Installation Guide
Version 4.1.2 (Network Version - Workstation)

E-Z Data, Inc.

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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 Network version 4.1.2 of CDS on a client workstation. A companion volume outlines how to install CDS on a server.

Performance of large applications in a network environment can seem slow and interfere with productivity. E-Z Data avoids this issue by employing 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 and efficient DataBase Management System (DBMS) available–Adaptive Server Anywhere 7.0.

CDS uses Client/Server technology, which allows a network to run efficiently regardless of the amount of information in the system database or the number of users accessing it at the same time. For more information on this technology, see the Client/Server overview below.

E-Z Data's 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 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' 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, that will be used (Windows 98, Windows Me, Windows NT, Windows 2000, or Windows XP)

- 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 machine. Users also need full access rights to the Shared folder on the server machine.

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.

Hardware and Software System Requirements

Minimum/Recommended hardware for client workstations

- **266 MHz Pentium-class processor** (400 MHz or higher recommended)

- **64 MB of RAM** (128 MB or higher recommended)

- **100 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.

- Full access to the network server directory containing CDS program and data files

- **Microsoft® Word 97**, or a later version, is required to use Word as the default word processor in CDS. Earlier versions of Word can be used independently of CDS on the same computer.

- **Microsoft® Outlook 2000 or Lotus Notes R5**, or a later version, is required to use the E-Z Mail interface. Please notes that the program does not support Microsoft® Outlook Express.

- **Palm™ Desktop for Windows software version 3.0.1**¸or a later version, is required to use the E-Z Conduit Module.

Minimum/Recommended hardware for the Server

400 MHz Pentium-class processor (700 MHz or higher recommended)

128 MB of RAM (256 MB 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 directory is maintained on a different drive.

Microsoft® Windows® 98, Me, NT, 2000, or XP 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)

Note: Client Data System **does not** currently support **Netware 6** or **Microsoft Server 2003**. For information on future compatibility with these applications, please contact E-Z Data Technical Support.

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 selections:

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

- Select the name of the Program group (Client Data System)

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 Program Group

CDS Icon

Double-click this icon to start Client Data System. This icon can also be used to create a Shortcut on the Windows desktops.

CDS Help Icons

Select one of these icons to start any of the CDS Help systems. The files can be viewed without running CDS.

CDS Uninstall Icon

This utility removes CDS files from the workstation. This method is superior to just deleting the **CDSWin** directory because it also removes files from the **Windows** and **Windows\System** directories.

DBUtil Icon

The DBUtil 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.

EZConfig Icon

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

ODBC Administrator Icon

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 98/Me Client

ATTENTION: AXA Agent Workstation Users - Proceed to the CDS Workstation Installation for AXA Agent Workstations section.

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.

Before Installation

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

1. From the desktop, click the **Start** button, point to **Programs**, then **Norton AntiVirus**, and then click **Norton AntiVirus**.

2. Select **Options** and click the **Auto-Protect** tab.

3. Clear the checkmark next to the **Load Auto-Protect at Startup** option and click the **OK** button.

4. Click the **Yes** button when prompted to unload Auto-Protect.

5. Exit Norton AntiVirus.

E-Z Conduit Module Users Only

Note: Other third-party conduits (Microsoft Outlook Conduit, Pocket Mirror, etc.) must be uninstalled before the installation of the E-Z Conduit Module.

1. Ensure that Palm™ Desktop for Windows is installed. If it is not currently installed, install it from a Palm™ Desktop for Windows CD or download the latest version from http://www.palm.com/support/downloads/#windowsdesktop. Upgrading to the latest version of Palm™ Desktop is highly recommended.

2. Run a HotSync® session to reconcile data between Palm™ Desktop for Windows and the handheld device. If the HotSync® does not work properly, contact Palm Technical Support at (847) 262-7256 for assistance.

3. If a database that has been converted for use with CDS 4.1.2 has been installed and the Contact and Activity records in the PDA duplicate the Contact and Activity records in the converted database, delete the duplicate records in Palm™ Desktop for Windows. If these records are not deleted, duplicate records will be created in CDS. After deleting the duplicate records, run a HotSync® session to reconcile the changes.
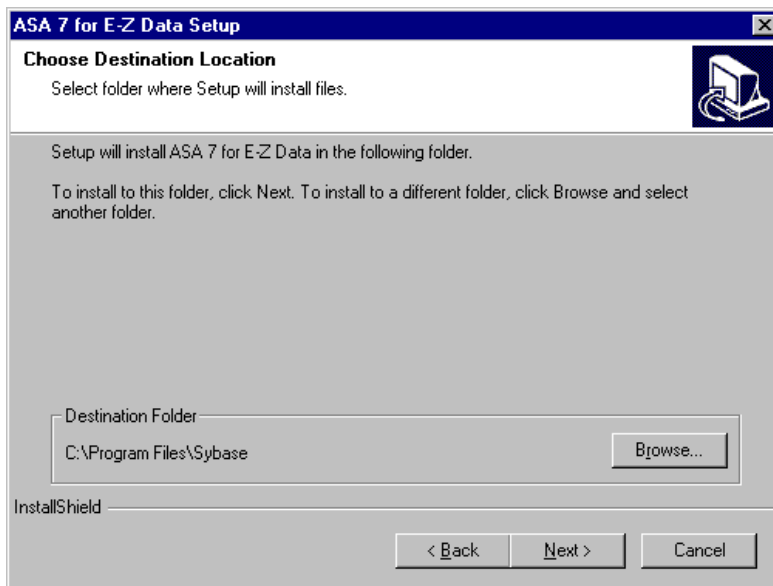
Installation

This procedure installs the Adaptive Server Anywhere and CDS client files on the workstation. This procedure 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 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. 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.

6. Double-click the **Setup** icon to close the Browse dialog box.

7. Click the **OK** button in the Run dialog box to start the CDS Setup program.

8. After reading the Welcome message, click the **Next** button to continue.

Note:	If Adaptive Server Anywhere has already been installed on the workstation, Steps 9-12 will be omitted.

9. A message box will indicate that Adaptive Server Anywhere 7.0 needs to be installed before running the CDS installation. Click the **Yes** button to continue.

10. From the next step, click the **Next** button to accept the default directories where Adaptive Server Anywhere 7.0 components will be installed.
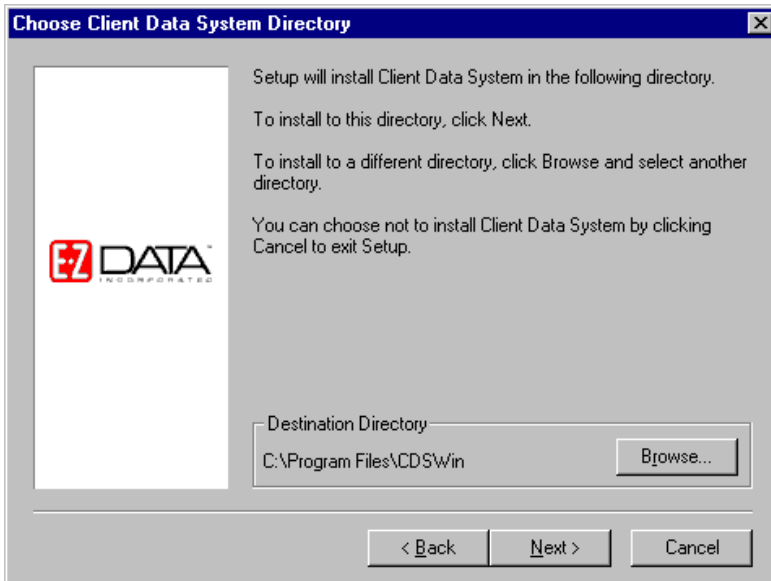

11. When the installation is complete, select the **Yes, I want to restart my computer now** option and click the **Finish** button to restart the computer.
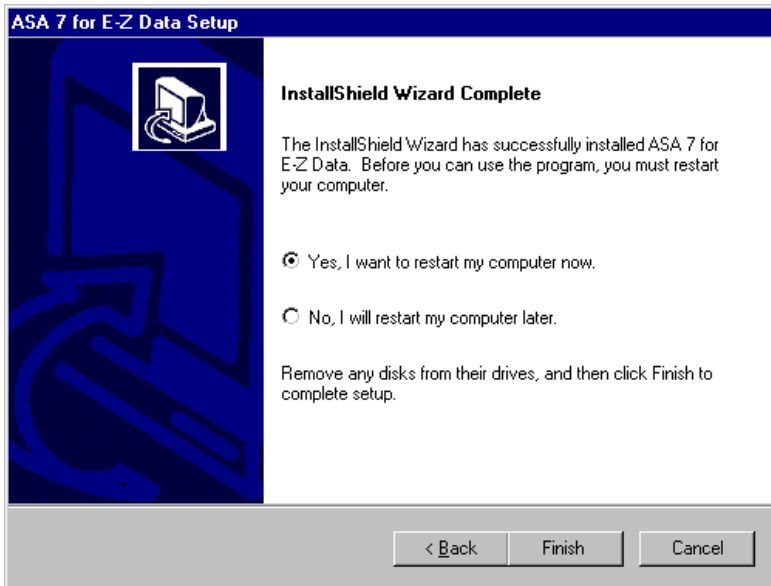
Note:	The computer may take a couple of minutes to restart. Do not shut the power off or reset the computer unless the computer has definitely stopped responding to the Setup program.

12. Upon restart, the CDS Setup program will start again. Click the **Next** button in the Welcome message dialog box to continue with the installation of CDS.

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

14. In the Select Program Folder dialog box, click the **Next** button to accept the default Program Folder (Client Data System).
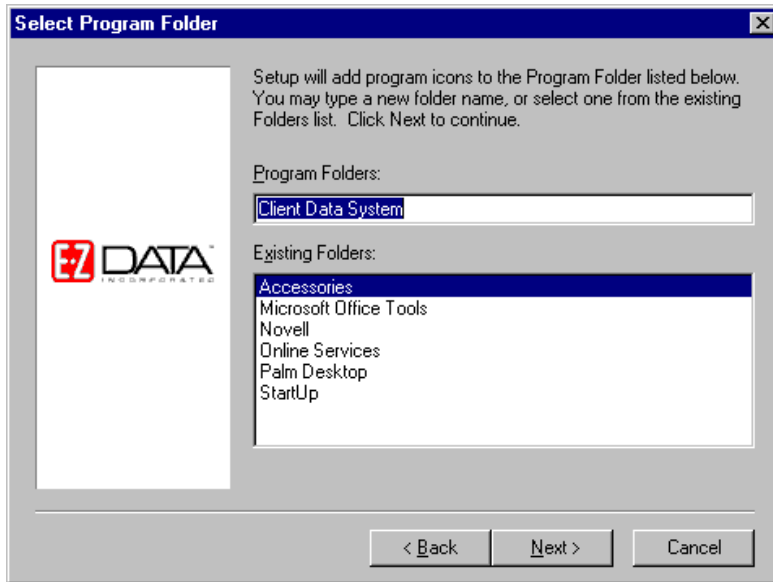
15. In the Start Copying Files dialog box, review the list of Current Settings. If a changed is required, click the **Back** button. Otherwise, click the **Next** button to begin. A progress bar will track the status of the files being copied.
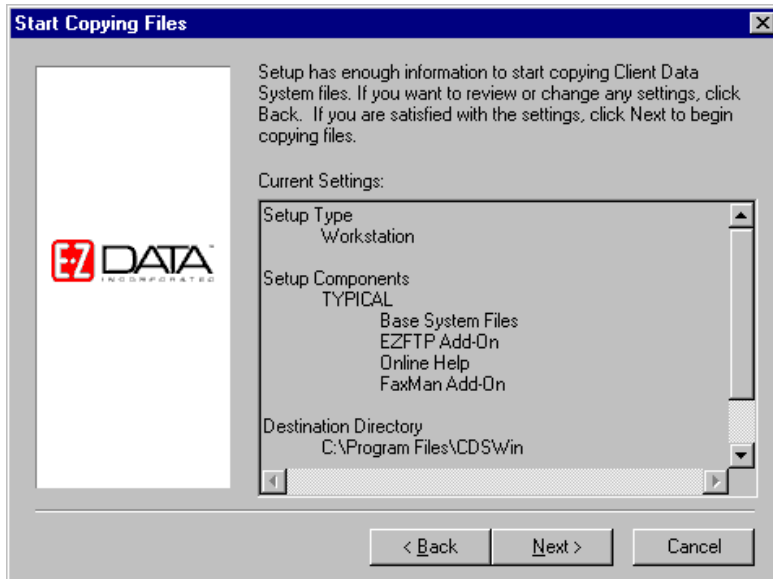
16. When prompted, select the **Yes, I want to restart my computer now** option and click the **Finish** button to restart the computer. This must be completed before starting CDS.
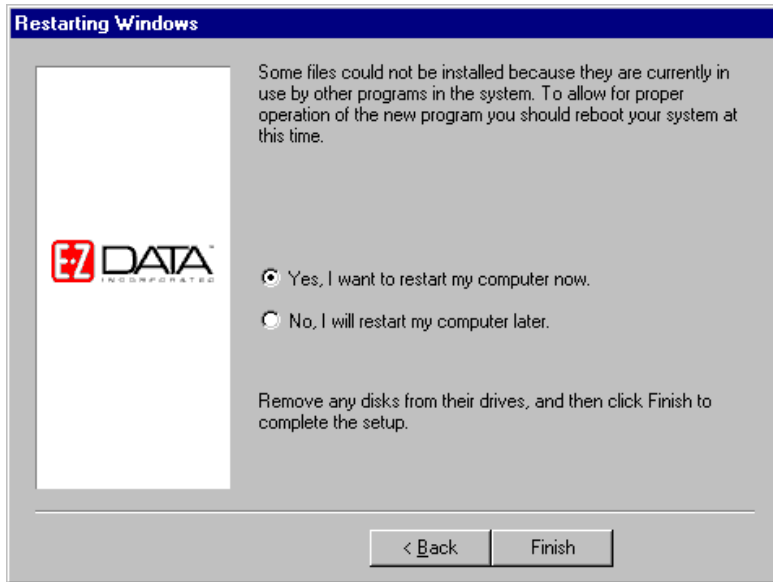
17. If either the E-Z Conduit Module or E-Z Mail are to be installed, continue as follows. If not, proceed to the **After the Installation** section.

18. 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**.

19. From the Taskbar, click the **Start** button and then select **Run**.

20. 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.

21. Double-click the **CDSWin.svr** folder to open it.

22. Double-click the **EZSetup** icon to close the Browse dialog box.

23. Click the **OK** button in the Run dialog box to start the E-Z Data Setup program.

Note:	E-Z Data Setup coordinates the CDS, E-Z Conduit Module, and E-Z Mail Setup programs. Based on the options selected, it runs any combination of the Setup programs automatically in order. The optional modules can be installed at any time after the CDS installation, but CDS always must be installed first.

24. To install the E-Z Conduit Module during the installation process, click the **E-Z Conduit** button.

25. To install the E-Z Mail during the installation process, click the **E-Z Mail** button.

26. Click the **Install** button to proceed with the installation. If the option to install the E-Z Conduit Module was not selected, Steps 27 and 28 are omitted.

27. After reading the Welcome message, click the **Next** button to continue.

28. When the Setup is complete, click the **OK** button to exit. If the option to install E-Z Mail was not selected, Steps 29 and 30 will be omitted.

29. The E-Z Mail Setup program begins. After reading the Welcome message, click the **Next** button to continue.

30. When the Congratulations dialog box appears, click the **Finish** button to exit.

After the Installation

Norton AntiVirus Users: Re-enable Auto-Protect as explained below.

1. From the desktop, click the **Start** button, point to **Programs**, then **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 the **OK** button.

4. Click the **Yes** button when prompted to load Auto-Protect.

5. Exit Norton AntiVirus.

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

CDS Workstation Installation for AXA Agent Workstations

To install Client Data System on an AXA Agent Workstation (a Windows-based desktop or laptop computer specifically provided by AXA Financial or its affiliates), please follow the instructions listed in this section.

FAILURE TO FOLLOW THE CORRECT INSTALLATION PROCEDURE CAN RESULT IN A COMPLETE LOSS OF HARD DRIVE DATA.

This procedure installs the Adaptive Server Anywhere and CDS client files on the workstation. This procedure 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.

Before the AXA Agent Workstation Installation

Before beginning installation, disable the Norton AntiVirus temporarily.

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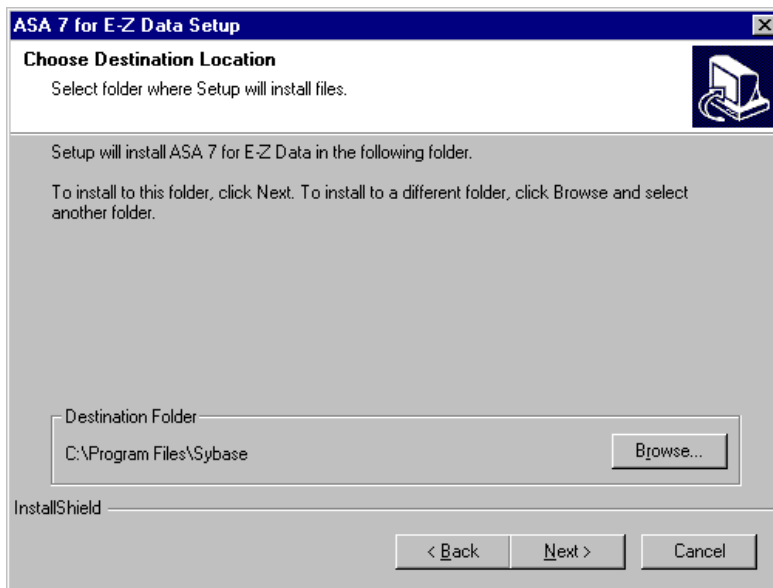5. Exit Norton AntiVirus.

E-Z Conduit Module Only for AXA Agent Workstations

Note: Other third-party conduits (Microsoft Outlook Conduit, Pocket Mirror, etc.) must be uninstalled before the installation of the E-Z Conduit Module.
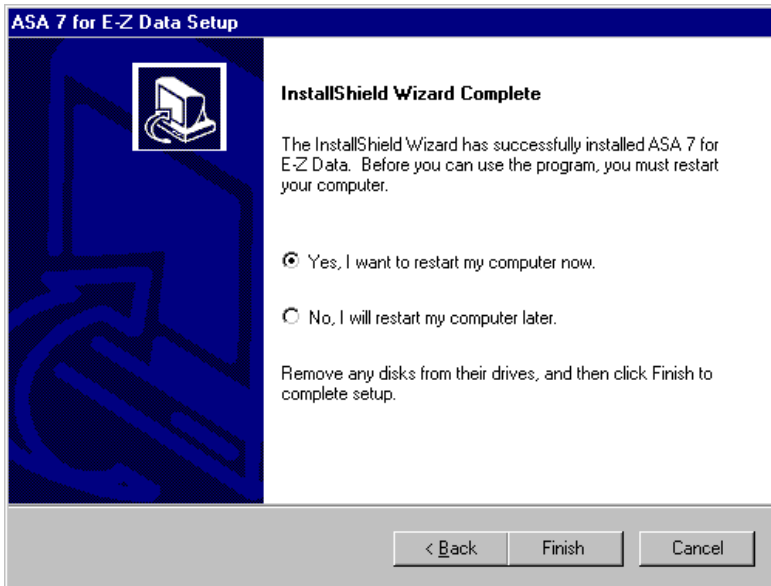
1. Ensure that Palm™ Desktop for Windows is installed. If it is not currently installed, install it from a Palm™ Desktop for Windows CD or download the latest version from http://www.palm.com/support/downloads/#windowsdesktop. Upgrading to the latest version of Palm™ Desktop is highly recommended.
2. Run a HotSync® session to reconcile data between Palm™ Desktop for Windows and the handheld device. If the HotSync® does not work properly, contact Palm Technical Support at (847) 262-7256 for assistance.
3. If a database that has been converted for use with CDS 4.1.2 has been installed and the Contact and Activity records in the PDA duplicate the Contact and Activity records in the converted database, delete the duplicate records in Palm™ Desktop for Windows. If these records are not deleted, duplicate records will be created in CDS. After deleting the duplicate records, run a HotSync® session to reconcile the changes.

Installation for AXA Agent Workstations

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. From the Taskbar, click the **Start** button and then select **Run**.

3. Click **Browse** to open the Browse dialog box and 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 and inside that folder, double-click the **Wssetup** folder. Within that folder, double-click the **Asany7** folder to open it.

5. Double-click the **Setup** icon to close the Browse dialog box.

6. In the Run dialog box, click the **OK** button to start the ASA 7 (Adaptive Server Anywhere 7.0) for E-Z Data Setup program.

7. Click the **Next** button to accept the default directories where Adaptive Server Anywhere 7.0 components will be installed.

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

| Note:	The computer may take a couple of minutes to restart. Do not shut the power off or reset the computer unless the computer has definitely stopped responding to the Setup program.

9. After the computer restarts, close any Windows applications that have opened, including any suite products and CDS Setup. Press **CTRL+ALT+DEL** and end all tasks except Explorer and Systray.

10. From the Taskbar, click the **Start** button and select **Run**.

11. Click the **Browse** button to open the Browse dialog box. From the **Look in:** field, select the network drive where CDS is installed.

12. Double-click the **Cdswin.svr** folder and then double-click the **Wssetup** folder to open it.

13. Double-click the **Setup** icon to close the Browse dialog box.

14. Click the **OK** button in the Run dialog box to start the Setup program.

15. After reading the Welcome message, click the **Next** button to continue.

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

17. In the Select Program Folder dialog box, click the **Next** button to accept the default Program Folder (Client Data System).
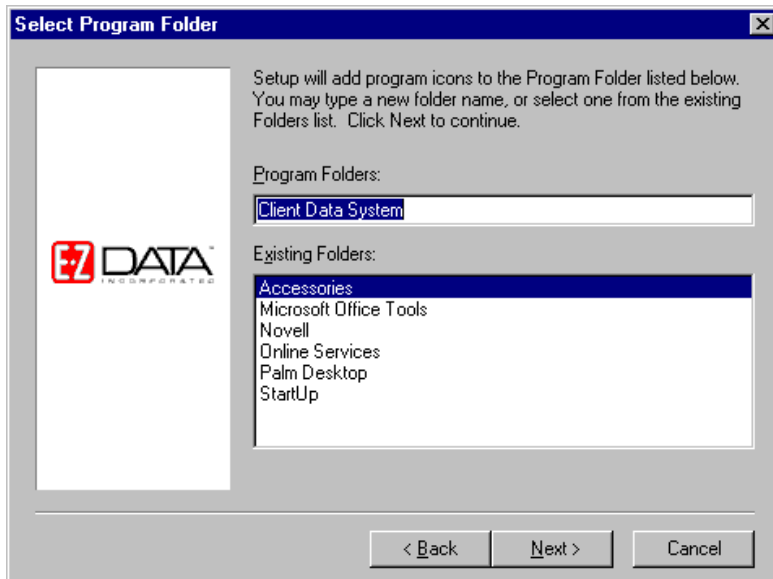
18. In the Start Copying Files dialog box, review the list of Current Settings. If a changed is required, click the **Back** button. Otherwise, click the **Next** button to begin. A Progress Bar will track the status of the files being copied.
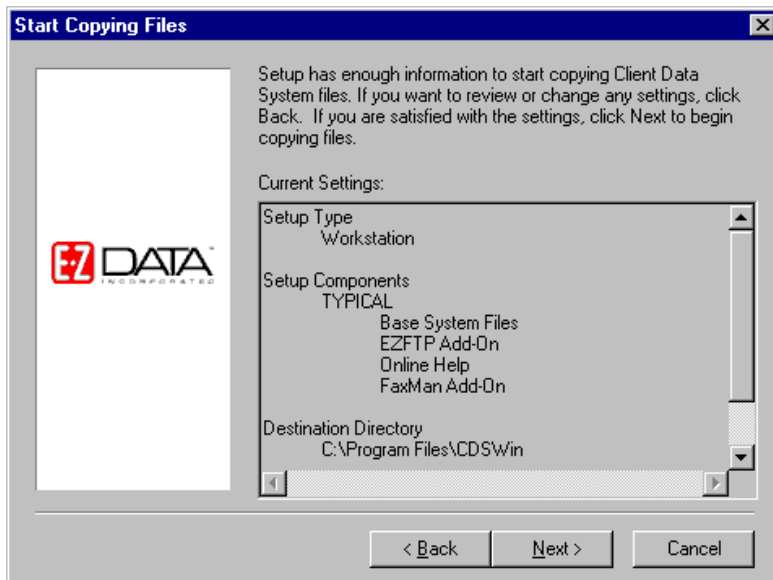
19. When prompted, select the **Yes, I want to restart my computer now** option and click the **Finish** button to restart the computer. This must be done before using CDS.
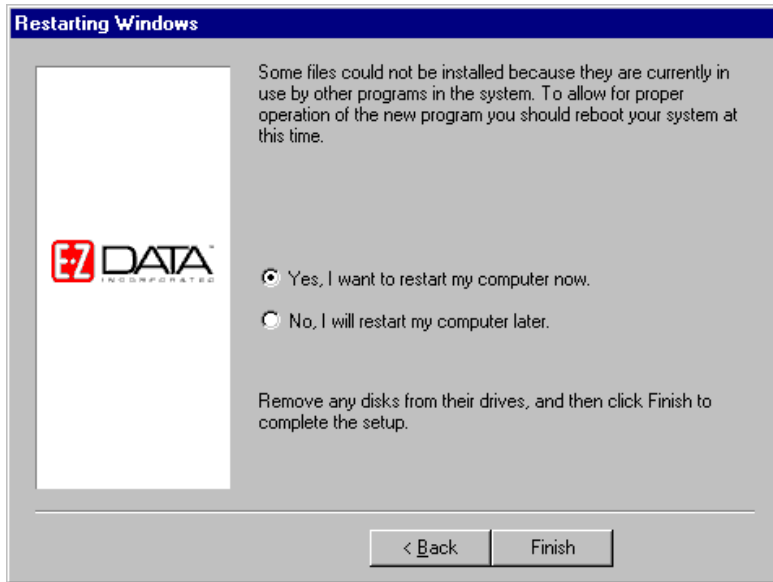
20. If either the E-Z Conduit Module or E-Z Mail are to be installed, continue as follows. If not, proceed to the **After the Installation** section.

21. 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**.

22. From the Taskbar, click the **Start** button and then select **Run**.

23. 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.

24. Double-click the **CDSWin.svr** folder to open it.

25. Double-click the **EZSetup** icon to close the Browse dialog box.

26. Click the **OK** button in the Run dialog box to start the E-Z Data Setup program.

Note:	E-Z Data Setup coordinates the CDS, E-Z Conduit Module, and E-Z Mail Setup programs. Based on the options selected, it runs any combination of the Setup programs automatically in order. The optional modules can be installed at any time after the CDS installation, but CDS always must be installed first.

27. To install the E-Z Conduit Module during the installation process, click the **E-Z Conduit** button.

28. To install the E-Z Mail during the installation process, click the **E-Z Mail** button.

29. Click the **Install** button to proceed with the installation. If the option to install the E-Z Conduit Module was not selected, Steps 30 and 31 are omitted.

30. After reading the Welcome message, click the **Next** button to continue.

31. When the Setup is complete, click the **OK** button to exit. If the option to install E-Z Mail was not selected, Steps 32 and 33 will be omitted.

32. The E-Z Mail Setup program begins. After reading the Welcome message, click the **Next** button to continue.

33. When the Congratulations dialog box appears, click the **Finish** button to exit.

After the AXA Agent Workstation Installation

Norton AntiVirus can now be re-enabled. Continue as follows:

1. From the desktop, click the **Start** button, point to **Programs**, then **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 the **OK** button.

4. Click the **Yes** button when prompted to load Auto-Protect.

5. Exit Norton AntiVirus.

After the client/server installation is complete, run CDS and create databases and users. Follow the directions in the <u>CDS Setup</u> section.

Installing CDS on a Windows NT/2000/XP 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**, then **Norton AntiVirus**, and then click **Norton AntiVirus**.

2. Select **Options** and click the **Auto-Protect** tab.

3. Clear the checkmark next to the **Load Auto-Protect at Startup** option and click the **OK** button.

4. Click the **Yes** button when prompted to unload Auto-Protect.

5. Exit Norton AntiVirus.

E-Z Conduit Module Only

Note: Other third-party conduits (Microsoft Outlook Conduit, Pocket Mirror, etc.) must be uninstalled before the installation of the E-Z Conduit Module.

1. Ensure that Palm™ Desktop for Windows is installed. If it is not currently installed, install it from a Palm™ Desktop for Windows CD or download the latest version from http://www.palm.com/support/downloads/#windowsdesktop. Upgrading to the latest version of Palm™ Desktop is highly recommended.

2. Run a HotSync® session to reconcile data between Palm™ Desktop for Windows and the handheld device. If the HotSync® does not work properly, contact Palm Technical Support at (847) 262-7256 for assistance.

3. If a database that has been converted for use with CDS 4.1.2 has been installed and the Contact and Activity records in the PDA duplicate the Contact and Activity records in the converted database, delete the duplicate records in Palm™ Desktop for Windows. If these records are not deleted, duplicate records will be created in CDS. After deleting the duplicate records, run a HotSync® session to reconcile the changes.
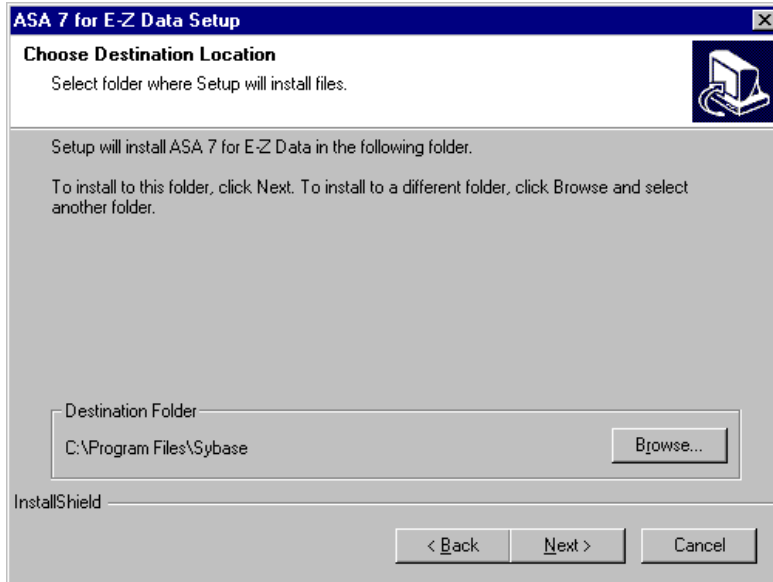
Installation

This procedure installs the Adaptive Server Anywhere and CDS client files on the workstation. This procedure 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 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. 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:	If Adaptive Server Anywhere has already been installed on the workstation, Steps 8-11 will be omitted.

8. A message box will indicate that Adaptive Server Anywhere 7.0 needs to be installed before running the CDS installation. Click the **Yes** button to continue.

9. From the next step, click the **Next** button to accept the default directories where Adaptive Server Anywhere 7.0 components will be installed.


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

| Note:	The computer may take a couple of minutes to restart. Do not shut the power off or reset the computer unless the computer has definitely stopped responding to the Setup program.

11. Upon restart, the CDS Setup program will start again. Click the **Next** button in the Welcome message dialog box to continue with the installation of CDS.

12. In the Choose Client Data System Directory dialog box, click the **Next** button to accept the default Destination Directory (C:\Program Files\CDSWin).
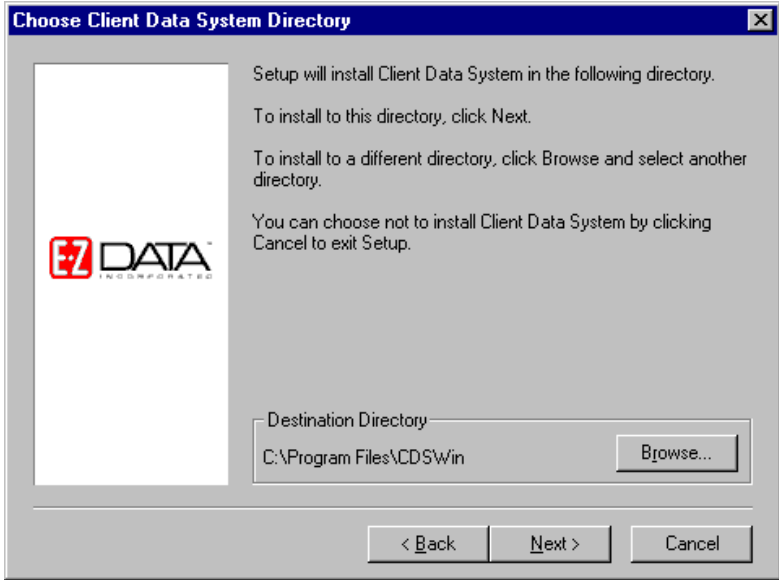
13. In the Select Program Folder dialog box, click the **Next** button to accept the default Program Folder (Client Data System).
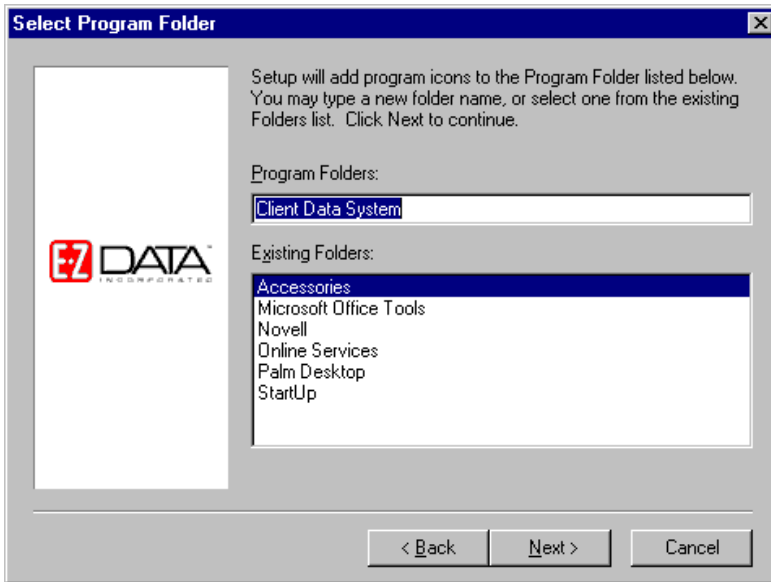
14. In the Start Copying Files dialog box, review the list of Current Settings. If a changed is required, click the **Back** button. Otherwise, click the **Next** button to begin. A progress bar will track the status of the files being copied.
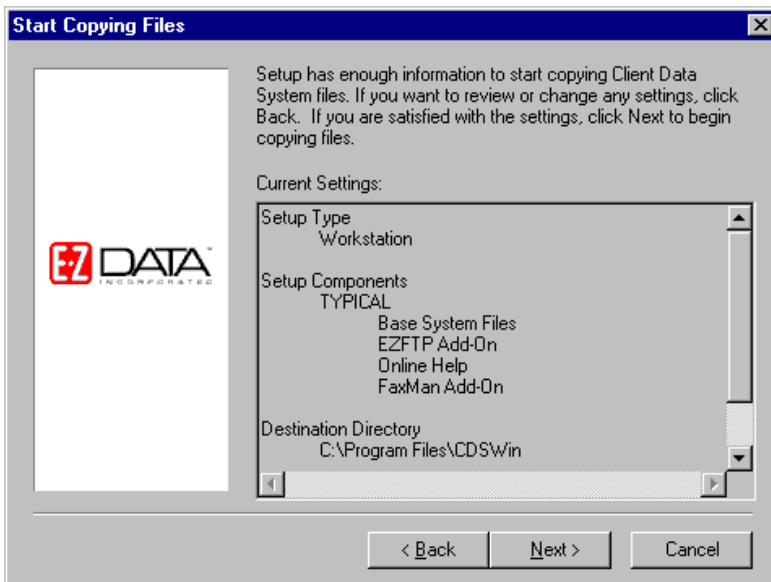
15. When the Setup is complete, click the **Finish** button to close the Setup program.
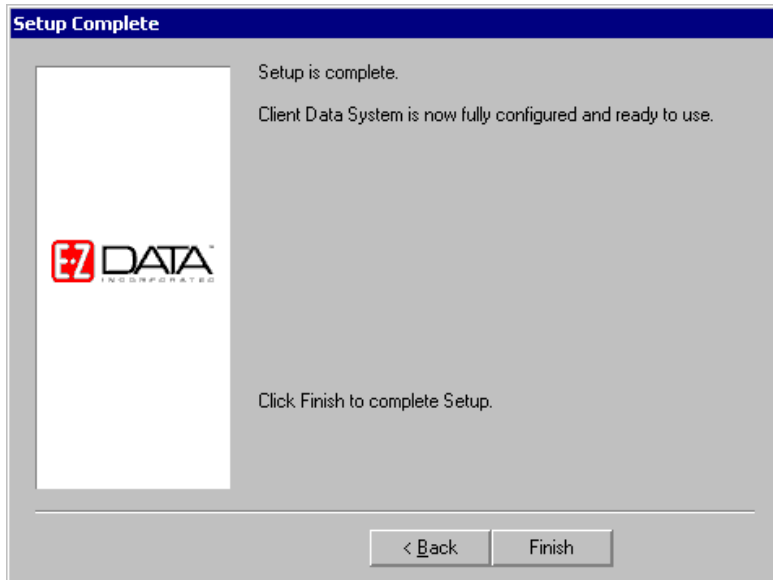
16. If either the E-Z Conduit Module or E-Z Mail are to be installed, continue as follows. If not, proceed to the **CDS Setup** section.

17. 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**.

18. From the Taskbar, click the **Start** button and then select **Run**.

19. 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.

20. Double-click the **CDSWin.svr** folder to open it.

21. Double-click the **EZSetup** icon to close the Browse dialog box.

22. Click the **OK** button in the Run dialog box to start the E-Z Data Setup program.

Note:	E-Z Data Setup coordinates the CDS, E-Z Conduit Module, and E-Z Mail Setup programs. Based on the options selected, it runs any combination of the Setup programs automatically in order. The optional modules can be installed at any time after the CDS installation, but CDS always must be installed first.

23. To install the E-Z Conduit Module during the installation process, click the **E-Z Conduit** button.

24. To install the E-Z Mail during the installation process, click the **E-Z Mail** button.

25. Click the **Install** button to proceed with the installation. If the option to install the E-Z Conduit Module was not selected, Steps 26 and 27 are omitted.

26. After reading the Welcome message, click the **Next** button to continue.

27. When the Setup is complete, click the **OK** button to exit. If the option to install E-Z Mail was not selected, Steps 28 and 29 will be omitted.

28. The E-Z Mail Setup program begins. After reading the Welcome message, click the **Next** button to continue.

29. When the Congratulations dialog box appears, 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 CDS Setup section.

Client Data System Setup

About the DEMO Database and User Name

The program installs some demonstration data and users. After logging in to the Demonstration (DEMO) database as the demonstration user (DEMO), agency databases and users.

Naming Databases

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

Creating Databases

Use the following procedure to create a new CDS database.

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

2. In the Login dialog box, select the Database **DEMO** and the User Name **DEMO**. Click the **OK** button to log into CDS (no password is required for DEMO). On the first login to CDS, a dialog box opens with the message that the database tables are being initialized. After the tables have been initialized, the program opens.

3. From the CDS desktop, click **Database** and 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. Then, 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 and click the **OK** button.
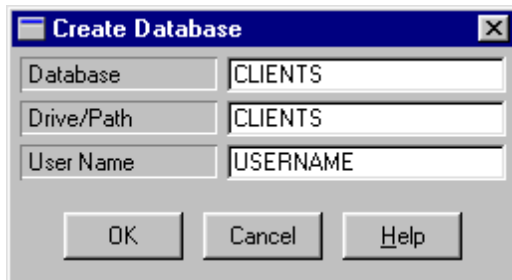

   Example: The Drive/Path entry creates a subdirectory under **CDSWIN.SVR** on the server. The database file for CLIENTS is created in this subdirectory, which has the same name. Do not enter path information (e.g., F:\Cdswin.svr\Clients) in the Drive/Path field.

5. Press the **TAB** key again, enter a user name and then click the **OK** button.

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

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

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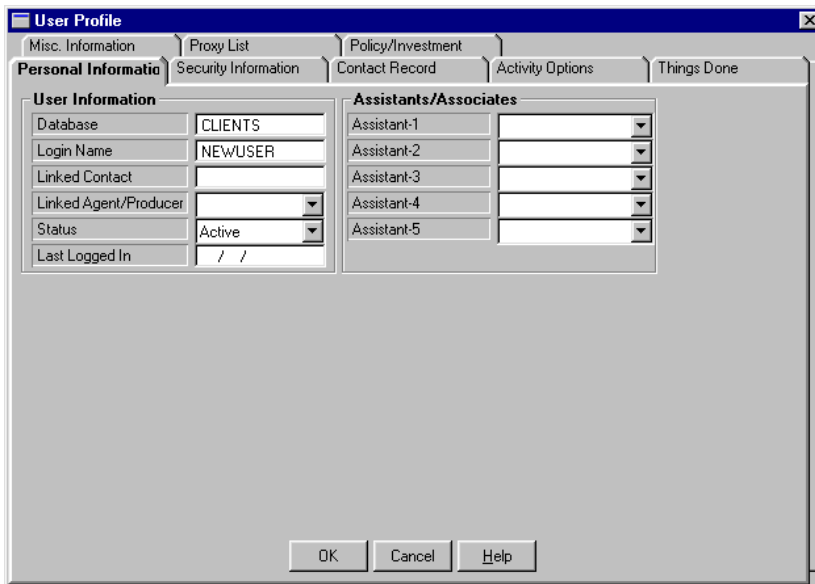
Note:	To setup and maintain security for the database after creating new users, refer to the CDS Help system topic *About the User Profile*.

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

6. The new user's name will appear on the Database Users list. Repeat Steps 3-5 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 other workstations licensed to access CDS, as described in the previous chapters.
- Use the CDS Help system for instruction and complete documentation.

Enabling the Optional Modules

Any Optional Modules (e.g., Investment, Transaction Download, etc.) purchased must be enabled on the workstations of the users who require them. Ensure that these optional 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 that the user requires access and then click the **OK** button. Close the program and restart it to implement the change.

E-Z Conduit Module and E-Z Mail Installation

These instructions are for users who are adding the E-Z Conduit Module and/or E-Z Mail *after* CDS version 4.1.2 is already installed on the workstation.

Before the E-Z Conduit or E-Z Mail Installation

Windows 98/Me Only

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

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

E-Z Conduit Module Only

Note: Other third-party conduits (Microsoft Outlook Conduit, Pocket Mirror, etc.) must be uninstalled before the installation of the E-Z Conduit Module.

1. Ensure that Palm™ Desktop for Windows is installed. If it is not currently installed, install it from a Palm™ Desktop for Windows CD or download the latest version from http://www.palm.com/support/downloads/#windowsdesktop. Upgrading to the latest version of Palm™ Desktop is highly recommended.
2. Run a HotSync® session to reconcile data between Palm™ Desktop for Windows and the handheld device. If the HotSync® does not work properly, contact Palm Technical Support at (847) 262-7256 for assistance.
3. If a database that has been converted for use with CDS 4.1.2 has been installed and the Contact and Activity records in the PDA duplicate the Contact and Activity records in the converted database, delete the duplicate records in Palm™ Desktop for Windows. If these records are not deleted, duplicate records will be created in CDS. After deleting the duplicate records, run a HotSync® session to reconcile the changes.

Installation of E-Z Conduit or E-Z Mail

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, skip to Step 7 – otherwise, continue with the next step.
3. From the Taskbar, click the **Start** button and then select **Run**.
4. Click the **Browse** button to open the Browse dialog box. From the **Look in:** field, select the CD-ROM drive from the drop-down menu
5. Double-click **EZSetup** to select it and close the Browse dialog box.
6. Click the **OK** button in the Run dialog box to start the E-Z Data Setup program.

Note:	E-Z Data Setup coordinates the CDS, E-Z Conduit Module, and E-Z Mail Setup programs. Based on the options selected, it runs any combination of the Setup programs automatically in order. The optional modules can be installed at any time after the CDS installation, but CDS always must be installed first.

7. To install the E-Z Conduit module, click the **E-Z Conduit** button to add it to the installation process.

8. To install the E-Z Mail module, click the **E-Z Mail** button to add it to the installation process.

9. After selecting the Setup program options, click the **Install** button to proceed with the installation. If the E-Z Conduit Module was not selected, skip to Step 12.

10. After reading the Welcome message, click the **Next** button to continue.

11. When the Setup is complete, click the **OK** button to exit. If E-Z Mail was not selected, skip Steps 12 and 13.

12. The E-Z Mail Setup program will begin if this option was selected. After reading the Welcome message, click the **Next** button to continue with the E-Z Mail Setup. Follow the prompts to complete the installation.

13. When the Congratulations dialog box appears, click the **OK** button to exit.

After the E-Z Conduit or E-Z Mail Installation

Windows 98/Me Only

Norton AntiVirus Users: Re-enable Auto-Protect as explained below.

1. From the desktop, click the **Start** button, point to **Programs**, then **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 the **OK** button.

4. Click the **Yes** button when prompted to load Auto-Protect.

5. Exit Norton AntiVirus.

If the E-Z Conduit Module was installed, proceed to the Setting up the E-Z Conduit Module section for setup procedures. For information on E-Z Mail, see the CDS Help topic *E-mail Utilities*.

Setting up the E-Z Conduit Module

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

Tip:	The contact records in the PDA can be imported as the basis for a new database during the first synchronization.

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.

3. From the CDS desktop, click **Database** and then **User Management** to open the Database Users dialog box.

4. Click the **Security Information** tab to bring it to the forefront.

5. In the **Data Security Options** section, click the down-arrow of the **PDA Options** menu and select **Conduit.** Then, click the **OK** button.


6. Log back in as the User who will be using the E-Z Conduit Module to enact the changes.

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.
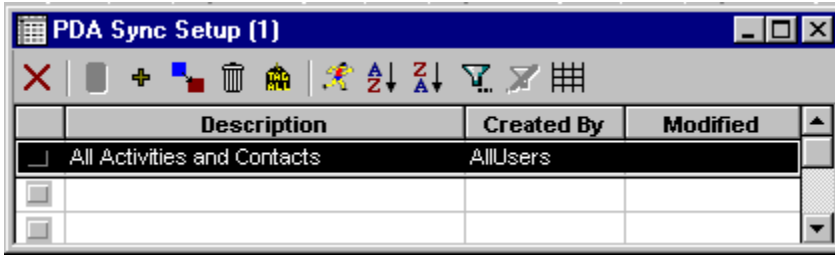
9. A default Setup record already exists named **All Activities and Contacts**. Double-click the row for this record to start the PDA HotSync Setup Wizard

10. After reading the Welcome message, click the **Next** button to start the Wizard. Follow the instructions to complete the setup. For more information about this process, see the CDS Help topic **Adding a PDA HotSync Setup Record**.

11. From the PDA Download Description dialog box, click the **Setup** button to set the custom fields in the PDA device to download from (and subsequently upload to) fields in the CDS Contact Information table. To save this Setup record without assigning custom fields, click the **Finish** button and proceed to Step 15.
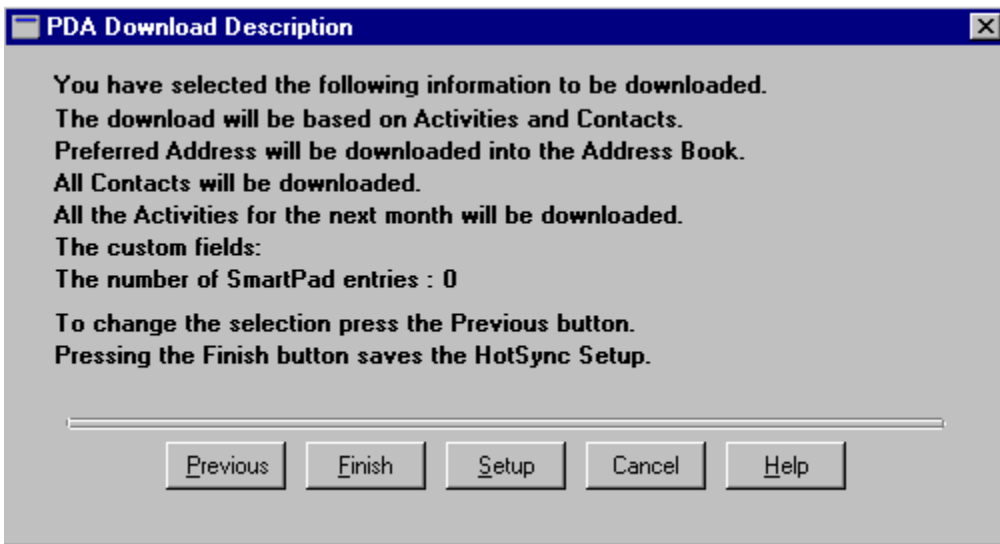
12. If **Setup** was selected in Step 11, assign a field from CDS to the first of four custom fields available on the PDA device. Click the drop-down menu arrow for **Custom1**, use the scroll bar to find the field name, and then select the field. Repeat the process for **Custom2**, etc.
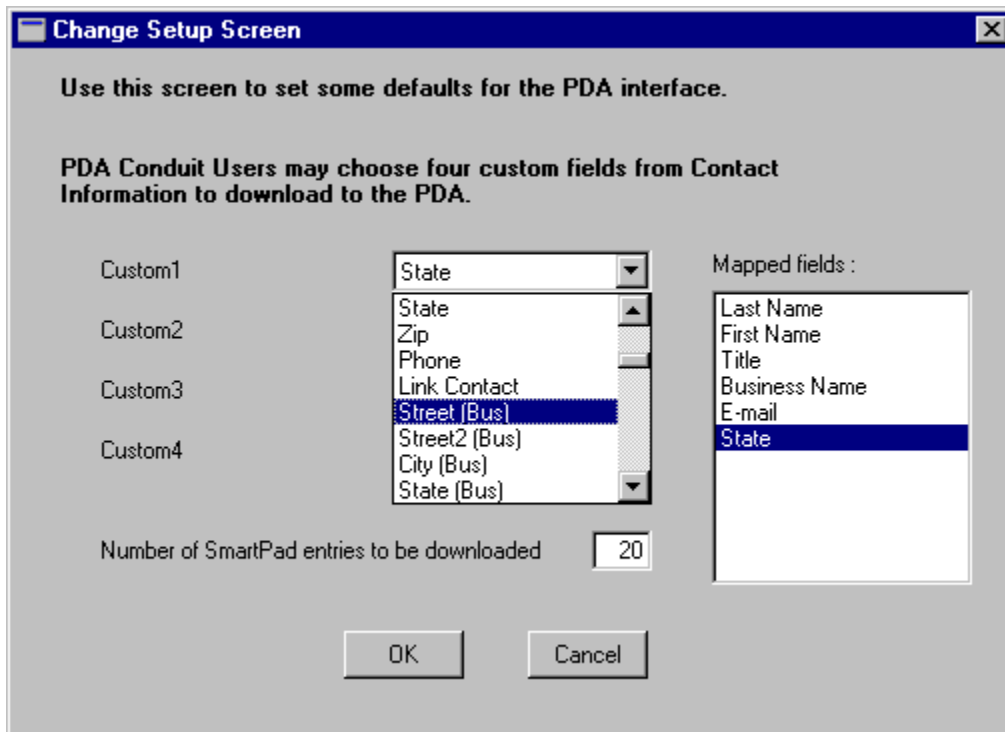
Note:	Choose the correct fields before selecting them. Once selected, the fields cannot be changed for this User's setup without risk of data corruption.

13. Enter the number of SmartPad entries to be downloaded and then click the **OK** button to confirm the selections and return to the PDA Download Description dialog box.

14. Click the **Finish** button to save this setup.

15. In the Save the PDA Download dialog box, change the **Description** and add a **Keyword**, if necessary.

Note:	If custom fields were assigned to the PDA device (as in Step 13), clear the **All Users** dialog box before clicking the **OK** button to save this setup. If **All Users** is not cleared, all PDA device users will have the same custom field assignments when connecting to CDS. Select **All Users** to make this setup available to all users.

16. Click the **OK** button to save the PDA Sync Setup.

17. If necessary, start the Palm HotSync® Manager, which is sometimes required for a HotSync®.

The E-Z Conduit Setup is now complete. For more information on usage, see the *E-Z Conduit Module* section of the CDS Help.

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 on a regular basis

- 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, excepting 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.

DBUtil Options

DBUtil (Database Utilities) is an application in the CDS program group. DBUtil 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**, then **Client Data System**, and click the **DBUtil** icon.
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 DBUtil.

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. If it is running, shut down the Sybase engine.

2. From the Taskbar, click the **Start** button, point to **Programs**, then **Client Data System**, and click the **DBUtil** icon.

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 DBUtil.

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 DBUtil at the server/workstation. If DBUtil is to be run from a workstation, DBENG7.EXE needs to be copied from the **SQL Anywhere 7\Win32** directory on the server to the **SQL Anywhere 7\Win32** directory on the workstation.

Running the Database Rebuild Utility

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

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 appear while DBUtil 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.
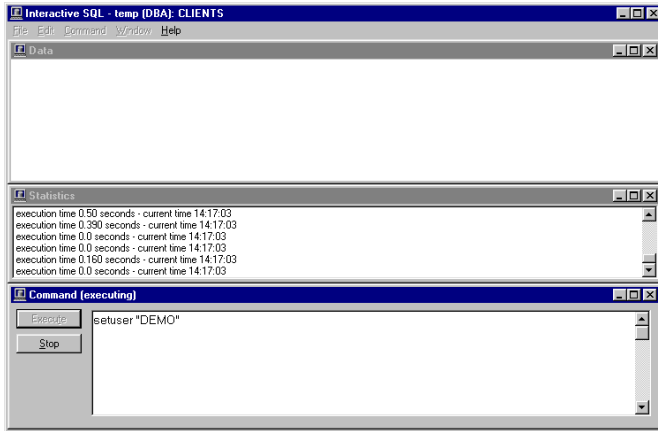
5. When prompted to "Replace" the database after the rebuild process is complete, click the **Yes** button to replace the database only if the process did not stop at any time due to an error. If the process stopped due to an error, click the **No** button at the prompt and then contact E-Z Data Technical 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 DBUtil.
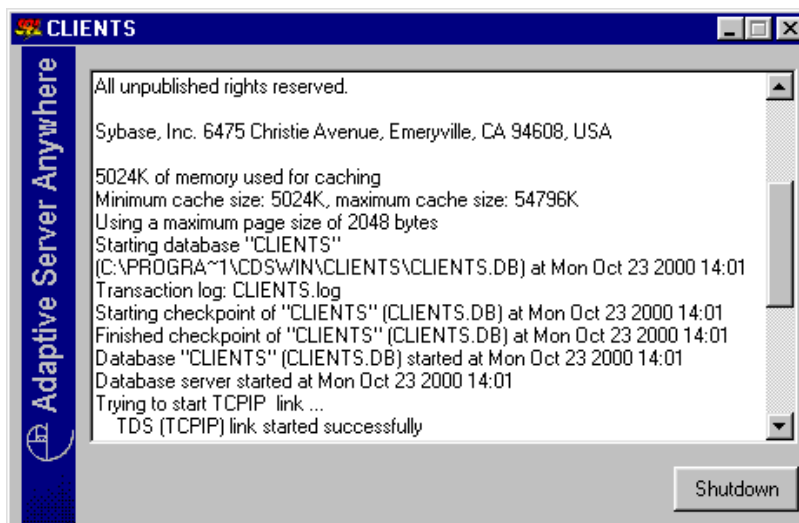
Troubleshooting Workstation Installation

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 select **Maximize** to open a dialog box with information about the database that is currently in use.
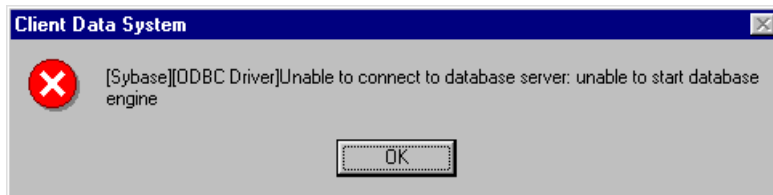

When exiting CDS, the Adaptive Server Anywhere program closes automatically.

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 display the following error message and could be the result of one or more of the following conditions:

Client Data System dialog box: [Sybase][ODBC Driver]Unable to connect to database server: unable to start database engine — OK

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 7** directory using the Path statement.

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

2. The Path= statement should contain a reference to **SQL Anywhere 7** (C:\…\SQLANY~1\Win32).

3. If the reference to **SQL Anywhere 7** does not display in the Path statement, the AUTOEXEC.BAT file needs to be edited. Insert the reference to **SQL Anywhere 7** 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

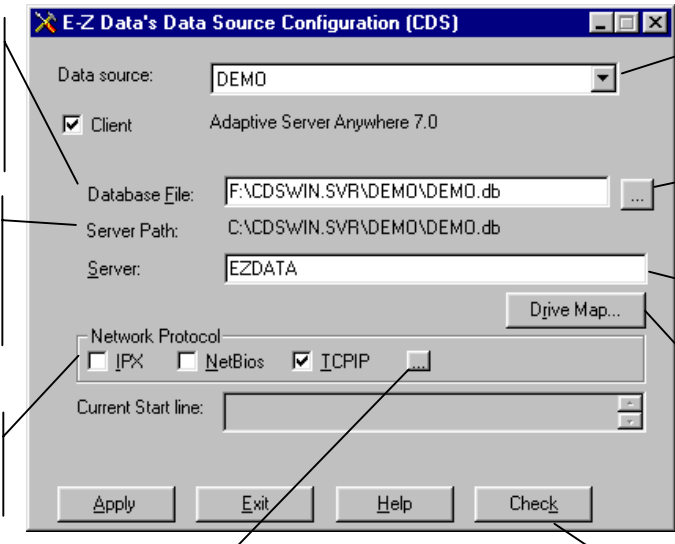For Windows peer-to-peer networks, the Sybase login dialog box or ODBC Data Source errors are symptoms of logical or physical connectivity problems. Refer to *Using EZConfig* for troubleshooting procedures.

Error Messages, "Unable to Connect to DB 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 EZConfig

E-Z Data, Inc. developed EZConfig 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 EZConfig to Configure the Data Source

1. From the Taskbar, click the **Start** button, point to **Programs**, then **Client Data System**, and click the **EZConfig** 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 sure that the **Client** box is checked.

4. Use the following instructions to complete the configuration:

Database File

The **Database File** box 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:

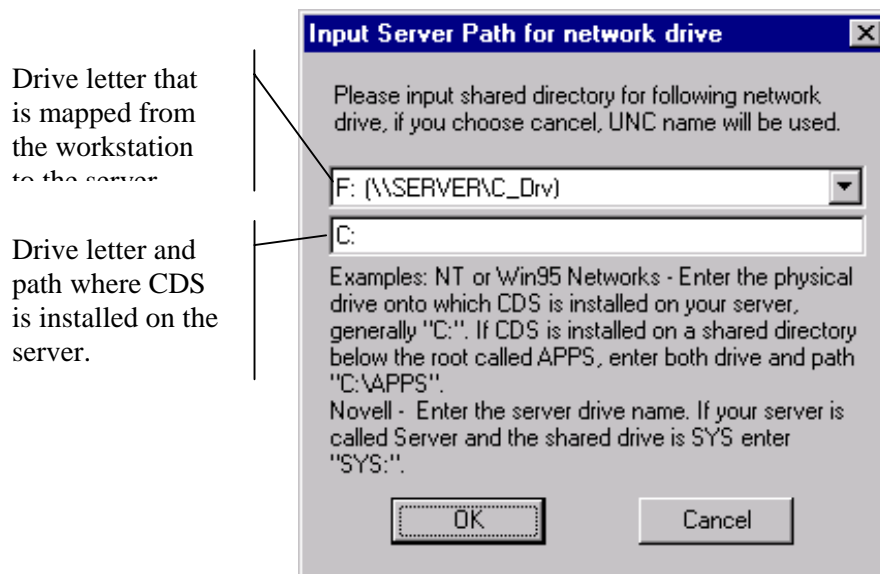| IPX	The transport protocol used in Novell NetWare networks.
NetBIOS	Network Basic Input/Output System. Provides support necessary to send and receive data on IBM or Microsoft-based local area networks.
TCP/IP	Transmission Control Protocol/Internet Protocol. A network protocol used for LAN communication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

Current Start Line

The **Current Start line** box 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 Serve 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.

AXA Agent Workstation

An IBM desktop or laptop computer specially prepared by AXA Financial for use by the personnel of AXA Financial and its subsidiaries. The computer comes with a modified version of Windows 95 and thus requires a special CDS installation procedure. See the special AXA Agent Workstations section for details.

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.