# Chapter 11
## Managing Core Database Downloads

Research Insight versions 7.7 and higher offer automated delivery of the COMPUSTAT core databases over the Internet through the Database Manager application. The Database Manager lets you control when the core databases are downloaded and where they are stored on your system.
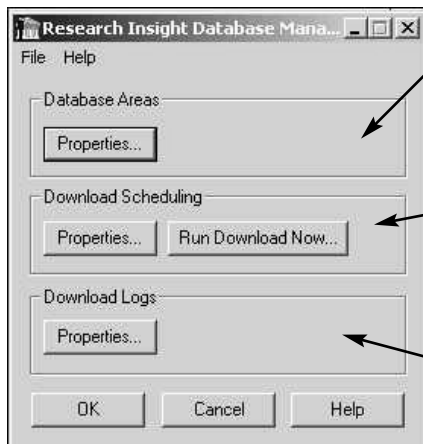
This chapter covers

- managing core database downloads

- specifying the location of the Database Manager

- enabling/disabling the Price History Database

- adjusting cache size

# Managing Core Database Downloads with the Database Manager

Research Insight offers the convenience of automated electronic delivery of the COMPUSTAT core databases. The Research Insight Database Manager allows you to control the download schedule and the location where the databases will be stored.

You can open the Database Manager from the Windows desktop (Select **Start > Programs > Research Insight > Research Insight Database Manager**) or through Research Insight Properties.

**Database Areas**
Verify the Databases, the Directory Paths, the Database Properties and the Server Properties for your subscription database(s).
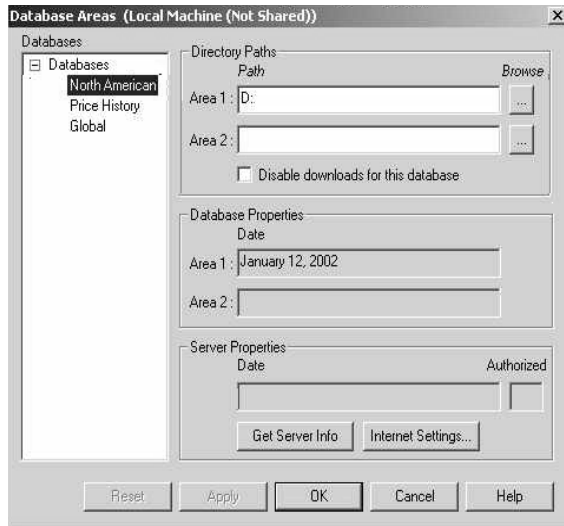
**Downloading Scheduling**
Schedule the database downloads and verify the database(s) you wish to download.

**Download Log**
Review a detailed report of the download(s) from both the Standard & Poor's server side (sender) and your company's side (recipient).

## Verify the Database, Directory Paths and Server Properties

From the Database Manager dialog box, click the **Properties** button under Database Areas to open the Database Areas dialog box. Here you can select the Database, the Directory Paths, the Database Properties and the Server Properties for your subscription database(s).



### Select a Database
Each database you subscribe to is listed in the Databases area. Select one of the databases from the list.

### Enter the Path to the Database
Under the Directory Paths area
1. **Area 1** and **Area 2** contain the location of the database on your hard drive or your company's computer network. Enter the location for Area 1 and/or Area 2 in the respective text boxes or use the **Browse** buttons to navigate to the correct hard drive or network location. An example of the path for Area 1 is x:/SpShare/North American/Area 1 where x:/represents your network drive. Click **Apply** to confirm the change.
2. Click the **Disable downloads for this database** checkbox if you do not want to automatically download the next update to the selected database.

### Choose the Database Version
The Database Properties area shows the date the databases on your hard drive or computer network were last updated. The dates reported in Area 1 and Area 2 correspond to the database locations under the Directory Paths area. By default, Research Insight retrieves data from the most recent database available. If you want to use data from an older database, delete the path in Area 1 or Area 2 under Directory Paths that corresponds to the newer database.
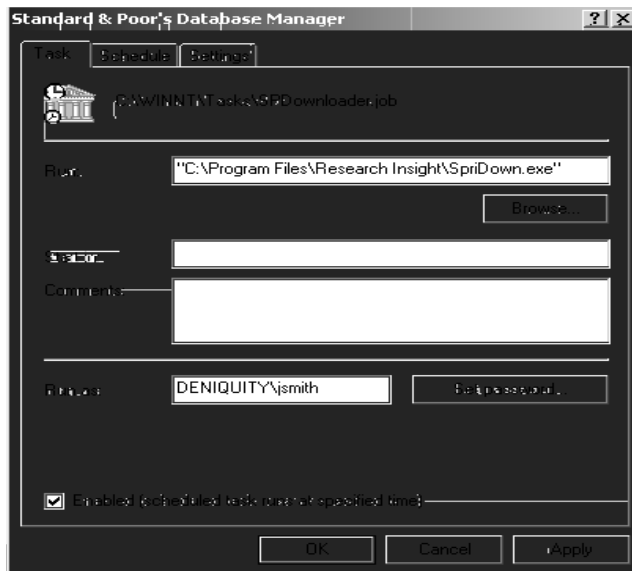
### Check the Database Version Available for Download and Select Internet Settings

Under Server Properties, you can verify the date of the databases available for download on the Standard & Poor's server, as well select your Internet settings.

1. Click the **Get Server Info** button to see current information for the database selected in the Databases dialog box. The Date field indicates the date of the database available on the server to be downloaded. The Authorized field indicates with a "Yes" or a "No" whether or not you have authorization to download the database .
2. Click the **Internet Settings...** button to open the Internet Settings dialog box. In the **Host Settings** area, enter your Research Insight Username and Password. In the **Proxy Settings** area, enter your Internet Username and Password. In the **Proxy URL** field, enter the URL that you access the internet by through your company's computer network firewalls.
3. Click **OK** in the Database Areas dialog box.

## Schedule Database Downloads

From the Research Insight Database Manager dialog box, click the **Properties** button under Downloading Scheduling. In the Standard & Poor's Database Manager dialog box you can locate the Downloader executable program, schedule downloads and change the parameters for the downloads.

**Locate the SpriDown.exe file and Enter Your User Name and Password**

The Task tab reports the default location of the program (SpriDown.exe) needed to download the databases from the Standard & Poor's server. You also need to enter your Domain\Username and Password in the **Run as** field. Click the **Set Password** button to set up your unique password for downloading the COMPUSTAT database(s). (Windows 98 does not require this entry.)

**Schedule the Download**

The time, frequency and starting date of the database download is reported at the top of the Schedule tab.

We recommend using the default schedule which is to download the databases daily.
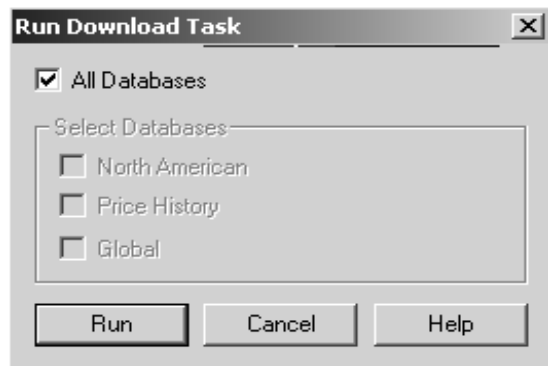
**Adjust Settings for More Efficient Downloads**

The Settings tab is divided into three main areas: Scheduled Task Completed, Idle Time and Power Management. The settings here are designed minimize any interference the download(s) may have with other projects and/or tasks you need to accomplish during your workday.

1.  In the **Scheduled Task Completed** area, you can check either of the two options.
2.  Use the **Idle Time** area to direct the Database Manager to complete a database download when you will be away from your computer for awhile. Select the **Stop the task if the computer ceases to be idle** box to ensure that the database download does not interrupt other priorities that you have during that time.
3.  The **Power Management** area provides several options to coordinate the database download with your computer's energy resources. Check all that apply.
4.  When information contained on ALL tabs is correct, click **OK** to accept your changes.

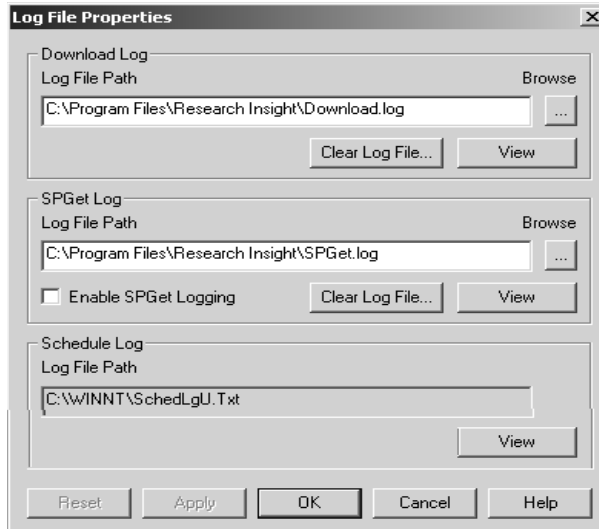**Run the Download Immediately**

If you want to download the databases now, instead of scheduling the download later, click the **Run Download Now** button in the Research Insight Database Manager dialog box. In the Run Download Task dialog box you can select the database(s) you wish to download.

1. Click the **All Databases** checkbox if you wish to download all of the databases (COMPUSTAT, Global and/or Price/History) that you subscribe to.
   **OR**
   Select the appropriate database(s) in the **Select Databases** area if you want to only download a specific database(s) at this time.
2. Click **Run**.

## Review a Detailed Report of your Database Downloads

Within the Download Logs area of the Research Insight Database Manager dialog box, click the **Properties** button to open the Log File Properties dialog box and review a report of the download(s) from both the Standard & Poor's server side and the recipient's side.



For a synopsis of the database download activity on the server, under the Download Log area:
1.   In the **Log File Path** field, enter the location of Download.log on your hard drive or network drive. If unsure of the path, click the **Browse** button and navigate to the correct location.
2.   Click the **View** button to review the Download.log, a text document that reports the sequence of events for the database download.
3.   Click the **Clear Log File** button to delete the information in the Download.log document.
4.   Click **Reset** if information input is not satisfactory. The Log File Properties dialog box information will revert to what it contained when first opened or since the last time the Apply button was selected, whichever is most recent.
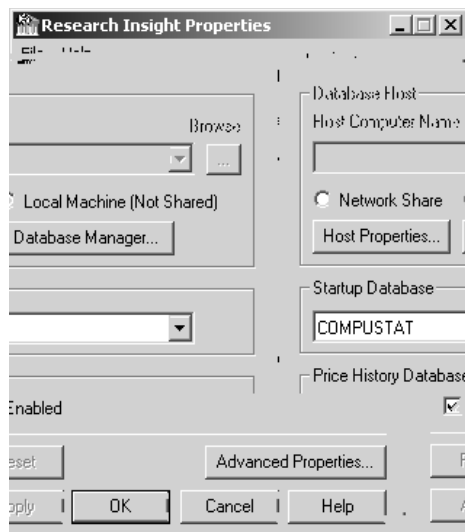5.   Click **Apply** if all information within the dialog box is satisfactory.

The SPGet.log option offers a more detailed report of the database downloads. Select the Enable SPGet Log checkbox for this option.

The Schedule Log area of the dialog box provides a short cut to your operating system task scheduler view log.
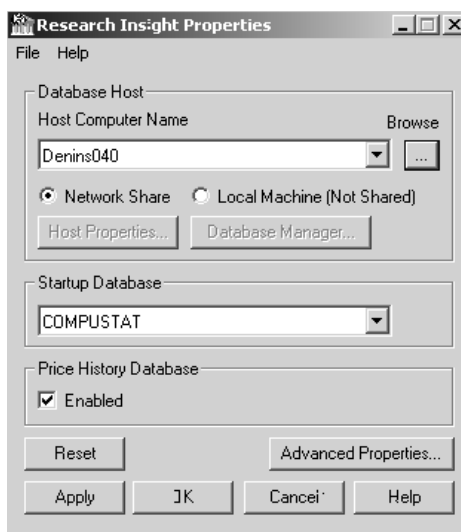
# Specifying the Location of the Database Manager through Research Insight Properties

The Research Insight Properties application allows you to set up the Research Insight database(s), specify the location of the Database Manager and manage the database(s) downloads through the Database Manager, verify the Default Database in Research Insight and enable/disable the Price History database. To open this application, on the Windows desktop select **Start > Programs > Research Insight > Research Insight Properties**.

**Important**: For the Database Manager to automatically download the latest Core Database images, Windows Task Scheduler must be installed on the computer from which the Database Manager schedules the downloads. The Windows Task Scheduler is included in the installation of Internet Explorer 5.0 or higher. (We recommend closing all applications before performing any software installations. If you need to reboot after the installation you will be prompted to do so.)



| Database hosted locally | Database hosted on the network |

### Choose a Network or Local Computer to Host the Database Files
Under the Database Host area, specify the location of the machine that hosts the database files.

Select either the **Network Share** radio button (the database is shared by a group of users) or the **Local Machine (Not Shared)** radio button (the database is used by an individual only).

If you select the Network Share radio button, the **Host Computer Name** field identifies the network computer that hosts the Database Manager (e.g., denins040_xxx). This field is grayed out when the Local Machine (Not Shared) radio button is selected.

**Access the Database Manager**

You can open the Database Manager through Research Insight Properties to view or change the Databases, the Directory Paths, the Database Properties and the Server Properties.

T So view settings in the Database Manager, click the **Host Properties** button.
T So change settings in the Database Manager, click the **Database Manager** button.

T So schedule database downloads, click the **Properties** button in the Download Scheduling area.

T So verify the database(s) you will download, click the **Run Download Now...** button in the Download Scheduling area.

T So review a detailed report of the download(s) from both the Standard & Poor's server side and your side (recipient), click the **Properties** button in the Download Log area

**Select the Default Database in Research Insight**

You can select the default database you wish to use for your analysis prior to opening Research Insight. In the **Startup Database** area of the Research Insight Properties dialog box, select the desired database from the drop-down menu. The COMPUSTAT database should be selected by default for Research Insight (North America) users.

**Reset the Properties**

Click the **Reset** button to revert all settings back to the way they were before the last time you selected the Apply button or when you first opened the dialog box, whichever is most recent. The **Reset** button will be grayed-out if you have not made any changes in Research Insight Properties.

# Enabling/Disabling the Price History Database

If you are a Price History Database subscriber you can enable this database by selecting the **Enable** checkbox in the Price History Database area of the Research Insight Properties dialog box. Disable the database by de-selecting the checkbox.

# Adjusting Cache Size

The Cache is the amount of memory reserved to complete calculations within the Research Insight application. You can adjust the Cache Size for each database you subscribe to by clicking the **Advanced Properties** button to open the Advanced Properties dialog box. T So revise the cache size, select a database from the drop-down list, enter the new amount in the **Cache Size** field and click **Apply**. Click **OK** to close the window.