
Client Data System

Installation Guide

(Stand-Alone)



E-Z Data, Inc.

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Product Overview

Client Data System is a comprehensive practice-management program designed to increase your marketing power and streamline your office operation.

Over a decade of leadership in client management software has resulted in innovative functions you won't find in other programs. Our unique SmartPad™, Letter Log, Sets, and powerful Dynamic Reports™ increase your effectiveness. You will find accessing information, entering data and navigating through the system to be smooth and efficient.

We use the most efficient tools available to achieve CDS's high performance. In addition to using the most powerful and effective development language (Microsoft Visual C++), we use the most powerful and efficient database management system (DBMS) available—Sybase Adaptive Server Anywhere 7.0.

We are certain that you will benefit from an industrial strength DBMS, using the latest technology, for many years to come.

Hardware and Software Requirements

The minimum/recommended hardware and software requirements for CDS are:

- 266 MHz / 400 MHz or higher Pentium-class processor.
- 64 MB / 128 MB of RAM. As with other Windows-based programs, adding more RAM generally improves performance.
- 500 MB / 1 GB of free space on the hard disk drive for initial installations. Plan to maintain approximately four times the size of the CDSWIN directory, including all subdirectories, as free space on the hard disk drive for program upgrades and database rebuilds. If the CDSWIN directory is not on drive C, you will still need approximately 1 GB of free space on drive C. The 1 GB of free space should be maintained for upgrade and rebuilding processes.
- **Windows 95, Windows 98, Windows Me, Windows NT, Windows 2000, or Windows XP** operating system.
- **CD-ROM installation on Notebook Computers.** If your portable computer has an interchangeable diskette drive and CD-ROM drive, copy the Control file from the diskette to drive C before you begin the installation. During the CDS installation from the CD-ROM you will be prompted to insert the Control File diskette in the diskette drive. Change the Control file location from A:\ to C:\.
- **Microsoft Word 97**, or a later version, is required if you plan to use Word as your default word processor in CDS. (Earlier versions of Word can still be used independently of CDS on the same computer.)
- **Palm™ Desktop for Windows software version 3.0.1**, or a later version, is required if you plan to use the E-Z Conduit Module.
- **Microsoft Outlook 2000 or Lotus Notes R5**, or a later version, is required if you plan to use the E-Z Mail interface.

CDS Installation

Attention AXA Agent WorkStation Users: Proceed to CDS Installation for AXA Agent WorkStations on page 9.

Pre-installation

To facilitate an error-free installation of the CDS program, disable the programs that start automatically by temporarily removing the contents of the **Startup** folder.

1. Using Windows Explorer, create a temporary folder on the root of drive C named **Hold**. (i.e., C:\Hold)
2. Move the contents of the Startup folder (e.g., C:\Windows\Start Menu\Programs\Startup) to the **Hold** folder.
3. Reboot the computer to the Windows desktop and proceed with the CDS installation.

Windows 95/98/Me Only

Norton AntiVirus Users: Disable Norton AntiVirus Auto-Protect prior to installing CDS.

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

E-Z Conduit Module Only

1. Other third-party conduits (Microsoft Outlook Conduit, Pocket Mirror, etc.) must be uninstalled prior to the installation of the E-Z Conduit Module.
2. Install Palm™ Desktop for Windows if this has not already been done. Install it from the Palm™ Desktop for Windows CD or download an updated version if necessary from <http://www.palm.com/support/downloads/#windowsdesktop>. Upgrading Palm™ Desktop is recommended for users of Windows 2000.
3. Run a HotSync® session to enter data into (or reconcile data with) Palm™ Desktop for Windows. Make certain that the interface is working properly. If you are unable to HotSync®, contact Palm Technical Support at (847) 262-7256 for assistance.
4. If you have installed a database that has been converted for use with CDS 4.1.1 and you have Contact and Activity records in your PDA device that duplicate the Contact and Activity records in the converted database, delete the duplicate records in Palm™ Desktop for Windows. If you do not delete these records, duplicate records will be created in CDS. Run a HotSync® session to reconcile the changes.

Installation

1. Close any Windows applications that may be running, including any suite products. Press CTRL+ALT+DEL and end all tasks except Explorer and Systray.
2. Insert the Client Data System CD into the CD-ROM drive. The E-Z Data Setup program should start automatically. (If it does not start, continue with the next step, otherwise skip to Step 7.)
3. Click **Start** and select **Run**.
4. Click **Browse** to open the Browse dialog box. Select the CD-ROM drive from the drop-down menu in the **Look in:** field.
5. Double-click on **EZSetup**. This closes the Browse dialog box.
6. Click **OK** in the Run dialog box to start the E-Z Data Setup program.
7. Click the **CDS** button to install Client Data System.
8. If you plan to install the E-Z Conduit Module, click the **E-Z Conduit** button to add it to the installation process.
9. If you plan to install E-Z Mail, click the **E-Z Mail** button to add it to the installation process.
10. After selecting the Setup program options, click the **Install** button to proceed with the installation.
11. After reading the Welcome message, click **Next** to continue.
12. After reading the Software License Agreement, click **Yes** to accept the terms of the license and continue with the installation.
13. In the Installation Type dialog box, select the **CDS Installation/Upgrade** option and click the **Next** button.
14. In the Select Components dialog box, click the **Single User** button.
(If Adaptive Server Anywhere 7.0 has already been installed, Steps 15-18 will be omitted.)
15. A message box will indicate that Adaptive Server Anywhere 7.0 needs to be installed prior to running the CDS installation. Click **Yes** to continue.
16. Click **Next** to accept the default directories where Adaptive Server Anywhere 7.0 components will be installed.
17. Select the **Yes, I want to restart my computer now** radio button and then click **Finish** to restart the computer.

Note:	Your computer may take a couple of minutes to restart, depending on your hardware configuration. Do not shut the power off or reset the computer unless you are certain that the computer has stopped responding to the Setup program.
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18. After your computer restarts, the CDS Setup program will start again. Click **Next** in the Welcome message dialog box to continue with the installation of CDS.

19. In the Setup Type dialog box, use **Typical** for the type of Setup. (Compact or Custom setup is not recommended for stand-alone installations.) Click **Next** to accept the default Destination Directory (C:\Program Files\CDSWin).
20. In the Select Program Folder dialog box, click **Next** to accept the default Program Folder (Client Data System).
21. In the Start Copying Files dialog box, review the list of Current Settings. If you must make a change, click **Back**. Otherwise, click **Next** to begin copying files. (A Progress Bar will indicate the current status of the files being copied.)
22. When the progress bar is at 97% you will be prompted to insert the Control File diskette into drive A. Insert the diskette (or type C:\ in the dialog box if the file was copied to the hard disk) and then click **OK** to continue with the installation.
23. When the Restarting Windows dialog box opens, select the **Yes, I want to restart my computer now** radio button, remove the floppy disk from drive A, and click **Finish** to complete the Setup of the main CDS program.

(If you did not select the option to install the E-Z Conduit Module, Steps 24 and 25 will be omitted.)
24. The E-Z Conduit Module Setup program will begin if you selected this option in Step 8. After reading the Welcome message, click **Next** to continue with the E-Z Conduit Module Setup.
25. When the Setup is complete, click **OK** to exit.

(If you did not select the option to install E-Z Mail, Steps 26 and 27 will be omitted.)
26. The E-Z Mail Setup program will begin if you selected this option in Step 9. After reading the Welcome message, click **Next** to continue with the E-Z Mail Setup program.
27. When the Congratulations dialog box appears, click **Finish** to exit.

Post-installation

Move the startup-programs back to the **Startup** folder from the **Hold** folder that was created prior to running the installation.

1. Using Windows Explorer, locate the **Hold** folder that you created to temporarily hold your startup programs.
2. Move the contents of the **Hold** folder to the **Startup** folder (e.g., C:\Windows\Start Menu\Programs\Startup).
3. Delete the empty **Hold** folder.
4. Close Windows Explorer and then reboot the computer.

Windows 95/98/Me Only

Norton AntiVirus Users: Enable Auto-Protect as explained below.

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

The installation process is complete. See the Using CDS for the First Time section on page 15 for information on using this software.

CDS Installation for AXA Agent WorkStations

If you are installing Client Data System on an AXA Agent WorkStation (an IBM desktop or laptop computer specifically provided by AXA Financial or its affiliates), you must follow the instructions listed in this section. **FAILURE TO FOLLOW THE CORRECT INSTALLATION PROCEDURE WILL RESULT IN A COMPLETE LOSS OF HARD DRIVE DATA.**

If you have already installed or upgraded to CDS 4.1.1 without installing the E-Z Conduit Module and/or E-Z Mail, see the CDS Installation section on page 5 for instructions on installing the optional modules only.

Pre-installation

To facilitate an error-free installation of the CDS program, disable Norton AntiVirus Auto-Protect and disable the programs that start automatically by temporarily removing the contents of the **Startup** folder.

1. From the desktop, select **Start, Programs, Norton AntiVirus**, and then click **Norton AntiVirus**.
2. Select **Options** and click the **Auto-Protect** tab.
3. Clear the check next to the **Load Auto-Protect at Startup** option and click **OK**.
4. Click **Yes** when prompted to unload Auto-Protect.
5. Exit Norton AntiVirus.
6. Using Windows Explorer, create a temporary folder on the root of drive C named **Hold** (i.e., C:\Hold).
7. Move the contents of the **Startup** folder (e.g., C:\Windows\Start Menu\Programs\Startup) to the **Hold** folder.
8. Reboot the computer to the Windows desktop and proceed with the CDS installation.

E-Z Conduit Module Only

1. Other third-party conduits (Microsoft Outlook Conduit, Pocket Mirror, etc.) must be uninstalled prior to the installation of the E-Z Conduit Module.
2. Install Palm™ Desktop for Windows if this has not already been done. Install it from the Palm™ Desktop for Windows CD or download an updated version if necessary from <http://www.palm.com/support/downloads/#windowsdesktop>. Upgrading Palm™ Desktop is recommended for users of Windows 2000.
3. Run a HotSync® session to enter data into (or reconcile data with) Palm™ Desktop for Windows. Make certain that the interface is working properly. If you are unable to HotSync®, contact Palm Technical Support at (847) 262-7256 for assistance.
4. If you have installed a database that has been converted for use with CDS 4.1.1 and you have Contact and Activity records in your PDA device that duplicate the Contact and Activity records in the converted database, delete the duplicate records in Palm™ Desktop for Windows. If you do not delete these records, duplicate records will be created in CDS. Run a HotSync® session to reconcile the changes.

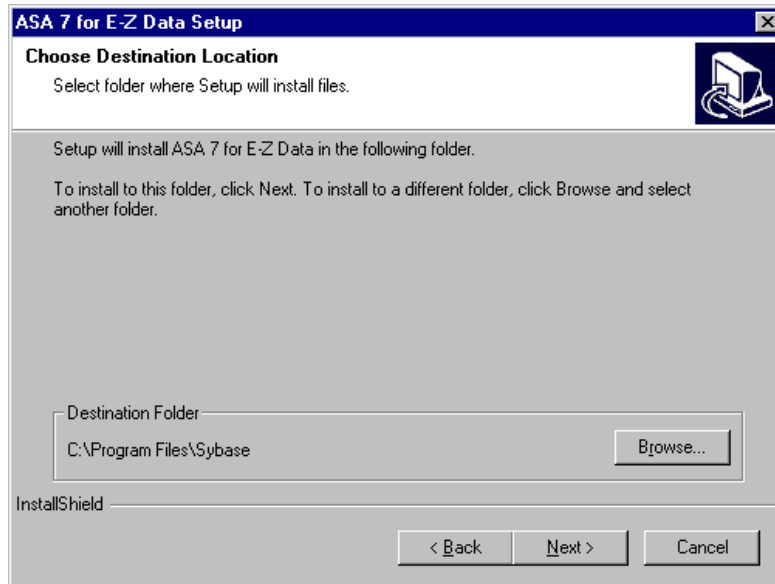
Installation

1. Close any Windows applications that may be running, including any suite products. Press CTRL+ALT+DEL and end all tasks except Explorer and Systray.
2. Insert the Client Data System CD into the CD-ROM drive. (The E-Z Data Setup program should start automatically. If it starts, continue with the next step, otherwise skip to Step 5.)

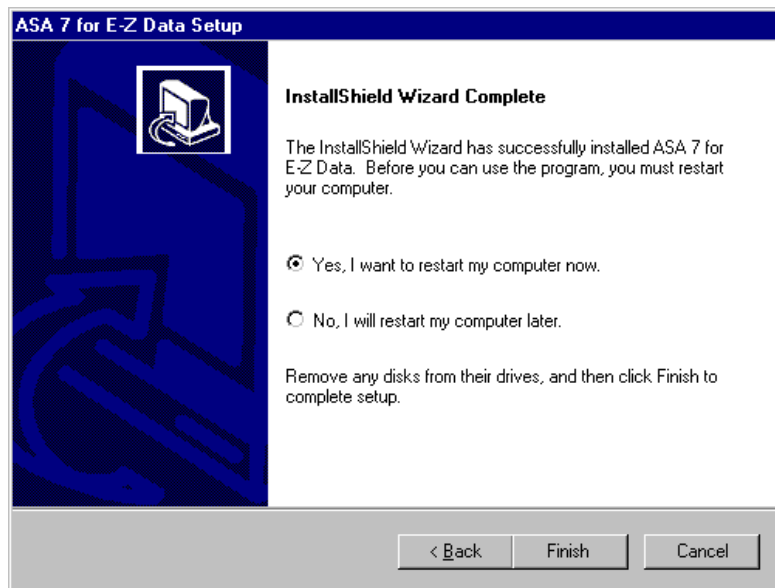
Note:	Sybase Adaptive Server Anywhere 7.0 must be installed by a special procedure prior to running the E-Z Data Setup program. Do not allow E-Z Data Setup to run at this time.
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3. Click **Exit** to close E-Z Data Setup.
4. Click **Start** and select **Run**.
5. Click **Browse** to open the Browse dialog box. Select the CD-ROM drive from the drop-down menu in the **Look in:** field.
6. Double-click the **CDS41** folder.
7. Double-click the **ASANY7** folder.
8. Double-click **Setup** to close the Browse dialog box.
9. Click **OK** in the Run dialog box.

10. When the ASA 7 for E-Z Data Setup dialog box opens, click **Next** to accept the default directories where Adaptive Server Anywhere 7.0 components will be installed.



11. When the installation is complete, select the **Yes, I want to restart my computer now** option and click **Finish** to restart the computer.



Note:	Your computer may take a couple of minutes to restart, depending on your hardware configuration. Do not shut the power off or reset the computer unless you are certain that the computer has stopped responding to the Setup
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12. After your computer restarts, close any Windows applications that may have opened, including any suite products and CDS Setup. Press **CTRL+ALT+DEL** and end all tasks except Explorer and Systray.

13. Click **Start** and select **Run**.

14. Click **Browse** to open the Browse dialog box. Select the CD-ROM drive from the drop-down menu in the **Look in:** field.
15. Double-click on **EZSetup**. This closes the Browse dialog box.
16. Click **OK** in the Run dialog box to start the E-Z Data Setup program.
17. Click the **CDS** button to install Client Data System.
18. If you purchased the E-Z Conduit Module, click the **E-Z Conduit** button to add it to the installation process.
19. If you plan to install E-Z Mail, click the **E-Z Mail** button to add it to the installation process.
20. After selecting the Setup program options, click the **Install** button to proceed with the installation.
21. After reading the Welcome message, click **Next** to continue.
22. After reading the Software License Agreement, click **Yes** to accept the terms of the license and continue with the installation.
23. In the Installation Type dialog box, select the **CDS Installation/Upgrade** option and click the **Next** button.
24. In the Setup Type dialog box, select **Typical** for the type of Setup. (Compact or Custom setup is not recommended for stand-alone installations.) Click **Next** to accept the default Destination Directory (C:\Program Files\CDSWin).
25. In the Select Program Folder dialog box, click **Next** to accept the default program folder (Client Data System).
26. In the Start Copying Files dialog box, review the list of Current Settings. If you must make a change, click **Back**. Otherwise, click **Next** to begin copying files. (A Progress Bar will indicate the current status of the files being copied.)
27. When the progress bar is at 97%, you will be prompted to insert the Control File diskette into drive A. Insert the diskette (or type C:\ in the dialog box if the file was copied to the hard disk) and then click **OK** to continue with the installation.
28. When the Restarting Windows dialog box opens, remove the floppy disk from drive A, select the **Yes, I want to restart my computer now** radio button, and click **Finish** to complete the Setup.

(If you did not select the option to install the E-Z Conduit Module, Steps 29 and 30 will be omitted.)
29. The E-Z Conduit Module Setup program will begin if you selected this option in Step 18. After reading the Welcome message, click **Next** to continue with the E-Z Conduit Module Setup.
30. When the Setup is complete, click **OK** to exit.

(If you did not select the option to install E-Z Mail, Steps 31 and 32 will be omitted.)
31. The E-Z Mail Setup program will begin if you selected this option in Step 19. After reading the Welcome message, click **Next** to continue with the E-Z Mail Setup program.
32. When the Congratulations dialog box appears, click **OK** to exit.

Post-installation

Move the startup-programs back to the **Startup** folder from the **Hold** folder that was created prior to running the installation.

1. Using Windows Explorer, locate the **Hold** folder that you created to temporarily hold your startup programs.
2. Move the contents of the **Hold** folder to the **Startup** folder (e.g., C:\Windows\Start Menu\Programs\Startup).
3. Delete the empty **Hold** folder.
4. Close Windows Explorer and then reboot the computer

Norton AntiVirus Auto-Protect may now be enabled as follows:

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

The installation process is complete. Refer to the Using CDS for the First Time section on page 15 for information on using this software.

Using CDS for the First Time

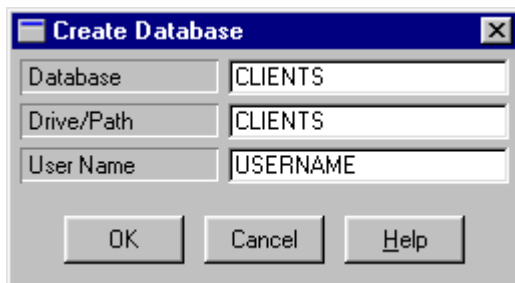
Before you use CDS for the first time, you should read the *Getting Started with the Client Data System* guide to familiarize yourself with the basic operation of the program. The information contained in the guide will prove to be invaluable toward discovering the full potential of CDS. The following information is included as a quick-start reference.

Creating Databases

The CDS program installs demonstration data and users. After logging into the Demonstration (DEMO) database as the demonstration user, you can create your own agency databases and users.

To Create a Database

1. Click **Start, Programs, Client Data System**, and then click **CDS for Windows**.
2. In the Login dialog box, select the Database **DEMO** and the User Name **DEMO**. Click **OK** to login to CDS (no password is required for DEMO).
3. From the CDS desktop, open the **Database** menu and click on **Create New Database**. Click **OK** on the simultaneous database creation warning box.
4. In the Create Database dialog box, enter the name for the database. After entering the name, press the **TAB** key. CDS uses the database name as the Drive/Path name automatically. Press the **TAB** key again, type your name in the User Name field and then click **OK**.



The Drive/Path location is a subdirectory of the CDSWIN directory. The CLIENTS database will be created in a subdirectory of CDSWIN named CLIENTS. Each database you create is located in a subdirectory of the same name as the database. Do not enter path information (e.g., C:\Program Files\CDSWin\Clients) in the Drive/Path field.

5. A message box will appear when the database has been successfully created. Click **OK** to log in to the new database.
6. Repeat Steps 3 and 4 of this section to create additional databases.

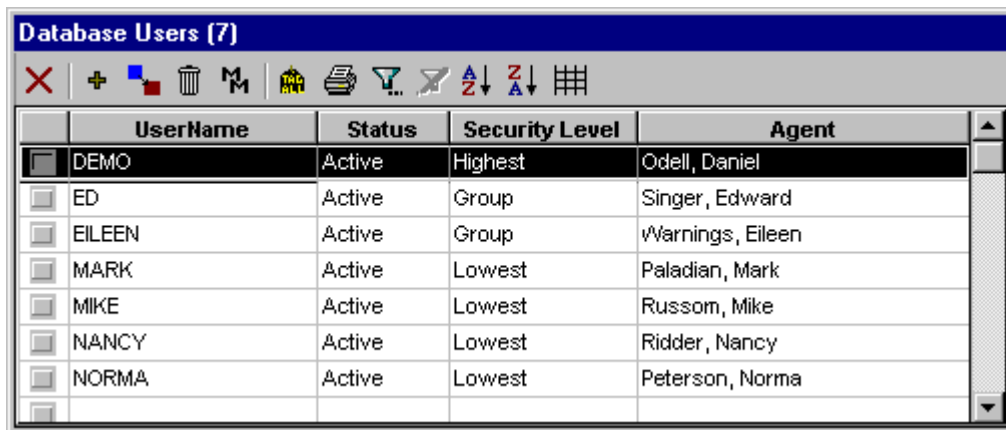
See the CDS Help topic *Getting Started in CDS* for additional information. If you have installed the E-Z Conduit Module, proceed to the Setting up the E-Z Conduit Module section on page 17 for setup procedures. If you have installed E-Z Mail, see the CDS Help topic *E-mail Utilities* for setup information.

Setting up the E-Z Conduit Module

Before running the first synchronization between the PDA device and CDS, follow these steps:

Tip:	If you do not have an existing database or are planning to create a new one, you can import the contact records in your PDA device into a CDS database during your first synchronization.
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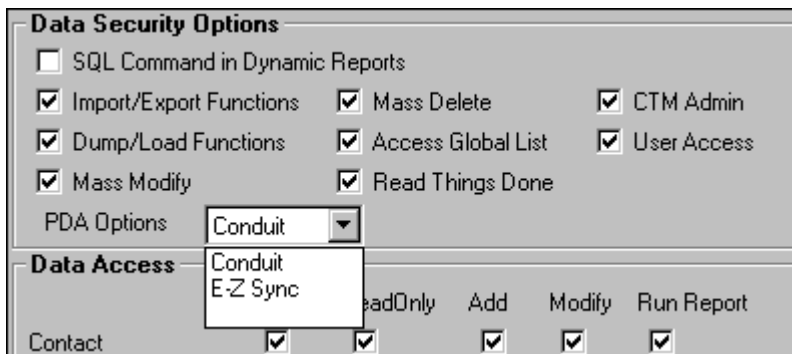
1. Log in to the CDS database that will be used with the PDA device.
2. From the CDS desktop, click **Database** and then **User Management** to open the Database Users dialog box.



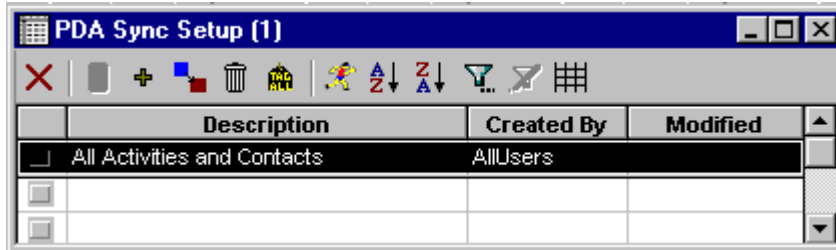
The screenshot shows a window titled "Database Users (7)". It contains a table with the following data:

	UserName	Status	Security Level	Agent
<input type="checkbox"/>	DEMO	Active	Highest	Odell, Daniel
<input type="checkbox"/>	ED	Active	Group	Singer, Edward
<input type="checkbox"/>	EILEEN	Active	Group	Warnings, Eileen
<input type="checkbox"/>	MARK	Active	Lowest	Paladian, Mark
<input type="checkbox"/>	MIKE	Active	Lowest	Russom, Mike
<input type="checkbox"/>	NANCY	Active	Lowest	Ridder, Nancy
<input type="checkbox"/>	NORMA	Active	Lowest	Peterson, Norma

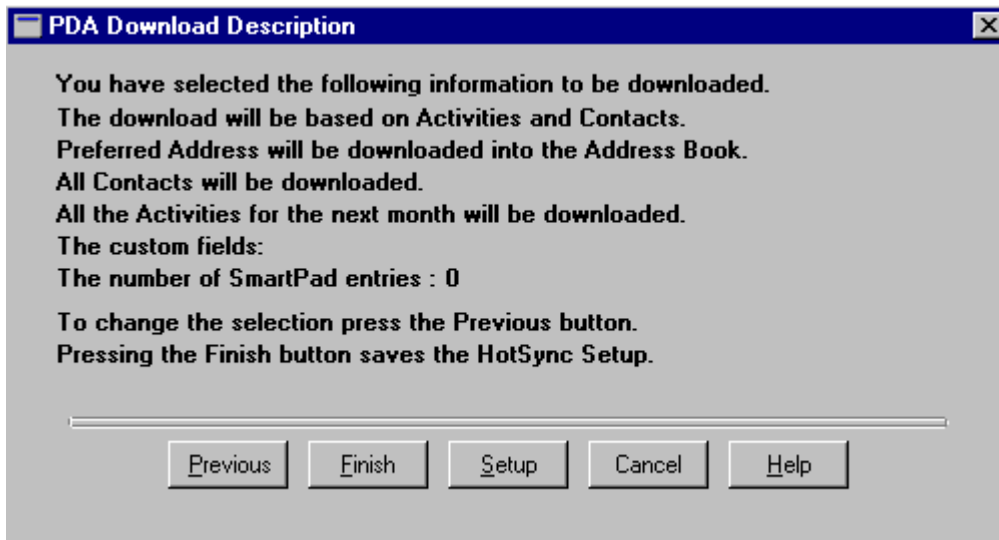
3. Double-click the row that represents the User that will be using the E-Z Conduit Module. This opens the User Profile window for the User selected.
4. Click the **Security Information** tab.
5. In the **Data Security Options** group, open the **PDA Options** drop-down menu. Select **Conduit** and click **OK**.



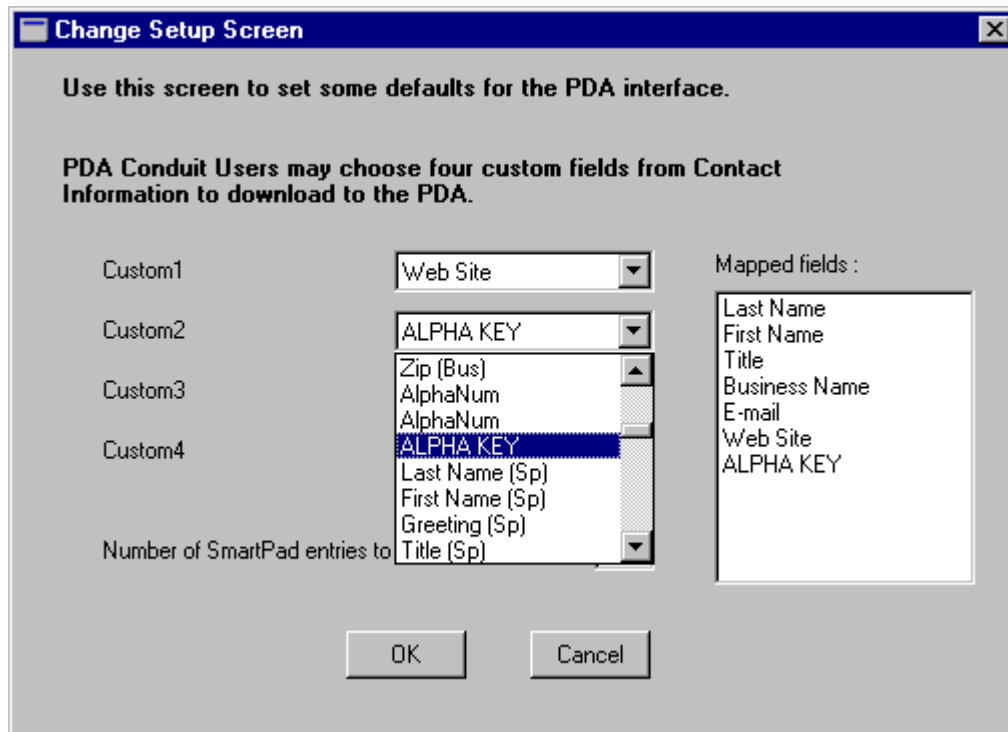
6. A dialog box will prompt you to log out of CDS and then log back in for the changes to take effect. Click **OK**.
7. Exit CDS and then log back in as the User who will be using the E-Z Conduit Module.
8. From the CDS desktop menu bar, click **Tools** and select **PDA Interface Setup**. This opens the PDA Sync Setup dialog box.



9. A default Setup record already exists named **All Activities and Contacts**. Double-click the row for this record to start the PDA HotSync Setup Wizard.
10. After reading the Welcome message, click the **Next** button to start the Wizard. You will be guided through the required steps. For more information about the PDA HotSync Setup Wizard options, see the CDS Help topic Adding a PDA HotSync Setup Record.
11. When you reach the PDA Download Description dialog box, click **Setup** to set the custom fields in the PDA device to download from (and subsequently upload to) fields in the CDS Contact Information table. If you want to save this Setup record without assigning custom fields, click the **Finish** button and proceed to Step 15.



- If you clicked **Setup** in Step 11, assign a field from CDS to the first of four custom fields available on the PDA device. Click the drop-down menu arrow for **Custom1**, use the scroll bar to find the field name, and then select the field. Repeat this process for **Custom2**, etc.



Note:	Choose fields with care. Once selected, they cannot be changed for this User's setup without risk of data corruption.
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- Click **OK** to confirm the selections and return to the PDA Download Description dialog box.
- Click **Finish** to save this setup.
- In the Save the PDA Download dialog box, change the **Description** and add a **Keyword** if necessary.

Note:	If you assigned custom fields to the PDA device (as in Step 13), you must clear the All Users dialog box before clicking the OK button to save this setup. If you do not clear All Users , all PDA device users will have the same custom field assignments when connecting to CDS. Select All Users if you would like to make this setup available to all users.
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- Click **OK** to save the PDA Sync Setup.
 - If necessary, start the HotSync Manager from the Palm Desktop program group.
- E-Z Conduit Module setup is now complete. See the *E-Z Conduit Module* section of the CDS Help for more information on setup and use.