

A StockOpter® White Paper
From: Net Worth Strategies. Inc.

Storing StockOpter files on Network Servers

Introduction:

It is common in many companies to require key files to be stored on a network server rather than a local hard disk. This is usually to allow them to be backed up and archived without any additional action by the user. The StockOpter™ product family fully supports this kind of file setup, though the details vary a bit by product.

StockOpter Insight:

StockOpter Insight must initially be installed on your local hard disk. By default, the files install within the "C:\Program Files\Net Worth Strategies \ StockOpter Insight" directory. (Direct installation on server is not supported and will most probably fail to work properly if this is tried.) Once installed locally, the key file is the "StockOpter Insight.xls" file within the installation directory. After installation, this file can simply be moved to the network server – or any other location -- and opened from there.

Insightful notes

If you do move the "StockOpter Insight.xls" file, the "StockOpter Insight" icon on your desktop, and the link within the "Start / All Programs / StockOpter Insight" menu will fail, as they're pointing to the old location. You can simply either delete these or right-mouse click on them and (in Windows XP), choose "Properties", then "Shortcut", then "Find Target..." point to its new location.

Once installed, there is nothing magic about "StockOpter Insight.xls" file name. This file can be renamed at will. The "Save" button within Insight will always save the "StockOpter Insight.xls" file into its current location, as you would expect. It will also update the special "Insight Backup.xls" file within "System Files" subdirectory of the original installation directory, which will still be on your local hard disk. The "Insight Backup.xls" file name is hard-wired and cannot be changed.

Even though the "StockOpter Insight.xls" file is moved to the server, it will only have full functionality when opened on the computer from which it originally came. If you have multiple Insight users within your organization, and they each want to move their file to the server, there are two possibilities. If they each want to keep the their "StockOpter Insight.xls" file name, they'll need to chose separate server

locations for each files. Alternately, it makes sense to rename the server-based files to names like "MaryUser Insight.xls", "JoeUser Insight.xls" regardless of where on the server they are stored (which might be all in the same server directory). This second naming style will also make data migration between the various Insight files easier as well.

StockOpter Pro:

Like Insight, StockOpter Pro must initially be installed on your local hard disk. By default, the files install within the "C:\Program Files\Net Worth Strategies \ StockOpter Pro 3.1" directory. (Direct installation on server is not supported and will most probably fail to work properly if this is tried.) Once installed locally, the "New SO Pro.xls" icon brings up an empty, read-only copy of StockOpter Pro for you to use. When you're entered client data you want to keep, you'll need to do a "File / Save As" within Excel to save it. At that point, you can point to any location you like, including a network server, and give it whatever file name you like. You can subsequently open the saved file from its new location with any computer on which StockOpter Pro has been installed and you'll have full functionality.

Professional notes

If you like, you can also move the empty "New SO Pro.xls" file from the installation directory to a network server, but there's no real benefit to this since there is no client data in this read-only file. If you do move this file, however, the "New SO Pro" icon on your desktop, and the link within the "Start / All Programs / StockOpter Pro 3.1" will need to be updated. To do this, you can right-mouse click on them, and (in Windows XP), choose "Properties", then "Shortcut", then "Find Target..." point to its new location.

Even though a StockOpter Pro file has been moved to the server, it will only have full functionality on the computer on which StockOpter Pro has been installed.