Client Data System®

Installation Guide for Workstations

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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 6.0.

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, please visit the E-Z Data, Inc. Web site, www.ez-data.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 7.0 and the CDS program on the server.

The second part of the process is to follow the platform-specific procedures in the *Installation Guide for Servers* to install the client software at 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 Expertise

The Installation requires as much as two hours 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 that will be used (Windows 98, Windows 2000, Windows XP, Windows 2003 Server)

- Network protocols

- All of the configuration details for the computers that will be used on the CDS network

- User Rights – To install and use CDS on a workstation, the user needs administrative rights to the local computer. Users also need full access rights to the Shared folder on the server computer.

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.

Once the initial installation is performed for the server, the setup process for each workstation is relatively quick. The files for the installation are available on the server so each user can perform the installation from his/her workstation without needing to pass around the CD-ROM.

Hardware and Software System Requirements

Minimum/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 v6.0 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 or Server 2003** 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 v6.0 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 the 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 administration rights to local workstations.

Workstation Setup

The Setup wizard copies CDS program files from the file server to the workstation. In addition, files are created that enable each workstation to find the CDS databases and other data on the file server. Workstation users make the following selection:

- Select a local directory where CDS will be installed (C:\Program Files\CDSWin)

At the end of the installation process, each user confirms any modifications to system files or the registry (the path to the Adaptive Server Anywhere program is added, etc.).

The CDS Additions to the Start Menu

CDS Folder

This folder is created under the Programs menu and contains all of the Client Data System icons and a sub-folder called CDS Utilities.

Client Data System

Click this icon to start the program.

Client Data System Online Help

Click this icon to open the CDS Online Help System. Ensure that you have an active Internet connection to view the latest version of the Online Help System for CDS.

E-Z Data Training and Support

Click this icon to open the E-Z Data Training and Support Web site. Ensure that you have an active Internet connection to view this site.

CDS Utilities Sub-folder

This sub-folder contains Database Utilities, E-Z Configuration and the ODBC Administrator programs that can be used to set up and maintain your CDS system.

Database Utilities

The CDS Database Utilities icon provides access to three general-purpose database utilities: Database Validate, Backup Database and Database Rebuild.

The Database Validate utility is used before backing up a database to verify the integrity of a database's structure.

A comprehensive backup of valuable CDS data is essential for data protection. Use the Backup Database utility with high quality storage media and up-to-date antivirus software to protect the databases.

After downloading, importing, or making numerous database changes, the database index should be rebuilt. Use the Rebuild Database option on a regular basis.

E-Z Configuration

Use this utility for troubleshooting connectivity problems between a workstation and the server.

ODBC Administrator

E-Z Data, Inc. recommends only using this utility with the guidance of E-Z Data (or Microsoft) Technical Support staff. This Data Sources utility is a Microsoft product.

Installing CDS on a Windows XP/Server 2003 Client

There are multiple steps for installing a Client/Server application. First, install Adaptive Server Anywhere and the CDS application on the file server, as documented in the *Installation Guide for Servers*. After the file server installation is complete, start the Adaptive Server Anywhere application and then install CDS on the 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.

Before the Installation

Norton AntiVirus Users: Disable Norton AntiVirus Auto-Protect before installing CDS.

1. From the desktop, click the **Start** button, point to **Programs**, **Norton AntiVirus**, and then click **Norton AntiVirus**.
2. Select **Options** and then click the **Auto-Protect** tab.
3. Clear the checkmark next to 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.

Installation

This procedure installs the Adaptive Server Anywhere and CDS client files on the workstation. This must be performed at each workstation that will access CDS on the network. E-Z Data, Inc. recommends that CDS be installed on one workstation initially and that all agency databases and users be created on that workstation before installing CDS on the other workstations.

1. Close any Windows applications that are currently running (including any suite products) to display the desktop.
2. From the Taskbar, click the **Start** button and then select **Run**.
3. Click **Browse** to open the Browse dialog box. Select the network drive where CDS is installed from the drop-down menu in the Look in: dialog box.
4. Double-click the **Cdswin.svr** folder to open it.
5. Double-click the **Wssetup** folder to open it and then double-click the **Setup** icon to close the Browse dialog box.
6. From the Run dialog box, click the **OK** button in the Run dialog box to start the Setup program.
7. After reading the Welcome message, click the **Next** button to continue. Note that if Adaptive Server Anywhere 9.0 has not already been installed, it will install automatically.
8. From the Choose Client Data System Directory dialog box, click the **Next** button to accept the default Destination Directory (C:\Program Files\CDSWin).
9. 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.

10. The installation program will prompt to install Microsoft Office Outlook 2003 E-mail Posting for Client Data System and Microsoft Office Outlook 2003 Calendar / Contact Synchronization for Client Data System. Select the appropriate options, if any. Ensure that MS Outlook is closed prior to beginning this installation. Click the **Next** button and then when the installation is complete, click the **Finish** button to close the installation.

11. When the InstallShield Wizard Complete dialog box displays, click the **Finish** button to exit.

After the client/server installation is complete, run CDS and create databases and users. Follow the directions in the *Client Data System Setup* section.

Client Data System Setup

About the DEMO Database and User Name

During installation, demonstration data and users are created in the Demonstration (DEMO) database. New users should log in to this database as the demonstration user to create agency databases and users for their company.
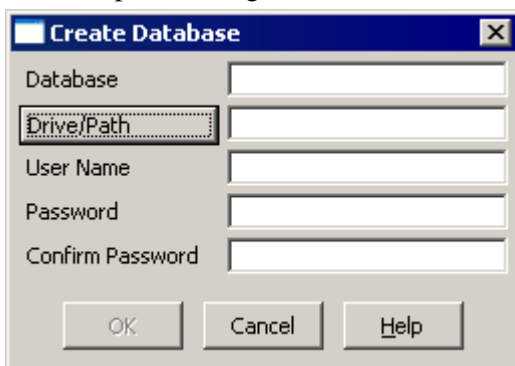
Database Names

Database names cannot be changed once they are created so choose a name carefully. Do not create more databases than necessary because each database uses resources and requires maintenance.

Create Databases

Use the following procedure to create a new CDS database.

1. From the Taskbar, click the **Start** button, point to **Programs**, **Client Data System**, and then select **Client Data System**.

2. In the Login dialog box, select the Database **DEMO**, specify the User Name **DEMO**, enter the password and then click the **OK** button to log into CDS.

3. From the CDS desktop, click **Database** and then select **Create New Database**. Click the **OK** button on the Simultaneous Database Creation warning dialog box.

4. In the Create Database dialog box, enter a name for the database. Press the **TAB** key to move the cursor to the Drive/Path field. CDS populates this field automatically. Press the **TAB** key again to move the cursor to the User Name field. Type a user name into this field, enter a Password and then enter the password again in the Confirm Password field. Click the **OK** button.

   Example: The Drive/Path entry creates a subdirectory under **CDSWIN.SVR** on the server. The database file for CLIENTS is created in this subdirectory of the same name. Do not enter path information (e.g., F:\Cdswin.svr\Clients) in the Drive/Path field.

5. When the database has been successfully created, a dialog box opens. Click the **OK** button to log in to the new database.

6. Repeat Steps 3-5 to create additional databases. Refer to the next section to create additional users.

Create Users

1. Log in to the database where the new users are to be created.

2. From the CDS desktop **Database** menu, select **User Management** to open the Database Users list.

3. Click the **Add** button to open a new User Profile dialog box.

4. Type in the new Login (User) Name (8 characters maximum, no spaces, each name must be unique). This is the name the user must enter when logging in to CDS.

Note:	To setup and maintain security for the database after creating new users, refer to the CDS Help system topic *About the User Profile*.

5. Enter the new user's E-mail address. Default e-mail and calendar integration options will be taken from the system's settings in Internet Explorer.

6. Click the **OK** button to save the new user and close the User Profile dialog box.

7. The new user's name will display on the Database Users list. Repeat Steps 3-6 to create additional users, as needed. When this process is complete, click the **Close** button to close this dialog box.

Next Steps

- Install CDS on the other workstations licensed to access CDS, as described in the previous chapters.

- Use the CDS Help system for instruction and complete documentation.

Enable the Optional Modules

Any purchased Optional Modules (e.g., Investment, Transaction Download, etc.) must be enabled on the workstations of the users who require them. Ensure that these modules are only enabled for the appropriate users if the number of basic user licenses purchased exceeds the number of optional modules licenses purchased for the office.

License Information

To verify the number of licenses purchased for CDS and the optional modules, continue as follows:

1. From the **Help** menu, select **About Client Data System** to open the About Client Data System dialog box.

2. Click the **More Info** button to open the Control Information for Client Data System dialog box.

3. In the Control Information for Client Data System dialog box, click the **Modules** button.

Module Preferences for Each User

To enable one or more Module Preferences on a user's workstation, continue as follows:

1. Log in to CDS as the user needing access to a specific module.

2. From the desktop **Database** menu, select **Module Preferences** from the **Utilities** submenu.

3. Select the module(s) to which the user requires access and then click the **OK** button. Close the program and restart to implement the change.

Safeguarding Data

About Backups

E-Z Data, Inc. strongly recommends regularly backing up system data to protect against corruption or loss due to human or computer error. While most offices make use of backup software, many of these applications do not back up "read-only" files automatically. Refer to the application's documentation to verify if this important step is performed during the backup process. If not, see the Note below for instructions on manually backing up these files. Ensure that the following files are backed up regularly:

- The folder (directory) named after the respective database (e.g., C:\CDSWin.svr\CLIENTS) on the server. Back up this folder and all of the files that it contains, including the read-only files.

- Any additional database folders apart from the DEMO database.

- The **Sysdata/CDSWin.svr** folder and all of its contents.

- The **Reports/CDSWin.svr** folder and all of its contents.

Note:	If the backup application does not back up read-only files, use the COPY command in DOS or Windows to back up these files to the storage device. Typically, files with extensions "db" and "log" in the database folders are read-only.

Database Utilities Options

Database Utilities is an application in the CDS program group. CDS Database Utilities includes utilities for backing up, rebuilding and checking the validity of databases. Please note that all users must be logged out of CDS when these utilities are used.

Database Validate

Database Validate is a utility that scans every record in each table and looks up each record in every index in the table to verify that the database file is not corrupt.

Before making a backup, use this utility to verify that the database file is not corrupt. File system errors or software errors (bugs) that exist on the computer may corrupt a small portion of a database without being apparent.

Running a Database Validation

1. From the Taskbar, click the **Start** button, point to **Programs**, **Client Data System**, **CDS Utilities** and then click **CDS Database Utilities**.

2. This step only applies to users with multiple E-Z Data applications. Otherwise, skip to Step 3. From the E-Z Data Applications dialog box, select **Client Data System** and then click the **OK** button.

3. In the Database Utilities dialog box, under **Databases**, select the names of one or more databases.

4. Under **Tools**, ensure that the **Database Validate** option is selected.

5. Click the **Validate** button to begin the validation check.

6. When the validation is complete, click the **OK** button to close the Database Validate dialog box and then click the **Exit** button to quit Database Utilities.

Backup Database

The Backup Database utility makes a copy of the database and transaction log files in another directory on the local drive. After the backup copies are made, the log file is restarted to prevent excessive size. A large log file consumes hard disk space and can eventually reduce system performance. E-Z Data, Inc. recommends running this utility weekly.

USING THIS UTILITY DOES NOT ELIMINATE THE NEED TO BACK UP THE DATA ON EXTERNAL MEDIA.

Running the Backup Database Utility

1. Shut down the Sybase engine on the server by right-clicking on the SQL icon in the Windows Systray and then selecting **Exit** from the expanded menu.

2. From the Taskbar, click the **Start** button, point to **Programs**, **Client Data System**, **CDS Utilities** and then click **CDS Database Utilities**.

3. This step only applies to users with multiple E-Z Data applications. Otherwise, skip to Step 4. From the E-Z Data Applications dialog box, select **Client Data System** and then click the **OK** button.)

4. In the Database Utilities dialog box, under **Databases**, select the names of one or more databases.

5. Under **Tools**, ensure that the **Backup Database** option is selected.

6. Click the **Backup** button to begin the backup.

7. When the backup is complete, click the **Exit** button to quit the Database Utilities application.

8. To find the backup of the database(s), open **My Computer**, **the network drive CDS is installed to**, **CDSWIN.SVR, the database folder (e.g., CLIENTS), BACKUP**. The BACKUP folder is the backup that was created <u>for that database</u>. We strongly encourage the user to move/copy the BACKUP and SYSDATA (found in the CDSWIN.SVR folder) folders to whatever external media is available.

Database Rebuild

The Database Rebuild option recreates indexes and maintains database integrity. Periodically, database indexes need to be recreated, especially after data imports, conversions, or heavy daily use. E-Z Data, Inc. recommends running this utility monthly.

The preferred method for rebuilding a database is to run the CDS Database Utility at the server/workstation. If the CDS Database Utility is to be run from a workstation, DBENG7.EXE needs to be copied from the **SQL Anywhere 9\Win32** directory on the server to the **SQL Anywhere 9\Win32** directory on the workstation.

Running the Database Rebuild Utility

1. From the Taskbar, click the **Start** button, point to **Programs**, **Client Data System**, **CDS Utilities** and then click **CDS Database Utilities**.

2. This step only applies to users with multiple E-Z Data applications. Otherwise, skip to Step 3. From the E-Z Data Applications dialog box, select **Client Data System** and then click the **OK** button.

3. In the Database Utilities dialog box, select one of the Database names (except for DEMO). The DEMO database does not need to be rebuilt.

Note:	Multiple databases can be rebuilt simultaneously, but this is not recommended.

4. From the **Tools** menu, select **Database Rebuild** and then click the **Rebuild** button.

    After clicking the **Rebuild** button, a dialog box will display while CDS Database Utilities makes a temporary backup of the selected database before rebuilding it. When the database rebuild begins, an "Interactive SQL" dialog box displays the various tables as they are processed.

    WARNING: DO NOT INTERRUPT THIS PROCESS.
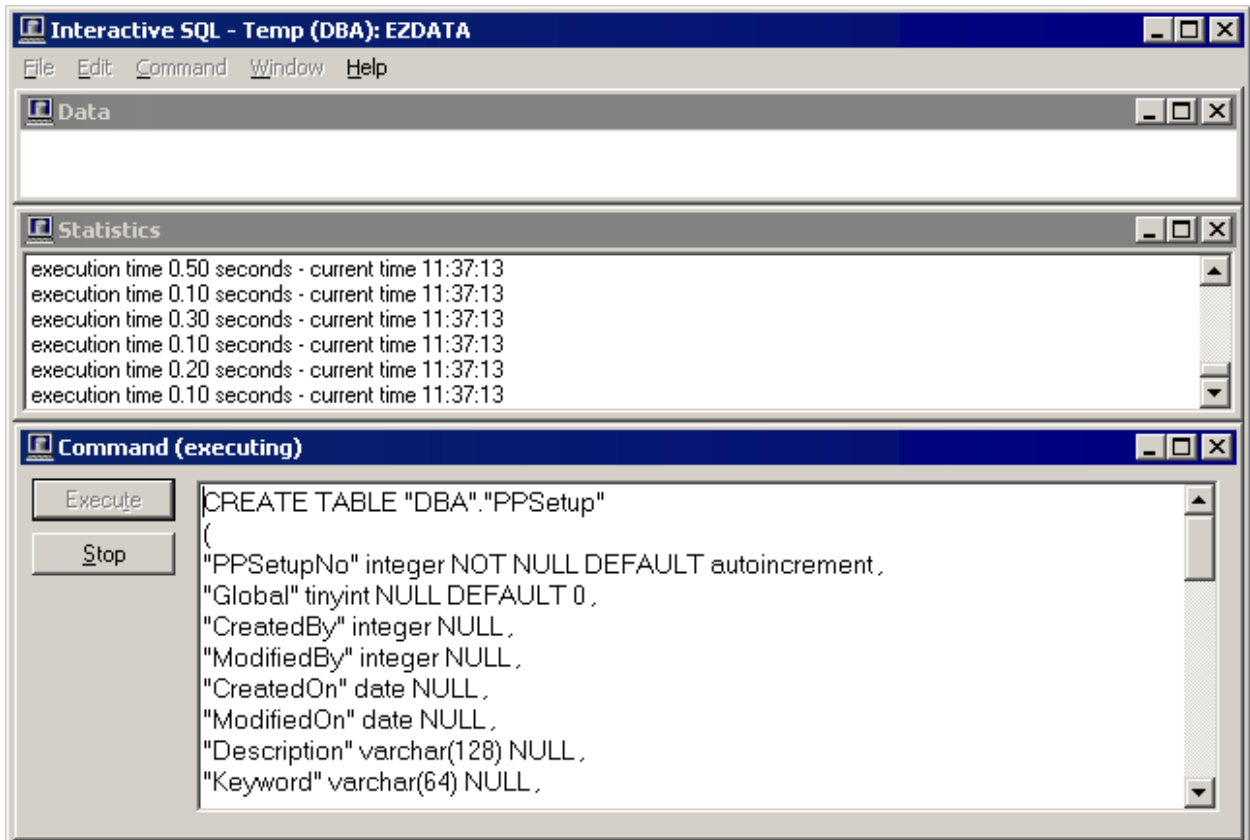
5. When prompted to "Replace" the database after the rebuild process is complete, click the **Yes** button to replace the database only if the process did not stop at any time due to an error. If the process stopped due to an error, write down the exact error message, click the **No** button at the prompt and then contact E-Z Data Technical Support to report the issue.

6. Click the **OK** button at the Database Rebuild dialog box.

7. Repeat Steps 3-6 in this section to rebuild additional databases (except for DEMO) and then click **Exit** to quit CDS Database Utilities.
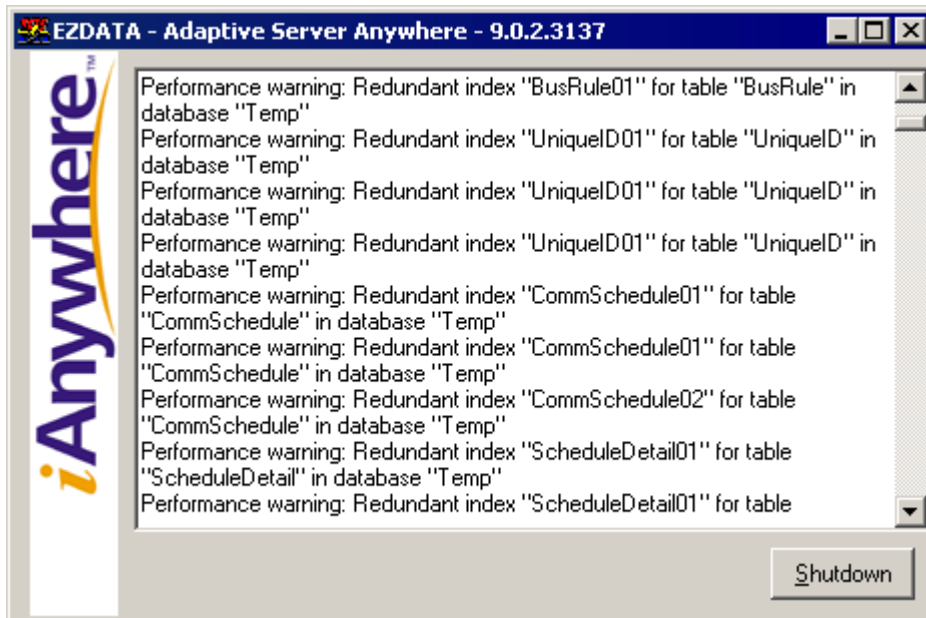
Troubleshooting Workstation Installation

Sybase Adaptive Server Anywhere

Sybase Adaptive Server Anywhere Icon

After logging in to CDS, an icon for the Sybase Adaptive Server Anywhere program is displayed in the Systray. DO NOT close this program icon. The Sybase Adaptive Server Anywhere program must be running while using CDS.

Right-click the icon and then select **Maximize** to open a dialog box with information about the database that is currently in use.

When exiting CDS, the Adaptive Server Anywhere program closes automatically.

Updates and Patches from Sybase

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

Program Startup Fails or is Unable to Connect

Connection or startup failures may display the "Unable to connect to database server: unable to start database engine" error message and could be the result of one or more of the following conditions:

Failure to Restart the Workstation

After installing CDS, each workstation must be restarted. This error can occur if the restart was not completed before using the application.

The PATH Command Was Longer than 128 Characters

The installation program cannot make the required changes to the AUTOEXEC.BAT file Path statement if the statement is longer than 128 characters. Program startup depends upon finding the **SQL Anywhere 9** directory using the Path statement.

1. From a DOS prompt, type **SET** and then press the **Enter** key.

2. The Path= statement should contain a reference to **SQL Anywhere 9** (C:\…\SQLANY~1\Win32).

3. If the reference to **SQL Anywhere 9** does not display in the Path statement, the AUTOEXEC.BAT file needs to be edited. Insert the reference to **SQL Anywhere 9** close to the beginning of the Path statement. (e.g., Path=C:\Windows\Command; C:…\SQLANY~1\Win32;…)

4. Save any changes to the AUTOEXEC.BAT file and reboot the computer.

Connect To Sybase Dialog Box Appears on Client Workstation

For Windows peer-to-peer networks, the Sybase login dialog box or ODBC Data Source errors are symptoms of logical or physical connectivity problems. Refer to *Using EZConfig* for troubleshooting procedures.

Error Messages, "Unable to Connect to Database Server" or "Server Not Found"

The network connection may not be working properly. Check for proper installation of the network card and cabling. Refer hardware troubleshooting to the network's administrator.

Using E-Z Configuration

E-Z Data, Inc. developed E-Z Configuration to assist with troubleshooting connectivity problems between the workstation and the server.

Database File: Logical location of the database file on the server. In this example, F: is the drive letter mapped to the server from the workstation.

Server Path: Physical location of the database file on the server. In this example, C: is the drive letter where the database file is located on the server.

Network Protocol: The communication protocol used on your network.

Select Button: Used only with TCP/IP, click on this button to enter the server's IP address. Use the following format; {DOBROADCAST=NO;HOST=[server IP address]}

Data Source: The name of the database being used.

Select Button: Click on this button to locate and select the correct database.

Server: This name identifies the database server.

Drive Map: Click this button to check or correct the physical and logical path to the database.

Check: Click on this button to check for a valid path and connection to the database.

Using E-Z Configuration to Configure the Data Source

1. From the Taskbar, click the **Start** button, point to **Programs**, **Client Data System**, **CDS Utilities** and then click the **E-Z Configuration** icon.

2. In the E-Z Data's Data Source Configuration dialog box, select the **Data source** name (name of the database being used) from the drop-down list.

3. Make certain that the **Client** option is selected.

4. Use the following instructions to complete the configuration:

Database File

The **Database File** field shows the complete path name for the database. If it is not correct, use the selection button to locate the correct path name.

Server

The default **Server** name is **EZDATA**. The letters must be all UPPERCASE. The **Server** name may be different if other Sybase applications are running or if the default name was not used during the original Sybase software installation.

Network Protocol

Check the **Network Protocol**(**s**) used by the network for communication. The values are:

IPX	The transport protocol used in Novell NetWare networks.
NetBIOS	Network Basic Input/Output System. Provides support necessary to send and receive data on IBM or Microsoft-based local area networks.
TCP/IP	Transmission Control Protocol/Internet Protocol. A network protocol used for LAN communication as well as Internet access.

Current Start Line

The **Current Start line** field shows the Run command used to start the connection to the Sybase server. This setting cannot be changed in EZConfig.

Check (Testing the Sybase Connection)

After making changes with EZConfig, click the **Check** button to test the Sybase connection.

Drive Map (Checking/Changing the Database Path)

Click the **Drive Map** button to show the settings for the physical and logical paths to the database. Click the **Drive Map** button to display the Input Server Path for network drive dialog box. The Input Server Path for network drive dialog box requires two entries—the logical drive (the mapping from the workstation to the server) and the physical drive (the server drive letter and path).

Drive letter that is mapped from the workstation to the server.

Drive letter and path where CDS is installed on the server.

Input Server Path for network drive

Please input shared directory for following network drive, if you choose cancel, UNC name will be used.

F: (\\SERVER\C_Drv)

C:

Examples: NT or Win95 Networks - Enter the physical drive onto which CDS is installed on your server, generally "C:". If CDS is installed on a shared directory below the root called APPS, enter both drive and path "C:\APPS".
Novell - Enter the server drive name. If your server is called Server and the shared drive is SYS enter "SYS:".

[OK]   [Cancel]

Glossary of Terms

Adaptive Server Anywhere

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 7.0 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 allows 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 cutting down on 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:\Program Files\CDSWin directory.

Desktop

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

Path

A path is the logical route to a drive, directory, or file on a computer.

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.).