PRACTICE MANAGEMENT | RELATIONSHIP MANAGEMENT

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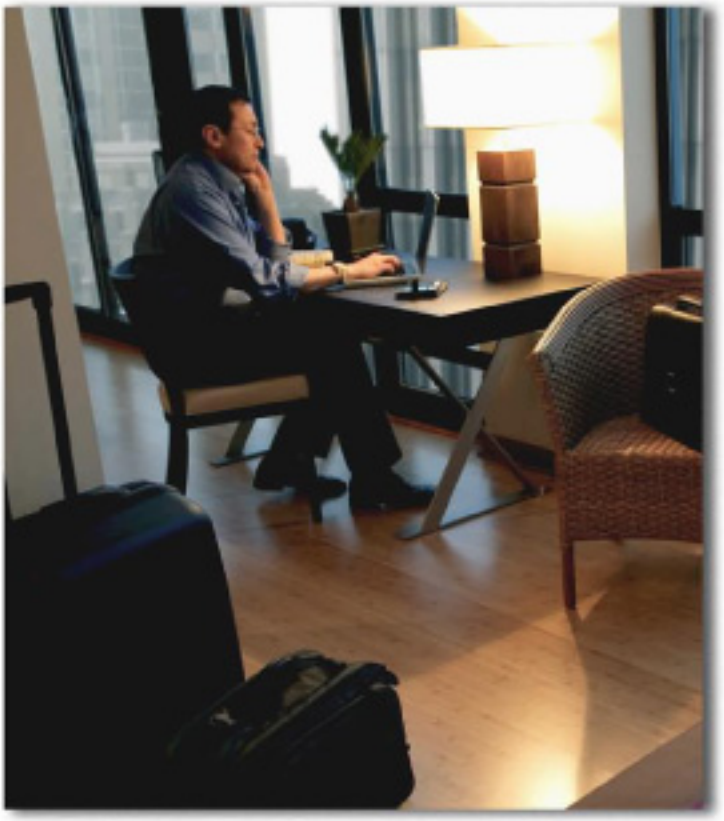

Client Data System®
Server
Installation Guide

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918 E. Green Street
Pasadena, CA 91106

Web: http://www.ezdata.com

Telephone: (626) 585-3505

Fax: (626) 440-9097

U.S. toll-free fax: (800) 779-3123

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Introduction

E-Z Data, Inc.'s Client Data System® (CDS) is a modular front office system designed to increase the marketing, sales, and customer servicing capabilities of insurance agents, investment advisors, and the companies they represent. This document contains instructions for installing CDS version 6.1.

E-Z Data employs the most resourceful tools available to achieve CDS's high performance. The program uses the most powerful and effective development language (Microsoft Visual C++) as well as the most robust database management system available—Sybase Adaptive Server Anywhere 9.0.

More than fifteen years of leadership in client management software has resulted in innovative functionality that cannot be found in other programs. The unique SmartPad™, Letter Log, Sets, and valuable Dynamic Reports™ are industry-specific tools that will increase the effectiveness of your office. CDS makes accessing information, entering data, and navigating through the system smooth and efficient. For more information on the system, visit the E-Z Data, Inc. Web site, www.ezdata.com.

PLEASE READ THIS PAGE BEFORE CONTINUING

Network Installation

The installation of a CDS Workstation on a Network is not complicated but does require some technical knowledge and attention to detail. The first part of the process is to follow the procedures in this guide to install Sybase Adaptive Server Anywhere 9.0 and the CDS program on the server.

The second part of the process is to follow the platform-specific procedures in the Workstation Installation Guide to install the client software on each workstation. For peer-to-peer networks, where there is a non-dedicated server (i.e., the server computer is also used as a workstation), the server will have a directory for the Network installation of CDS and a different directory for the Client installation of CDS.

Network Protocols

E-Z Data, Inc. strongly recommends using the TCP/IP protocol when using a Windows-based network. Internal testing and extensive polling of past CDS customers have shown superior DBMS performance when using this protocol.

Network Expertise

The Installation requires as much as two hours' time to set up the server and the first workstation. The individual responsible for this installation should be competent in the following areas:

- Each Windows operating system supported by CDS (Windows XP, Windows Server 2003)
- Network protocols
- All of the configuration details for the computers that will be used on the CDS network

If an individual with this experience is not available, consider hiring a consultant to handle the installation. This is not a procedure for novices. E-Z Data personnel can provide telephone-consultation regarding network issues at the standard rate of $75 per hour. Please contact the E-Z Data Sales department for details or to arrange for a consultation appointment.

Network Type

This guide explains the procedure for installing the Sybase Adaptive Server Anywhere 9.0 software and the master copy of CDS on the server. After installing the software on the server, use the companion Workstation Installation Guide to install and run CDS on each workstation.

Typing Command Lines

While the Setup Wizard guides users through most of the installation process, some command lines will need to be entered manually.

Adaptive Server Anywhere 9.0 commands are case sensitive. When a server name, such as **EZDATA**, is listed in uppercase letters, ensure that it is typed in that way. When a switch, such as **-gd**, is listed in lowercase letters, ensure that it is typed in that way.

Hardware and Software System Requirements

Miniumum/Recommended Hardware for the Server

- **1 GHz Pentium IV processor** (2.2 GHz Pentium IV or higher recommended)
- **512 MB of RAM** (1 GB or higher recommended)
- **2 GB of free hard disk drive space** for initial installation (4 GB recommended). In addition, plan to maintain additional free hard disk space of approximately four times the size of the CDSWIN directory, including all subdirectories, for program upgrades and database rebuilds. This additional space is still required on the C: drive even if the CDSWIN.SVR directory is maintained on a different drive.
- **Microsoft® Windows® XP or Server 2003** operating system

CDS runs across Microsoft compatible LANs (Local Area Networks) with the following protocols:

- **IPX/SPX** compatible protocol (with NetBIOS enabled over IPX/SPX)
- **TCP/IP** (must be selected during Server installation)

Please note that CDS v6.1 does not support E-Z Conduit. E-Z Data strongly encourages CDS users who use E-Z Conduit to upgrade to the superior quality and features found in E-Z Mobile.

Minimum/Recommended Hardware for Client Workstations

- **750 MHz Pentium III processor** (2 GHz or higher recommended)
- **128 MB of RAM** (256 MB or higher recommended)
- **300 MB of free hard disk space**. Workstations that are used for database maintenance procedures should have three times the size of the largest CDS database as free hard disk space on the drive.
- **Microsoft® Windows® XP, Server 2003 or Vista** operating system
- **Microsoft® Word 2000**, or a later version, is required to use Word as the default word processor in CDS
- **Microsoft® Outlook 2003 or Lotus Notes R6**, or a later version, is required for Calendar and E-mail Posting synchronization with CDS. For Microsoft Exchange Servers, Exchange 2000 or later is required. Please note that some security settings may need to be taken into account when setting up the Outlook Synchronization in an Exchange environment.
- Please note that CDS v6.1 does not support E-Z Conduit.

Notes regarding CDS client/server requirements for XP networks

- The user performing the installation must have Administrator rights to the server where CDS will be installed.
- CDS users must be granted full access rights to the server directory containing CDS program and data files.
- Each client workstation must be mapped to the server. E-Z Data, Inc. recommends mapping the same drive letter to the server on all workstations to avoid confusion.
- CDS users must have full administrative rights to local workstations.

Using the Adaptive Server Anywhere 9.0 DBMS

Other Programs Using Adaptive Server Anywhere 9.0

If Sybase Adaptive Server Anywhere 9.0 is already installed, the name of the database server is needed to complete the installation. This name is available from the console window of the database server.

During the installation of CDS, the user is prompted to enter the default Database Server Name, **EZDATA**. If Sybase Adaptive Server Anywhere is being used with another application, use the existing name of the Database Server. Please note that the database server name is case sensitive.

About Changing Servers After Installation

The Adaptive Server Anywhere 9.0 software is specific to each operating system. For example, the Windows XP Adaptive Server Anywhere server software is different from the Adaptive Server Anywhere software for another version of Windows. Please note that any change in the operating system of the network server must be accompanied by a change in the Adaptive Server Anywhere software version.

Updates and Patches From Sybase

Do not install updates and patches for the Sybase Adaptive Server Anywhere software without instruction from E-Z Data's Technical Support department. E-Z Data is not responsible for system problems that may occur after installing incompatible versions or patches.

Before the Installation

Norton AntiVirus Users: Disable Norton AntiVirus Auto-Protect before installing CDS. Note that users will need administrative rights to perform this action.

1. From the desktop, select **Start**, **Programs**, **Norton AntiVirus**, and then click **Norton AntiVirus**.
2. Select **Options** and then click the **Auto-Protect** tab.
3. Clear the **Load Auto-Protect at Startup** option and then click the **OK** button.
4. Click the **Yes** button when prompted to unload Auto-Protect.
5. Exit Norton AntiVirus.

Windows Vista Users: Turn off the User Account Control (UAC) before installing CDS. Note that users will need administrative rights to perform this action**.**

1. From the desktop, select **Start**, **Settings**, **Control Panel**, **User Accounts**, and then click **Turn User Accounts Control on or off**.
2. Clear the **Use User Account Control (UAC) to help protect your computer** option and then click the **OK** button.
3. Restart the computer to apply these changes.

Windows Server Installation

Regarding Windows XP/2003 Server Use

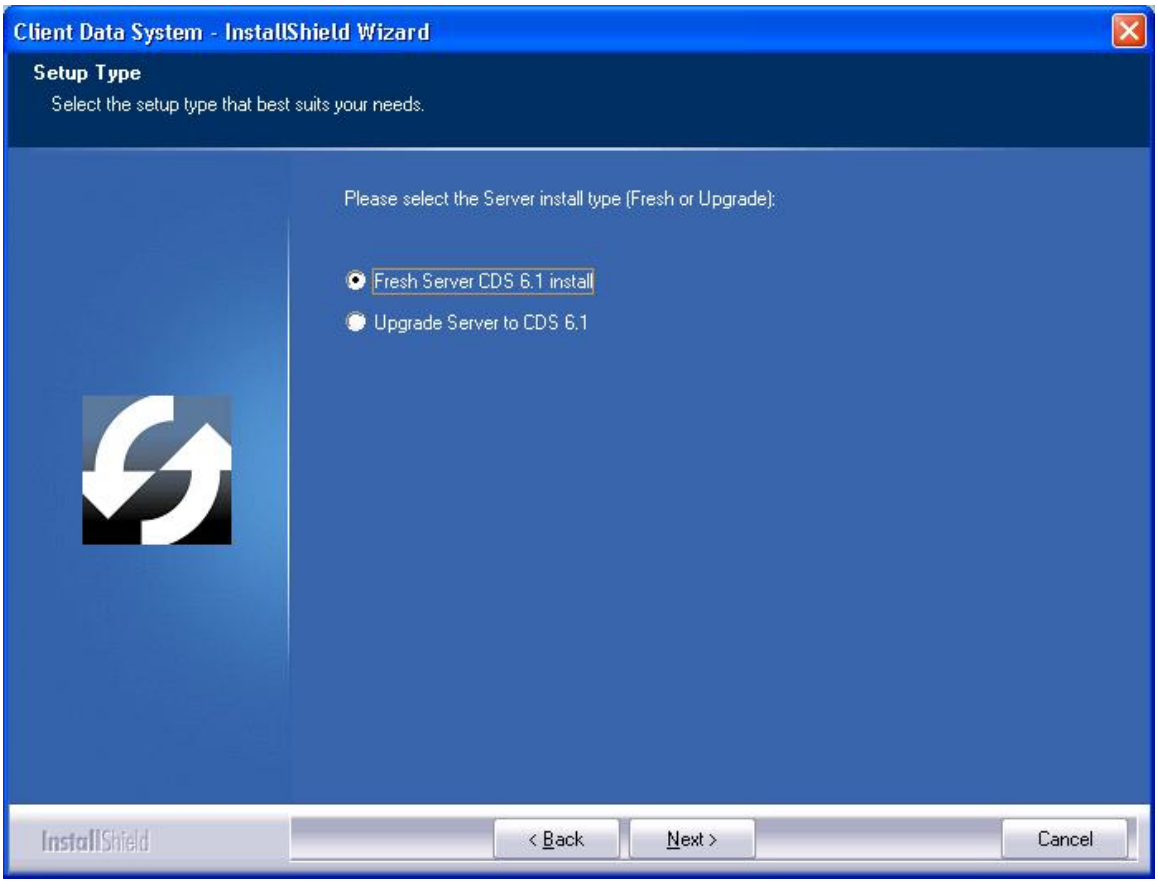
Installing the CDS and Sybase software using the default settings for a Windows XP/2003 server works well and is appropriate in most cases. However, managing the initial installation of CDS, as well as future maintenance procedures, will be more efficient if the CDS and Sybase software is installed in a common directory on the server (e.g., c:\apps\cdswin.svr, c:\apps\sql anywhere 9). This installation can be performed from any workstation connected with the server.

Installation

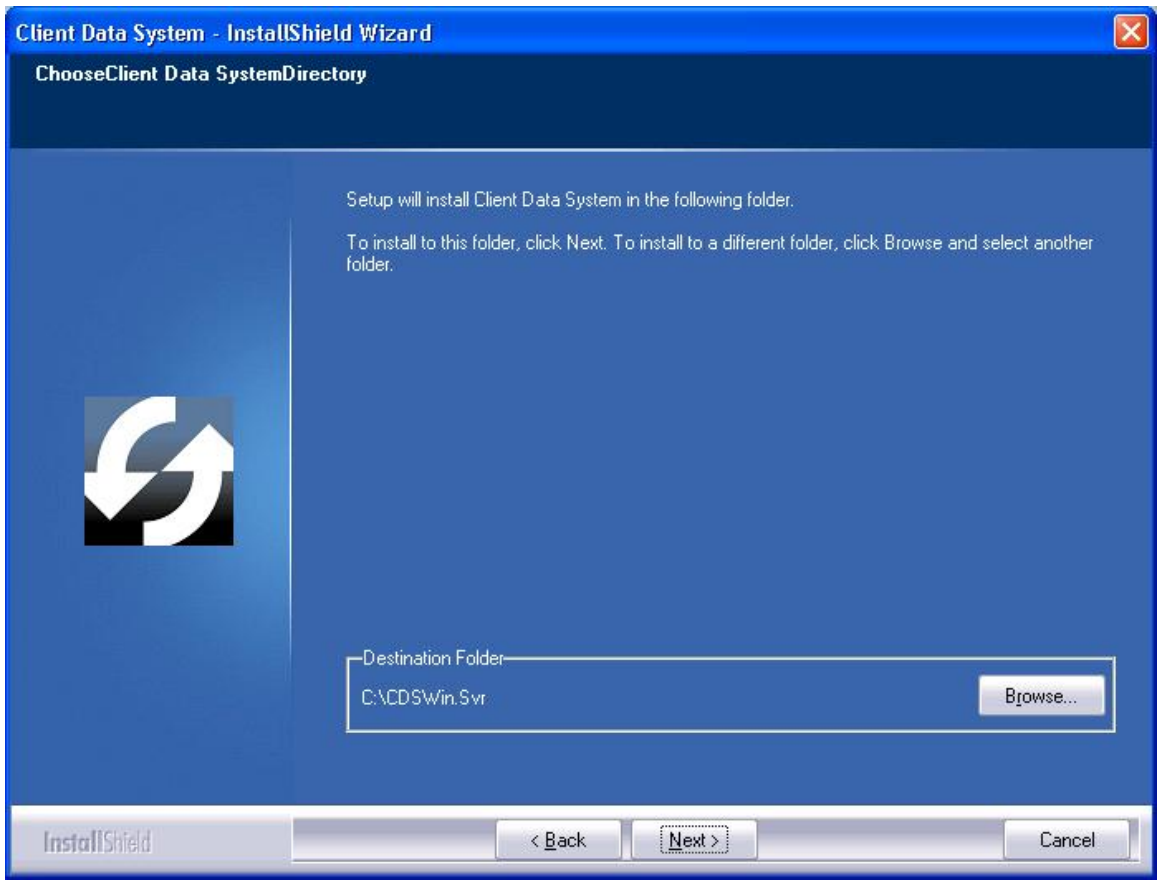
This procedure installs the Sybase Adaptive Server Anywhere and CDS software on a Windows XP/2003 server.

1. Close any Windows applications that are currently running, including any suite products. To open the Task List, press the **CTRL**+**ALT**+**DEL** keys. Select and then click the **End Task** button for each task except **Explorer** and **Systray**.
2. Locate the folder containing the CDS v6.1 Installation files. From this folder, double-click the **Setup.exe** file.
3. After reading the Welcome message, click the **Next** button to continue.
4. Click **Yes** to accept the license agreement.
5. Select the **Server** option.

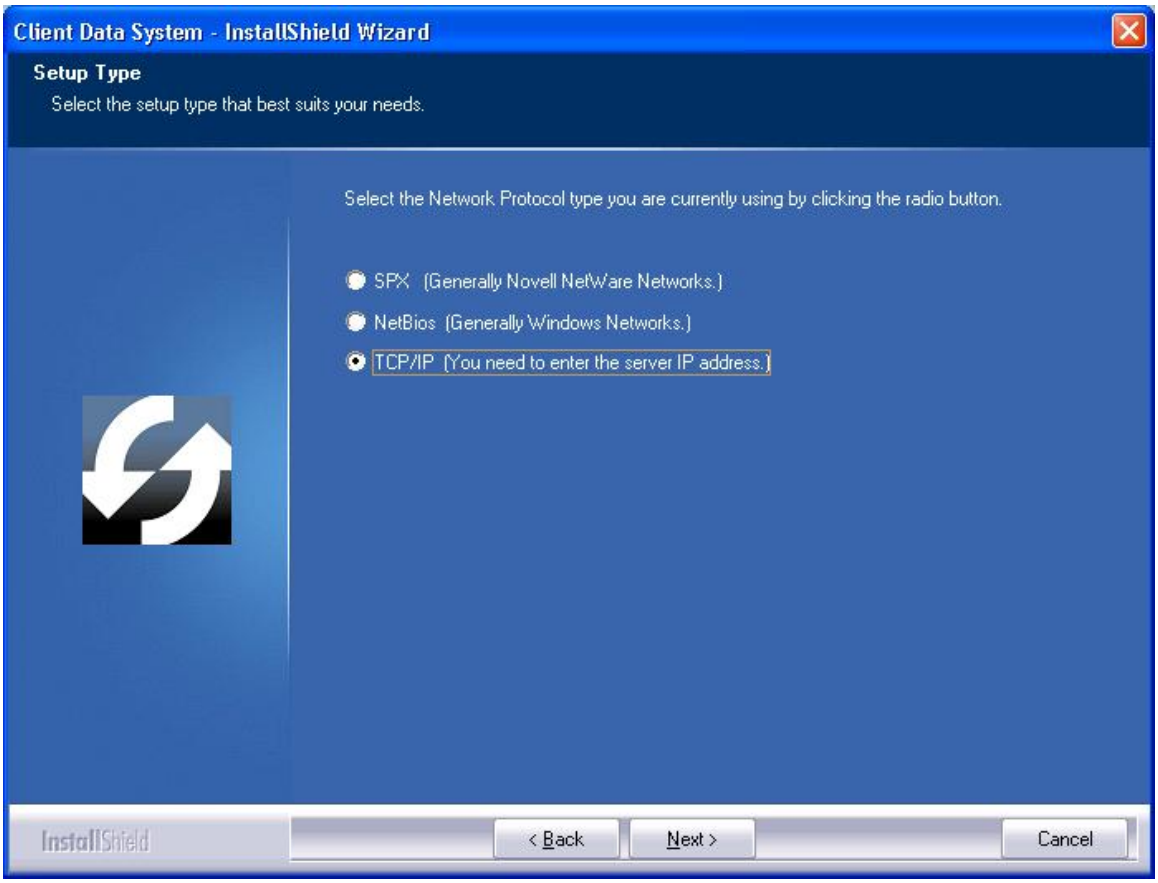
6. Select the **Fresh Server CDS 6.1 Install** option and then click the **Next** button. Note that if Adaptive Server Anywhere 9.0 has not already been installed, it will install automatically.



7. In the Choose Client Data System Directory dialog box, click the **Next** button to accept the default Destination Directory (C:\CDSWin.svr).



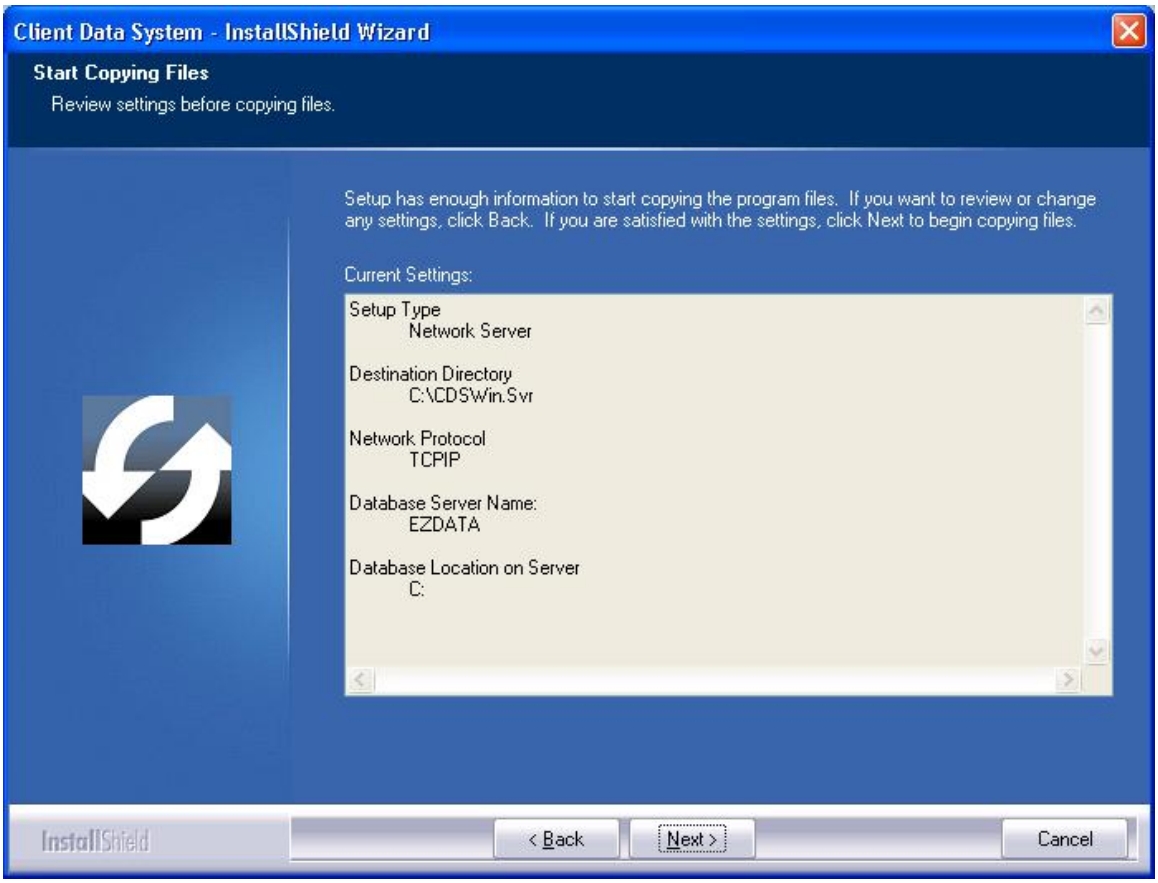
8. In the Setup Type dialog box, select the appropriate option (E-Z Data recommends selecting **TCP/IP**) and then click the **Next** button.



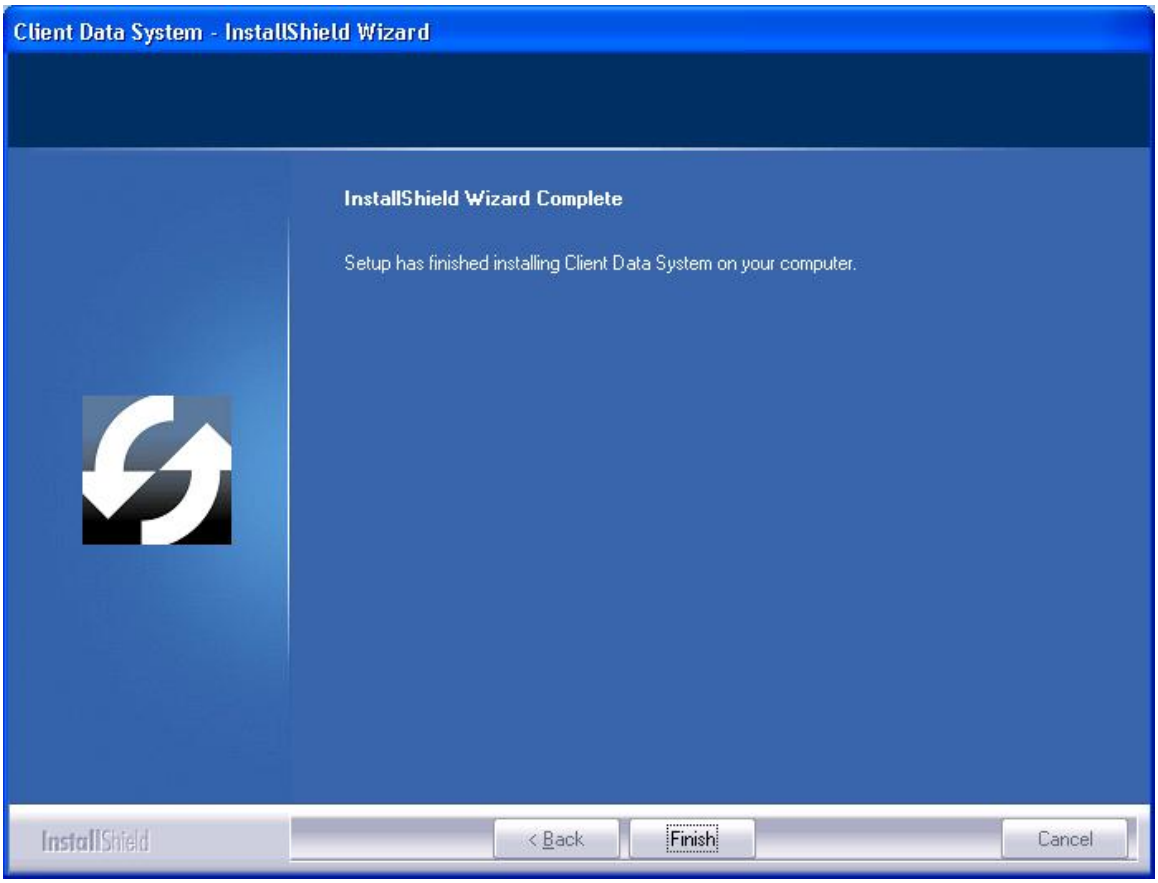
9. In the Database Information dialog box, use **EZDATA** as the Database Server Name and **C:** for the Database Location (these are the default settings). Change these settings if necessary and then click the **Next** button to continue.

   Note: If Sybase Adaptive Server Anywhere 9.0 is being used for another software application, use the name of that database server. The name is available from the task list of the database server. Please note that this name is case sensitive.

10. In the Start Copying Files dialog box, review the list of Current Settings. If a change is required, click the **Back** button. Otherwise, click the **Next** button to begin. A progress bar will track the status of the files being copied.



11. When the Server Setup is complete, click the **Finish** button to close the Setup program.



12. Once the application is installed, refer to the *Client Data System v6.1 - Workstation Installation Guide* to install the client workstations on each computer that will need one. When CDS is opened from one of the workstations, a prompt to enter the e-mail address and password provided by E-Z Data's sales department will display to obtain your license through E-Z Data's Online Registration Web site.

Windows Adaptive Server Anywhere 9.0 Startup

The ASA 9.0 Startup instructions may be skipped if a new install of CDS was performed; a shortcut to start the Adaptive Server Anywhere 9.0 engine was automatically created in the Startup folder of the server computer. Proceed to the *Client Data System v6.1 - Workstation Installation Guide* to continue.

To make Adaptive Server Anywhere 9.0 a service, refer to the *Sybase Engine Startup as a Windows XP Service* section.

Sybase Engine Startup as a Windows XP Service

The Sybase Adaptive Server Anywhere 9.0 DBSVC command can be used to start the Sybase engine as a Windows XP service. To run the server engine as a service:

1. From the Windows desktop, click the **Start** button and then select **Run** to open the Run dialog box.
2. Type the following command line and the complete path to the **dbsrv9** file in the Open field and then click the **OK** button (refer to *Appendix A - Configuring the Database Cache* for details about setting up the database cache).

   Example: **`dbsvc.exe -i -as -t network -s automatic -w EZDATA C:\Progra~1\Sybase\SQL Anywhere 9\win32\dbsrv9.exe -n EZDATA -gd all -gp 4096 -tl 0 -ti 0`**
3. From the Windows desktop, click the **Start** button, point to **Settings**, select **Control Panel**, point to **Administrative Tools**, and then click **Services**.
4. From the Services folder, right-click the **Adaptive Server Anywhere Service** listing and, from the context menu, select **Start** to start the service.

Windows XP

1. From the Windows desktop, double-click **My Computer** and then browse to the **Startup** folder (e.g., **C:\Documents and Settings\All Users\Start Menu\Programs\Startup**.)
2. Right-click in the Startup window, point to **New** and then select **Shortcut**.

   In the Create Shortcut dialog box, type the complete path to the **dbsrv9** file in the Command line field and then click the **Next** button (refer to *Appendix A - Configuring the Database Cache* for details about setting up the database cache).

   Example**: `C:\Progra~1\Sybase\SQL Anywhere 9\win32\dbsrv9 -n EZDATA -gd all -gp 4096`**
4. Name the shortcut **SQL Server** and then click the **Finish** button.
5. Reboot the computer to start Adaptive Server Anywhere 9.0.

After the Server Installation Process

Once the server has been set up, install CDS on each workstation on the related network. For information on this installation, refer to the *Client Data System v6.1 – Workstation Installation Guide*.

Appendix A - Configuring the Database Cache

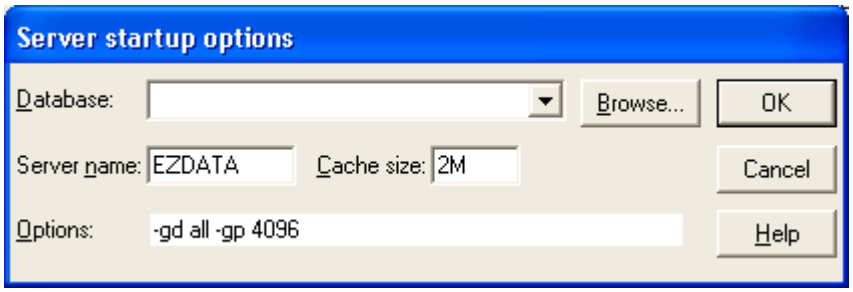
By default, Sybase Adaptive Server Anywhere uses two megabytes of memory for caching. This default cache size is adequate for databases that are less than 20 MB in size. For very large databases, increasing the memory that is allocated to the server cache improves performance. Accessing database pages that have been cached in memory is much faster than reading the information directly from the server's hard disk. Allocating too much memory, however, will limit the available resources that other server-based programs may need to operate efficiently.

Generally, 10% of the total size of the database(s) is used to calculate the amount of memory to use for caching that will provide optimum performance. For example, a 32-MB database and a 28-MB database produce a total database size of 60 MB. Using the general rule, 10% of the total database size, 6 MB of memory (60 MB x .10 = 6 MB) is the optimum cache size.

The Sybase parameter *-c cache-size* is used to specify the amount of memory to be used for caching. Among other methods, the cache size can be specified with *n*M (number of Megabytes) as in the following example.

Example:

The following Sybase Server parameters are typically used to create a new service on a Windows XP Server. The cache parameter in this example will allocate 2 Megabytes of memory for database caching.



Appendix B - Glossary of Terms

- **Adaptive Server Anywhere 9.0**

  A product of Sybase, Inc. and the database management system that CDS uses.

- **CDS**

  Client Data System®, a registered trademark.

- **Client/Server**

  Client/Server technology is the basis for the design of software and hardware architectures that support shared processing between a server and a workstation. Shared processing results in increased system speed and performance over traditional methods where the workstation is burdened with all of the processing. The client/server architecture of Sybase Adaptive Server Anywhere 9.0 exemplifies the principles of this technology and provides superior performance as a DBMS.

  With traditional network databases, individual workstation resources are used to locate and retrieve data from the server. The Client/Server architecture enables the workstation to retain most of its resources by just sending requests for information to the server. The server then uses its own resources to process the request and return the requested data to the workstation. This also improves system and program performance by limiting network traffic.

- **Default**

  A setting or choice that will be used unless it is changed. For example, CDS workstation files are installed, by default, in the C:\ProgramFiles\CDSWin directory.

- **CDS Desktop**

  The CDS desktop is the first window that displays after logging in to the CDS program and the starting point for access to all other areas of the program.

- **Path Name**

  The route to locate a file on disk. For example, c:\data\client1.bmp identifies the location of the "client1.bmp" file as the "data" directory on the "C" drive.

- **Peer-to-peer**

  Peer-to-peer is a term that describes a network of two or more computers where each computer acts as a server to other computers on the same network. The computer where a server-based program is installed in this type of network is often referred to as a non-dedicated server.

- **User Profile**

  The User Profile contains the privileges and preferences assigned to a CDS user (i.e., Database name, linked Contact or Agent record, customization details, etc.).