily backup some users back up on the same diskette every day. If a problem is not discovered for a day or two, the error-free data files will be lost. The best way to ensure you have an error-free set of data files is to create a multi-generation backup. Back up to a different set of diskettes each day. For example, a five-generation backup would use five diskettes. Diskette #1 would be used on Monday, #2 on Tuesday, #3 on Wednesday, #4 on Thursday, and #5 on Friday. On the following Monday the #1 diskette would be reused. A problem created on Tuesday the 10th and discovered on Friday the 13th can be solved by restoring Monday the 9th backup.

Note: *Even if you discover a problem in your data files, continue backing up as usual (and label appropriately). You may be able to solve the problem without re-entering all the data since the last error-free backup, and you may still be able to use reports and other information if you need to re-enter data.*

A recommended rotation would be to create five generations for daily backups, four generations for weekly backups, and twelve generations for monthly backups. Annual backups can be made and stored for as long as necessary.

Storing Backups

Where to backup the data depends on how often you backup and what problems you are trying to prevent. Backing up to another folder on the same hard drive provides a past copy to review or restore from if necessary, but it will not protect you from serious hard drive problems, such as a fatal crash. Backing up to a floppy diskette or other medium and storing it near your workstation or on-site will protect you from a hard drive crash but not from fire or theft. The following are some tips on creating and storing backups:

- Backup frequency should be related to the probability of a problem occurring. If your hard drive seems susceptible to problems, then you need to backup on another medium more often.
- Typically network file servers are backed up on a periodic basis. Find out how often that is. Also verify what files are backed up. Some backup procedures copy all files; others copy only newer files. Some do incremental backups for only the part of the file that changed.
- Backing up to another folder is a good idea before trying something new. Using a different medium such as another hard drive or a tape drive is good for daily backups since most hard disk crashes occur when a drive is turned on or off. Store backups off-site at the end of the month and year to in case of fire or theft. The off site backup should be a complete backup and taken to another location, such as a safety deposit box.

Testing Backups

A backup is good only if you can use it to recover the data. Test your backup periodically, especially after you have changed to a new backup system. Restore the files to a different location. Then compare the files using a program such as **Comp.exe** to ensure they are identical. Access the data to produce a report, such as a detail trial balance, to ensure most of the data is accessible. Produce other reports or view other screens to verify other data.

Using Symbol and Price Files

In the Multi-User version, multiple symbol and price files can be located on separate workstations or network directories. This will enable separate price files for each user or by

client. The option is specified by setting a parameter **/pr=** to the folder where you want the symbol and price files to reside. The setting can be in the shortcut on the Target line as follows:

F:\Programs\Fn\Fnwin80.exe C:\Data /pr=C:\Prices

The setting can also be written in the **Fnwin.ini** file as:

Command=/pr=C:\Prices

The shortcut allows it to be different on the same workstation for different sets of data files by using a different shortcut for each set of data files. The **.ini** file allows the setting to be different for each workstation while being the same for all data files used by that workstation.

This parameter can be verified by looking at the startup parameters display in the About Financial Navigator screen.

Printing on a Network

Windows controls printer settings. The setup is similar for network and local printers. The exception is CheckForm Navigator, which uses a DOS printer driver. When CheckForm Navigator is installed, you select the printer port to be used. Under Windows 95/98, if this printer is a network printer, the port must be captured and redirected to the network printer.

To redirect the printer port:

1. Select **Start | Settings | Printers**.
2. Select the network printer you will be using for CheckForm Navigator. Right-click the icon and select **Properties**.
3. Select the **Capture Settings** tab.
4. If the **Capture Settings** tab is not available, select **File.**
5. Select the **Capture Printer Port** command button.
6. From the Device list box, select the same port that was set when CheckForm Navigator was installed.
7. From the Path list box, select the appropriate network printer.
8. Check the **Reconnect at logon** box. This way the capture will be done each time you restart your computer.

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