

Oracle® Insurance Compliance Forms Tracker

Guide for New Installations with Oracle

Release 6.5.1 SP4

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Chapter 1

Overview

This guide describes how to install and configure Tracker for new installations deployed on Oracle.

This chapter describes:

- *Document Conventions* on page 6
- *Tracker Documentation* on page 7
- *Contacting Skywire Software for Help* on page 8

Document Conventions

Tips, Notes, Important Notes and Warnings

Tip: A **Tip** provides a better way to use the software.

Note: A **Note** contains special information and reminders.

Important: An **Important** note contains significant information about the use and understanding of the software.

Warning: A **Warning** contains critical information that if ignored, may cause errors or result in the loss of information.

Other Document Conventions

- Microsoft Window names, buttons, tabs and other screen elements are in bold, for example: Click **Next**.
- paths, URLs and code samples are in the Courier font, for example:
`C:\Windows`
- values that you need to enter or specify are indicated in the italicized Courier font, for example, *server_name*
- values that are optional are indicated with square brackets, for example
[reserved]

Tracker Documentation

Tracker includes the following documents and online help files. If you need a copy of any of these documents, please contact your system or product administrator.

- The *Tracker User Guide* contains overviews, step-by-step procedures and descriptions of the screens and fields.
- The *Tracker Online Help* contains the same information as the User's Guide, but in an online help format with a search tool, an index and a table of contents.
- The *Tracker Release Notes* include general product information, product enhancements and new features, supported platforms and third-party software, assorted considerations, and known issues and limitations.
- The *Tracker Installation Guides* contain system requirements and detailed installation and configuration information. Guides are supplied for new installations and upgrades, and for both Oracle and SQL environments.
- The *Tracker Technical Guide* is for system administrators and includes information about the optional DMS, maintaining DMS components, log files, error levels and Tracker Monitor, technical information about the Regulatory Specialist files and validation process, and troubleshooting information.

Contacting Skywire Software for Help

Customer Support hours are 8:00 AM to 8:00 PM. (Eastern Time), Monday through Friday. Outside of these hours, send us a detailed e-mail message and you will be contacted during regular business hours. Please provide detailed information, as described in the .

Contact Information

Mail: Customer Support
Skywire Software
19 Allstate Parkway, Suite 400
Markham, Ontario, L3R 5A4

Phone: 1-905-513-7466

Fax: 1-905-513-1419

Email: directsupport@skywiresoftware.com

Web: www.skywiresoftware.com

Support Checklist

When contacting Skywire Software Customer Support, please provide the following information:

- Your name, company name, email address, and phone number
- The exact version number, including any service pack numbers of
 - all your Skywire Software products
 - your network software
 - your database, including the type
 - Microsoft Windows and Microsoft Word
 - Microsoft .NET Framework
 - your DMS (Document Management System)
- Error messages and the circumstances of their occurrence
- A full description of the problem:
 - What happened? What were the sequence of events that preceded the problem?
 - In which screen or window did the problem occur?
 - Was the problem the result of pressing a key?
 - Did the screen freeze? What functions of the software are affected?
 - How many people are affected?

Chapter 2

Installing Tracker

This chapter describes how to install Tracker and includes the following topics and installation stages:

- *Introduction to the Installation Process* on page 10
- *Stage 1: Checking the System Requirements* on page 11
- *Stage 2: Planning Your Tracker Monitor Installation* on page 14
- *Stage 3: Install Launcher* on page 15
- *Stage 4: Creating the Tracker Database* on page 16
- *Stage 5: Installing Livelink and Setting Up the Calligo DMS* on page 17
- *Stage 6: Installing Tracker Monitor and File Server on One Computer* on page 22
- *Stage 7: Installing Tracker Monitor and File Server on Separate Computers* on page 42
- *Stage 8: Installing the Tracker Client* on page 70
- *Stage 9: Installing the Tracker Status Plug-in* on page 79
- *Appendix – Uninstalling Tracker Server* on page 80

Introduction to the Installation Process

Please note the following information about the installation process:

- **IMPORTANT! You must complete the procedures in the *exact* order they appear in this document.**
- Depending on your configuration, you may not need to complete some of the procedures or specific steps. Please read the introduction at the beginning of each procedure to ensure that you complete only the required ones.
- Several installation CDs are supplied:
 - a *Tracker* installation CD
 - a *Calligo Enterprise* installation CD
 - if you are installing Tracker with Launcher, a *Launcher* installation CD

This guide indicates which CD to use.

- If you will be using the Calligo DMS to store documents, Calligo Enterprise must be installed on a server that can be accessed by Tracker Server and Tracker Client.

Stage 1: Checking the System Requirements

Before you begin the installation process, check your system requirements.

Step A: Check the Server and Client Setup

1. Ensure that the server and each client workstation has a Temp directory at the root of the C: drive, for example, C:\Temp.

Warning: The Temp directory must never be deleted because it is required during document generation.

2. When choosing a drive letter for client drive mapping, ensure that all workstations have the same drive letter available. You will need to enter this drive letter during the Tracker server installation.

Step B: Check the Software Requirements

This section lists the required operating systems, databases and other software required by or supported with Tracker. For specific version numbers, please see the *Tracker Release Notes*.

Verify that your systems meet the requirements described in the following sections.

Client Workstation Requirements

Ensure that the following software is installed on all client workstations.

- Internet Explorer
- the **ODBC drivers** for your Oracle client
- **Adobe Acrobat Reader** – required to view filing packages (only workstations)

Server Components Requirements

The Tracker Server, Tracker DMS, Calligo DMS and Tracker Monitor are supported on the following platforms:

Tracker Server

- **Operating System:** Microsoft Windows
- **Tracker Monitor:** Microsoft .NET Framework and Web Services Enhancements (WSE) for Microsoft .NET
- **Database:** Oracle

Calligo DMS Server

Microsoft Internet Information Server (IIS) must be installed on the Calligo DMS server.

Refer to the *Calligo Enterprise Installation Guide* and the *Prepare and Install Livelink Modules in the Calligo DMS* section for instructions on how to configure the Calligo DMS Server and its requirements.

Client Components Requirements

- **Operating System:** Microsoft Windows

Other required software:

- Microsoft.NET Framework
- Adobe Reader
- Microsoft Word
- Microsoft Excel
- Microsoft Internet Explorer

(The Amyuni PDF Converter is included with Tracker.)

Step C: Check the Hardware Requirements

This section describes the minimum and recommended hardware requirements for both the Tracker file server and client systems.

Verify that your systems meet the requirements described in the following sections.

File Server and Tracker Monitor Hardware Requirements

Component	Minimum	Recommended
Processor	Pentium 4	Pentium 4
Memory (RAM)	512 MB	1 GB
Free Disk Space	5 GB	10 GB

Client Hardware Requirements

Component	Minimum	Recommended
Processor	Pentium 3 or faster	Pentium 4
Memory (RAM)	256 MB	512 MB
Free Disk Space	500 MB	1 GB

Step D: Check the Citrix Requirements

If you are using Citrix, as a guideline, you may need approximately 96 MB of memory for each user on the Tracker Application. This is in addition to the base memory required for the operating system and other Applications. Base memory

can be 128 MB or more, depending on your specific server configuration. Please consult with your Citrix Administrator for the appropriate setup, which may need to be customized depending on what other Applications run on your server.

Step E: Check the Screen Resolution and Font Size

1. Ensure that your screen resolution is at least 800 x 600.
2. Ensure that your screen font size is set to **NORMAL**.

Stage 2: Planning Your Tracker Monitor Installation

This section describes the Tracker Monitor and how to carefully plan its installation.

About Tracker Monitor

Tracker Monitor is a separate application from the Tracker client and Calligo Enterprise. You use it to:

- monitor changes made by Launcher in the Tracker database when users are entering and updating filings
- monitor and facilitate communications between Tracker and SERFF when users are entering and updating SERFF filings
- manage all regulatory specialist update and communication between Tracker and the regulatory specialist update server

Because of these functions, you will need to properly install and configure Tracker Monitor and ensure that the service is running.

Plan the Tracker Monitor Installation

You need to plan which server will act as your Tracker Monitor server. Note that you should not install Tracker Monitor on more than one server.

Tracker Monitor has various components, including supporting DLL files. All these components should be installed on a drive that is physically located on the Tracker Monitor server, rather than on a remote network drive. This is because Tracker Monitor is a Windows service and therefore must be able to access files from a local drive.

Note: If you want to install Calligo Enterprise on the same system as Tracker Monitor, you must install Calligo Enterprise first. This process is described later in this chapter.

Installing Tracker with Tracker Monitor vs. Installing Tracker Monitor by Itself

During the installation process, you may be asked whether you want to install Tracker, Tracker Monitor, or both.

- If you install Tracker Monitor by itself, then you cannot subsequently install Tracker on that server.
- If you want to install *both* Tracker Monitor and Tracker on the same server, then you have to select to install both at the appropriate step in the installation process, as described later.

Stage 3: Install Launcher

If you will be using Launcher to create filing profiles and send them to Tracker,

1. Install Launcher and its database by following the *Launcher Installation Guide* in the `Manuals` folder on the *Launcher* installation CD.
2. Make a note of the schema name of the Launcher database.

Stage 4: Creating the Tracker Database

This section describes how to create a new Oracle schema for Tracker in an existing Oracle database.

You will need to create a new database to store your Tracker data for a Oracle database. After you have created the database, you will add tables and schemas for the Tracker Life & Health or Property & Casualty version, depending on your branch of the insurance industry.

Note: Before creating the database, ensure that you have the required version of the Oracle database application software installed.

Data (tables and indexes) for the Tracker schema are in a separate rollback and temporary tablespace called `Tracker_data`. The default tablespace for the user Tracker is `Tracker_data`.

Step A: Create Tablespaces and Oracle User

In this step, you create the required Tracker tablespaces and the Oracle logon user profile.

1. From the Tracker installation CD, copy the files from the `Database\DBNew\Oracle` folder to a temporary folder on the database server.
2. Ensure that `BLTspace.sql` is not read-only.
3. Open `BLTspace.sql` and change the paths for the database files to the path you copied them to in step 1.
4. Log on as a user with DBA privileges.
5. Run the `BLTspace.sql` script.

Step B: Create a New Tracker Oracle Schema

1. From a DOS prompt, import the Tracker schema using the following command:

```
imp userid=system/[password] file=T651Ora.dmp  
fromuser=tracker touser=tracker log=T651ORA.log
```
2. For a Life and Health schema, run the `SetComp.sql` script when logged on as `Tracker/InSystems`.
3. Run the `CompObjs.SQL` script when logged on as `Tracker/InSystems` to recompile all the Tracker procedures, functions, triggers and views.

Stage 5: Installing Livelink and Setting Up the Calligo DMS

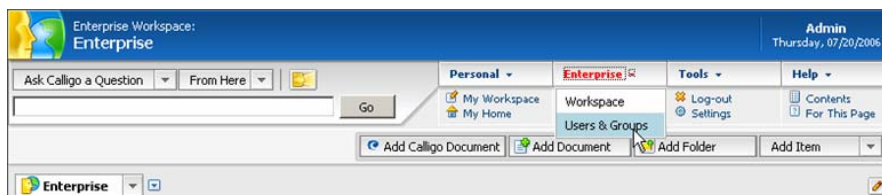
Note: You do not need to complete this stage if you already have or will not be using the Calligo DMS.

Livelink must be installed before you can install the Calligo DMS module. Perform the installation of Livelink. See the *Livelink First-Time Installation Guide* on the Calligo 5.4 installation CD in the \Calligo Enterprise v5.4\Manuals\Livelink folder. If this guide is missing, please contact Customer Support.

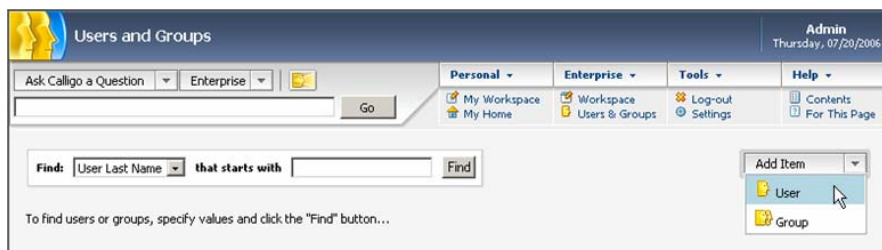
Step A: Create a Calligo User

In this step, you create a Calligo user that can integrate with Tracker.

1. Log in to the Calligo DMS using the **Admin** user name and password.
2. Click **Enterprise > Users & Groups**.



3. From the **Add Item** drop-down list, select **User**.



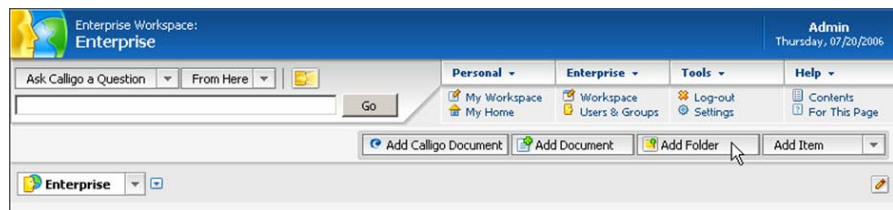
4. Create a new user called Tracker with the password InSystems.
5. Grant this user **Login** and **System Administration** privileges.

6. Click **Submit**.

Step B: Create Tracker Folders in Calligo

In this step and the following steps, you create the Tracker folders and configure workflows inside the Calligo DMS. You create a main folder called Tracker Info and a subfolder called Maps to hold all the workflow maps.

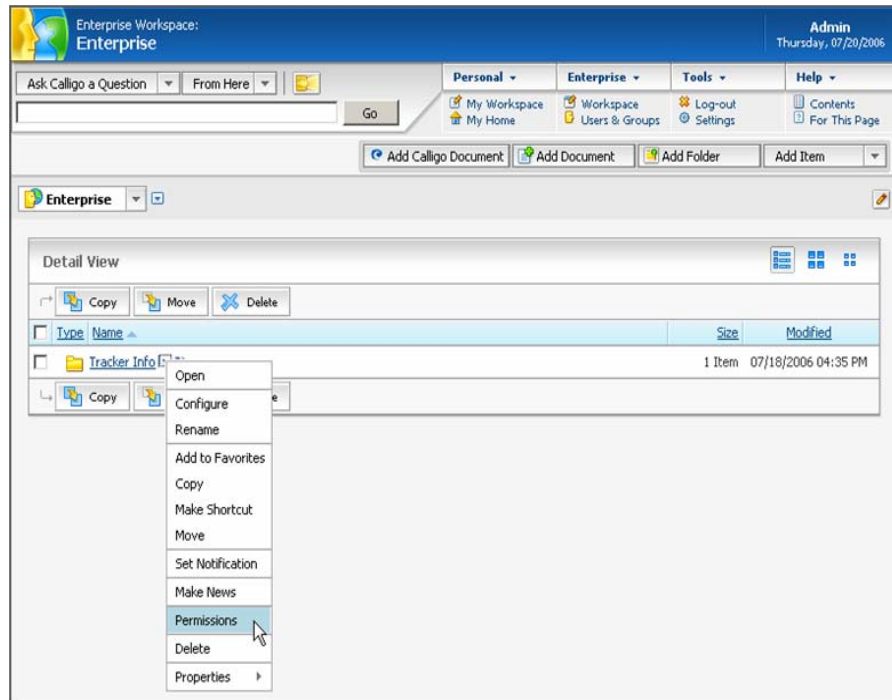
1. Click **Add Folder** at the Enterprise level.



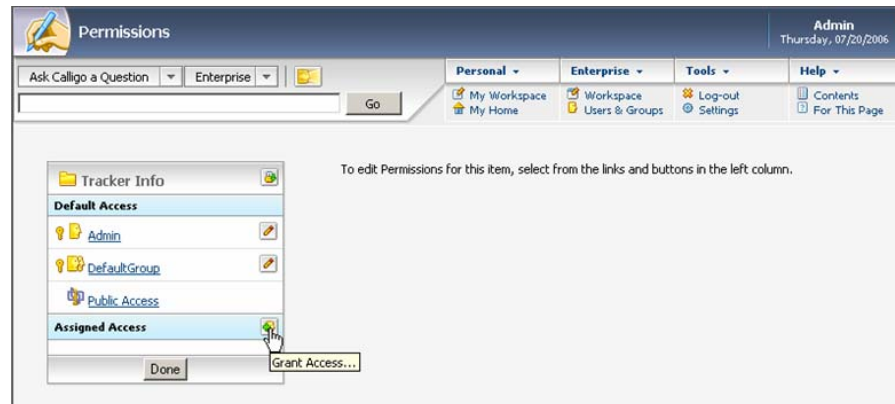
2. Enter **Tracker Info** for Name, then click **Add**.

The screenshot shows the 'Add: Folder' dialog box. The 'Name' field is filled with 'Tracker Info'. The 'Description' field is empty. The 'Categories' field is empty with an 'Edit...' button. The 'Create In' field is set to 'Enterprise' with a 'Browse Calligo Enterprise...' button. At the bottom are 'Add' and 'Reset' buttons.

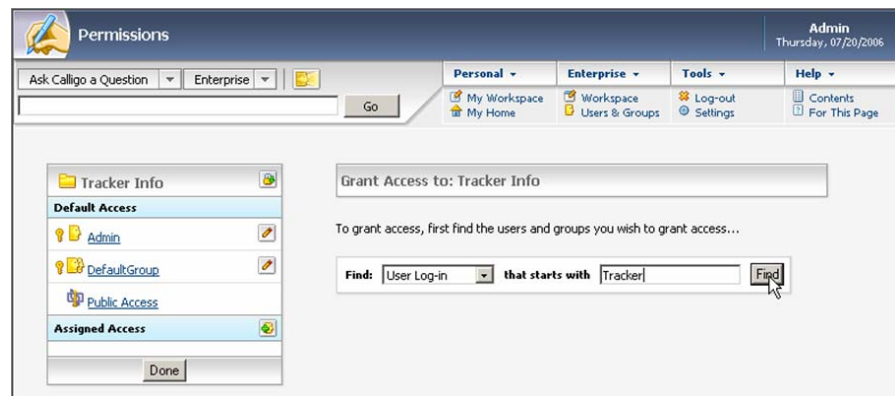
3. Click the function icon beside **Tracker Info** and choose **Permissions**.



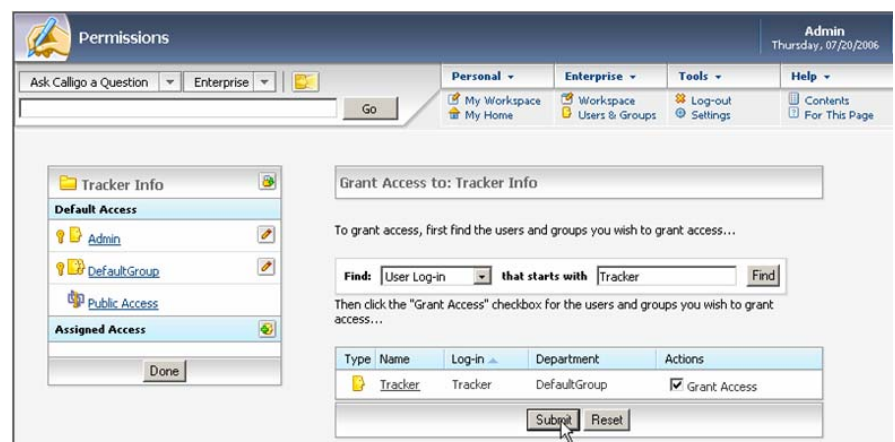
4. Click the **Assigned** icon. The view changes to display the user search functionality on the right.



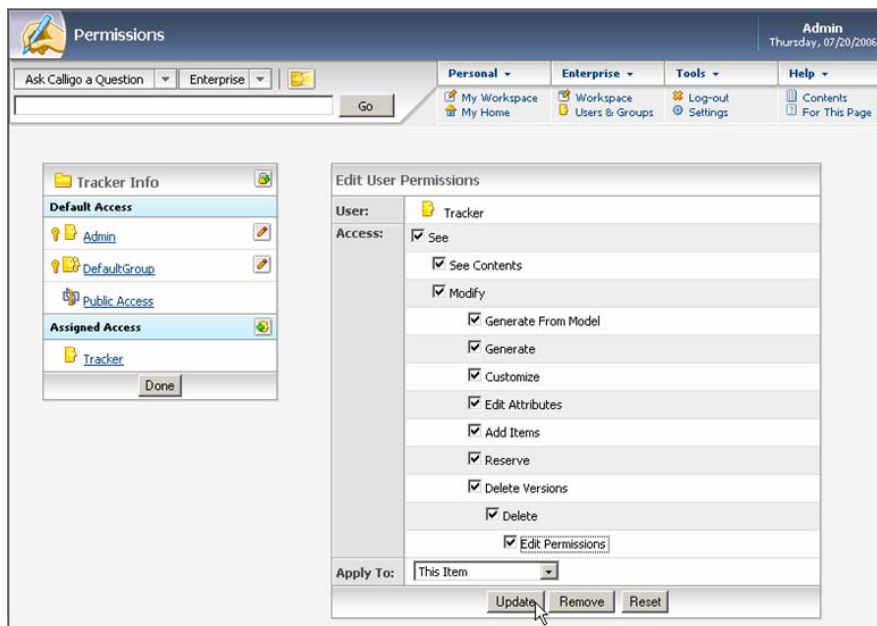
5. For **Search**, select **User Login**. Next to the text: **that starts with**, select **Tracker**, then click **Find**.



6. Under **Actions**, select **Grant Access**, then click **Submit**.



7. Give the user **Tracker** full access to the **Tracker Info** folder by selecting all permissions for this user.
8. Click **Update**.



The new permissions are applied to this user.

Note: You will need to repeat this process to give this user full access to all folders that will contain attachments (rates, rules, advertisements, and forms) in the Calligo DMS.

9. Click **Done** to return to the Enterprise level.

Stage 6: Installing Tracker Monitor and File Server on One Computer

This section describes how to install Tracker when the Tracker Monitor and Tracker Server are on the *same* computer.

If you want to install the Tracker File Server and Tracker Monitor on *separate* computers, please see *Stage 7: Installing Tracker Monitor and File Server on Separate Computers* on page 42.

Important: Before proceeding, ensure that the Calligo DMS is installed.

Step A: Install Microsoft .NET Framework

If your host operating system is Windows 2003:

Install Service Pack 1 (SP1) for Microsoft .NET by running the following setup file on the Tracker installation CD:

- From the \DotNet folder, run
WindowsServer2003-KB86746-X86-ENU.exe.

If your host operating system is *not* Windows 2003:

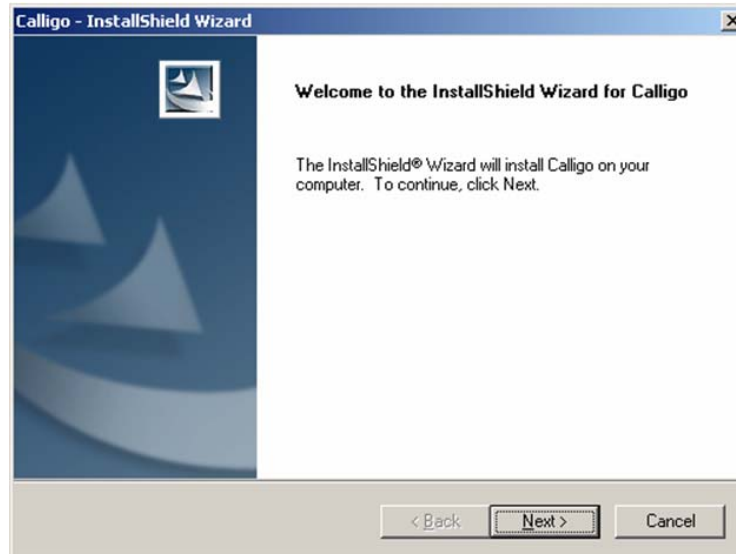
1. From the \DotNet folder on the Tracker installation CD, run
Dotnetfx.exe.
2. Install Service Pack 1 (SP1) for Microsoft .NET by running the following setup file on the Tracker installation CD:

From the \DotNet folder, run NDP1.1sp1-KB867460-X86.exe.

Step B: Install Calligo Core

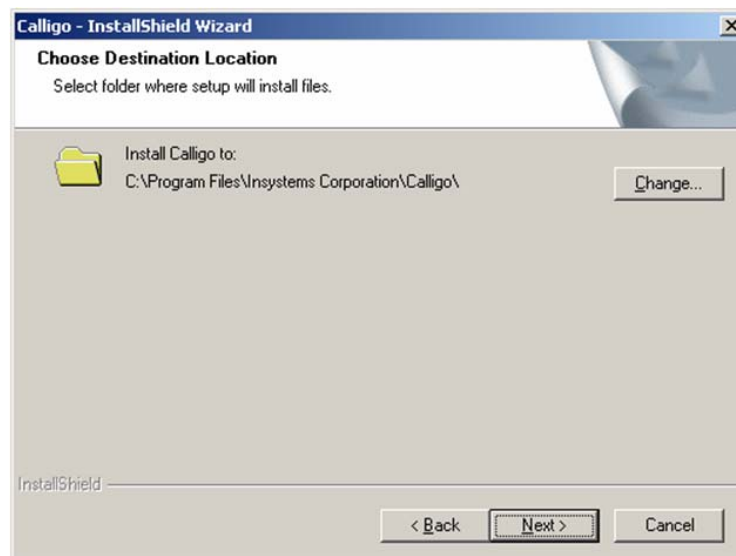
1. From the *Calligo* installation CD, run the setup.exe file located in the
\Calligo Enterprise v5.4\Calligo\ folder.

The **Calligo – InstallShield Wizard** opens.



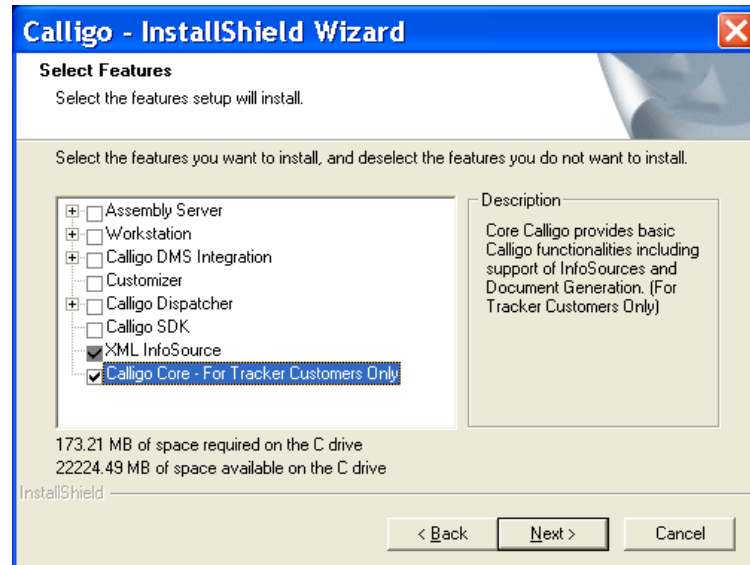
2. Click **Next**.

The **Choose Destination Location** dialog box displays the location where Calligo will be installed.



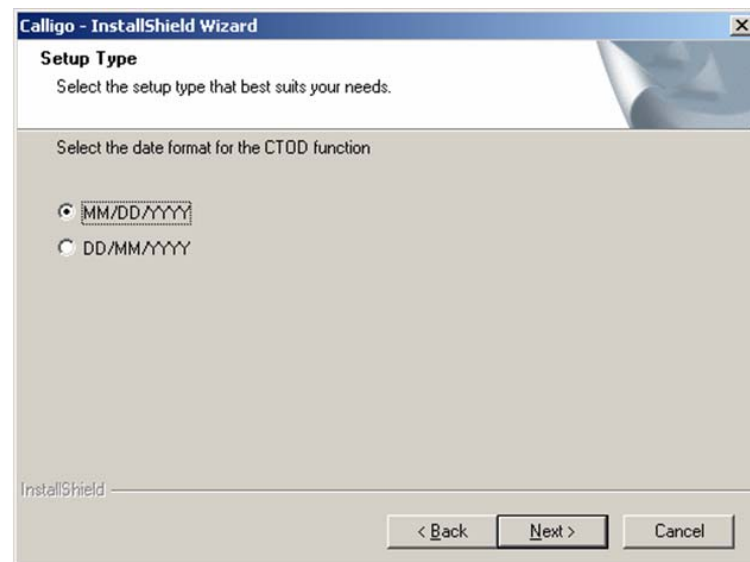
To change the location:

- a. Click **Change**.
- b. In the **Choose Folder** dialog box, select the folder you want to install Calligo.
- c. Click **OK**.
3. Click **Next**.
4. On the **Select Features** dialog box, ensure that the **Calligo Core** check box is selected, then click **Next**.

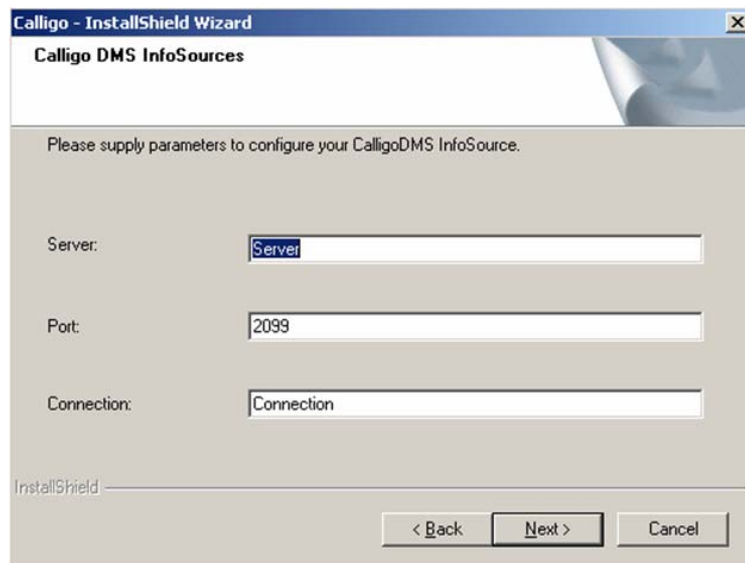


A warning message may appear asking to make sure Livelink services are stopped before proceeding to the next step.

The **Setup Type** dialog box opens.



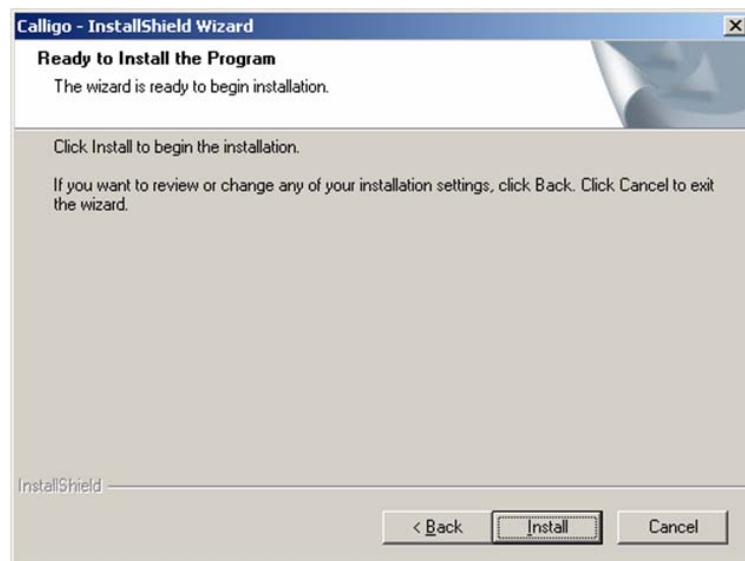
5. Choose the default date format for the CTOD function, then click **Next**.
6. If you had selected **Calligo DMS Integration** in the **Select Features** dialog box, then the **Calligo DMS InfoSources** dialog box opens.



The screenshot shows the 'Calligo - InstallShield Wizard' window with the 'Calligo DMS InfoSources' tab selected. The window contains a text area with the instruction 'Please supply parameters to configure your CalligoDMS InfoSource.' Below this are three input fields: 'Server:' with the text 'Server', 'Port:' with the text '2099', and 'Connection:' with the text 'Connection'. At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'. The 'InstallShield' logo is visible in the bottom left corner.

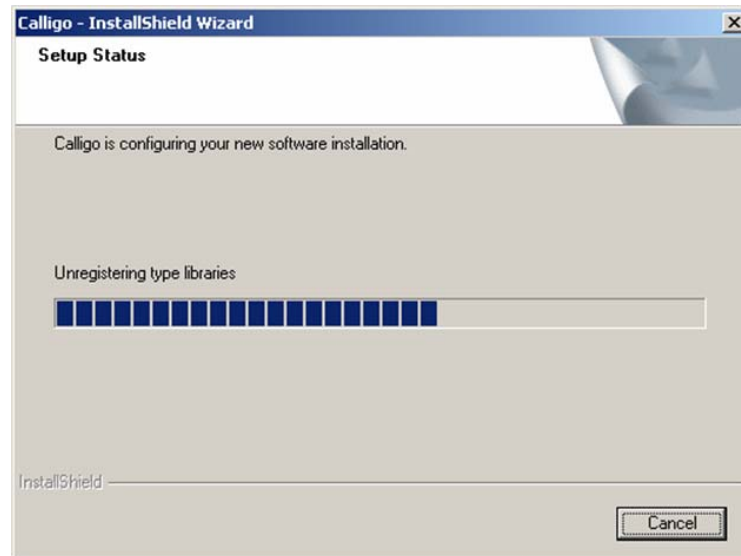
- a. Enter the name of the CalligoDMS **Server** and its **Port** number.
- b. In the **Connection** field, enter the name of the CalligoDMS database, then click **Next**.

The **Ready to Install the Program** dialog box opens.



The screenshot shows the 'Calligo - InstallShield Wizard' window with the 'Ready to Install the Program' tab selected. The window contains a text area with the instruction 'The wizard is ready to begin installation.' Below this is a button labeled 'Click Install to begin the installation.' At the bottom, there are three buttons: '< Back', 'Install', and 'Cancel'. The 'InstallShield' logo is visible in the bottom left corner.

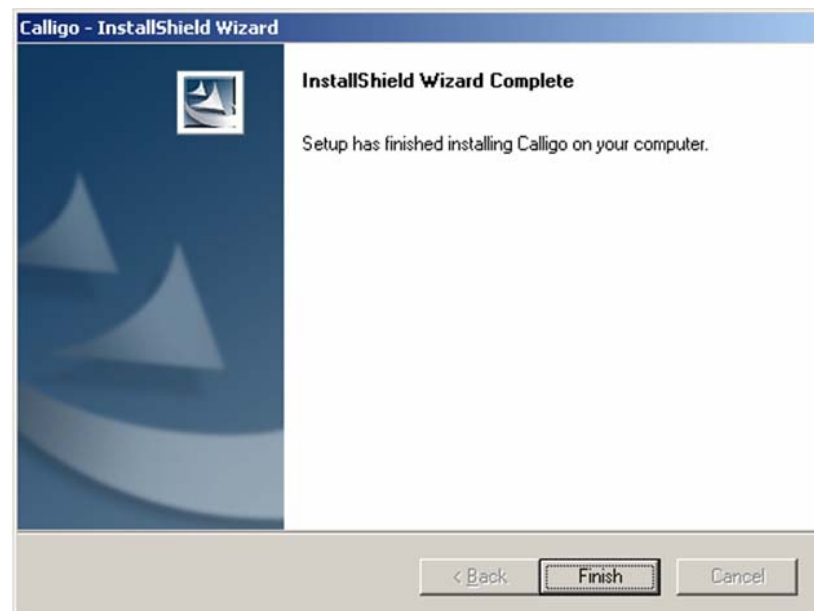
7. To review or change any of your installation settings, click **Back**, otherwise click **Install**.
8. The **Setup Status** dialog box opens.



The installation program begins copying the required files. A blue progress bar indicates the progress of the installation.

To stop the installation process, click **Cancel**.

When the installation is complete, the **InstallShield Wizard Complete** dialog box opens.



9. Click **Finish** to close the installation program.
10. If prompted, reboot the system.

Step C: Create a Tracker Monitor User

You can create the Tracker Monitor user (TkRWFMon) as a local user on the Monitor system, or as a domain user.

If the user is a *domain* user, it must be:

- able to log on to the Monitor server and the file server (if separate from the Monitor server)
- set up as a local administrator on the Monitor computer
- a local administrator on the Tracker Monitor Server

If the user is a *local* user, it must be:

- created on the Monitor server and the file server (if separate from the Monitor server)
- a local administrator

Step D: Create the Tracker Monitor User as a Local User

If you want to create the Tracker Monitor user as a local user, complete the following procedure on the Monitor computer.

1. From the **Control Panel**, select **Administrative Tools > Computer Management**.
2. Select **System Tools > Local Users and Groups > Users**.
3. Right-click **Users** and choose **New User**.
The **New User** dialog box opens.
4. In the **User** name field, enter tkrwfmon.
5. Enter a **Password** for the user. Note this password; you will need it later.
6. Enter the password again in the **Confirm Password** box.
7. Clear the **User must change password at next logon** check box.
8. Select the **User cannot change password** check box.
9. Select the **Password never expires** check box.
10. Clear the **Account is disabled** check box.
11. Click **Create**, then **Close**.

Note: If you are using Internet proxy server with NTLM (Windows) authentication, you must create the monitor user as domain user and allow them to access the Internet.

Step E: Set the Tracker Monitor User as an Administrator

Note: The actual steps may vary slightly depending on your version of Windows.

1. From the **Control Panel**, select **Administrative Tools > Computer Management**.
2. Select **System Tools > Local Users and Groups > Users**.
3. Double-click the user `tkrwfmon`.
4. Go to the **Member Of** tab, then click **Add**.
5. Add **Administrators** to the lower list box.
6. Click **OK**, then **OK** again.
7. Close the **Computer Management** screen.

Step F: Run the Tracker File Server Setup

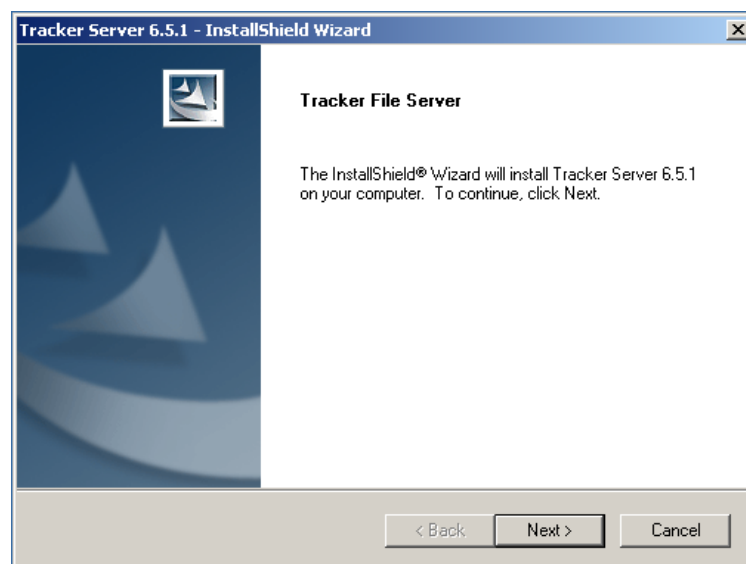
In this step, you run the setup application to actually install Tracker.

Important: If the Tracker File Server and DMS will be installed on the same system, install the Tracker File Server first and then install the DMS. If you need to uninstall Tracker, uninstall the DMS first, and then uninstall the Tracker File Server.

1. From the **Setup** folder on the Tracker installation CD, run `setup.exe`.
2. If a Security Warning dialog box appears, click **Run**.

The **InstallShield Wizard** opens. A progress window temporarily appears.

Important: The **Tracker File Server** dialog box opens.



3. Click **Next**.
4. On the **Registration** dialog box, enter your company name.

Tracker - Registration/Industry/DMS Launcher Options

Registration Information
Please enter the name of the company for which you work:

Industry Type
Please select the industry type you want the product installed for.

☒ Property & Casualty
☐ Life & Health

DMS Launcher Options
Check the Access DMS checkbox if you want to use the DMS to access attachments and store Filing Packages. If you do not select the DMS, attachments must be accessed from the File System and Filing Packages will be stored in the Tracker database.

☐ Access DMS

Check the Use Launcher checkbox if you want to receive and process Filing Profiles.

☐ Use Launcher

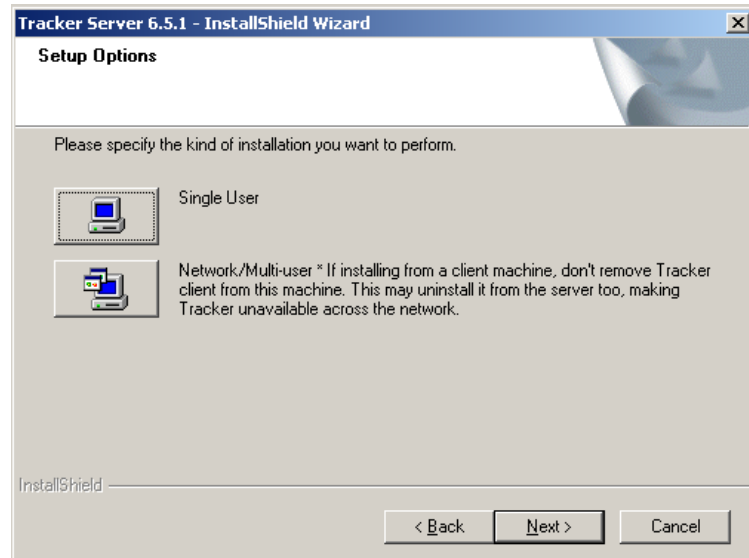
< Back Next > Cancel

Important: Choose your insurance **Industry Type**:

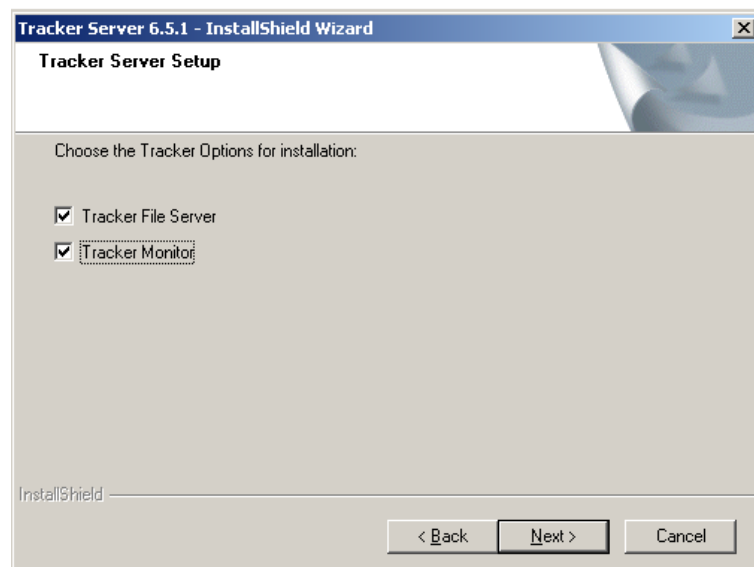
- **Property & Casualty**
 - **Life & Health**
5. In the **DMS Launcher Options** section, select any of the following options:
 - **Access DMS** – select this check box to use the DMS (Document Management System) to access filing attachments and store filing packages
 - if you do not select this option, then filing attachments must be accessed from the file system, and filing packages will be stored in the Tracker database
 - **Use Launcher** – select this check box to receive and process filing profiles sent from Launcher, a separate application
 6. Click **Next**.

Important: On the **Setup Options** dialog box, select **Network/Multi-user**. (You do not need to click **Next**.)

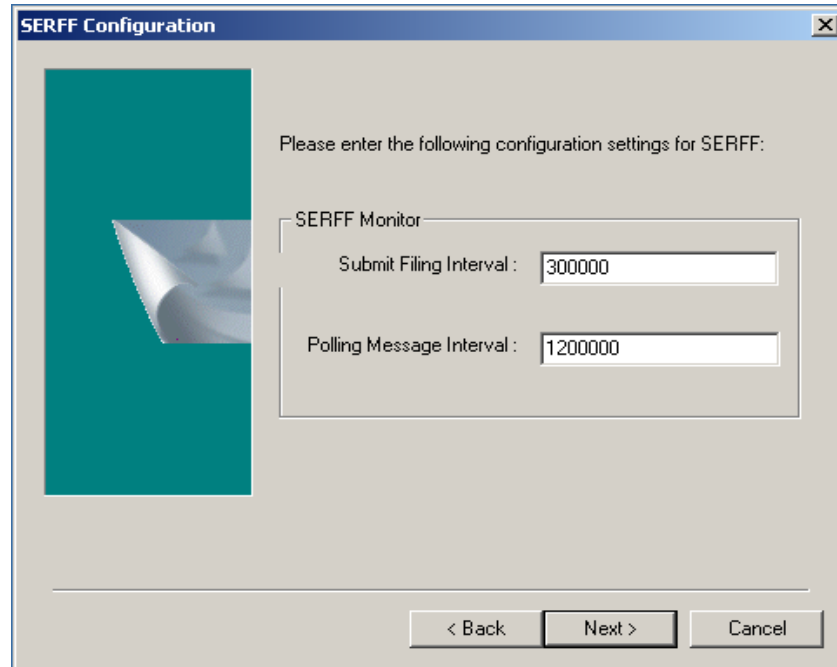
(The **Single user** option is generally used only in a test environment.)



7. On the **Tracker Setup** dialog box, select both **Tracker File Server** and **Tracker Monitor**, then click **Next**.

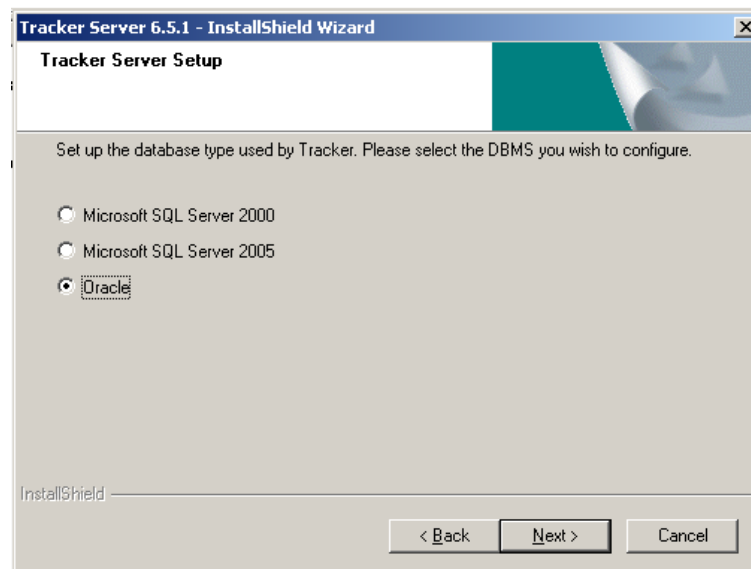


The **SERFF Configuration** dialog box opens.

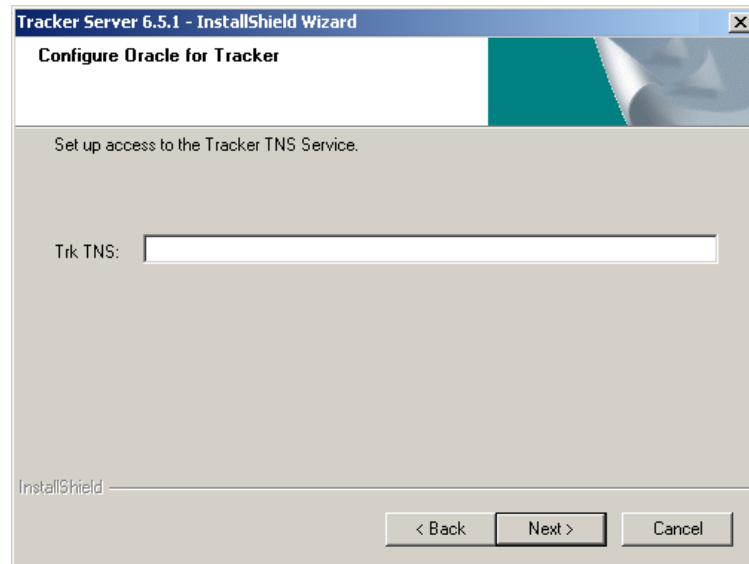


8. Enter the **Submit Filing Interval** and **Polling Message Interval** (in milliseconds), then click **Next**.

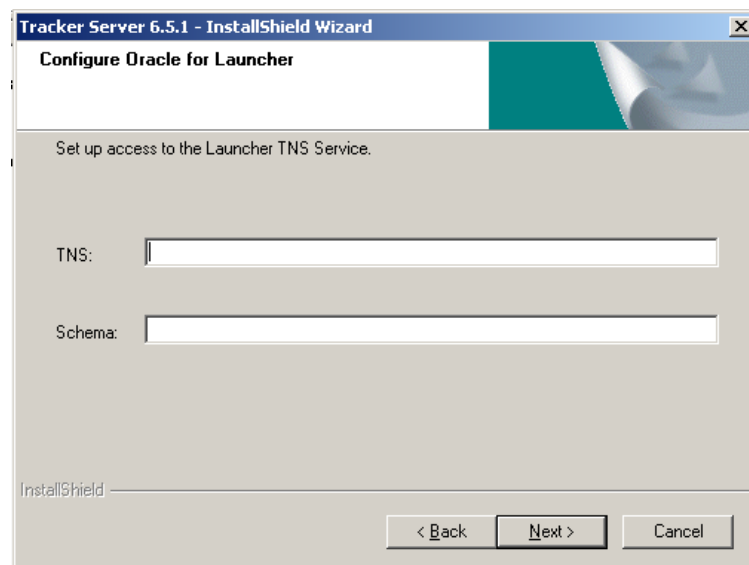
On the **Tracker Database** dialog box, select **Oracle** as the database type, then click **Next**.



9. On the **Configure Oracle for Tracker** dialog box, enter the name of the Tracker **TNS** service, then click **Next**.



10. If you have selected **Use Launcher** previously, the **Configure Oracle for Launcher** dialog appears. Enter the following information then click **Next**:
 - the Launcher **TNS** name
 - the Launcher TNS **Schema** name



Important: If you selected **Access DMS**, the **Configure Livelink Server** dialog box opens. Enter the **Server**, **Port**, and **Database** name for the DMS server, then click **Next**.

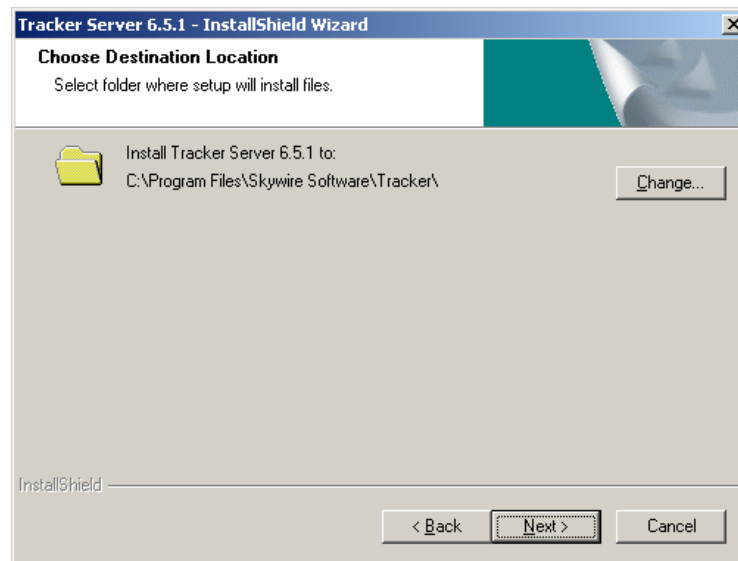
The screenshot shows a Windows-style dialog box titled "Tracker Server 6.5.1 - InstallShield Wizard". The main heading is "Configure Livelink Server". Below the heading, it says "Set up Livelink access." There are three input fields: "Server:" (empty), "Port:" (containing "2099"), and "Database:" (empty). At the bottom, there are three buttons: "< Back", "Next >", and "Cancel". The "InstallShield" logo is visible in the bottom left corner.

Important: If you selected **Access DMS**, the **Configure default Tracker folders** dialog box opens.

- a. In the **Filing** field, enter the default path of the filing documents folder.
- b. In the **Package** field, enter the default path of the DMS package folders.

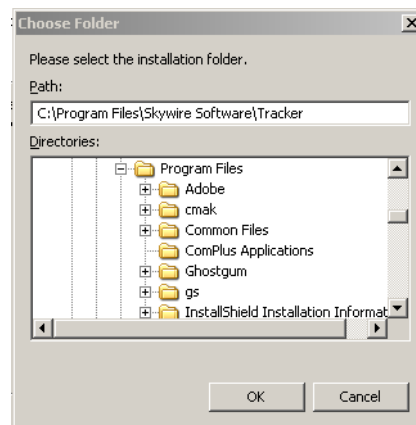
The screenshot shows a Windows-style dialog box titled "Tracker Server 6.5.1 - InstallShield Wizard". The main heading is "Configure default Tracker folders". Below the heading, it says "Configure the default Filing Documents and DMS Package folders." There are two input fields: "Filing:" (containing "TrackerDMSE:Tracker Info\Filing Documents") and "Package:" (containing "TrackerDMSE:Tracker Info\Packages"). At the bottom, there are three buttons: "< Back", "Next >", and "Cancel". The "InstallShield" logo is visible in the bottom left corner.

- c. Click **Next**.
11. The **Choose Destination Location** dialog box opens, displaying the installation location.

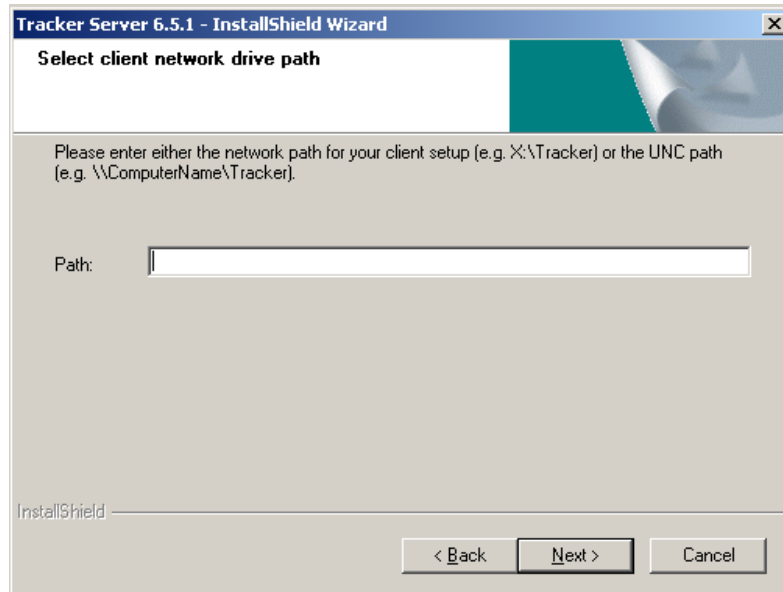


To change the location:

- a. Click **Change**.
- b. In the **Choose Folder** dialog box, select the folder you want to install Tracker.



- c. Click **OK**.
12. Click **Next**.
13. In the **Select Client Network Drive Path** dialog box, enter the network drive path where you want to install the Tracker server software.



For example: *X:\Tracker*. *X* is the letter to map the Tracker installation folder on the client system.

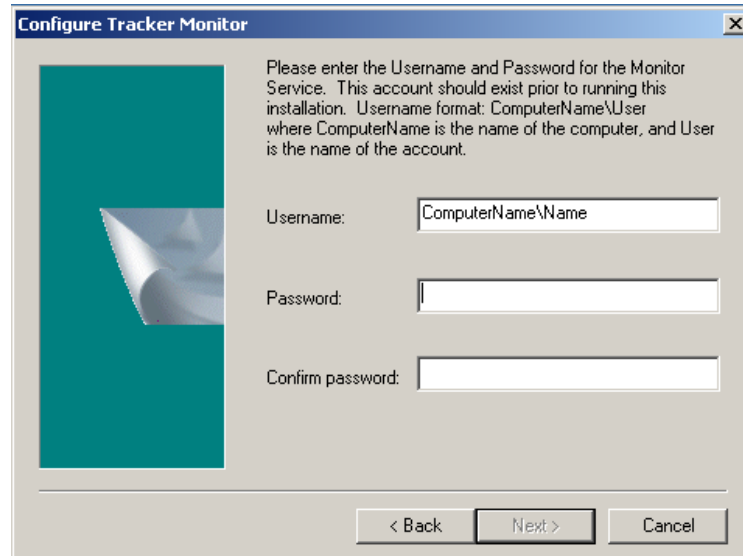
14. Click **Next**.

Important: Note this drive letter. This drive path and letter will be used for *all* Tracker client systems.

Alternatively, you can use UNC notation to specify a network location for the installation, for example *\\ServerName\ShareName*, where:

- *ServerName* is the computer name where Tracker Server is installed
- *ShareName* is the name given to the installation path when sharing it for network access

The **Configure Tracker Monitor** dialog box may open.



- a. Enter the **Username** of the user account under which the Tracker Monitor service should run.

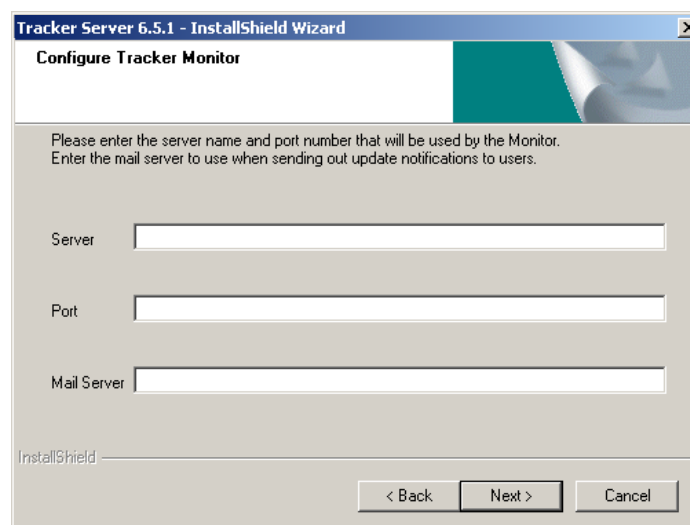
The format is:

ComputerName\Name, where *ComputerName* is the name of the computer and *Name* is the actual name of the account, that is, *ComputerName\tkrwfmon*

Important: This user account should exist before installing Tracker.

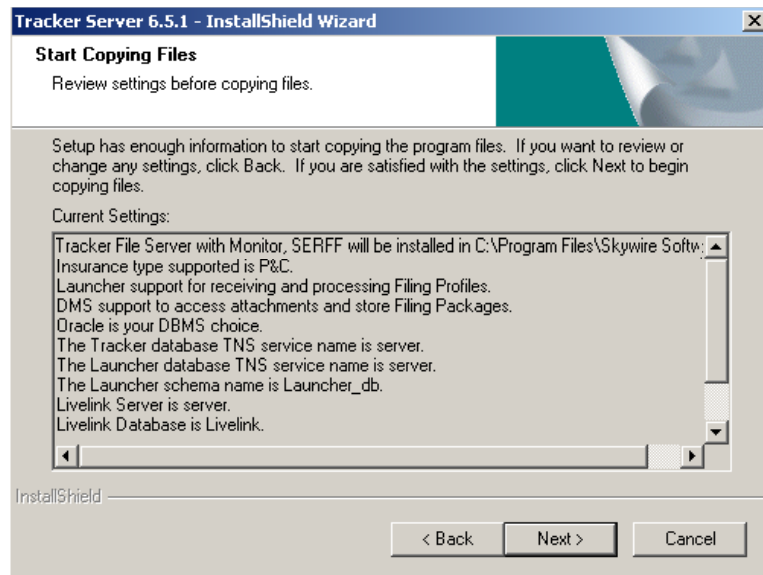
- b. Enter the **Password** assigned to the Monitor user account. (Your password will not appear when you type it, but will be displayed as asterisks.)
- c. In the **Confirm Password** field, enter the password again.
- d. Click **Next**.

Another **Configure Tracker Monitor** dialog box will appear.



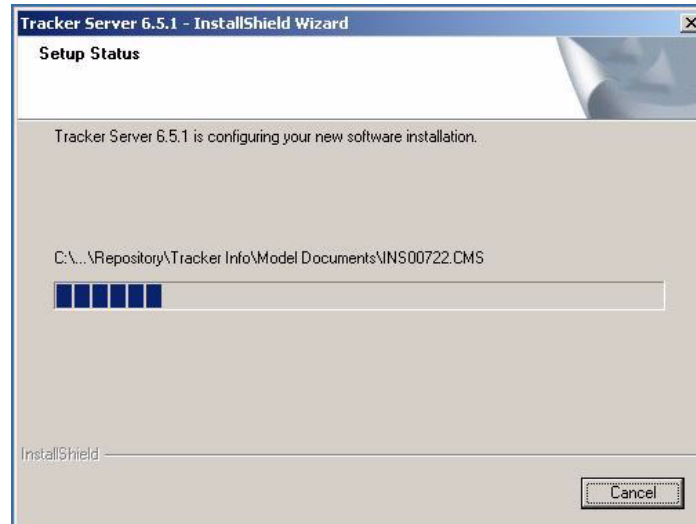
15. In this dialog box:
 - a. In the **Server** field, enter the name of the computer where Tracker Monitor will run. By default, this field contains the name of the computer where the Tracker installation is being run.
 - b. Enter the **Port** number that Tracker Monitor will use.
 - c. Enter the SMTP-compliant **Mail Server** to use when sending out notification emails after each regulatory specialist CAB file update.
 - d. Click **Next**.

Note: The information entered here will be copied into the Tracker database when the Monitor runs for the first time. However, if this information has been populated in the database, it will not be overwritten and information entered in this dialog box will be disregarded. For details on how to change this information after installation, please see the *Tracker User Guide* or *Online Help*.



16. If the settings are correct, click **Next**, otherwise click **Back** until you have reached the step you want to correct. Make any necessary corrections, then click **Next**.

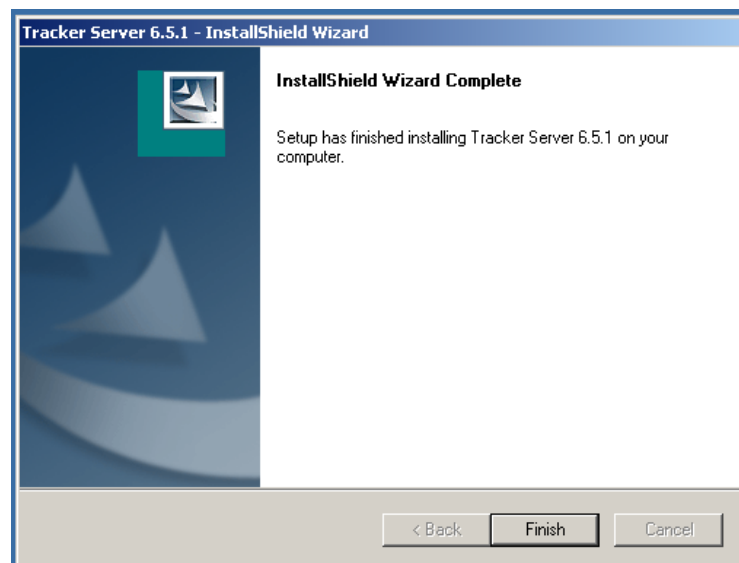
The **Setup Status** dialog box opens.



The installation program begins copying the required files. A blue progress bar indicates the progress of the installation.

To stop the installation process, click **Cancel**.

When the installation is complete, the **InstallShield Wizard Complete** dialog box opens.



17. Click **Finish** to close the installation program.
18. If prompted, reboot the system.
19. Ensure that you share the newly created Tracker folder on the Tracker server for the client installation. The default location is:
C:\Program Files\Skywire Software

20. Delete all *.installLog files from the TkrWF subfolder in the Tracker Monitor installation folder. These files contain user names and passwords of the Tracker Monitor users and for security reasons, they must be deleted.

Step G: Verify the Installation Files

The manuals folder on the CD contains the Excel workbook installed_files_Oracle.xls. The spreadsheets in this workbook list the files installed in various folders.

To verify that the installation process has successfully completed, compare the files in the subfolders of the Tracker installation folder (typically C:\Program Files\Skywire Software\Tracker) to the lists in the workbook. If there are any discrepancies, please contact *Customer Support*.

Step H: Configure the Tracker Monitor User

1. Select **Start > Run** and enter DCOMCNFG in the **Open** field.

Windows 2000:

The **Distributed COM Configuration Properties** screen opens. On the **Applications** tab, double-click the TkrWF application.

Windows 2003:

The **Component Services** screen opens. Select **Computers > My Computer > DCOM Config**. Right click TkrWF, then click **Properties**.

The **Properties** dialog box opens.

2. Click the **Location** tab and select the option **Run application on this computer**.
3. Click the **Security** tab and select the option **Customize** under **Launch and Activation Permissions** section, then click **Edit**.
The **Launch Permission** dialog box opens.
4. Click **Add** and add **Everyone** to the lower list box.
5. Click **OK**, then **OK** again.
6. Select the option **Customize** under **Access Permissions** section, then click **Edit**.

The **Access Permission** dialog box opens.

7. Click **Add** and add **Everyone** to the lower list box.
8. Click **OK**, then **OK** again.
9. Click the **Identity** tab and select **Launching User**.
10. Click **OK** to close the **TkrWF Properties** dialog box.
11. Click **OK** to close **DCOMCNFG**, or close the **Component Services** dialog if using Windows 2003.

Step I: Register the Tracker Monitor Services Manually

If during the Tracker Monitor installation, you did not correctly enter the user name and password (or if they did not exist at the time of the installation), you will need to complete this step to manually register the Tracker services.

1. In DOS, change to the current directory in which the Tracker Monitor files are installed.

2. Enter the following commands to register the Monitor services:

```
C:\WINDOWS\Microsoft.NET\Framework\v1.1.4322\installutil
/username={computer_name\User_name} /password={password}
/eventlogname=TrackerMonitor /eventlogsource=TkrMonitor
tkrmonitor.exe
```

```
C:\WINDOWS\Microsoft.NET\Framework\v1.1.4322\installutil
/username={computer_name\User_name} /password={password}
/eventlogname=TrackerMonitor /eventlogsource=TkrCabLoad
tkrcabload.exe
```

3. If you are using Launcher, register the Launcher Monitor service:

```
C:\WINDOWS\Microsoft.NET\Framework\v1.1.4322\installutil
/username={computer_name\User_name} /password={password}
/eventlogname=IPDLinkService /eventlogsource=IPDLinkService
IPDLinkService.exe
```

Notes:

- Replace {computer_name\User_name} and {password} with the user name and password for which the Monitor should run under.
- It is assumed that the .NET framework is installed at:
C:\WINDOWS\Microsoft.NET\Framework\v1.1.4322

4. After the installation has completed, delete all *.installLog files from the TkrWF subfolder in the Tracker Monitor installation folder. These files contain user names and passwords of the Tracker Monitor users. For security reasons, they should therefore be deleted.

Step J: Configure IE for Tracker Monitor

1. Log onto Windows using the TkrWFMon user ID.
2. In Internet Explorer, select **Tools > Internet Options**.
3. Click the **Advanced** tab.
4. In the **Security** section, clear **Check for server certificate revocation (requires restart)**.
5. Click **Apply**.
6. **If you are using Internet proxy server:**
 - a. Click the **Connections** tab, then click **LAN Settings...**
 - b. In the **Proxy server** section, select **Use a proxy server for your LAN**.
 - c. Ensure that the correct **Address** and **Port** have been entered, then click **OK**.
7. Click **OK** to close **Internet Options**.
8. The SERFF testing URL is:
`https://serff-services-beta.naic.org/spi_2.1/
FilingRules`
If you have an Internet connection, XML code is displayed in your browser when accessing this page.

Important: This URL is for *testing* only, and is not for a production environment.

9. Close Internet Explorer.
10. Log out of the server.
11. Reboot the system.

Stage 7: Installing Tracker Monitor and File Server on Separate Computers

This section describes how to install Tracker when the Tracker Monitor and Tracker Server are on *separate* computers.

If you want to install the Tracker File Server and Tracker Monitor on the *same* computer, please see *Stage 6: Installing Tracker Monitor and File Server on One Computer* on page 22.

Part 1: Installing Tracker Server

This section describes how to install the Tracker file server.

Step A: Run Tracker Server Setup

Important: If the Tracker File Server and DMS will be installed on the same system, install the Tracker File Server first and then install the DMS. If you need to uninstall Tracker, uninstall the DMS first, and then uninstall the Tracker File Server.

1. From the Setup folder on the Tracker installation CD, run `setup.exe`.
2. If a Security Warning dialog box appears, click **Run**.

The **InstallShield Wizard** opens. A progress window temporarily appears.

3. On the **Registration** dialog box, enter your company name.

Tracker - Registration/Industry/DMS Launcher Options

Registration Information
Please enter the name of the company for which you work:

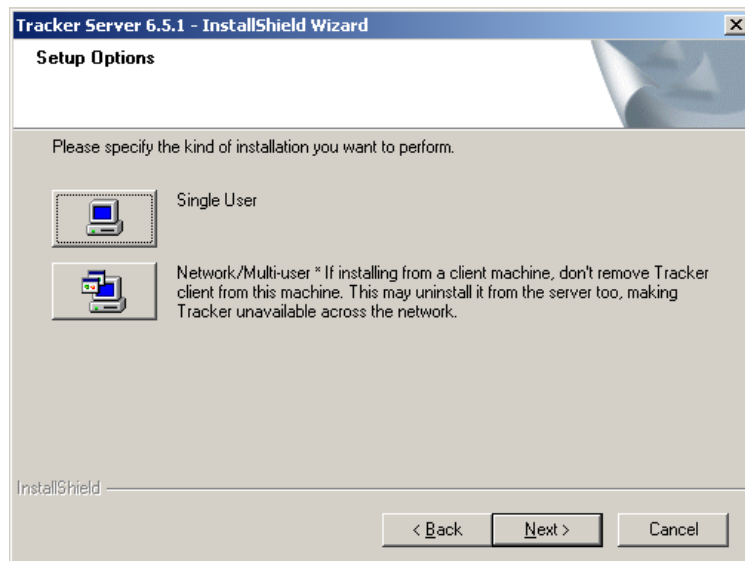
Industry Type
Please select the industry type you want the product installed for.
☒ Property & Casualty
☐ Life & Health

DMS Launcher Options
Check the Access DMS checkbox if you want to use the DMS to access attachments and store Filing Packages. If you do not select the DMS, attachments must be accessed from the File System and Filing Packages will be stored in the Tracker database.
☐ Access DMS
 Check the Use Launcher checkbox if you want to receive and process Filing Profiles.
☐ Use Launcher

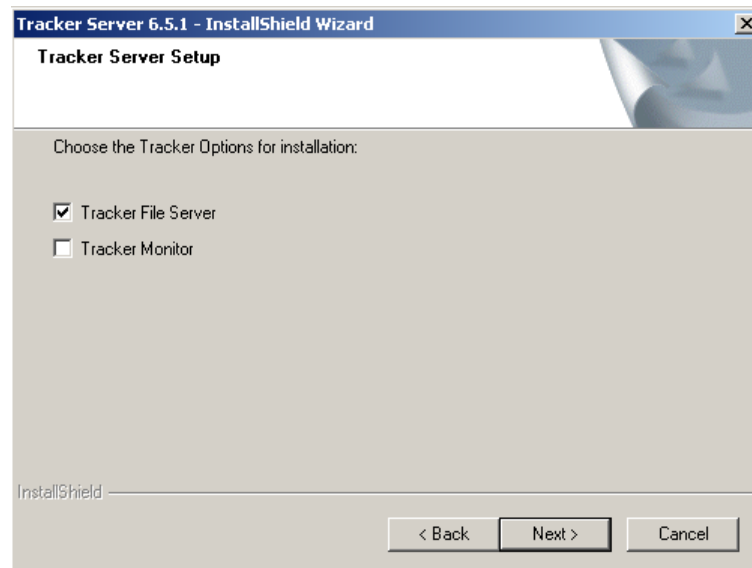
< Back Next > Cancel

4. Choose your insurance **Industry Type**:
 - **Property & Casualty**
 - **Life & Health**
5. In the **DMS Launcher Options** section, select any of the following options:
 - **Access DMS** – select this check box to use the DMS (Document Management System) to access filing attachments and store filing packages
 - if you do not select this option, then filing attachments must be accessed from the file system, and filing packages will be stored in the Tracker database
 - **Use Launcher** – select this check box to receive and process filing profiles sent from Launcher, a separate application
6. Click **Next**.
7. On the **Setup Options** dialog box, select **Network/Multi-user**. (You do not need to click **Next**.)

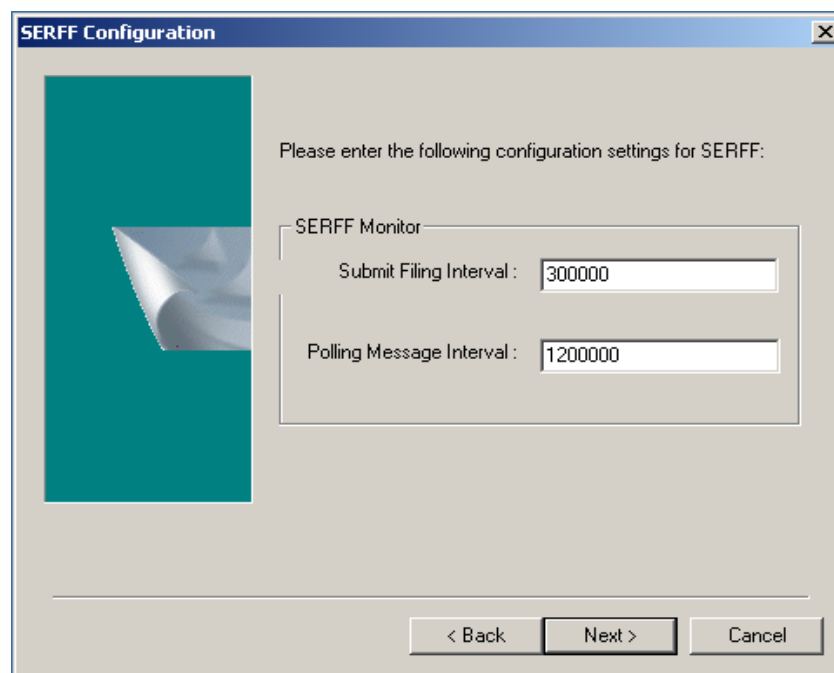
(The **Single user** option is generally used only in a test environment.)



8. On the **Tracker Setup** dialog box, select **Tracker File Server** only, then click **Next**.

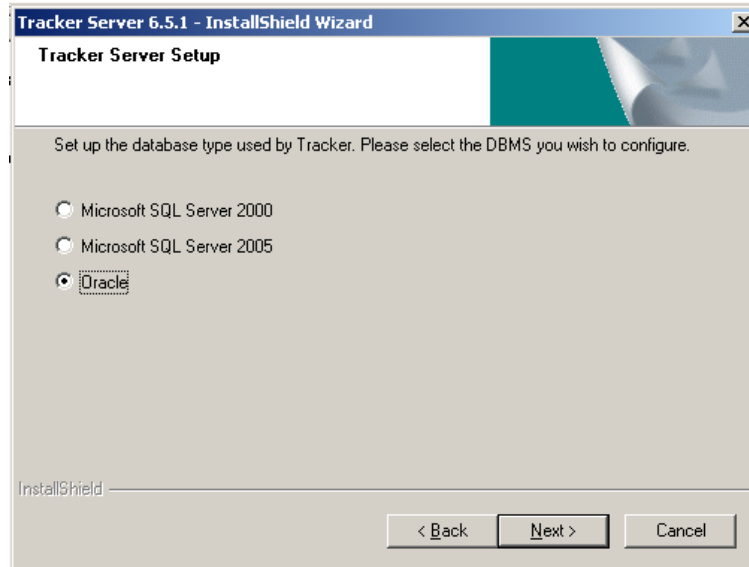


The **SERFF Configuration** dialog box opens.

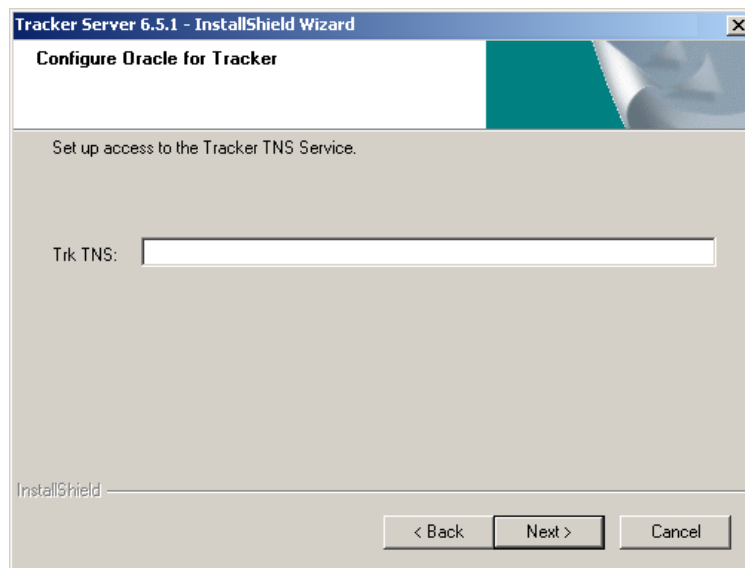


9. Enter the **Submit Filing Interval** and **Polling Message Interval** (in milliseconds), then click **Next**.

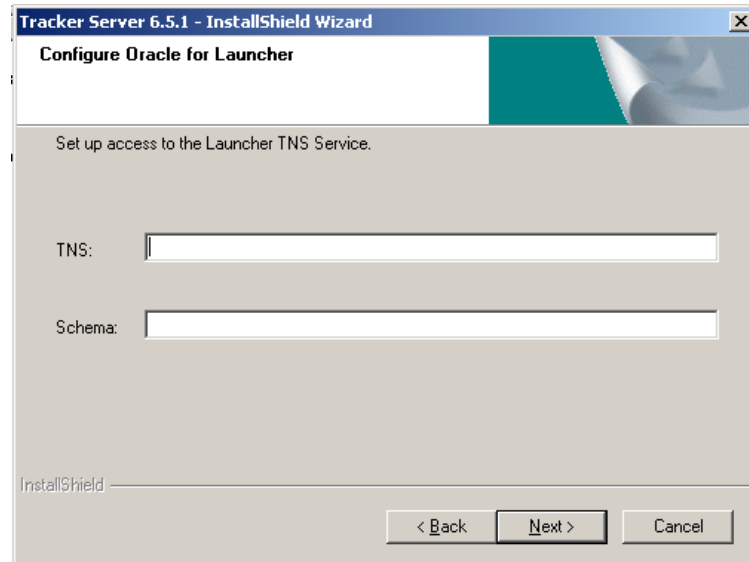
On the **Tracker Database** dialog box, select **Oracle** as the database type, then click **Next**.



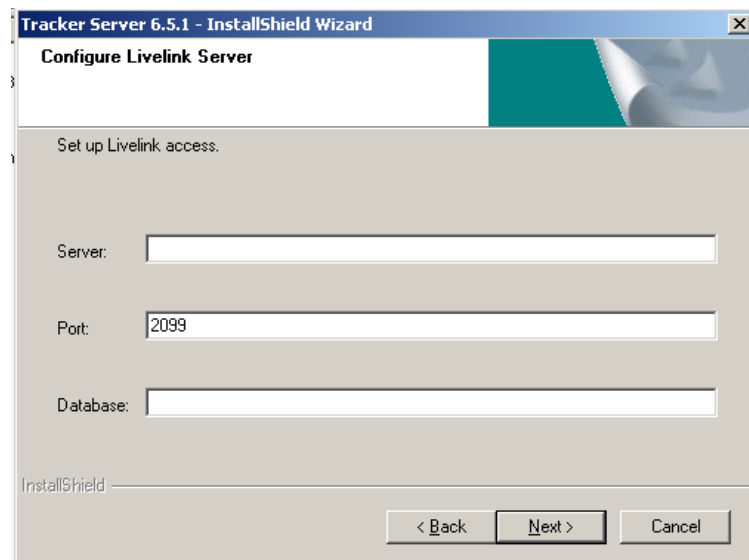
10. On the **Configure Oracle for Tracker** dialog box, enter the name of the Tracker **TNS** service, then click **Next**.



11. If you have selected **Use Launcher** previously, the **Configure Oracle for Launcher** dialog appears. Enter the following information then click **Next**:
- the Launcher **TNS** name
 - the Launcher TNS **Schema** name

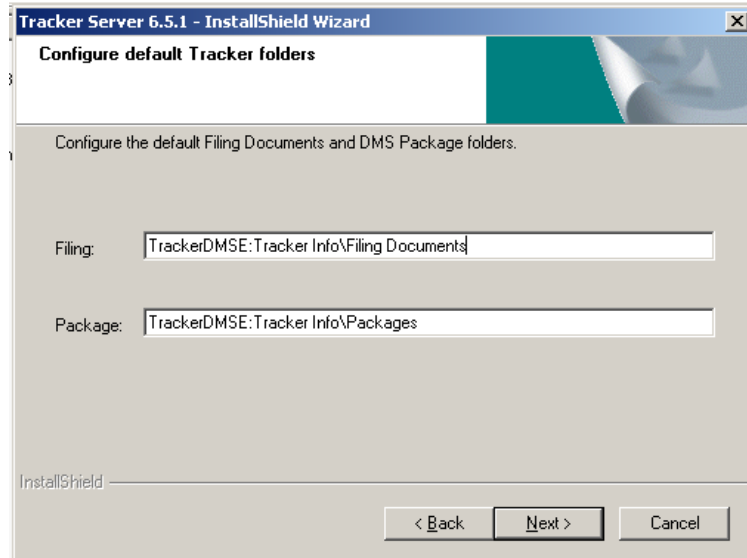


If you selected **Access DMS**, the **Configure Livelink Server** dialog box opens. Enter the **Server**, **Port**, and **Database** name for the DMS server, then click **Next**.

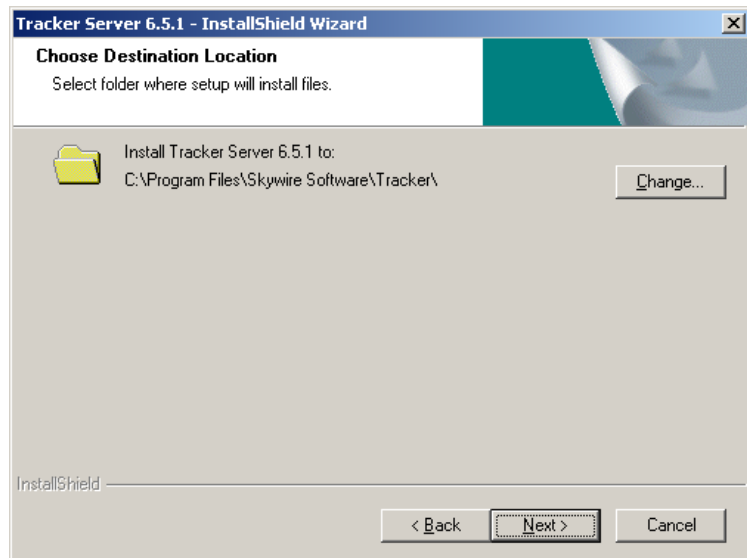


If you selected **Access DMS**, the **Configure default Tracker folders** dialog box opens.

- a. In the **Filing** field, enter the default path of the filing documents folder.
- b. In the **Package** field, enter the default path of the DMS package folders.

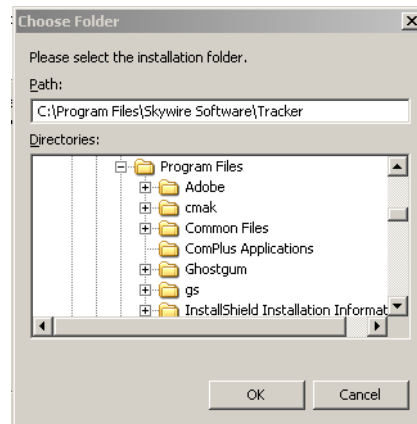


- c. Click **Next**.
12. The **Choose Destination Location** dialog box opens, displaying the installation location.

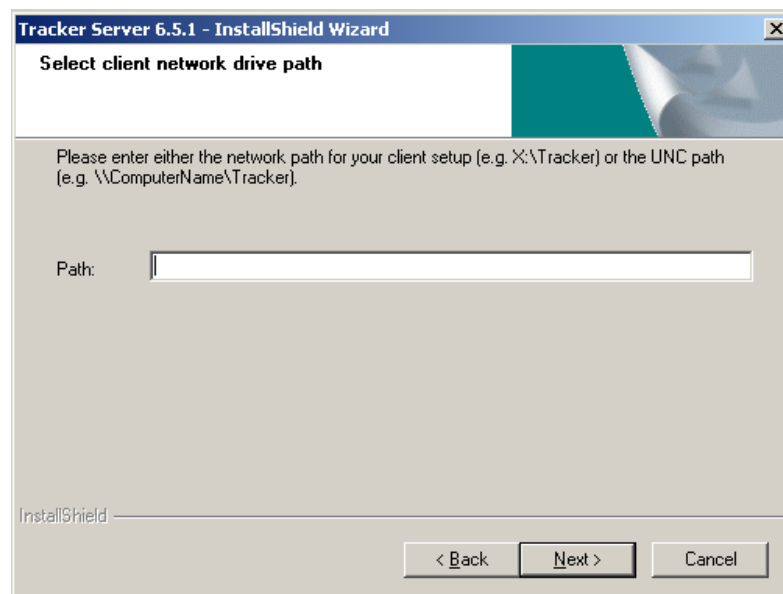


To change the location:

- a. Click **Change**.
- b. In the **Choose Folder** dialog box, select the folder you want to install Tracker.



- c. Click **OK**.
13. Click **Next**.
14. In the **Select Client Network Drive Path** dialog box, enter the network drive path where you want to install the Tracker server software.



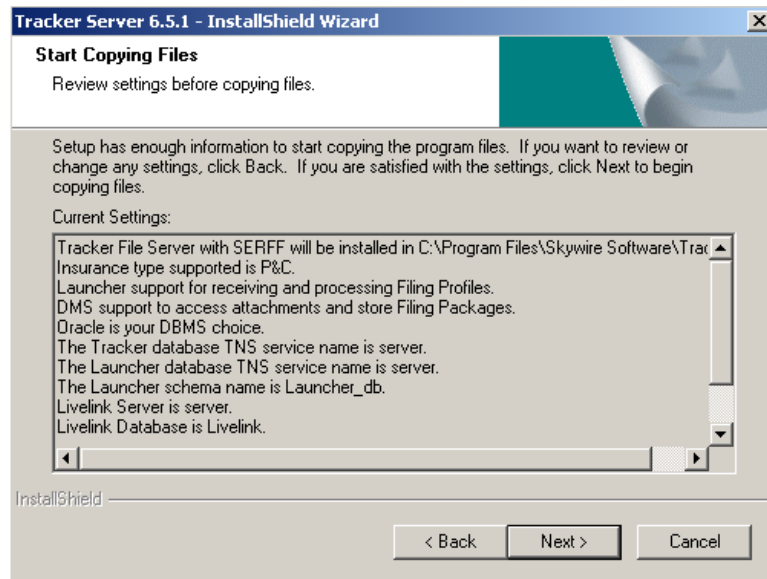
For example: `X:\Tracker`. `X` is the letter to map the Tracker installation folder on the client system.

15. Click **Next**.

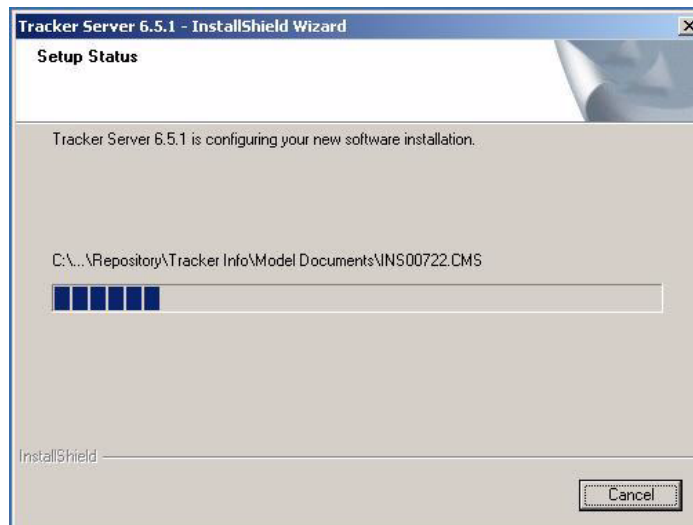
Important: Note this drive letter. This drive path and letter will be used for *all* Tracker client systems.

Alternatively, you can use UNC notation to specify a network location for the installation, for example `\\ServerName\ShareName`, where:

- *ServerName* is the computer name where Tracker Server is installed
 - *ShareName* is the name given to the installation path when sharing it for network access
16. In the **Start Copying Files** dialog box, review your **Current Settings**, then click **Next**.



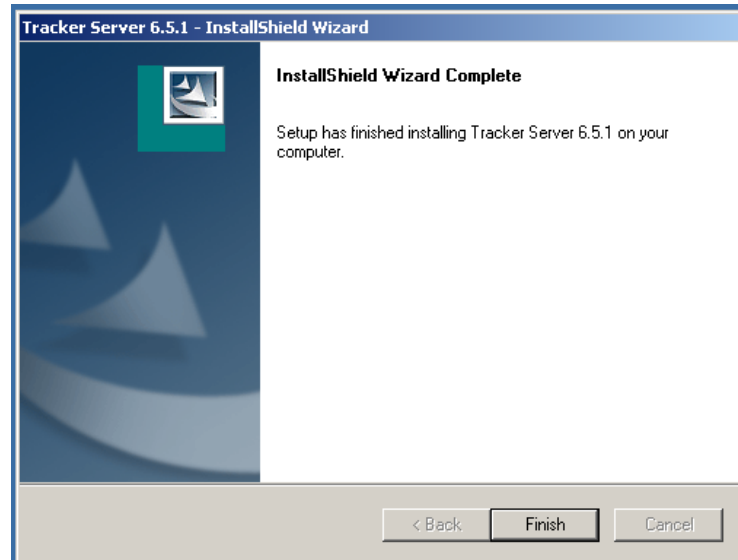
The **Setup Status** dialog box opens.



The installation program begins copying the required files. A blue progress bar indicates the progress of the installation.

To stop the installation process, click **Cancel**.

When the installation is complete, the **InstallShield Wizard Complete** dialog box opens.



17. Click **Finish** to close the installation program.
18. If prompted, reboot the system.
19. Ensure that you share the newly created Tracker folder on the Tracker server for the client installation. The default location is:
`C:\Program Files\Skywire Software`
20. Delete all *.installLog files from the TkrWF subfolder in the Tracker Monitor installation folder. These files contain user names and passwords of the Tracker Monitor users and for security reasons, they must be deleted.
21. Reboot the system.

Step B: Verify the Installation Files

The manuals folder on the CD contains the Excel workbook `installed_files_Oracle.xls`. The spreadsheets in this workbook list the files installed in various folders.

To verify that the installation process has successfully completed, compare the files in the subfolders of the Tracker installation folder (typically `C:\Program Files\Skywire Software\Tracker`) to the lists in the workbook. If there are any discrepancies, please contact *Customer Support*.

Part 2: Installing Tracker Monitor

This section describes how to install and configure Tracker Monitor on the Tracker Monitor Server.

Step A: Install Microsoft .NET Framework

If your host operating system is Windows 2003:

Install Service Pack 1 (SP1) for Microsoft .NET by running the following setup file on the Tracker installation CD:

- From the \DotNet folder, run
WindowsServer2003-KB86746-X86-ENU.exe.

If your host operating system is *not* Windows 2003:

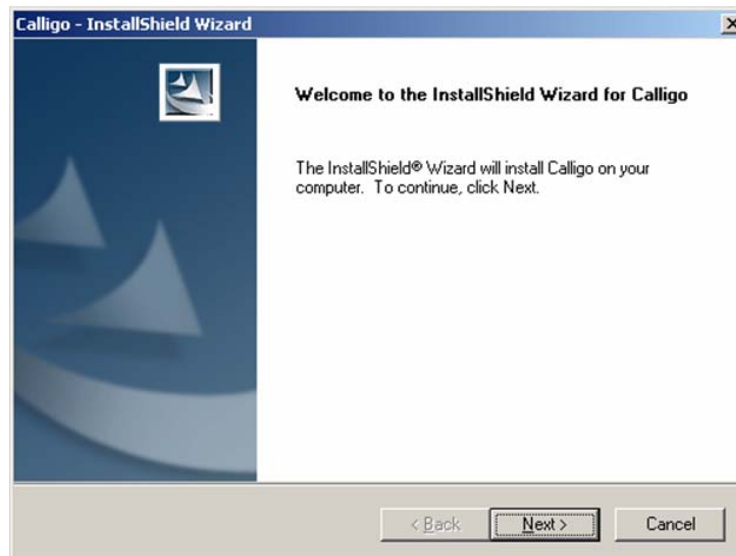
1. From the \DotNet folder on the Tracker installation CD, run
Dotnetfx.exe.
2. Install Service Pack 1 (SP1) for Microsoft .NET by running the following setup file on the Tracker installation CD:

From the \DotNet folder, run NDP1.1sp1-KB867460-X86.exe.

Step B: Install Calligo Core

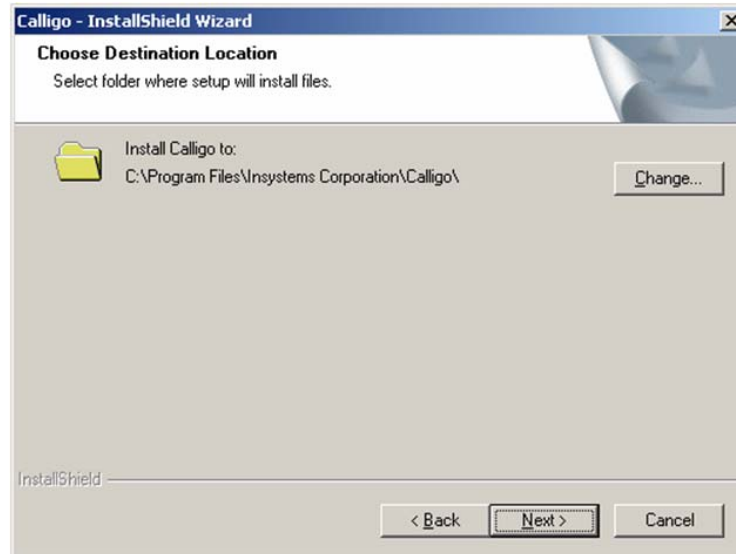
1. From the *Calligo* installation CD, run the setup.exe file located in the
\Calligo Enterprise v5.4\Calligo\ folder.

The **Calligo – InstallShield Wizard** opens.



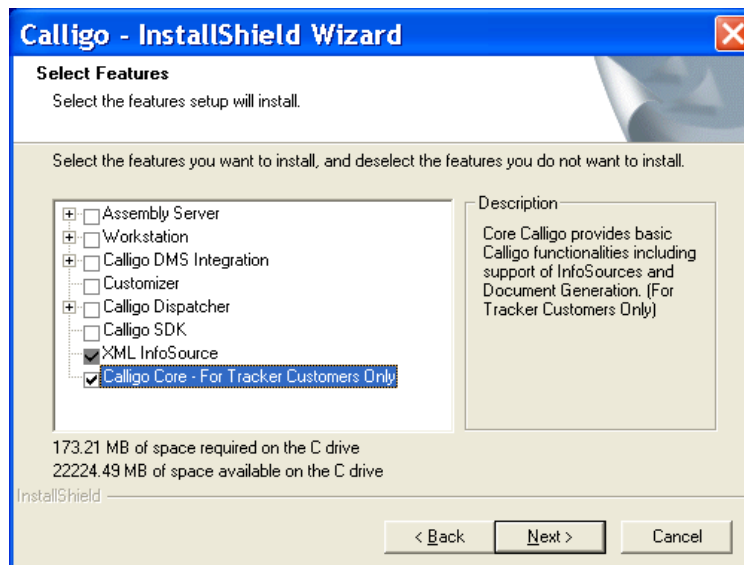
2. Click **Next**.

The **Choose Destination Location** dialog box displays the location where Calligo will be installed.



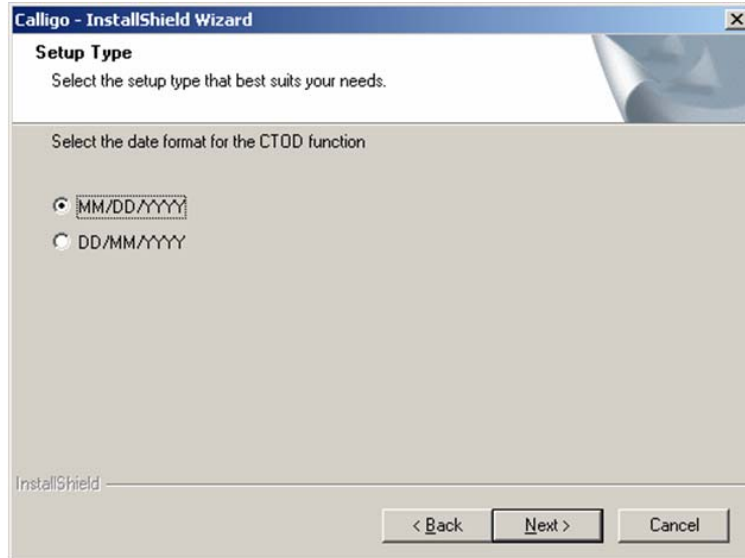
To change the location:

- a. Click **Change**.
- b. In the **Choose Folder** dialog box, select the folder you want to install Calligo.
- c. Click **OK**.
3. Click **Next**.
4. On the **Select Features** dialog box, ensure that the **Calligo Core** check box is selected, then click **Next**.

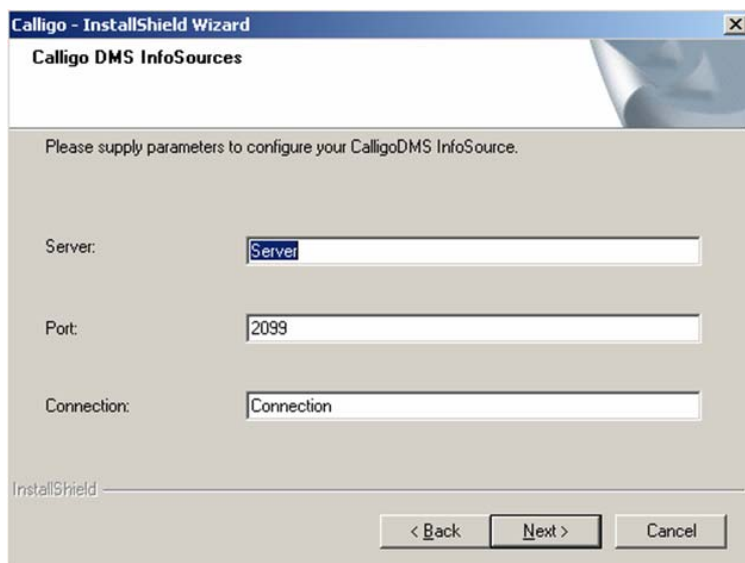


A warning message may appear asking to make sure Livelink services are stopped before proceeding to the next step.

The **Setup Type** dialog box opens.

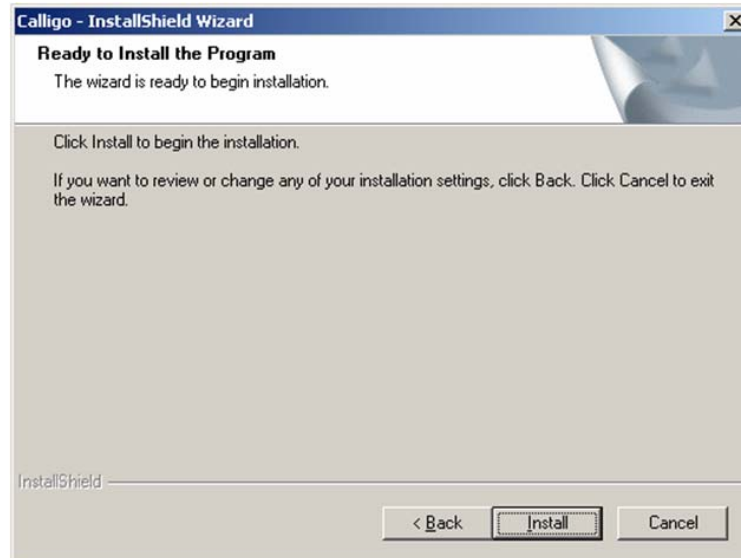


5. Choose the default date format for the CTOD function, then click **Next**.
6. If you had selected **Calligo DMS Integration** in the **Select Features** dialog box, then the **Calligo DMS InfoSources** dialog box opens.

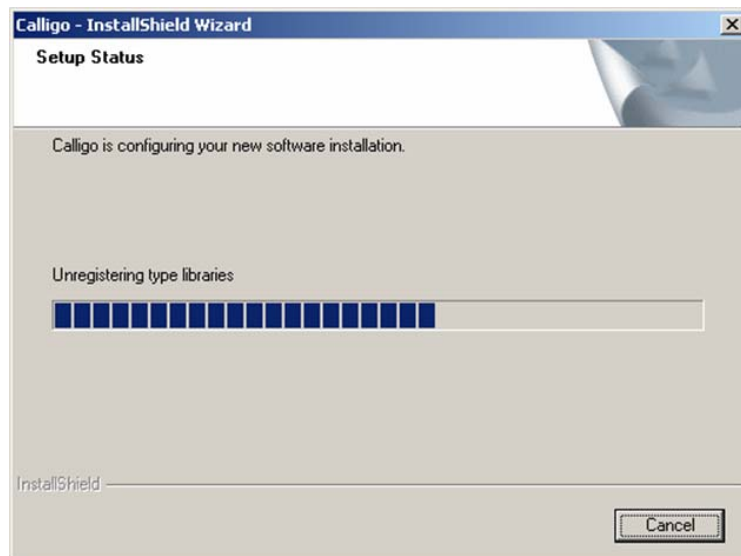


- a. Enter the name of the CalligoDMS **Server** and its **Port** number.
- b. In the **Connection** field, enter the name of the CalligoDMS database, then click **Next**.

The **Ready to Install the Program** dialog box opens.



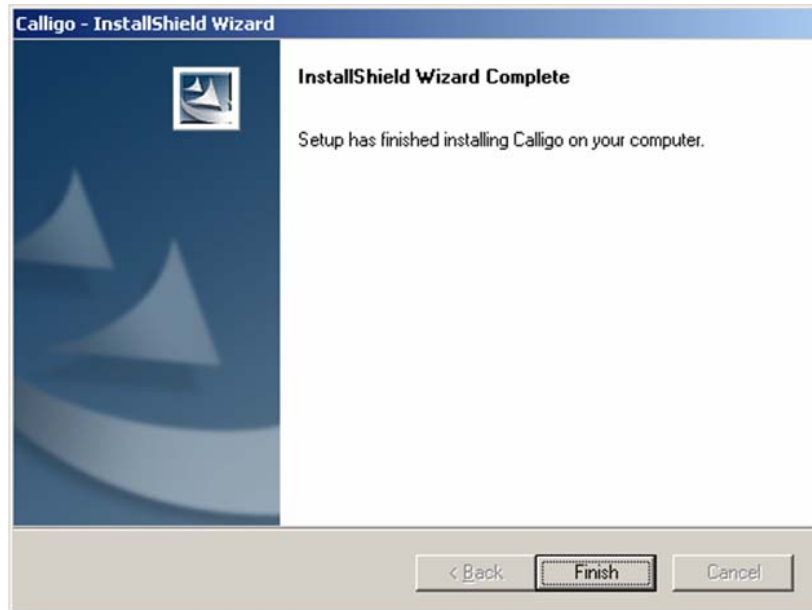
7. To review or change any of your installation settings, click **Back**, otherwise click **Install**.
8. The **Setup Status** dialog box opens.



The installation program begins copying the required files. A blue progress bar indicates the progress of the installation.

To stop the installation process, click **Cancel**.

When the installation is complete, the **InstallShield Wizard Complete** dialog box opens.



9. Click **Finish** to close the installation program.
10. If prompted, reboot the system.

Step C: Create a Tracker Monitor User

You can create the Tracker Monitor user (TkrfWFMOn) as a local user on the Monitor system, or as a domain user.

If the user is a *domain* user, it must be:

- able to log on to the Monitor server and the file server (if separate from the Monitor server)
- set up as a local administrator on the Monitor computer
- a local administrator on the Tracker Monitor Server

If the user is a *local* user, it must be:

- created on the Monitor server and the file server (if separate from the Monitor server)
- a local administrator

Step D: Create the Tracker Monitor User as a Local User

If you want to create the Tracker Monitor user as a local user, complete the following procedure on the Monitor computer.

1. From the **Control Panel**, select **Administrative Tools > Computer Management**.
2. Select **System Tools > Local Users and Groups > Users**.
3. Right-click **Users** and choose **New User**.
The **New User** dialog box opens.
4. In the **User** name field, enter `tkrwfmon`.
5. Enter a **Password** for the user. Note this password; you will need it later.
6. Enter the password again in the **Confirm Password** box.
7. Clear the **User must change password at next logon** check box.
8. Select the **User cannot change password** check box.
9. Select the **Password never expires** check box.
10. Clear the **Account is disabled** check box.
11. Click **Create**, then **Close**.

Note: If you are using Internet proxy server with NTLM (Windows) authentication, you must create the monitor user as domain user and allow them to access the Internet.

Step E: Set the Tracker Monitor User as an Administrator

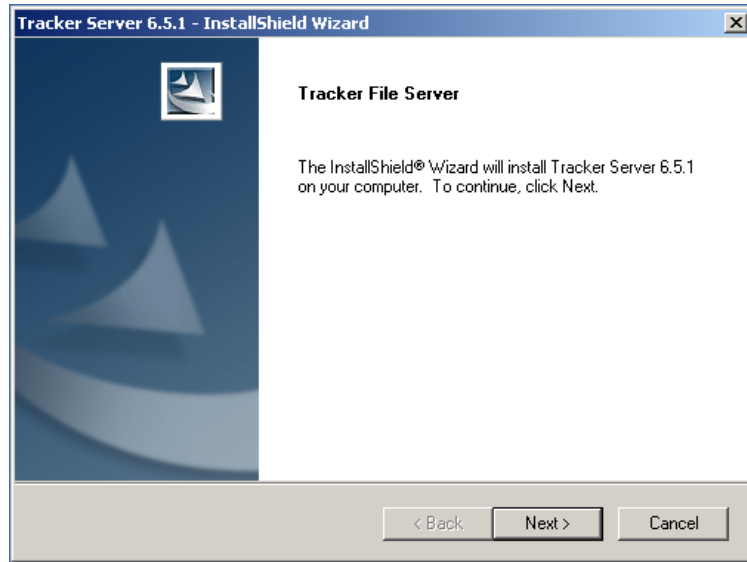
Note: The actual steps may vary slightly depending on your version of Windows.

1. From the **Control Panel**, select **Administrative Tools > Computer Management**.
2. Select **System Tools > Local Users and Groups > Users**.
3. Double-click the user `tkrwfmon`.
4. Go to the **Member Of** tab, then click **Add**.
5. Add **Administrators** to the lower list box.
6. Click **OK**, then **OK** again.
7. Close the **Computer Management** screen.

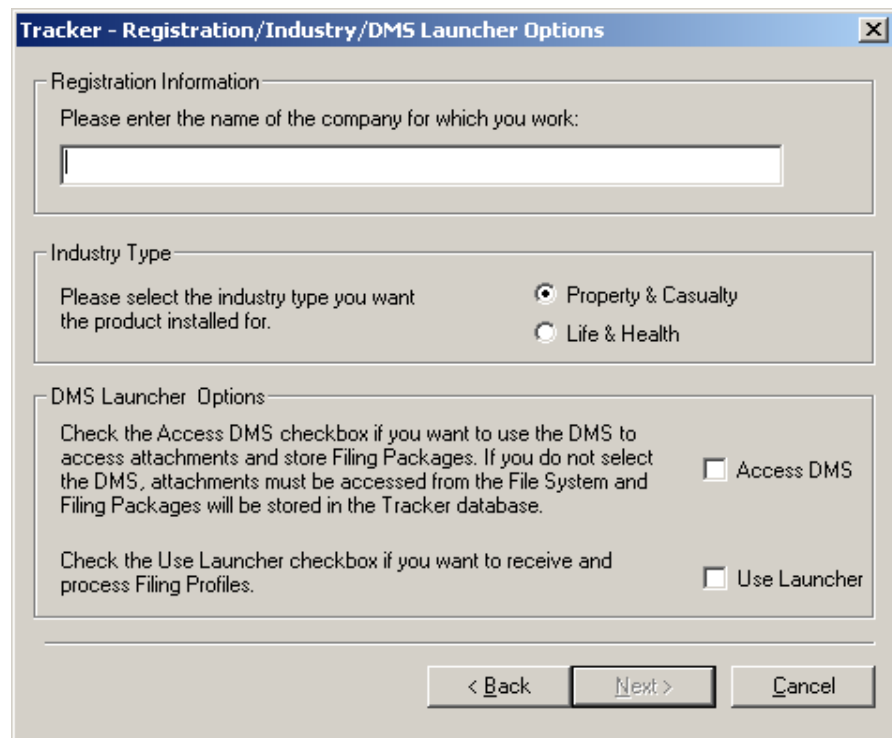
Step F: Run the Tracker Server Setup to Install Tracker Monitor

In this step, you run the setup application to actually install Tracker.

1. From the **Setup** folder on the Tracker installation CD, run `setup.exe`.
2. If a Security Warning dialog box appears, click **Run**.
The **InstallShield Wizard** opens. A progress window temporarily appears.
The **Tracker File Server** dialog box opens.



3. Click **Next**.
4. On the **Registration** dialog box, enter your company name.



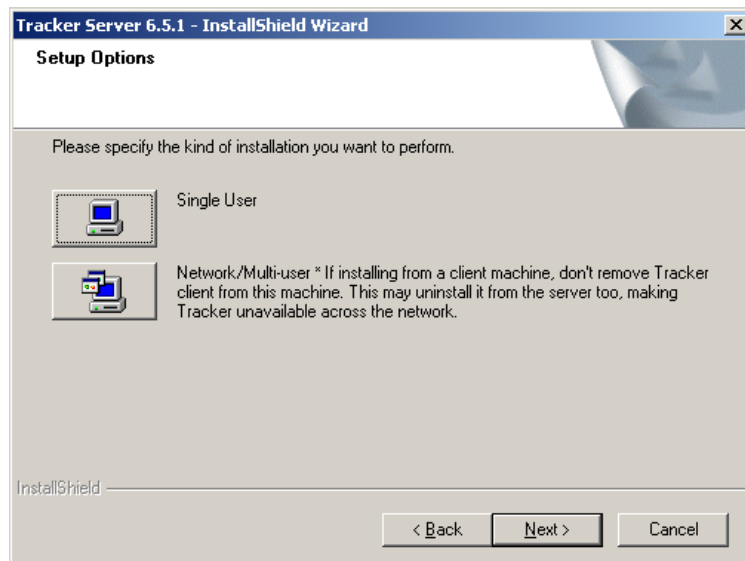
5. Choose your insurance **Industry Type**:
 - **Property & Casualty**
 - **Life & Health**

6. In the **DMS Launcher Options** section, select any of the following options:
 - **Access DMS** – select this check box to use the DMS (Document Management System) to access filing attachments and store filing packages
 - if you do not select this option, then filing attachments must be accessed from the file system, and filing packages will be stored in the Tracker database
 - **Use Launcher** – select this check box to receive and process filing profiles sent from Launcher, a separate application
7. Click **Next**.

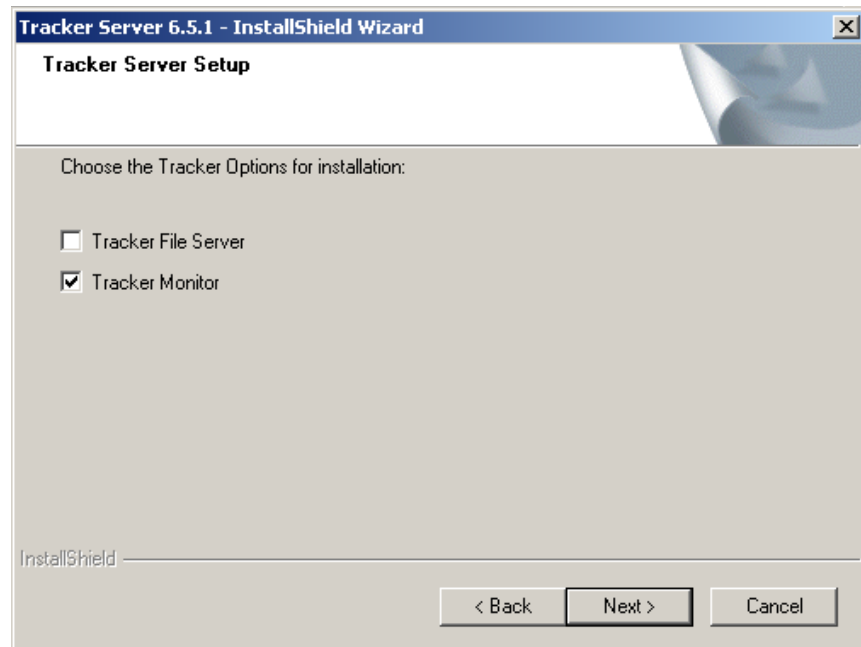
Note: Ensure that the selections here are identical to the ones you made when setting up the Tracker File Server.

8. On the **Setup Options** dialog box, select **Network/Multi-user**. (You do not need to click **Next**.)

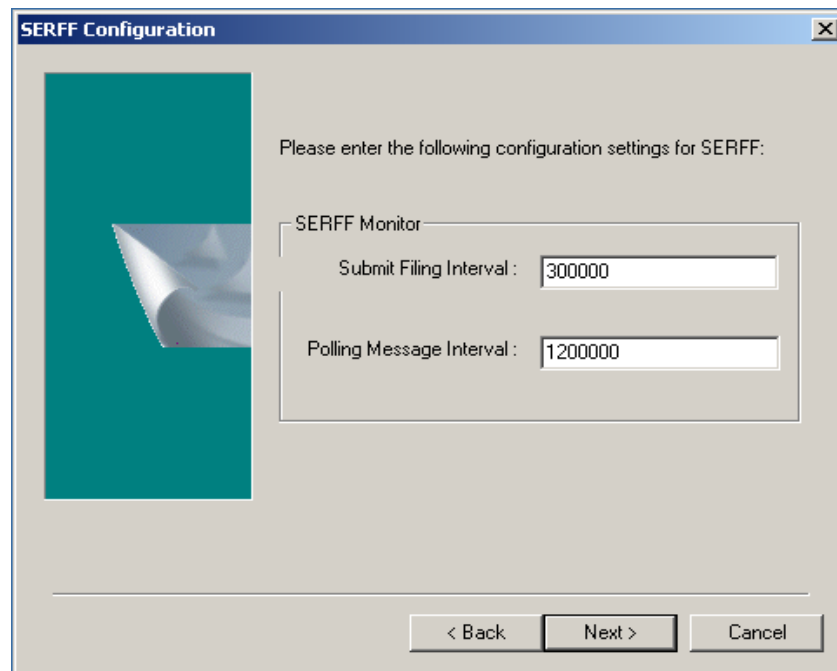
(The **Single user** option is generally used only in a test environment.)



9. On the **Tracker Setup** dialog box, select **Tracker Monitor** only, then click **Next**.

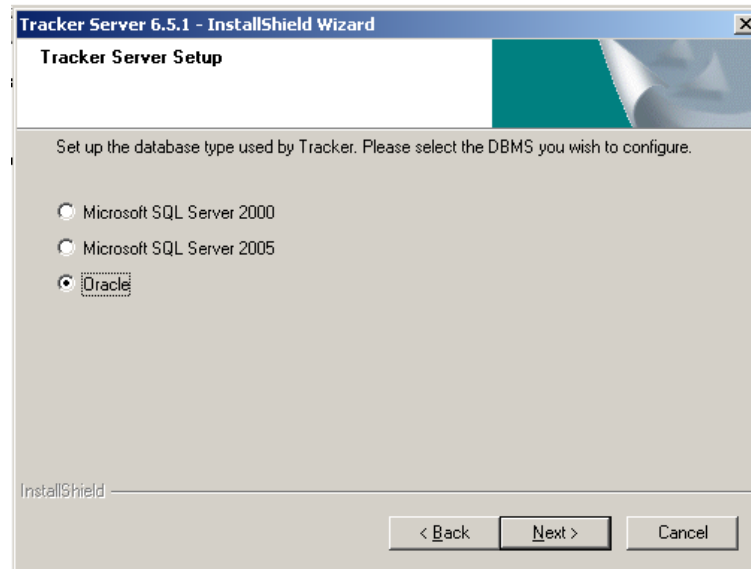


The **SERFF Configuration** dialog box opens.

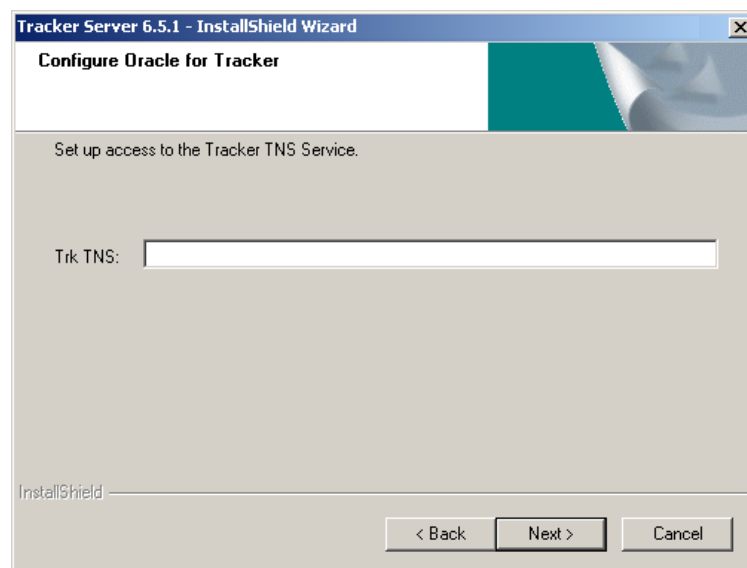


10. Enter the **Submit Filing Interval** and **Polling Message Interval** (in milliseconds), then click **Next**.

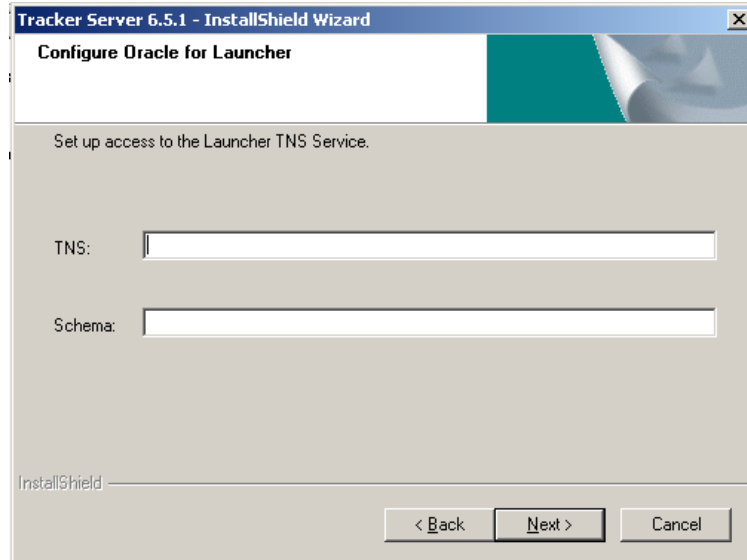
On the **Tracker Database** dialog box, select **Oracle** as the database type, then click **Next**.



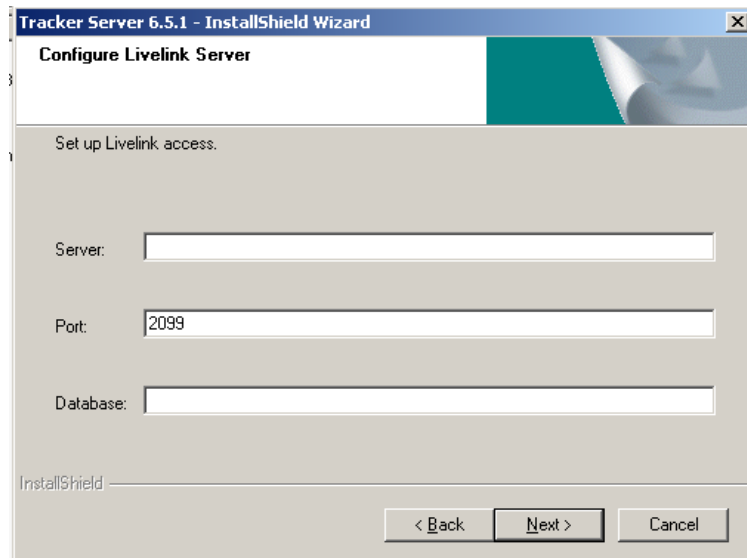
11. On the **Configure Oracle for Tracker** dialog box, enter the name of the Tracker **TNS** service, then click **Next**.



12. If you have selected **Use Launcher** previously, the **Configure Oracle for Launcher** dialog appears. Enter the following information then click **Next**:
 - the Launcher **TNS** name
 - the Launcher TNS **Schema** name

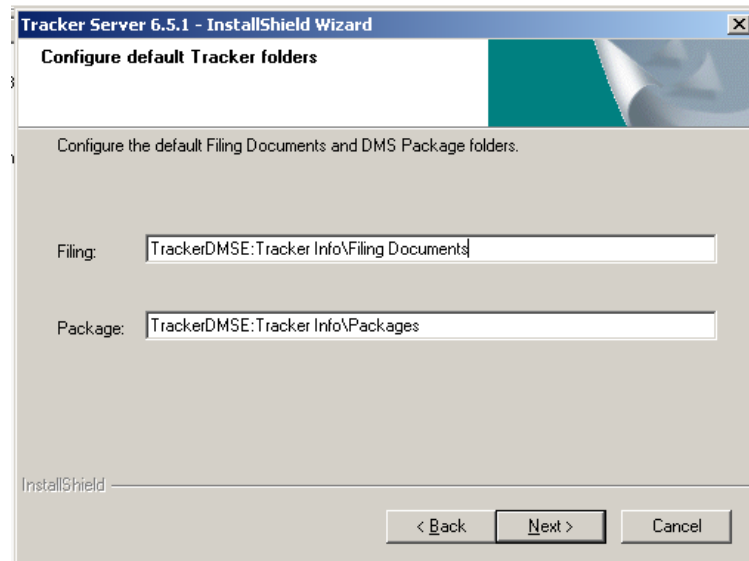


If you selected **Access DMS**, the **Configure Livelink Server** dialog box opens. Enter the **Server**, **Port**, and **Database** name for the DMS server, then click **Next**.

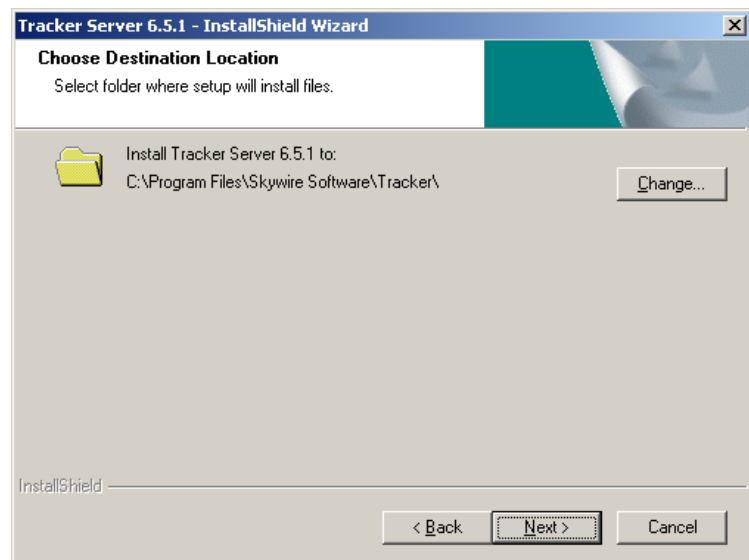


If you selected **Access DMS**, the **Configure default Tracker folders** dialog box opens.

- a. In the **Filing** field, enter the default path of the filing documents folder.
- b. In the **Package** field, enter the default path of the DMS package folders.

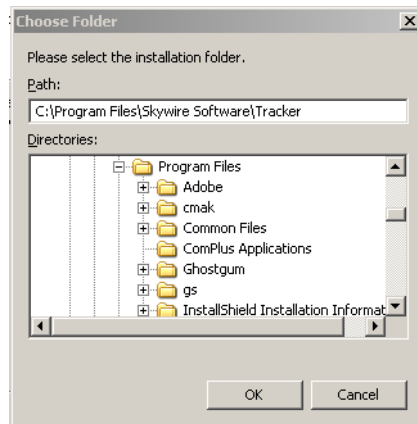


- c. Click **Next**.
13. The **Choose Destination Location** dialog box opens, displaying the installation location.



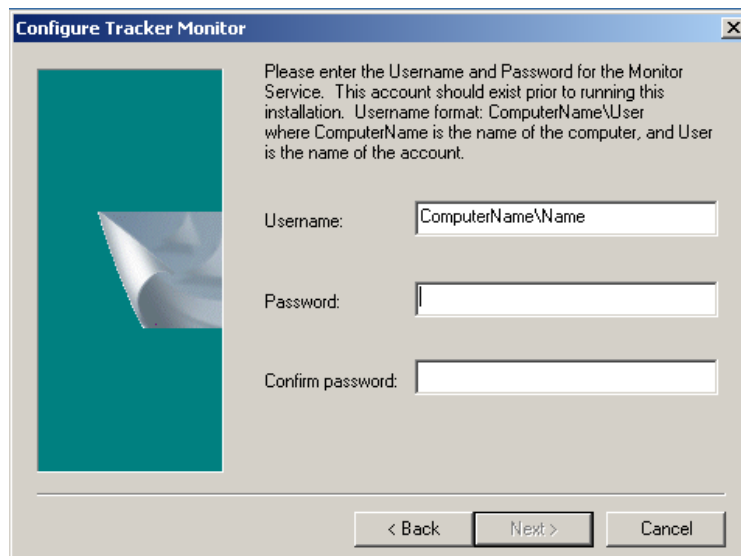
To change the location:

- a. Click **Change**.
- b. In the **Choose Folder** dialog box, select the folder you want to install Tracker.



- c. Click **OK**.
14. Click **Next**.

The **Configure Tracker Monitor** dialog box may open.



- a. Enter the **Username** of the user account under which the Tracker Monitor service should run.

The format is:

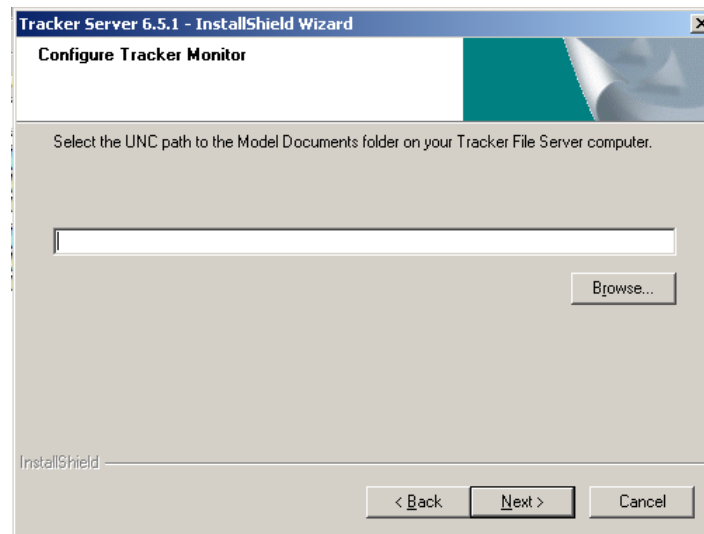
ComputerName\Name, where *ComputerName* is the name of the computer and *Name* is the actual name of the account, that is, *ComputerName\tkrwfmon*

Important: This user account should exist before installing Tracker.

- b. Enter the **Password** assigned to the Monitor user account. (Your password will not appear when you type it, but will be displayed as asterisks.)
- c. In the **Confirm Password** field, enter the password again.
- d. Click **Next**.

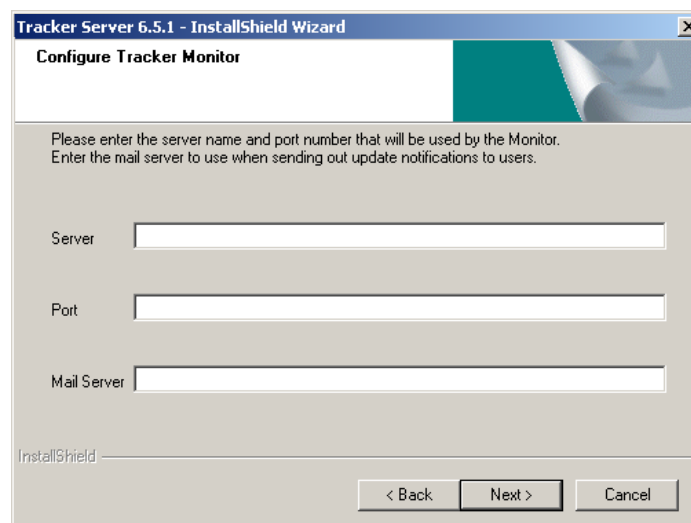
Another **Configure Tracker Monitor** dialog box will appear.

Select the UNC path to the model documents folder on the Tracker file server.



15. Click **Next**.

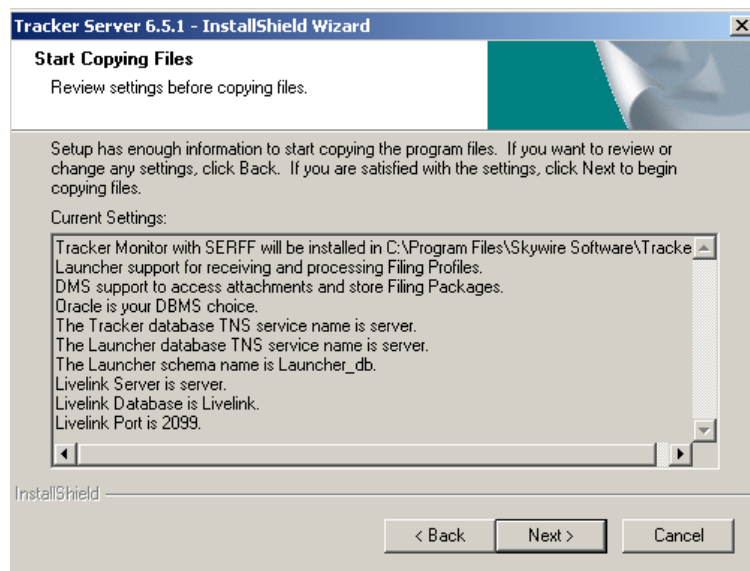
Another **Configure Tracker Monitor** opens.



- a. In the **Server** field, enter the name of the computer where Tracker Monitor will run. By default, this field contains the name of the computer where the Tracker installation is being run.
- b. Enter the **Port** number that Tracker Monitor will use.
- c. Enter the SMTP-compliant **Mail Server** to use when sending out notification emails after each regulatory specialist CAB file update.
- d. Click **Next**.

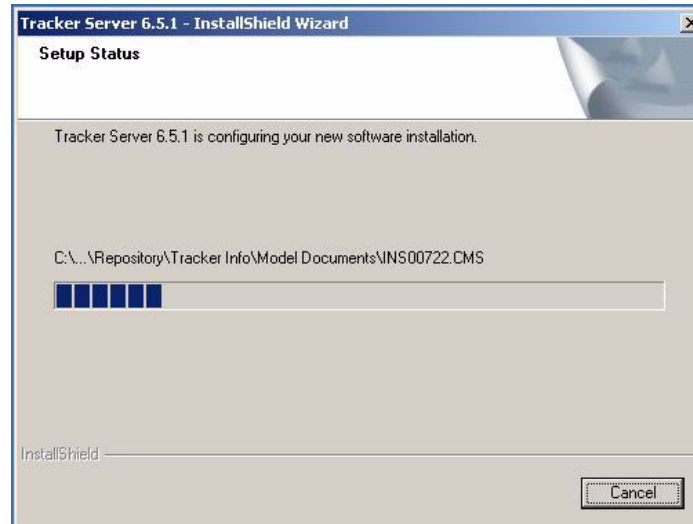
Note: The information entered here will be copied into the Tracker database when the Monitor runs for the first time. However, if this information has been populated in the database, it will not be overwritten and information entered in this dialog box will be disregarded. For details on how to change this information after installation, please see the *Tracker User Guide* or *Online Help*.

In the **Start Copying Files** dialog box, review your **Current Settings**, then click **Next**.



16. If the settings are correct, click **Next**, otherwise click **Back** until you have reached the step you want to correct. Make any necessary corrections, then click **Next**.

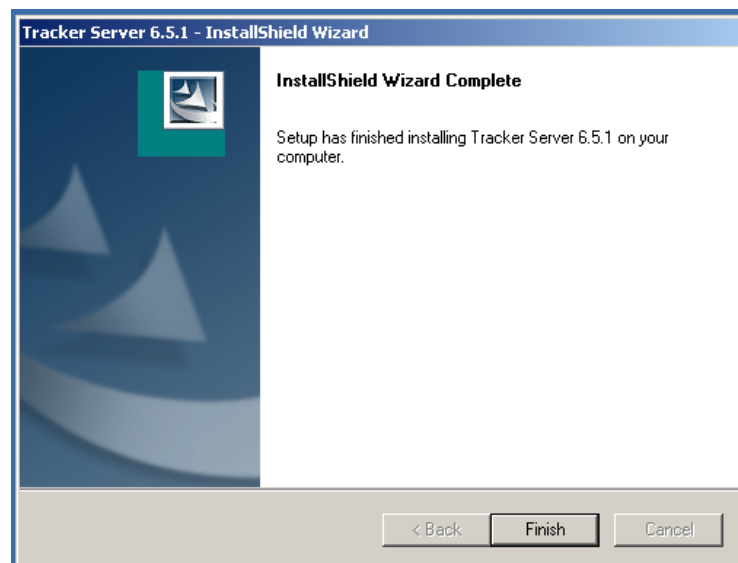
The **Setup Status** dialog box opens.



The installation program begins copying the required files. A blue progress bar indicates the progress of the installation.

To stop the installation process, click **Cancel**.

When the installation is complete, the **InstallShield Wizard Complete** dialog box opens.



17. Click **Finish** to close the installation program.
18. If prompted, reboot the system.
19. Ensure that you share the newly created Tracker folder on the Tracker server for the client installation. The default location is:
C:\Program Files\Skywire Software

Step G: Verify the Installation Files

The `manuals` folder on the CD contains the Excel workbook `installed_files_Oracle.xls`. The spreadsheets in this workbook list the files installed in various folders.

To verify that the installation process has successfully completed, compare the files in the subfolders of the Tracker installation folder (typically `C:\Program Files\Skywire Software\Tracker`) to the lists in the workbook. If there are any discrepancies, please contact *Customer Support*.

Step H: Configure the Tracker Monitor User

1. Select **Start > Run** and enter `DCOMCNFG` in the **Open** field.

Windows 2000:

The **Distributed COM Configuration Properties** screen opens. On the **Applications** tab, double-click the `TkrWF` application.

Windows 2003:

The **Component Services** screen opens. Select **Computers > My Computer > DCOM Config**. Right click `TkrWF`, then click **Properties**.

The **Properties** dialog box opens.

2. Click the **Location** tab and select the option **Run application on this computer**.
3. Click the **Security** tab and select the option **Customize** under **Launch and Activation Permissions** section, then click **Edit**.

The **Launch Permission** dialog box opens.

4. Click **Add** and add **Everyone** to the lower list box.
5. Click **OK**, then **OK** again.
6. Select the option **Customize** under **Access Permissions** section, then click **Edit**.

The **Access Permission** dialog box opens.

7. Click **Add** and add **Everyone** to the lower list box.
8. Click **OK**, then **OK** again.
9. Click the **Identity** tab and select **Launching User**.
10. Click **OK** to close the **TkrWF Properties** dialog box.
11. Click **OK** to close **DCOMCNFG**, or close the **Component Services** dialog if using Windows 2003.

Step I: Register the Tracker Monitor Services Manually

If during the Tracker Monitor installation, you did not correctly enter the user name and password (or if they did not exist at the time of the installation), you will need to complete this step to manually register the Tracker services.

1. In DOS, change to the current directory in which the Tracker Monitor files are installed.

2. Enter the following commands to register the Monitor services:

```
C:\WINDOWS\Microsoft.NET\Framework\v1.1.4322\installutil  
/username={computer_name\User_name} /password={password}  
/eventlogname=TrackerMonitor /eventlogsource=TkrMonitor  
tkrmonitor.exe
```

```
C:\WINDOWS\Microsoft.NET\Framework\v1.1.4322\installutil  
/username={computer_name\User_name} /password={password}  
/eventlogname=TrackerMonitor /eventlogsource=TkrCabLoad  
tkrcabload.exe
```

3. If you are using Launcher, register the Launcher Monitor service:

```
C:\WINDOWS\Microsoft.NET\Framework\v1.1.4322\installutil  
/username={computer_name\User_name} /password={password}  
/eventlogname=IPDLinkService /eventlogsource=IPDLinkService  
IPDLinkService.exe
```

Notes:

- Replace {computer_name\User_name} and {password} with the user name and password for which the Monitor should run under.
- It is assumed that the .NET framework is installed at:
C:\WINDOWS\Microsoft.NET\Framework\v1.1.4322

4. After the installation has completed, delete all *.installLog files from the TkrWF subfolder in the Tracker Monitor installation folder. These files contain user names and passwords of the Tracker Monitor users. For security reasons, they should therefore be deleted.

Step J: Configure IE for Tracker Monitor

1. Log onto Windows using the TkrWFMon user ID.
2. In Internet Explorer, select **Tools > Internet Options**.
3. Click the **Advanced** tab.
4. In the **Security** section, clear **Check for server certificate revocation (requires restart)**.
5. Click **Apply**.
6. **If you are using Internet proxy server:**
 - a. Click the **Connections** tab, then click **LAN Settings...**
 - b. In the **Proxy server** section, select **Use a proxy server for your LAN**.
 - c. Ensure that the correct **Address** and **Port** have been entered, then click **OK**.
7. Click **OK** to close **Internet Options**.
8. The SERFF testing URL is:
`https://serff-services-beta.naic.org/spi_2.1/
FilingRules`
If you have an Internet connection, XML code is displayed in your browser when accessing this page.

Important: This URL is for *testing* only, and is not for a production environment.

9. Close Internet Explorer.
10. Log out of the server.
11. Reboot the system.

Stage 8: Installing the Tracker Client

Note: You install the Tracker client from the server on which you installed the Tracker server software. You will need to map a network drive on the client workstation to the network drive letter. Alternatively, if you are using UNC, browse to the UNC path.

Step A: Create a Tracker Database Alias

At each Tracker client workstation, set up a new SQL*Net database alias description named specifically for your database. The name used should match the service name on the database server. For more information, please contact your database administrator.

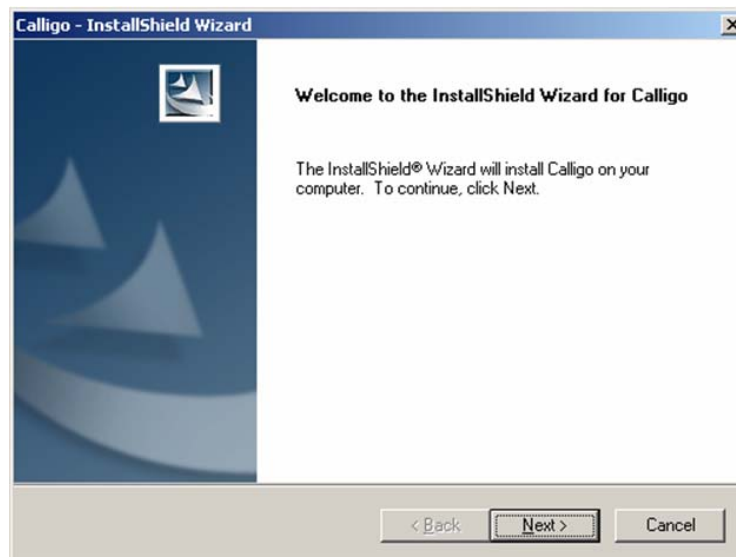
Step B: Install Microsoft .NET Framework

1. From the \DotNet folder on the Tracker installation CD, run `Dotnetfx.exe`.
2. Install Service Pack 1 (SP1) for Microsoft .NET by running the following setup file on the Tracker installation CD:
From the \DotNet folder, run `NDP1.1sp1-KB867460-X86.exe`.

Step C: Install Calligo Core

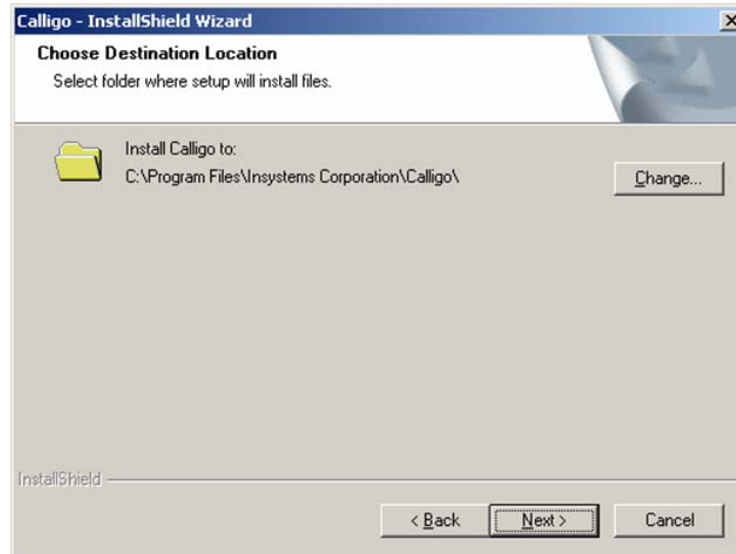
1. From the *Calligo* installation CD, run the `setup.exe` file located in the \Calligo Enterprise v5.4\Calligo\ folder.

The **Calligo – InstallShield Wizard** opens.



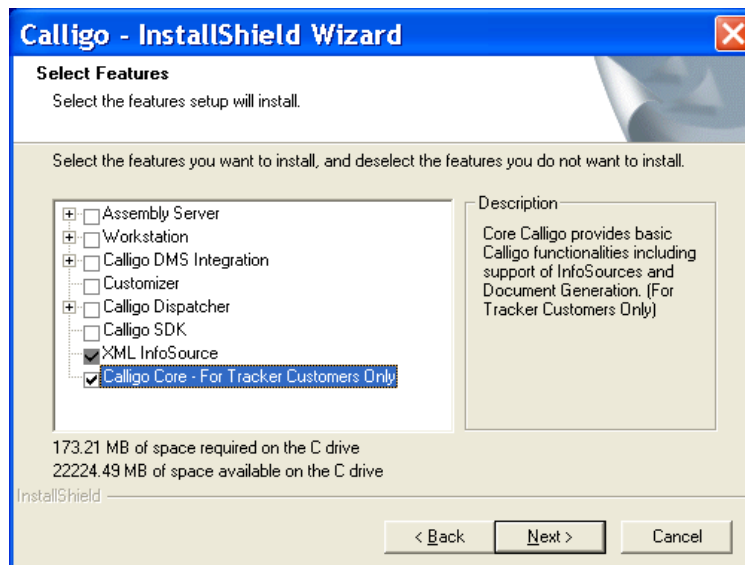
2. Click **Next**.

The **Choose Destination Location** dialog box displays the location where Calligo will be installed.

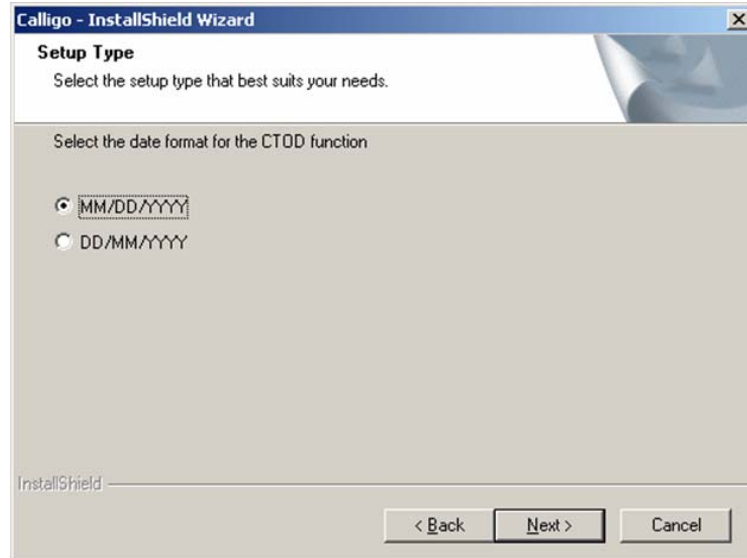


To change the location:

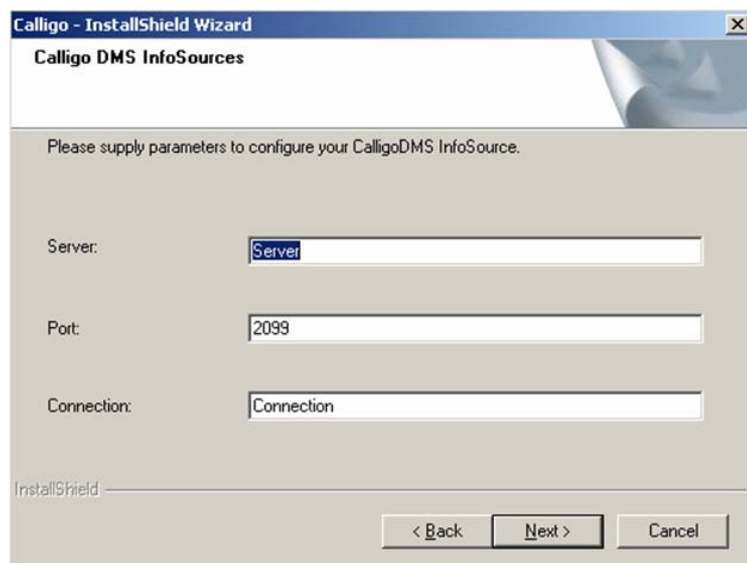
- a. Click **Change**.
- b. In the **Choose Folder** dialog box, select the folder you want to install Calligo.
- c. Click **OK**.
3. Click **Next**.
4. On the **Select Features** dialog box, ensure that the **Calligo Core** check box is selected, then click **Next**.



The **Setup Type** dialog box opens.

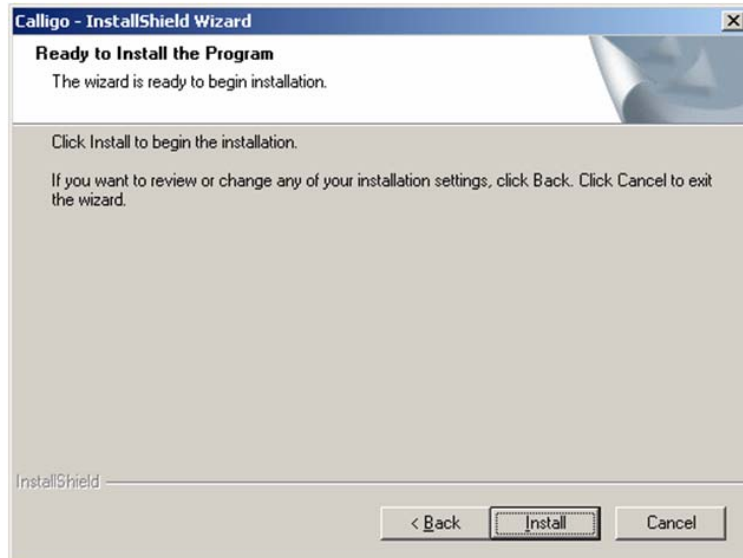


5. Choose the default date format for the CTOD function, then click **Next**.
6. If you had selected **Calligo DMS Integration** in the **Select Features** dialog box, then the **Calligo DMS InfoSources** dialog box opens.

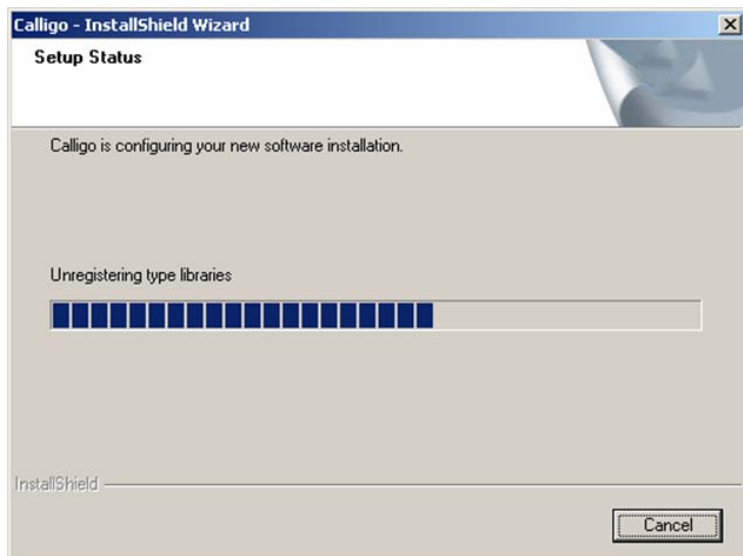


- a. Enter the name of the CalligoDMS **Server** and its **Port** number.
- b. In the **Connection** field, enter the name of the CalligoDMS database, then click **Next**.

The **Ready to Install the Program** dialog box opens.



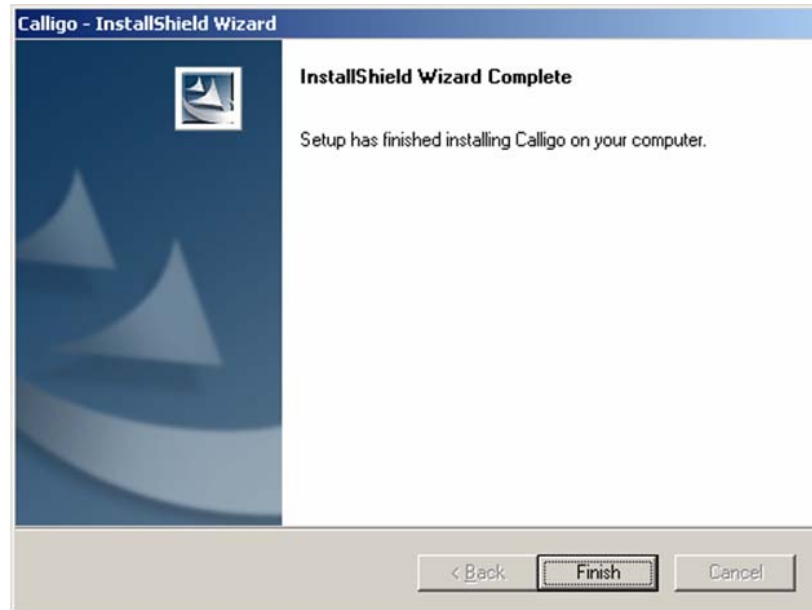
7. To review or change any of your installation settings, click **Back**, otherwise click **Install**.
8. The **Setup Status** dialog box opens.



The installation program begins copying the required files. A blue progress bar indicates the progress of the installation.

To stop the installation process, click **Cancel**.

When the installation is complete, the **InstallShield Wizard Complete** dialog box opens.



9. Click **Finish** to close the installation program.
10. If prompted, reboot the system.

Step D: Run the Tracker Client Setup

In this step, you run the setup application to actually install Tracker.

1. Run the client `Setup.exe` located on the Tracker File Server, for example, `X:\Tracker\CliSetup\Setup.exe`, where `X` is mapped to the Tracker installation folder on the Tracker File Server.

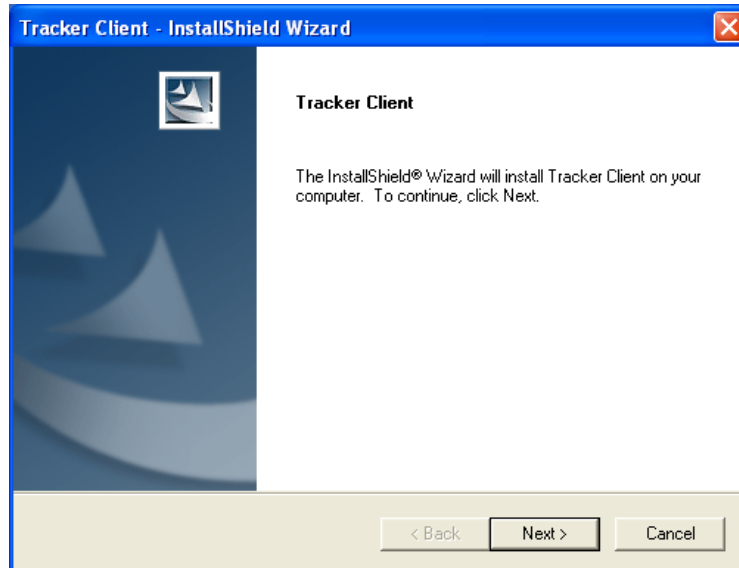
Alternatively, you can use UNC notation to specify a network location for the installation, depending on the Tracker file server setup, for example,

```
\\Tracker_server\shared_folder\Tracker\CliSetup\
Setup.exe
```

where `Tracker_server` is the name of the Tracker File Server.

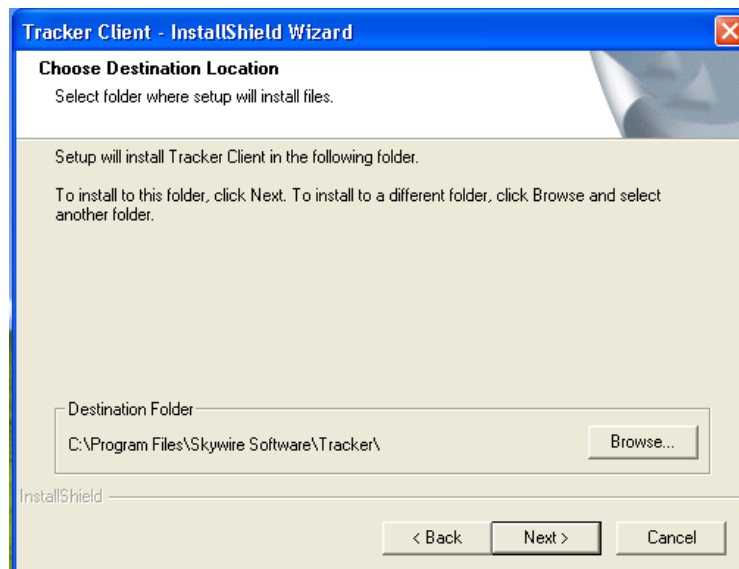
The **InstallShield Wizard** opens. A progress window temporarily appears.

The **Tracker Client InstallShield Wizard** dialog box opens.



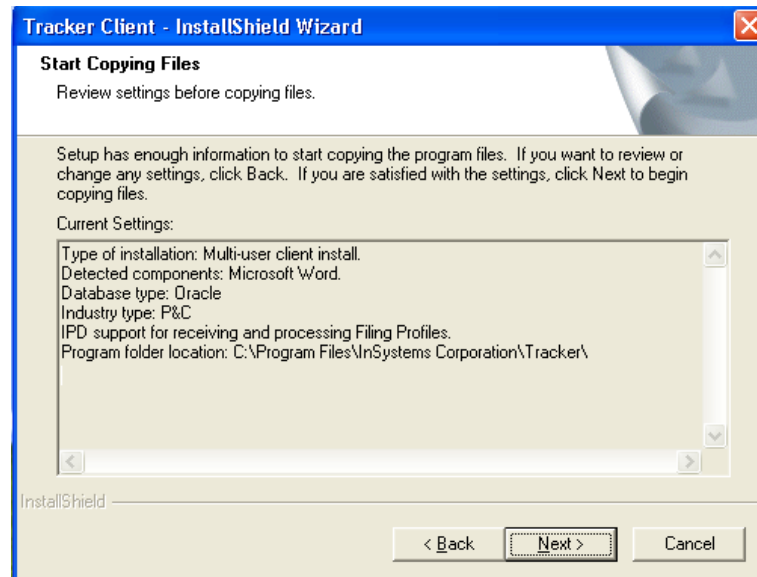
2. Click **Next**.

The **Choose Destination Location** dialog box opens, displaying the installation location.

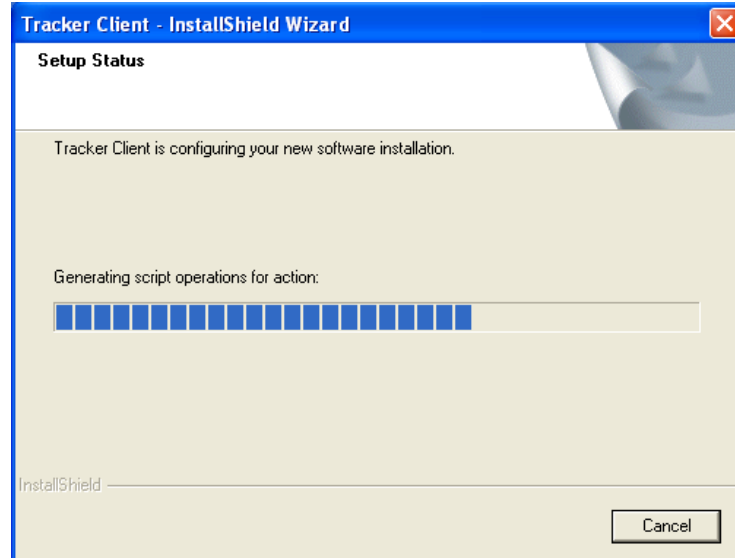


To change the location, click **Browse**, then select another folder.

3. In the **Start Copying Files** dialog box, review your **Current Settings**, then click **Next**.



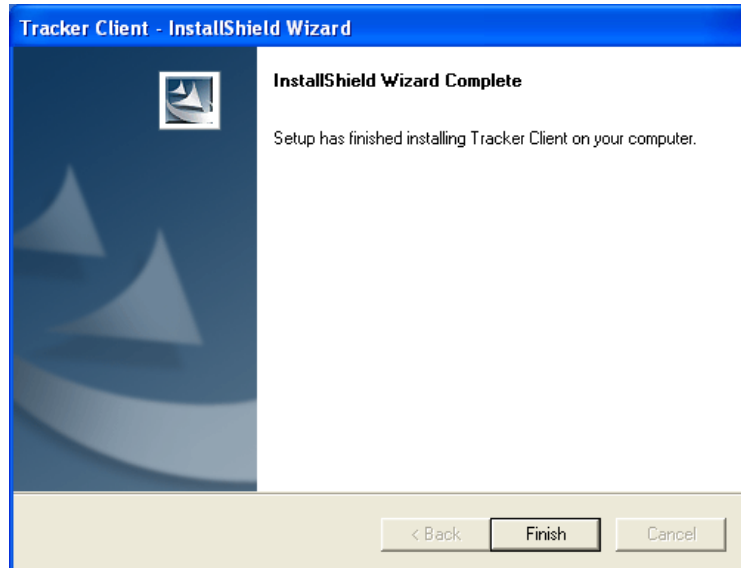
4. If the settings are correct, click **Next**, otherwise click **Back** until you have reached the step you want to correct. Make any necessary corrections, then click **Next**.
5. The **Setup Status** dialog box opens.



The installation program begins copying the required files. A blue progress bar indicates the progress of the installation.

To stop the installation process, click **Cancel**.

When the installation is complete, the **InstallShield Wizard Complete** dialog box opens.



6. Click **Finish** to close the installation program.
7. If prompted, reboot the system.

Step E: Verify the Installation Files

The `manuals` folder on the CD contains the Excel workbook `installed_files_Oracle.xls`. The spreadsheets in this workbook list the files installed in various folders.

To verify that the installation process has successfully completed, compare the files in the subfolders of the Tracker installation folder (typically `C:\Program Files\Skywire Software\Tracker`) to the lists in the workbook. If there are any discrepancies, please contact *Customer Support*.

Step F: Configure SERFF

Complete this procedure on all client workstations to ensure that Tracker can properly connect to SERFF through the Internet:

1. Log in to the workstation using the name and password of the user who will be using Tracker.
2. In Internet Explorer, select **Tools > Internet Options**.
3. Click the **Advanced** tab.
4. In the **Security** section, clear **Check for server certificate revocation (requires restart)**.
5. Click **Apply**.
6. **If you are using Internet proxy server:**
 - a. Click the **Connections** tab, then click **LAN Settings...**
 - b. In the **Proxy server** section, select **Use a proxy server for your LAN**.
 - c. Ensure that the correct **Address** and **Port** have been entered, then click **OK**.
7. Click **OK** to close **Internet Options**.
8. The SERFF testing URL is:

```
https://serff-services-beta.naic.org/spi_2.1/  
FilingRules
```

If you have an Internet connection, XML code is displayed in your browser when accessing this page.

Important: This URL is for *testing* only, and is not for a production environment.

The installation of Tracker is now complete. The following sections describe how to install the Tracker Status Plug-in

Stage 9: Installing the Tracker Status Plug-in

1. On the Tracker installation CD, locate the plug-in zip file in the Tracker Status Plugin folder, and unzip the contents to the %OpenText%\staging folder, saving the directory tree.

Important: Ensure you retain the directory organization of the plug-in files when you unzip the file.

2. In Calligo, log in as **Admin**.
3. Go to ?func=admin.index and select **Install modules**.
4. Select **Tracker Module 6.5.1**.
5. Click **Install**.
6. Follow the instructions to restart the Livelink services.
7. Go to the **Admin** page.
8. In the **Tracker Administration** section, select **Configure Tracker Database**.
9. Enter the configuration information for your Tracker database, then click **Apply**.
10. Follow the instructions to restart the Livelink services.
11. Go to the **Admin** page.
12. In the **Tracker Administration** section, select Tracker **Insurance Type**, then click **Apply**.
13. Follow the instructions to restart the Livelink services.

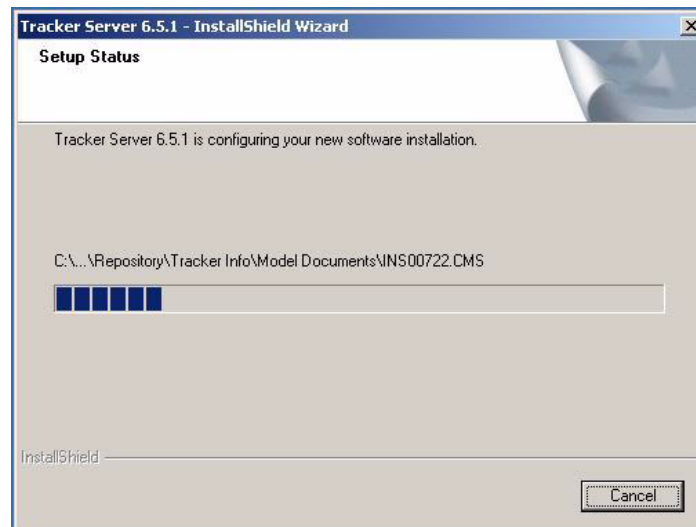
The Tracker Status plug-in is now installed.

Appendix – Uninstalling Tracker Server

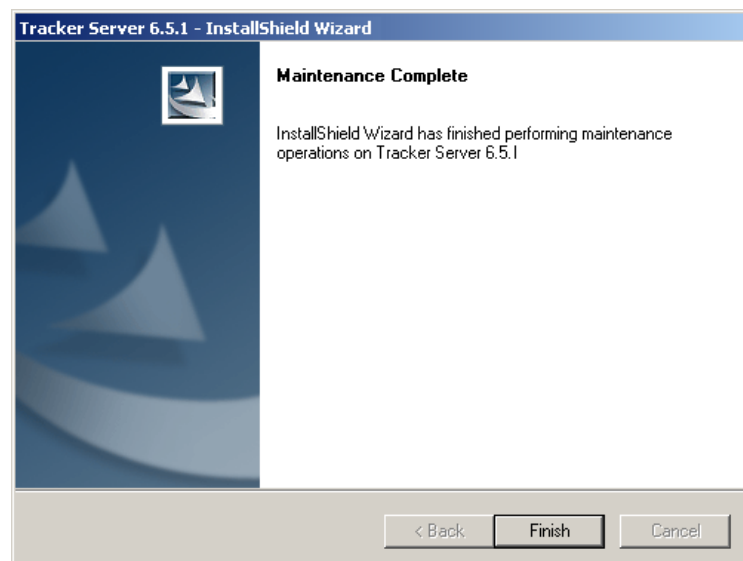
This section describes how to uninstall Tracker server.

1. From the **Control Panel**, select **Add/Remove Programs**.
2. Click the **Tracker Server 6.5.1** entry to highlight it.
3. Click **Change/Remove**.

The **Setup Status** dialog box opens.



4. A blue bar indicates the progress of the uninstallation.
5. After Tracker has been completely uninstalled, the **Maintenance Complete** dialog box opens.



6. Click **Finish** to close this dialog box.

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