

Oracle® Insurance Compliance Forms Tracker

Upgrade Installation Guide for SQL

Release 6.5.1 SP4

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Chapter 1

Overview

This guide describes how to upgrade and configure Tracker for existing installations deployed on Microsoft SQL.

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

Upgrading Tracker

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

- *Introduction to the Upgrade Process* on page 10
- *Stage 1: Pre-Installation Steps* on page 11
- *Stage 2: Upgrade the Tracker Database* on page 13
- *Stage 3: Upgrade Tracker Database from SQL Server 2000 to SQL Server 2005* on page 14
- *Stage 4: Upgrading Tracker Monitor and File Server on One Computer* on page 16
- *Stage 5: Upgrading Tracker Monitor and File Server on Separate Computers* on page 33

Introduction to the Upgrade Process

Please note the following information about the upgrade 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: Pre-Installation Steps

You need to complete the following steps before installing Tracker.

Step A: Check 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 B: Install the Sun JDK

If you will be installing the Calligo DMS, **ensure that the supported Sun Microsystems Java Development Kit (JDK) version has been installed on the computer.**

To install the Sun JDK

1. Go to the following URL:
`http://java.sun.com/products/archive/j2se/1.4.2_07/index.html`
2. Download and install the **Offline Installation** file of the Windows version of the JDK:
`j2sdk-1_4_2_07-windows-i586-p.exe`
3. From the **Control Panel**, double click the **System** icon.
4. In the **System Properties** dialog box, click the **Advanced** tab.
5. Click **Environment Variables**.
6. Create the following new **System Variables**:

Variable name	Variable value
JAVA_HOME	The JDK installation path, usually C:\J2sdk1.4.2_07
CLASSPATH	JAVA_HOME\lib\tools.jar

7. Edit the **PATH System Variable**, adding `JAVA_HOME\bin;` to the very beginning of the **PATH** variable. This ensures that Calligo will use the correct JDK version.
8. Click **OK** to save your changes.

Step C: Shut Down Tracker

Ensure that the Tracker application has been shut down on all workstations.

Step D: Check the Tracker Monitor Queue

Complete this procedure to verify that the SERFF submission queue in Tracker Monitor is empty.

1. Query the Tracker database by entering the following SQL statement:

```
SELECT COUNT(*) FROM SFFilingSubmission;
```
2. If the value returned is 0, you can proceed with the upgrade.
3. If the value returned is 1 or greater:
 - a. Ensure that the Tracker Monitor is running,
 - b. Allow at least 15 minutes for the Tracker Monitor to finish processing the filings.
 - c. Re-run the query from step 1.
 - d. If the value returned is still greater than 0, repeat steps 1 and 2.

Step E: Stop the Tracker Monitor Task

1. From the Control Panel, select **Administrative Tools > Services**.
2. In the list that appears, highlight the Tracker Monitor Service.
3. Click the “Stop” button at the top of the screen.
4. Close the **Control Panel**.

Note: It may take up to ten minutes for the Tracker Monitor to shut down after you stop the service. To check if the Tracker Monitor has stopped, open the **Task Manager**, then click the **Processes** tab. If `TkrWF.EXE` is listed in the **Image Name** column, then the Tracker Monitor is still running.

Step F: Delete Tracker Shortcuts

If you have manually added a shortcut to Tracker on any client system’s desktop, please delete it. The installation process will add a new Tracker shortcut to the client desktop. The old shortcuts therefore need to be removed.

Stage 2: Upgrade the Tracker Database

Pre-installation Requirements

Before running this update, ensure that:

- Microsoft SQL Server 2000 service pack 4, or Microsoft SQL Server 2005 service pack 2 is installed
- A Tracker 6.5.1 database is installed.
- You have completely backed up your database.
- All Tracker clients have been shut down.
- The Tracker Monitor is shut down.
- All users have logged out.

Installation Instructions

To upgrade your Tracker database, you need to run the database update batch file from the console of the database server or from a workstation with an MSSQL client that is installed and configured to connect to the desired database server.

1. Copy the directory DBUpdate\MSSQL to a temporary location on your local drive, for example, C:\Temp.
2. In DOS, change the current directory to the directory containing the script, for example, C:\Temp.
3. Run the following command:

```
66SP1MSSQL Server_Name SQL_ver Database_Name  
AdmLoginName [Password]
```

where:

- *Server_Name* is the network name of the computer containing your Tracker database
- *SQL_ver* is 2000 for SQL2000, and 2005 for SQL2005
- *Database_Name* is the name of your Tracker database.
- *AdmLoginName* is the login name of the database administrator
- *[Password]* is the password of the database administrator (optional)

Note: The first four parameters are mandatory; the fifth is optional.

Stage 3: Upgrade Tracker Database from SQL Server 2000 to SQL Server 2005

To upgrade your Tracker database from SQL Server 2000 to SQL Server 2005, you need to perform the following steps from the console of the database server or from a workstation with a client that is installed and configured to connect to the desired database server.

Note: This procedure is optional, and applies only to Tracker **databases** that have been upgraded to version 6.5.1. Tracker **DMS** supports SQL Server 2000, but not SQL Server 2005.

Important: Ensure the Tracker Monitor Service is stopped before beginning this stage. See *Step E: Stop the Tracker Monitor Task* on page 12

Step A: Backup the Current Tracker Database from SQL Server 2000

1. Log on as SA in **SQL Query Analyzer**.
2. Ensure there is enough room on the specific drive, then run the `BackupTrackerProdFromMssql2k.SQL` script. This script backs up the Tracker TrackerProd database to `C:\TEMP\Tracker.BAK`.
3. Copy `Tracker.BAK` to the SQL Server 2005 database server `C:\TEMP` folder.

Step B: Restore the Current Tracker Database in SQL Server 2005

1. Edit the `RestoreTrackerProdInMssql2K5.SQL` script. Change the path in the line `Filename` from `C:\MSSQL` to the path you use to store the data and log files of Tracker database.

Note: This path must exist when running this script.

2. Log on as SA in **Microsoft SQL Server Management Studio**.
3. Run the `RestoreTrackerProdInMssql2K5.SQL` script. This script restores the Tracker TrackerProd database from `C:\TEMP\Tracker.BAK` backup file.
4. Run the `FixTrackerUserAfterDbRestoreIn2K5.SQL` script. This script changes Tracker database compatibility level to 90 from 80. Also, it creates and grants Tracker user privileges to access Tracker database.
5. Ensure the TCP/IP protocol is enabled for the database instance:
 - a. Select **SQL Server Configuration Manager > SQL Server 2005 Network Configuration > Protocols for *your_database_instance* name**.
 - b. Ensure **TCP/IP** is enabled. In some new installations of SQL 2005, TCP/IP connectivity to SQL 2005 is disabled by default.

Step C: Tracker Client and Monitor Upgrade

On each client and the Tracker Monitor server, perform the following steps:

1. Install SQL Server 2005 Native Client ODBC driver.
2. In ODBC Data Source Administrator, click **System DSN**.
3. Remove the existing TR32 data source.
4. Add new TR32 data source with **SQL Native Client** driver.
5. Configure this new data source to point to the Tracker database server and TrackerProd database.

Stage 4: Upgrading Tracker Monitor and File Server on One Computer

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

If you want to upgrade the Tracker File Server and Tracker Monitor on *separate* computers, please see *Stage 5: Upgrading Tracker Monitor and File Server on Separate Computers* on page 33.

Part 1: Upgrade the Tracker File Server: Calligo Upgrade

This section describes upgrading Calligo Core on the Tracker File Server. If you are using Calligo 5.3, upgrading to Calligo 5.4 is optional, and you can skip this part. Tracker 6.5.1 supports both Calligo 5.3 and Calligo 5.4.

Additional steps to upgrading the Tracker File Server are described in *Part 2: Upgrade the Tracker File Server: Run the Tracker File Server Setup* on page 21.

Step A: Back Up the Current System

1. Open the InfoSource Administrator.
2. From the **InfoSource** menu, click **Backup IDB** to back up the `local.idb`.
3. Back up all repositories on the system.
4. Export the following registry key:
`HKEY_LOCAL_MACHINE\SOFTWARE\InSystems Technologies Inc.\Tracker`
5. In the Registry Key, click into a folder described above.
6. Click **Registry > Export Registry File...**
7. Enter a file name and save.

This creates a `.reg` file with all value settings within the folders.

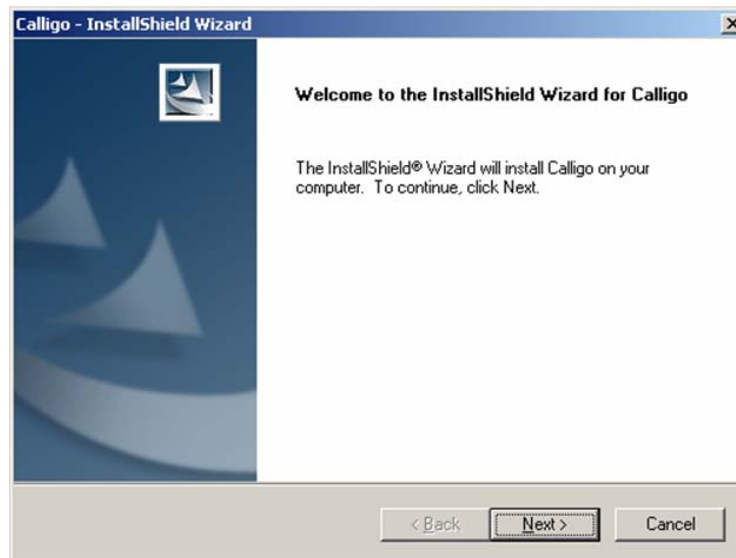
Step B: Uninstall Calligo Core

1. From the Control Panel, select **Add/Remove Programs**.
2. Select **Calligo**, then click **Remove**.
3. Delete the Calligo installation folder, which is usually:
`C:\Program Files\InSystems Corporation\Calligo`

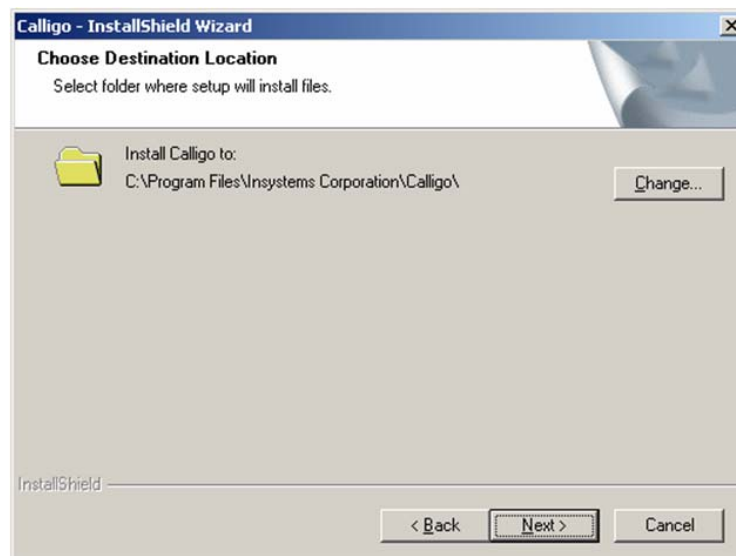
Step C: Install Calligo Core

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.

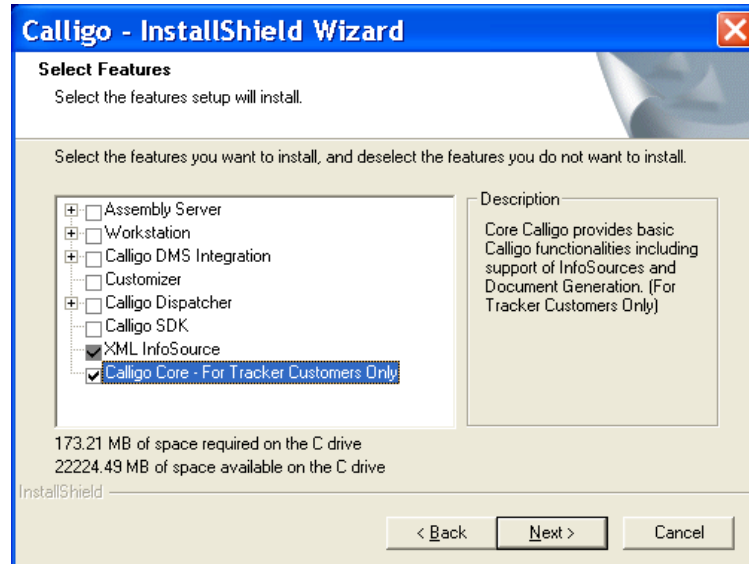


2. Click **Next**.
3. The **Choose Destination Location** dialog box displays the location where Calligo will be installed.



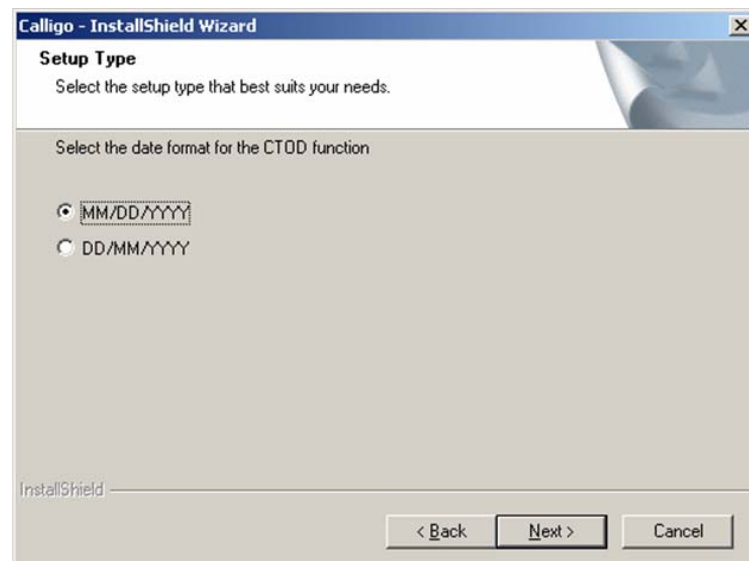
To change the location:

- a. Click **Change**.
- b. In the **Choose Folder** dialog box, select the folder you want to install Calligo.
- c. Click **OK**.
4. Click **Next**.
5. 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.



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

Calligo - InstallShield Wizard

Calligo DMS InfoSources

Please supply parameters to configure your CalligoDMS InfoSource.

Server:

Port:

Connection:

InstallShield

< Back Next > Cancel

- 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.

Calligo - InstallShield Wizard

Ready to Install the Program

The wizard is ready to begin installation.

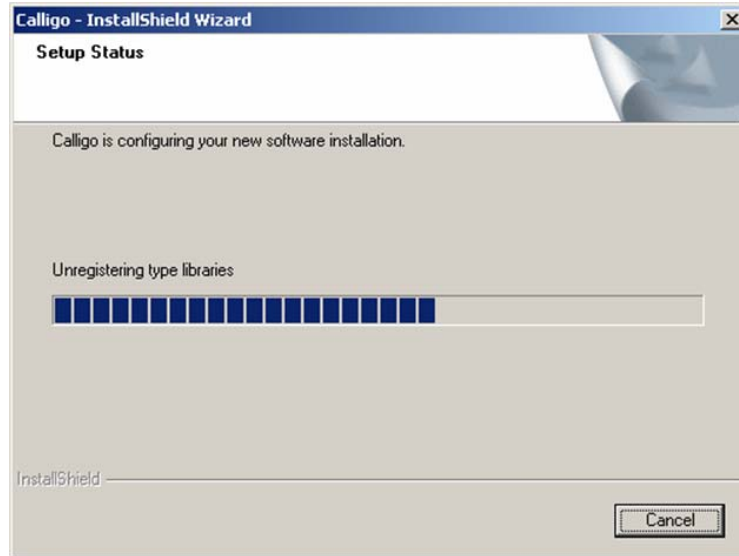
Click Install to begin the installation.

If you want to review or change any of your installation settings, click Back. Click Cancel to exit the wizard.

InstallShield

< Back Install Cancel

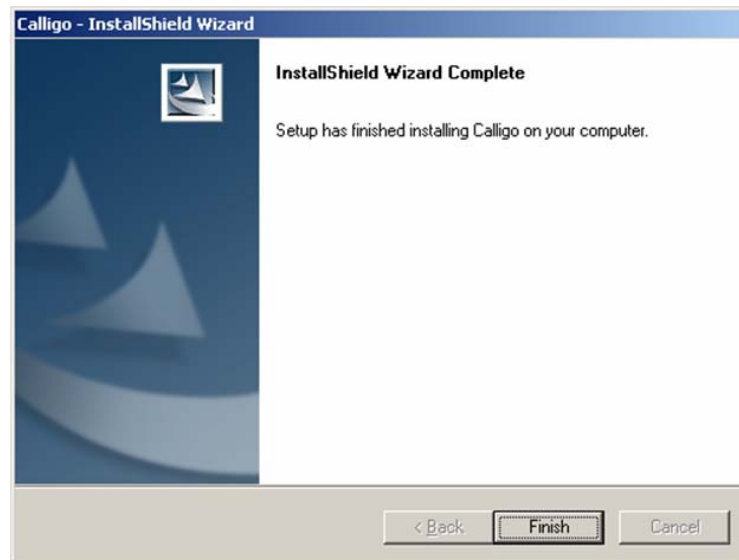
8. To review or change any of your installation settings, click **Back**, otherwise click **Install**.
9. The **Setup Status** dialog box opens.



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

10. If you are prompted to overwrite existing files, click **Yes** for each file.
To stop the installation process, click **Cancel**.

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



11. Click **Finish** to close the installation program.
12. If prompted, reboot the system.

Step D: Restore Your Calligo Settings

In this step, you configure the InfoSource Administrator to point to the original .idb file:

1. In the InfoSource Administrator, select **InfoSource >Import**.
2. Select the .idb file that you previously backed up before the installation as the **Source IDB File**.
3. Select the InfoSources you want to import.
4. Ensure that the values in the registry keys described above are the same as those before upgrading. Use the .reg file previously created to compare values.

Part 2: Upgrade the Tracker File Server: Run the Tracker File Server Setup

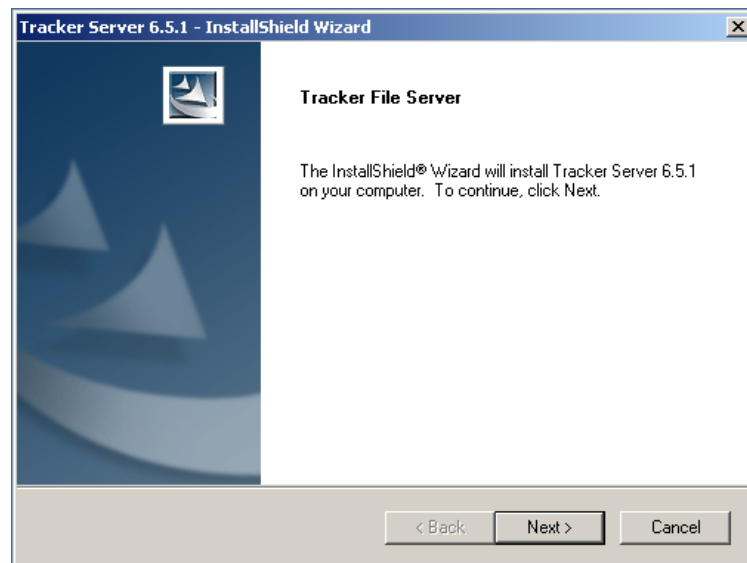
In this step, you run the setup application to actually upgrade Tracker.

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.

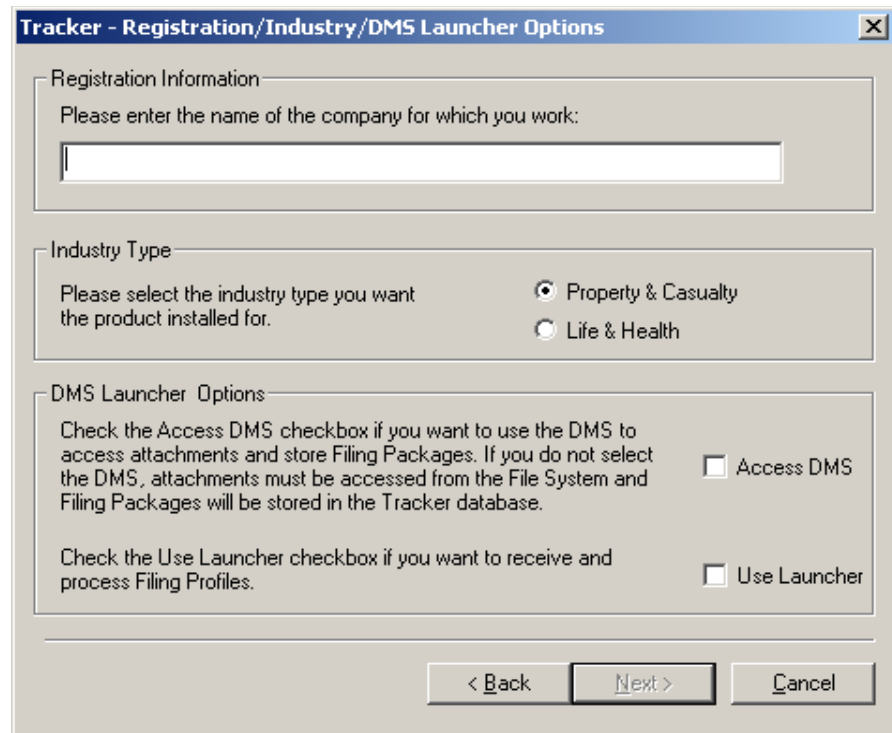
1. From the Setup folder on the Tracker installation CD, run setup.exe.
2. If a Security Warning dialog box appears, click **Run**.

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

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



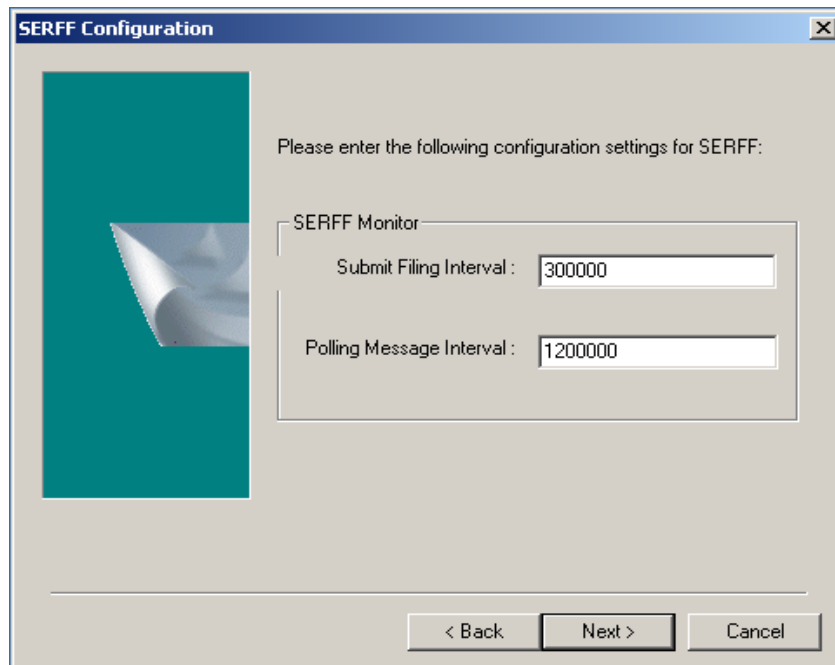
3. Click **Next**.
4. If the system detects a previous version of Tracker and you are asked if you want to upgrade it, click **Yes**.
5. On the **Registration** dialog box, enter your company name.



The dialog box is titled "Tracker - Registration/Industry/DMS Launcher Options". It contains three sections: "Registration Information" with a text field for company name; "Industry Type" with radio buttons for "Property & Casualty" (selected) and "Life & Health"; and "DMS Launcher Options" with checkboxes for "Access DMS" and "Use Launcher", both of which are unchecked. At the bottom are buttons for "< Back", "Next >", and "Cancel".

6. Click **Next**.

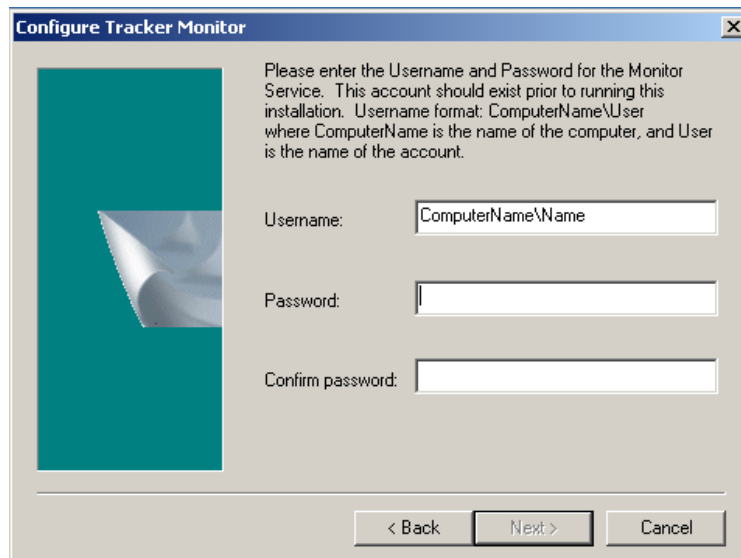
The **SERFF Configuration** dialog box opens.



The dialog box is titled "SERFF Configuration". It features a teal graphic on the left and a text prompt: "Please enter the following configuration settings for SERFF:". Below this is a "SERFF Monitor" section with two input fields: "Submit Filing Interval" set to "300000" and "Polling Message Interval" set to "1200000". At the bottom are buttons for "< Back", "Next >", and "Cancel".

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

Important: It must be *identical* to the username you used in the previous version of Tracker Monitor.

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\tkrwmfon*

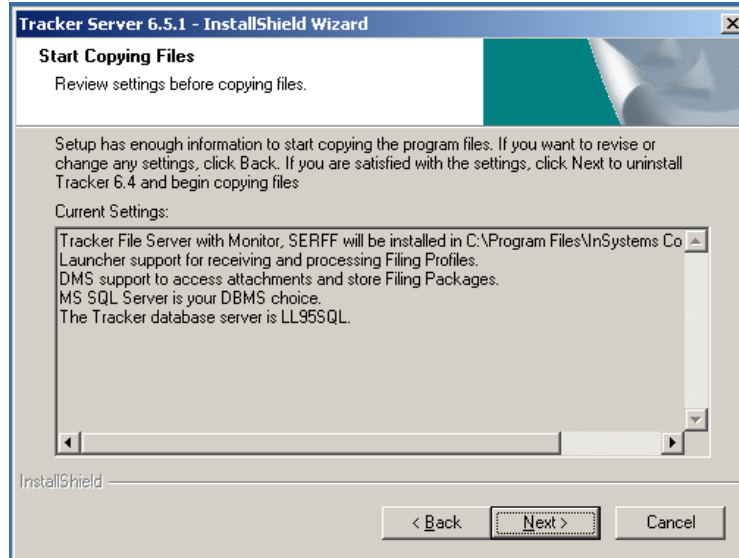
- b. Enter the **Password** assigned to the Monitor user account. (Your password will not appear when you type it, but will be displayed as asterisks.)

Important: It must be *identical* to the password used for the previous version of Tracker Monitor.

- c. In the **Confirm Password** field, enter the password again.
- d. Click **Next**.

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

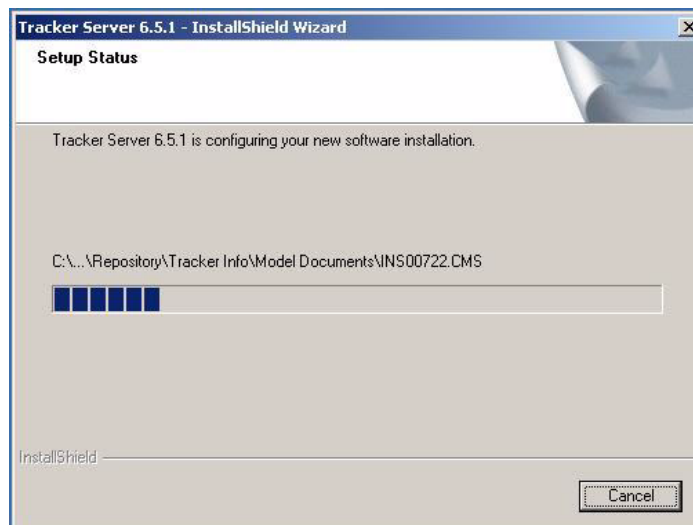
8. In the **Start Copying Files** dialog box, review your **Current Settings**, then click **Next**.



9. 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 system will delete old files, but no progress display will be shown. The system will be unresponsive until the old files have been deleted.

The **Setup Status** dialog box opens.

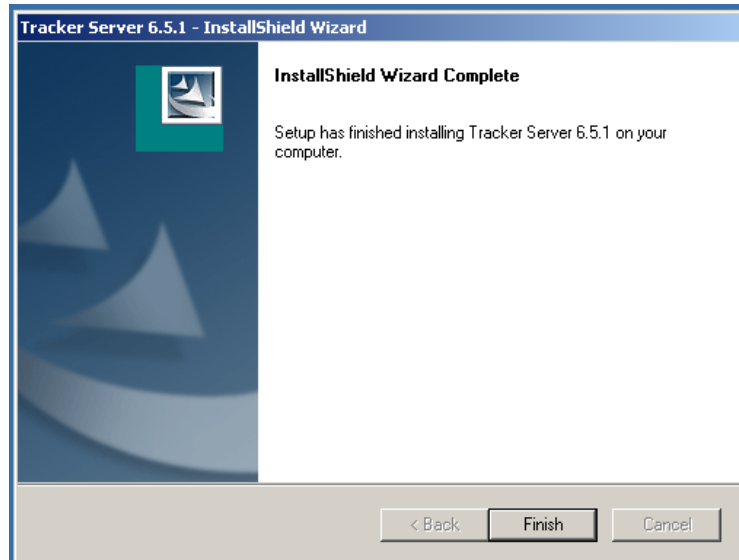


The installation program begins copying the required files. A blue progress bar indicates the progress of the installation.

10. If you are prompted to overwrite existing files, click **Yes** for each file.

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

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



11. Click **Finish** to close the installation program.
12. If prompted, reboot the system.
13. Ensure that you share the Tracker folder on the Tracker server for the client installation. The default location is:
`C:\Program Files\Insystems Corporation`
-OR-
`C:\Program Files\Whitehill Technologies`
14. 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.

Part 3: Upgrade the Tracker Client: Calligo Upgrade

This section describes how to upgrade the Tracker client.

The Tracker client upgrade will automatically uninstall the previous Tracker client and install Tracker 6.5.1.

Note: Complete this stage only on systems that are currently running the Tracker client.

Note: If you are using Calligo 5.3, upgrading to Calligo 5.4 is optional, and you can skip this part. Tracker 6.5.1 supports both Calligo 5.3 and Calligo 5.4.

Step A: Back Up the Current System

1. Open the InfoSource Administrator.
2. From the **InfoSource** menu, click **Backup IDB** to back up the local.idb.
3. Back up all repositories on the system.
4. Export the following registry key:

HKEY_LOCAL_MACHINE\SOFTWARE\InSystems Technologies
Inc.\Tracker

5. In the Registry Key, click into a folder described above.
6. Click **Registry > Export Registry File...**
7. Enter a file name and save.

This creates a .reg file with all value settings within the folders.

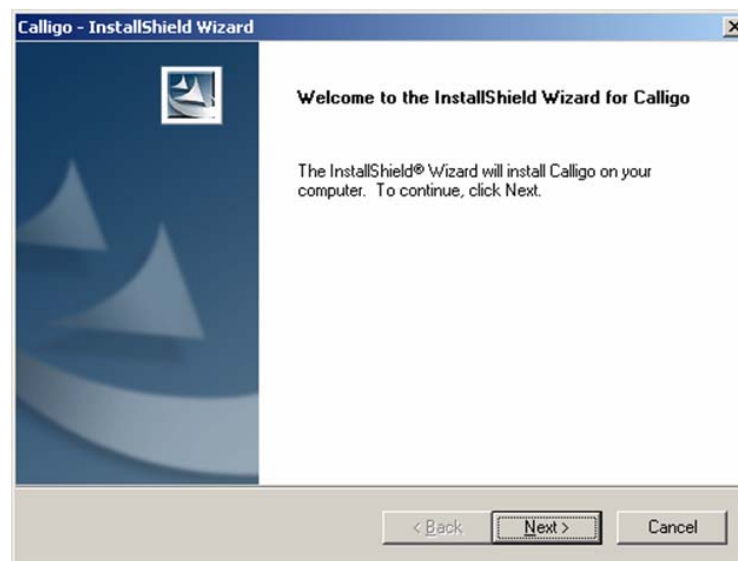
Step B: Uninstall Calligo Core

1. From the Control Panel, select **Add/Remove Programs**.
2. Select **Calligo**, then click **Remove**.
3. Delete the Calligo installation folder, which is usually:
C:\Program Files\InSystems Corporation\Calligo

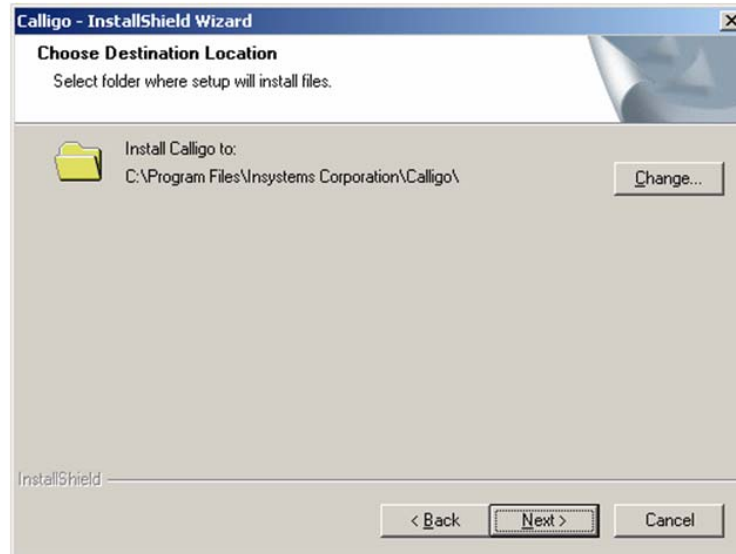
Step C: Install Calligo Core

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.

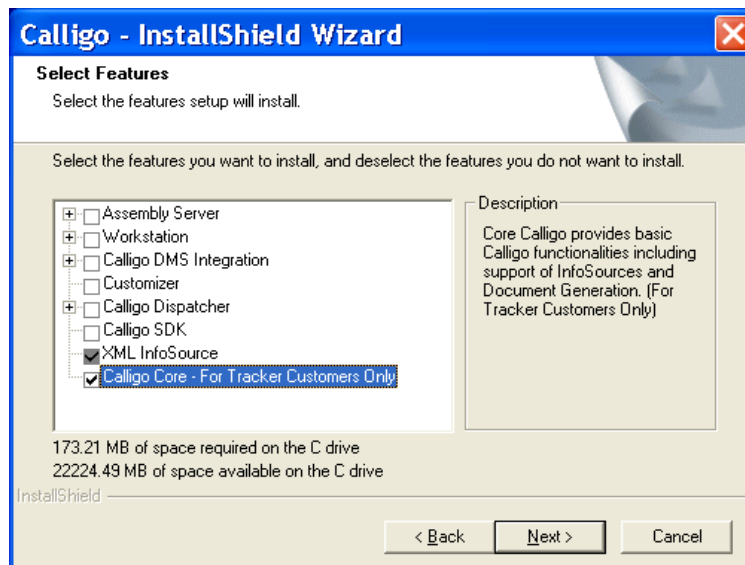


2. Click **Next**.
3. The **Choose Destination Location** dialog box displays the location where Calligo will be installed.

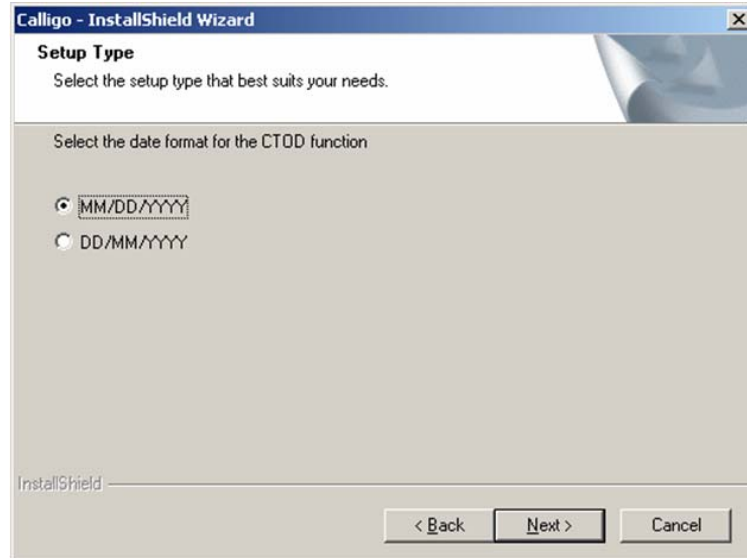


To change the location:

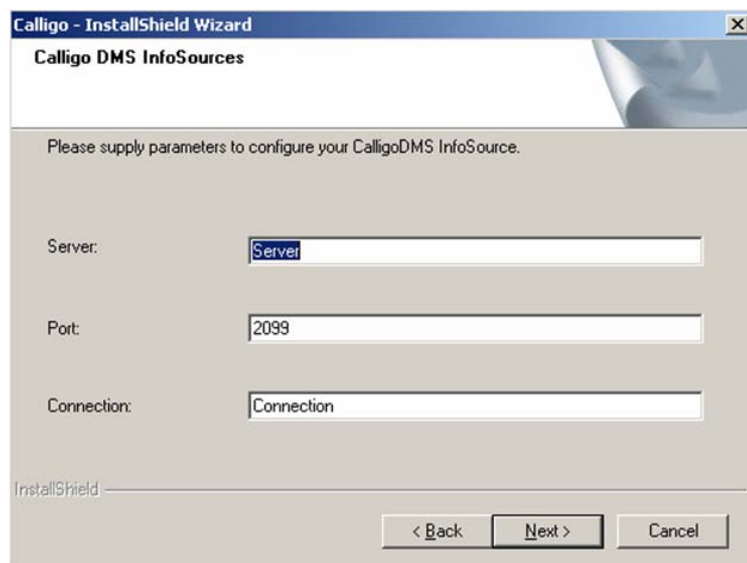
- a. Click **Change**.
- b. In the **Choose Folder** dialog box, select the folder you want to install Calligo.
- c. Click **OK**.
4. Click **Next**.
5. On the **Select Features** dialog box, ensure that the **Calligo Core** check box is selected, then click **Next**.



The **Setup Type** dialog box opens.

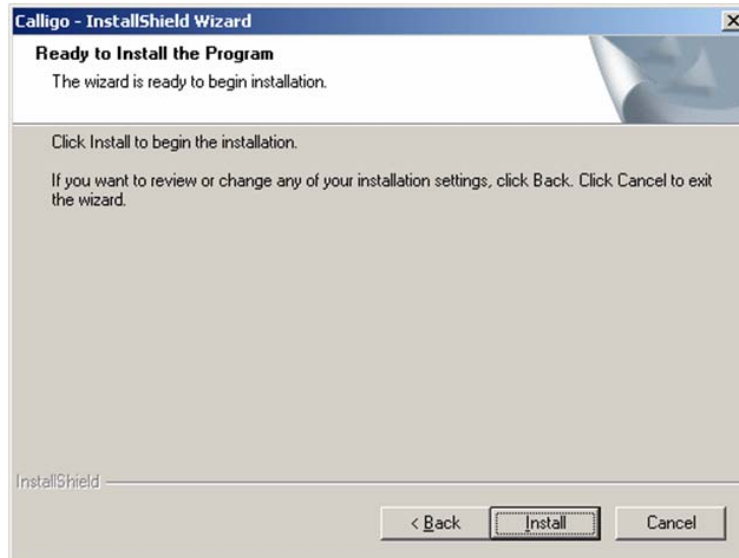


6. Choose the default date format for the CTOD function, then click **Next**.
7. If you had selected **Calligo DMS Integration** in the **Select Features** dialog box, then the **Calligo DMS InfoSources** dialog box opens.

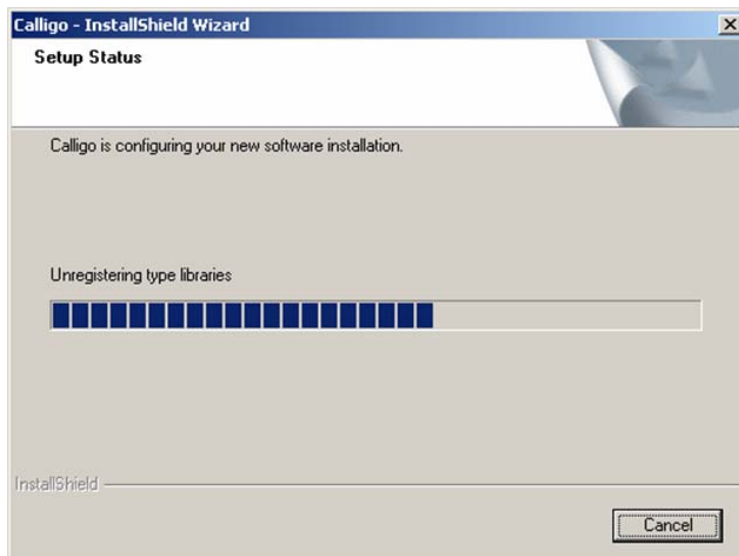


- a. Enter the name of the CalligoDMS **Server** and its **Port** number.
- b. In the **Connection** field, enter the name of the CalligoDMS database, then click **Next**.

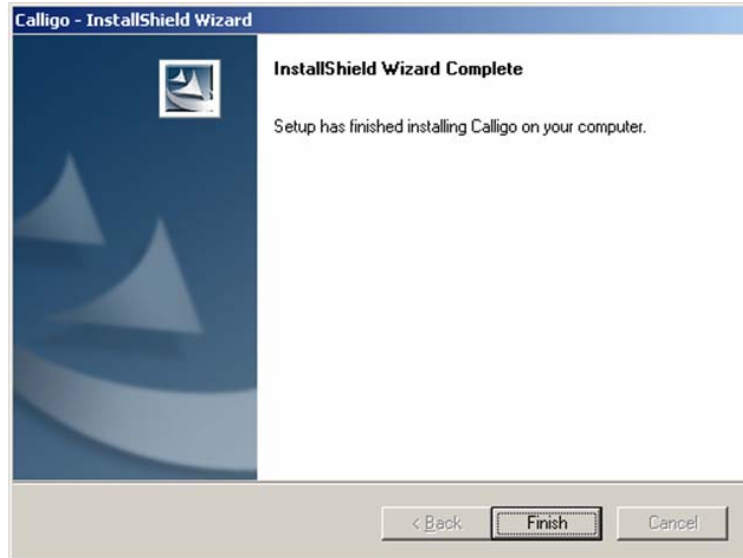
The **Ready to Install the Program** dialog box opens.



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



- The installation program begins copying the required files. A blue progress bar indicates the progress of the installation.
10. If you are prompted to overwrite existing files, click **Yes** for each file.
To stop the installation process, click **Cancel**.
When the installation is complete, the **InstallShield Wizard Complete** dialog box opens.



11. Click **Finish** to close the installation program.
12. If prompted, reboot the system.

Step D: Restore Your Calligo Settings

In this step, you configure the InfoSource Administrator to point to the original .idb file:

1. In the InfoSource Administrator, select **InfoSource >Import**.
2. Select the .idb file that you previously backed up before the installation as the **Source IDB File**.
3. Select the InfoSources you want to import.
4. Ensure that the values in the registry keys described above are the same as those before upgrading. Use the .reg file previously created to compare values.

Step E: Run the Tracker Client Setup

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

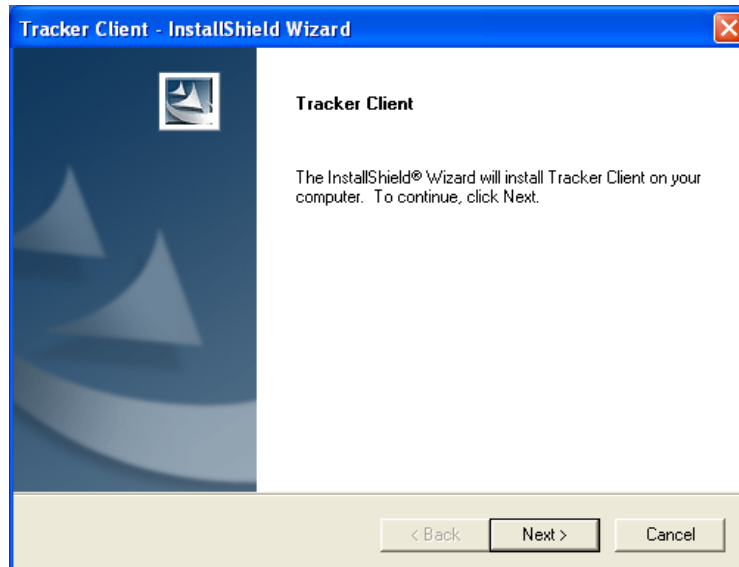
Alternatively, you can use UNC notation to specify a network location for the installation, depending on the Tracker file server setup, for example,

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

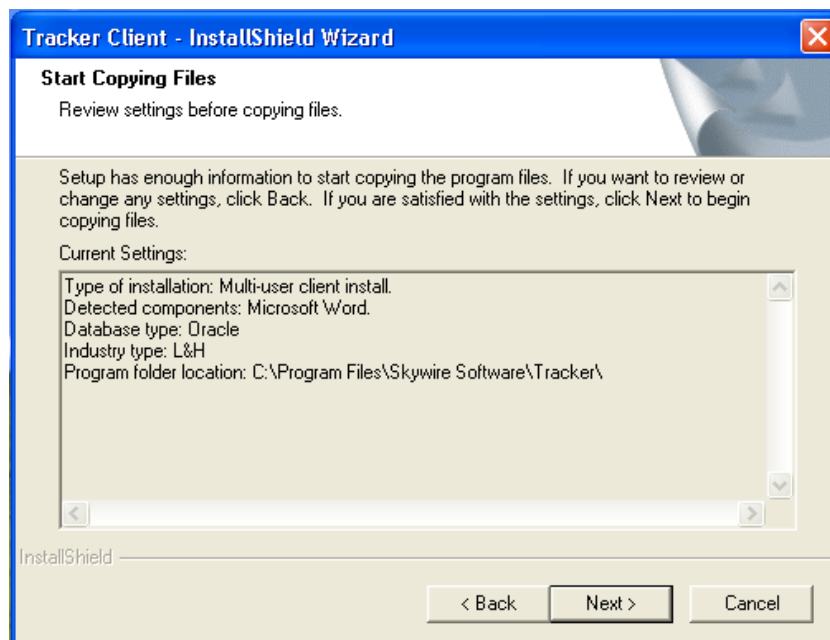
where *Tracker_server* is the name of the Tracker File Server.

2. If the system detects a previous version of Tracker and you are asked if you want to upgrade it, click **Yes**.

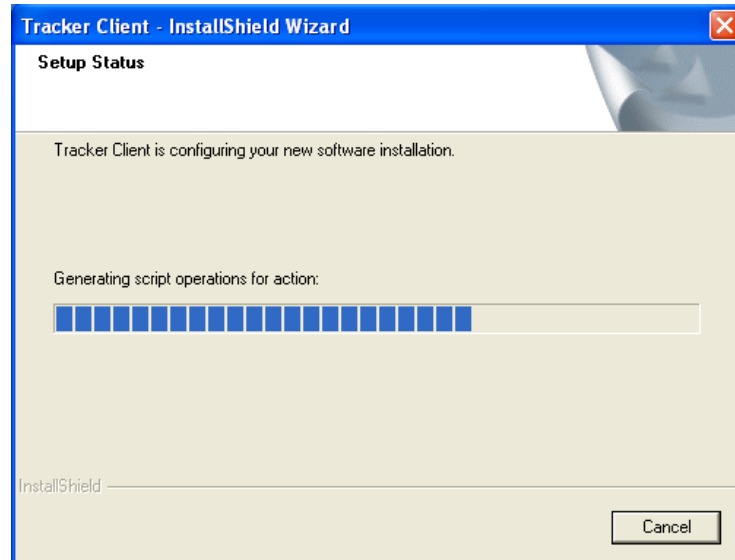
The **InstallShield Wizard** opens. A progress window temporarily appears.
The **Tracker Client InstallShield Wizard** dialog box opens.



3. Click **Next**.
4. The **Choose Destination Location** dialog box opens, displaying the installation location.
5. In the **Start Copying Files** dialog box, review your **Current Settings**.



6. 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**.
7. The **Setup Status** dialog box opens.

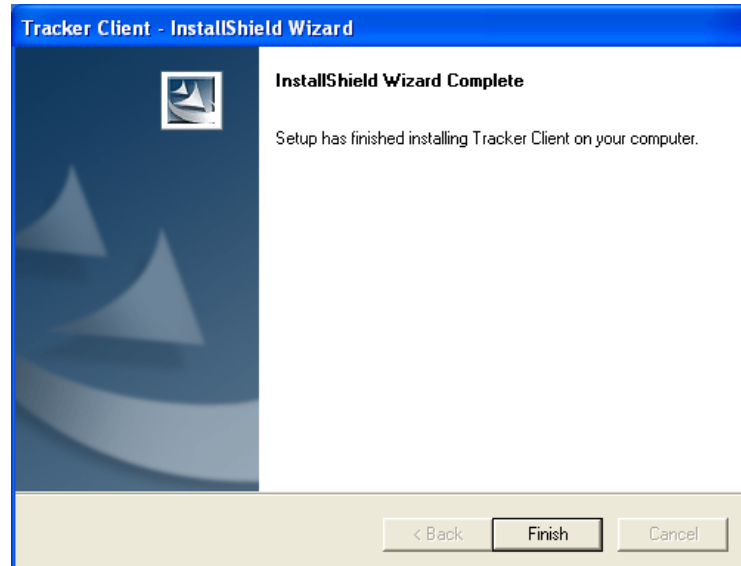


The installation program begins copying the required files. A blue progress bar indicates the progress of the installation.

8. If you are prompted to overwrite existing files, click **Yes** for each file.

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.

Stage 5: Upgrading Tracker Monitor and File Server on Separate Computers

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

If you want to upgrade the Tracker File Server and Tracker Monitor on the *same* computer, please see *Stage 4: Upgrading Tracker Monitor and File Server on One Computer* on page 16.

Part 1: Upgrade the Tracker File Server: Calligo Upgrade

This section describes upgrading Calligo Core on the Tracker File Server. If you are using Calligo 5.3, upgrading to Calligo 5.4 is optional, and you can skip this part. Tracker 6.5.1 supports both Calligo 5.3 and Calligo 5.4.

Additional steps to upgrading the Tracker File Server are described in *Part 2: Upgrade the Tracker File Server: Run the Tracker File Server Setup* on page 36.

Step A: Back Up the Current System

1. Open the InfoSource Administrator.
2. From the **InfoSource** menu, click **Backup IDB** to back up the `local.idb`.
3. Back up all repositories on the system.
4. Export the following registry key:
`HKEY_LOCAL_MACHINE\SOFTWARE\InSystems Technologies Inc.\Tracker`
5. In the Registry Key, click into a folder described above.
6. Click **Registry > Export Registry File...**
7. Enter a file name and save.

This creates a `.reg` file with all value settings within the folders.

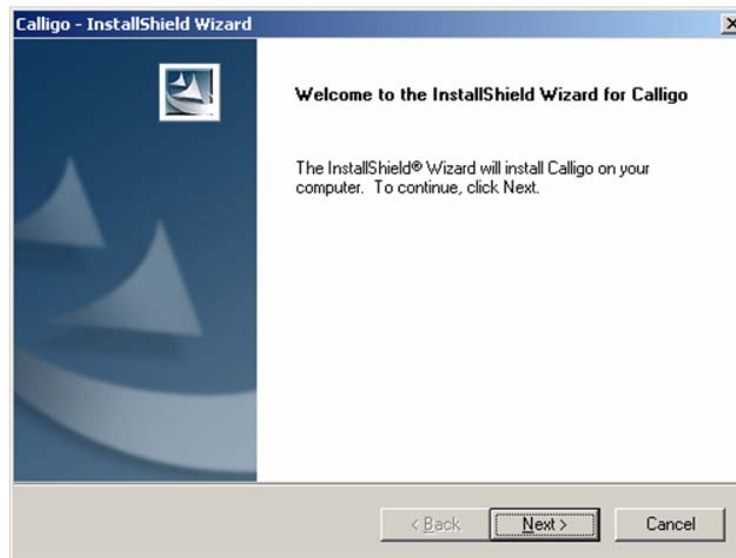
Step B: Uninstall Calligo Core

1. From the Control Panel, select **Add/Remove Programs**.
2. Select **Calligo**, then click **Remove**.
3. Delete the Calligo installation folder, which is usually:
`C:\Program Files\InSystems Corporation\Calligo`

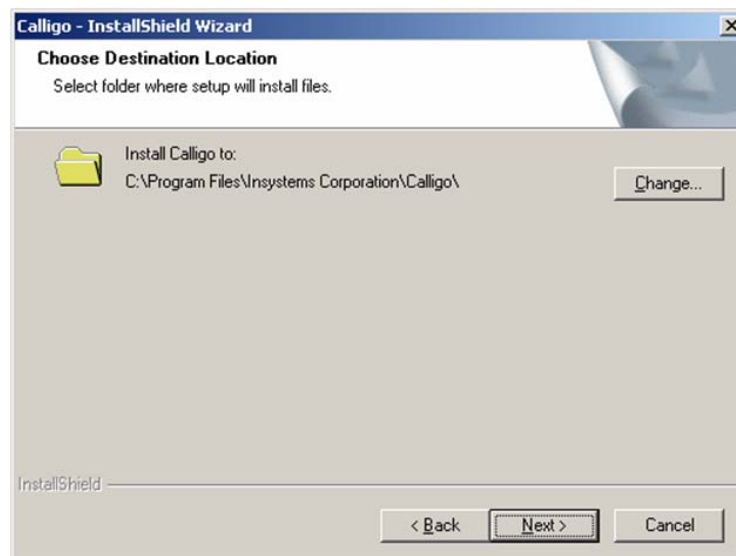
Step C: Install Calligo Core

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.

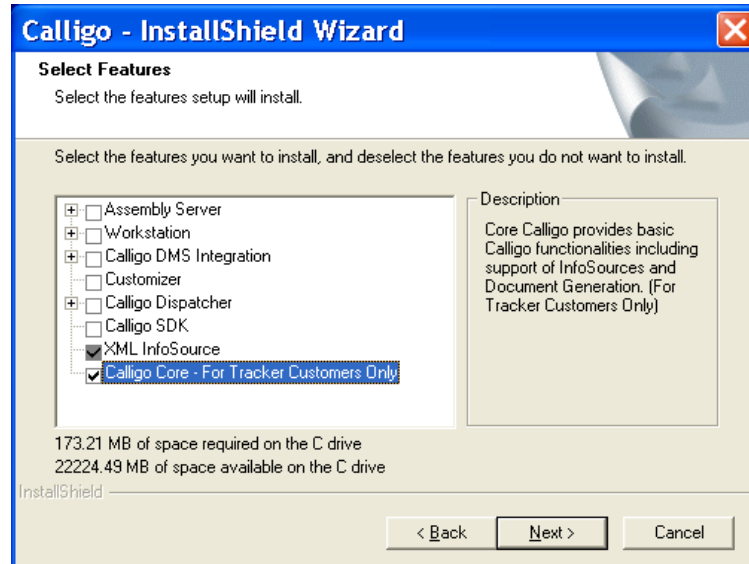


2. Click **Next**.
3. The **Choose Destination Location** dialog box displays the location where Calligo will be installed.



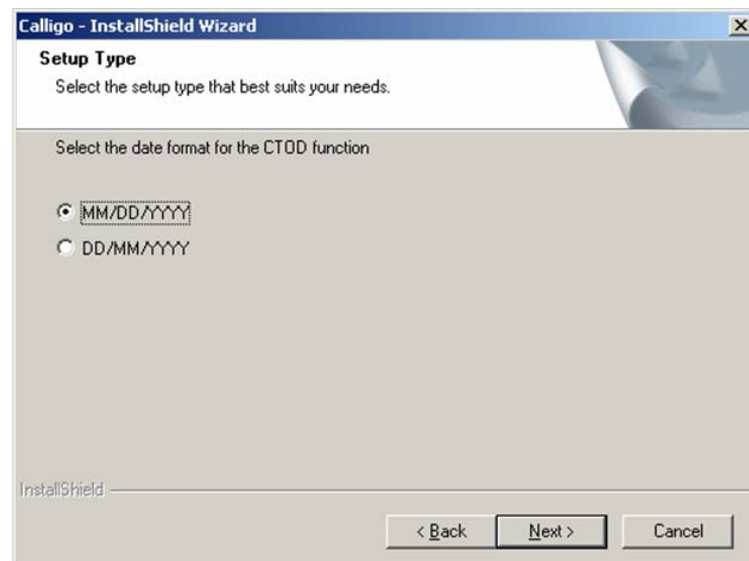
To change the location:

- a. Click **Change**.
- b. In the **Choose Folder** dialog box, select the folder you want to install Calligo.
- c. Click **OK**.
4. Click **Next**.
5. 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.



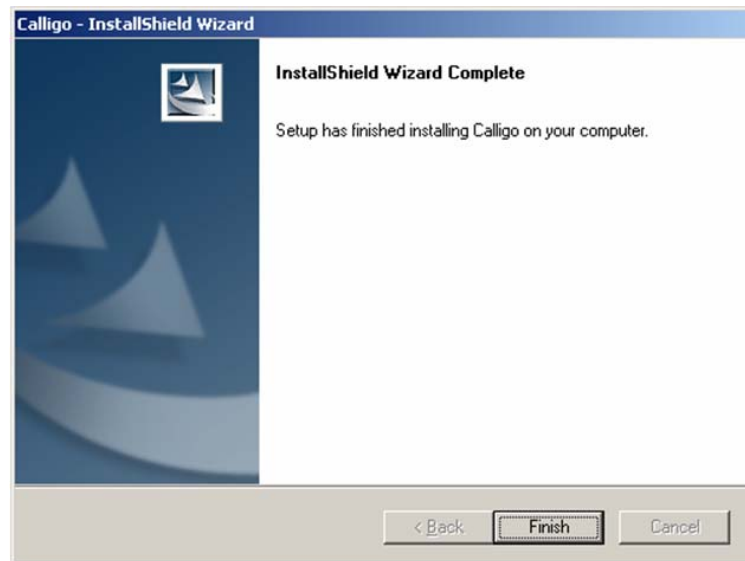
6. Choose the default date format for the CTOD function, then click **Next**.
7. In the **Start Copying Files** dialog box, review your **Current Settings**, then click **Next**.
8. If the settings are correct, click **Next**, otherwise click **Back** until you have reached the step you want to correct. Make any necessary corrections, then click **Next**.

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

9. If you are prompted to overwrite existing files, click **Yes** for each file.

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

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



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

Step D: Restore Your Calligo Settings

In this step, you configure the InfoSource Administrator to point to the original `.idb` file:

1. In the InfoSource Administrator, select **InfoSource >Import**.
2. Select the `.idb` file that you previously backed up before the installation as the **Source IDB File**.
3. Select the InfoSources you want to import.
4. Ensure that the values in the registry keys described above are the same as those before upgrading. Use the `.reg` file previously created to compare values.

Part 2: Upgrade the Tracker File Server: Run the Tracker File Server Setup

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

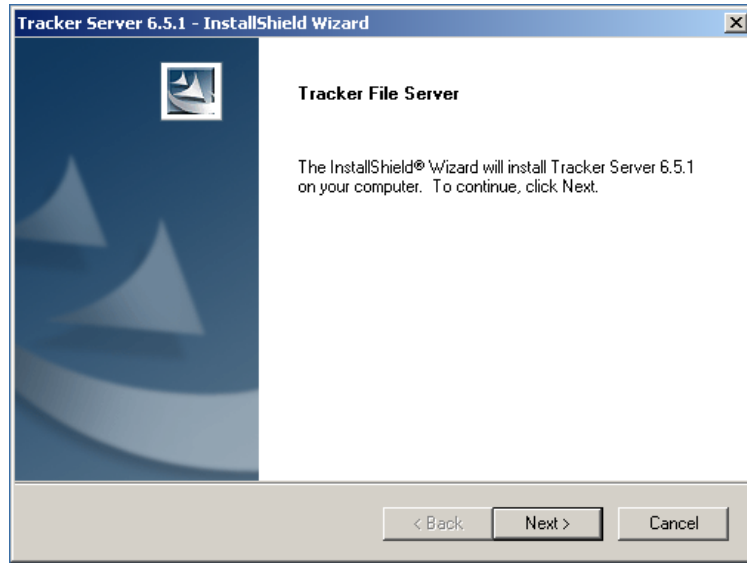
Important: If the Tracker File Server and DMS will be installed on the same system, install the Tracker File Server first and then install the DMS. If you need to uninstall Tracker, uninstall the DMS first, and then uninstall the Tracker File Server.

1. From the `Setup` folder on the Tracker installation CD, run `setup.exe`.

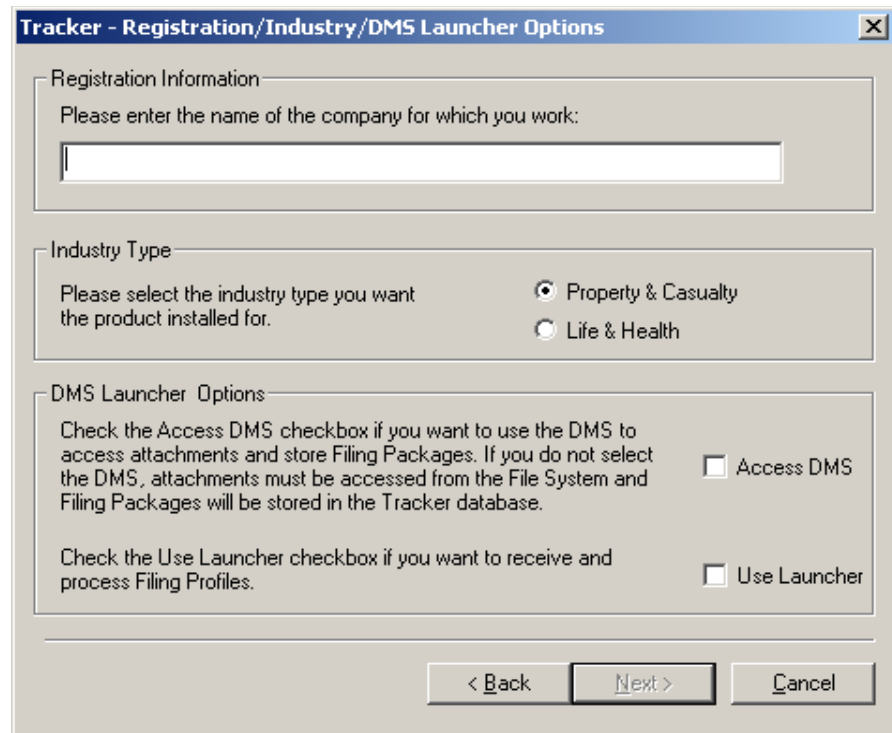
2. If a **Security Warning** dialog box appears, click **Run**. If the system detects a previous version of Tracker and you are asked if you want to upgrade it, click **Yes**.

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

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



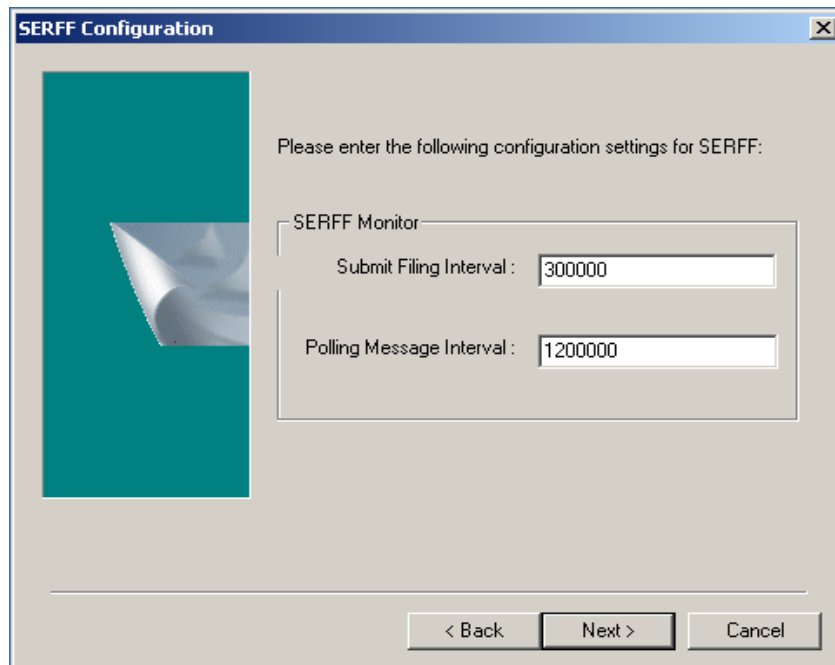
3. Click **Next**.
4. If the system detects a previous version of Tracker, you are asked if you want to upgrade it. Click **Yes**.
5. On the **Registration** dialog box, enter your company name.



The dialog box is titled "Tracker - Registration/Industry/DMS Launcher Options". It contains three sections: "Registration Information" with a text input field for company name; "Industry Type" with radio buttons for "Property & Casualty" (selected) and "Life & Health"; and "DMS Launcher Options" with checkboxes for "Access DMS" and "Use Launcher". Navigation buttons at the bottom are "< Back", "Next >", and "Cancel".

6. Click **Next**.

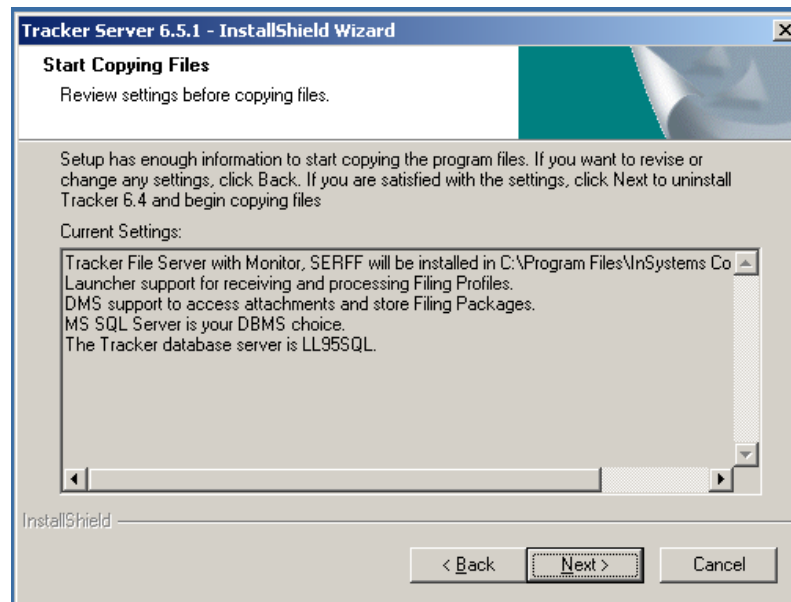
The **SERFF Configuration** dialog box opens.



The dialog box is titled "SERFF Configuration". It features a teal graphic on the left and a text input area on the right. The text area says "Please enter the following configuration settings for SERFF:" and contains a "SERFF Monitor" section with two input fields: "Submit Filing Interval" (value: 300000) and "Polling Message Interval" (value: 1200000). Navigation buttons at the bottom are "< Back", "Next >", and "Cancel".

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

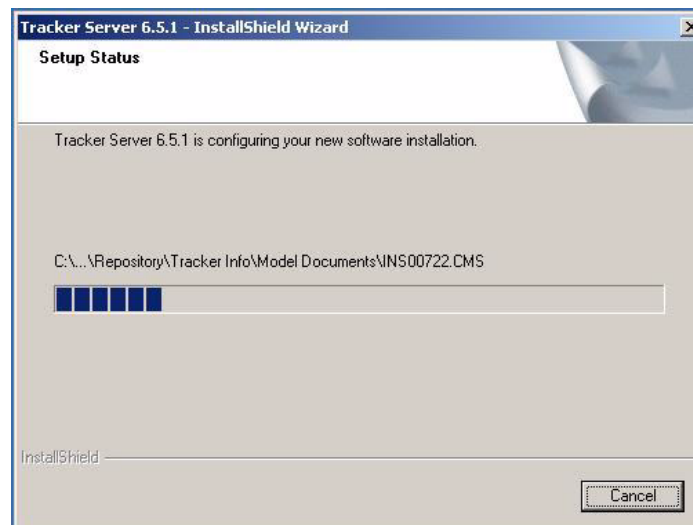
8. In the **Start Copying Files** dialog box, review your **Current Settings**.



9. 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 system will delete old files, but no progress display will be shown. The system will be unresponsive until the old files have been deleted.

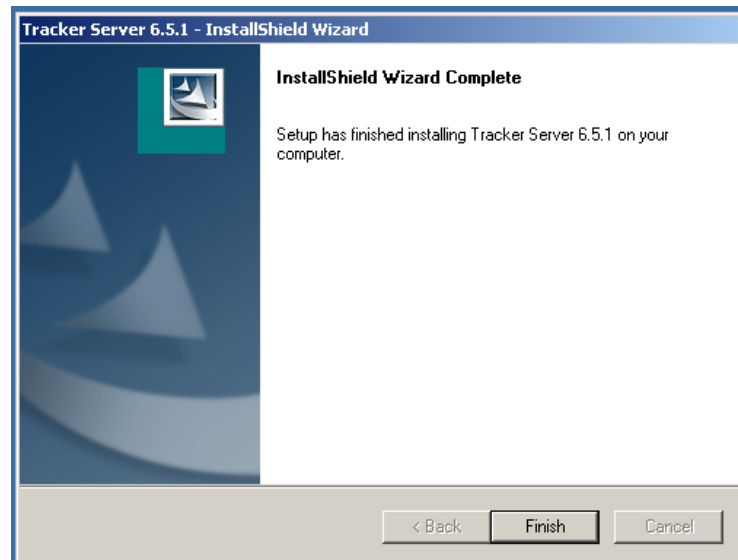
The **Setup Status** dialog box opens.



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

10. If you are prompted to overwrite existing files, click **Yes** for each file.
To stop the installation process, click **Cancel**.

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



11. Click **Finish** to close the installation program.
12. If prompted, reboot the system.
13. Ensure that you share the Tracker folder on the Tracker server for the client installation. The default location is:
`C:\Program Files\Insystems Corporation`
-OR-
`C:\Program Files\Whitehill Technologies`
14. 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.

Part 3: Upgrade the Tracker Monitor: Calligo Upgrade

This section describes upgrading Calligo Core on the Tracker Monitor. If you are using Calligo 5.3, upgrading to Calligo 5.4 is optional, and you can skip this part. Tracker 6.5.1 supports both Calligo 5.3 and Calligo 5.4.

Additional steps to upgrading the Tracker Monitor are described in *Part 4: Upgrade the Tracker Monitor: Run the Tracker File Server Setup* on page 45.

Step A: Back Up the Current System

1. Open the InfoSource Administrator.
2. From the **InfoSource** menu, click **Backup IDB** to back up the local.idb.
3. Back up all repositories on the system.

4. Export the following registry key:
HKEY_LOCAL_MACHINE\SOFTWARE\InSystems Technologies
Inc.\Tracker
5. In the Registry Key, click into a folder described above.
6. Click **Registry > Export Registry File...**
7. Enter a file name and save.

This creates a .reg file with all value settings within the folders.

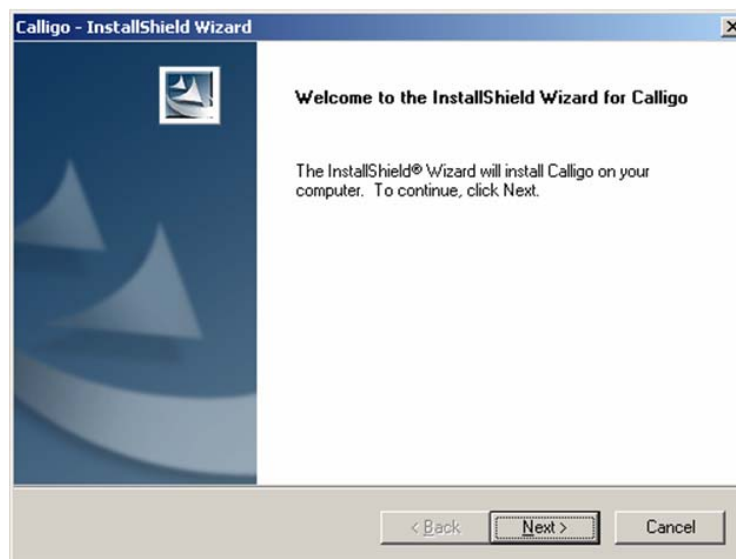
Step B: Uninstall Calligo Core

1. From the Control Panel, select **Add/Remove Programs**.
2. Select **Calligo**, then click **Remove**.
3. Delete the Calligo installation folder, which is usually:
C:\Program Files\InSystems Corporation\Calligo

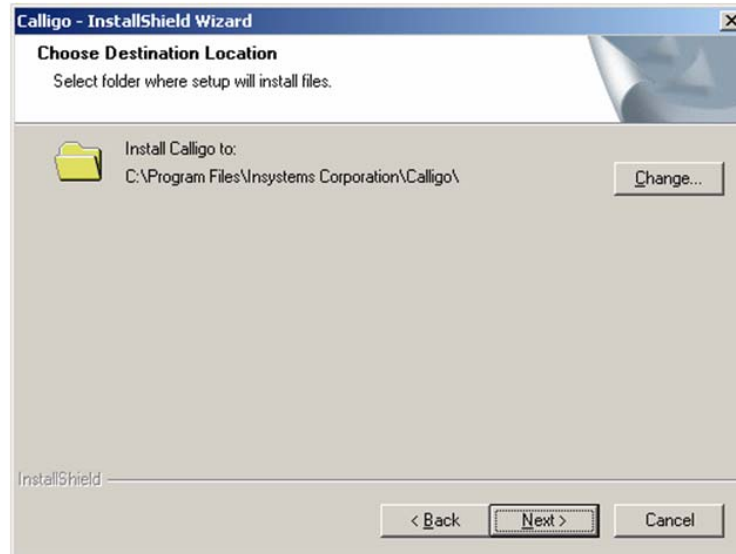
Step C: Install Calligo Core

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.

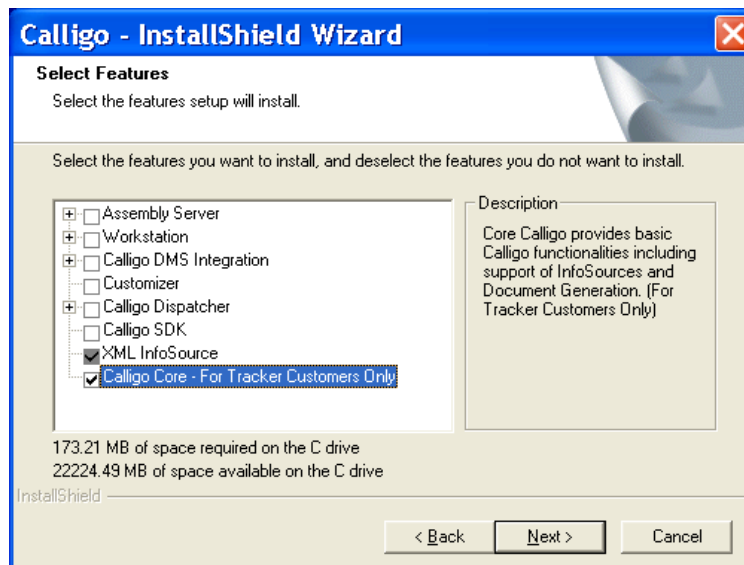


2. Click **Next**.
3. The **Choose Destination Location** dialog box displays the location where Calligo will be installed.



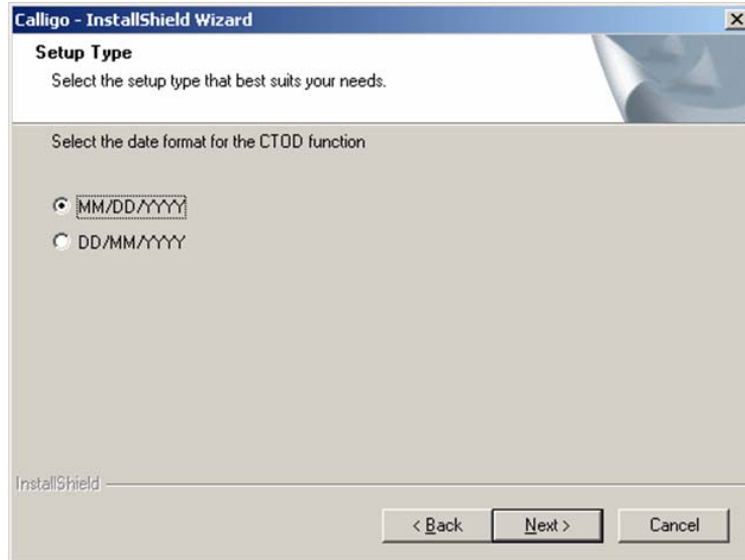
To change the location:

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

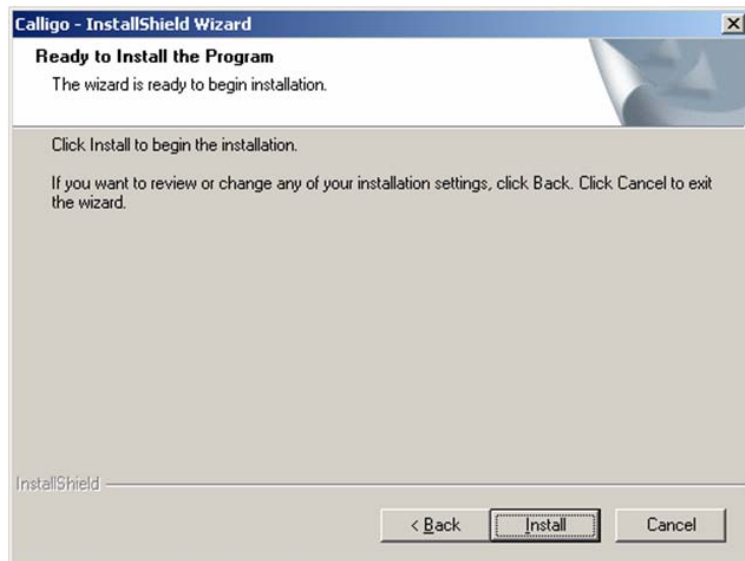


A warning message may appear asking to make sure Livelink services are stopped before proceeding to the next step.

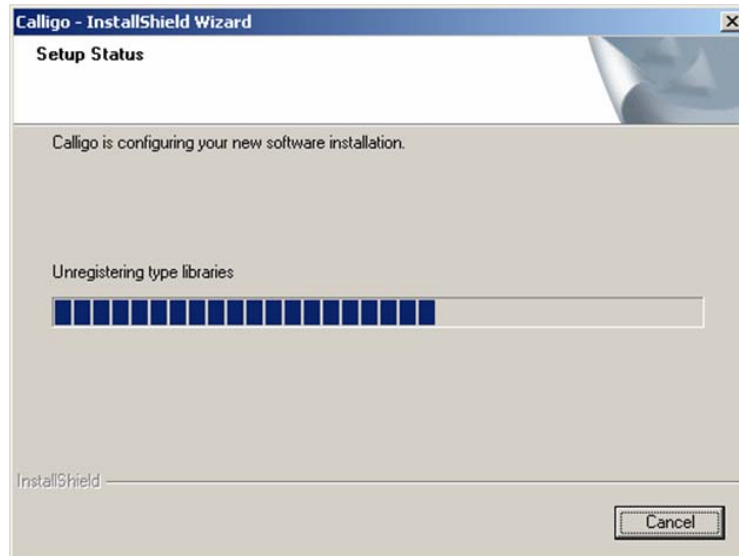
The **Setup Type** dialog box opens.



6. Choose the default date format for the CTOD function, then click **Next**. The **Ready to Install the Program** dialog box opens.



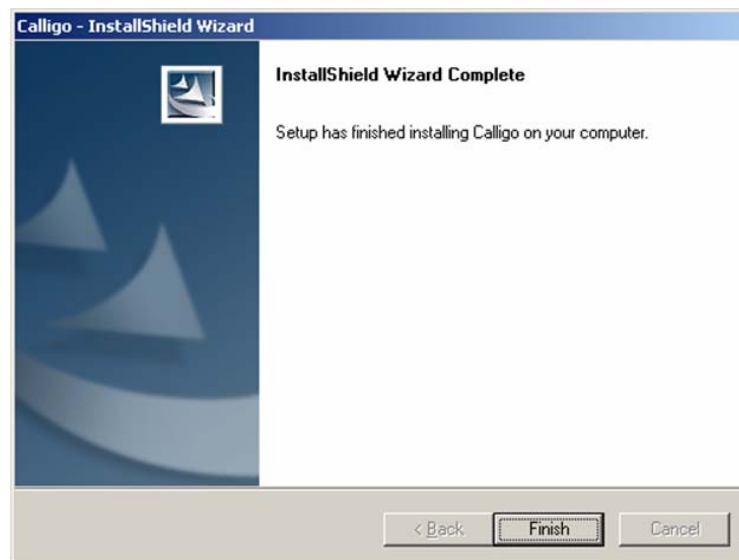
7. To review or change any of your installation settings, click **Back**, otherwise click **Install**.
8. The **Setup Status** dialog box opens.



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

9. If you are prompted to overwrite existing files, click **Yes** for each file.
To stop the installation process, click **Cancel**.

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



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

Step D: Restore Your Calligo Settings

In this step, you configure the InfoSource Administrator to point to the original .idb file:

1. In the InfoSource Administrator, select **InfoSource >Import**.
2. Select the `.idb` file that you previously backed up before the installation as the **Source IDB File**.
3. Select the InfoSources you want to import.
4. Ensure that the values in the registry keys described above are the same as those before upgrading. Use the `.reg` file previously created to compare values.

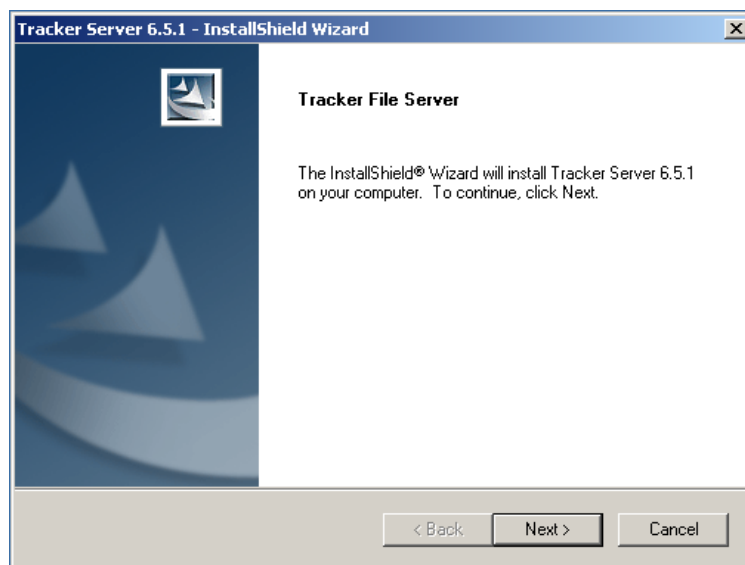
Part 4: Upgrade the Tracker Monitor: Run the Tracker File Server Setup

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

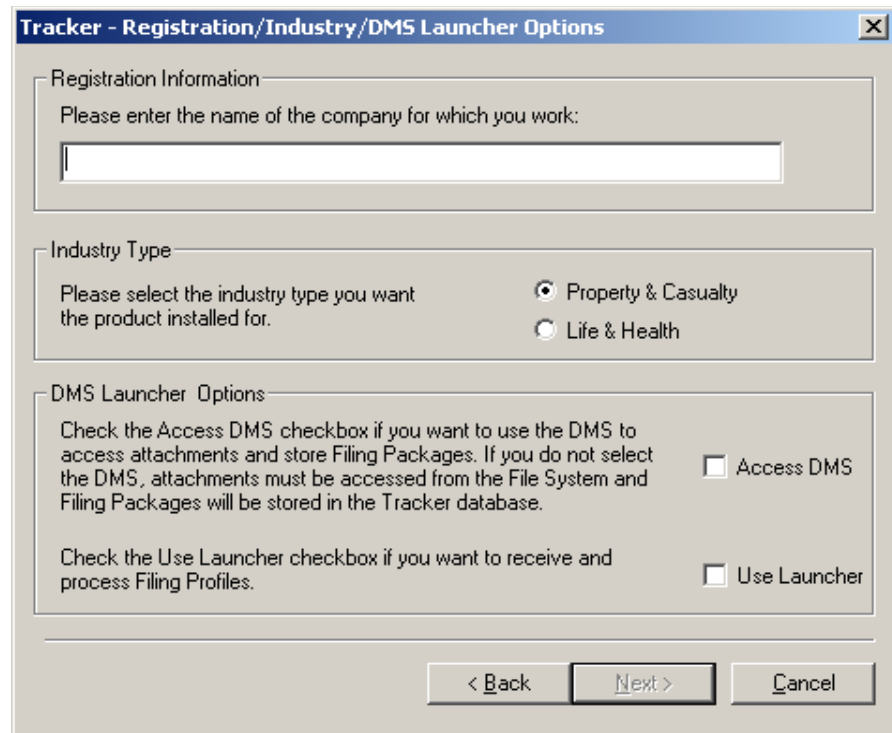
1. From the `Setup` folder on the Tracker installation CD, run `setup.exe`.
2. If a Security Warning dialog box appears, click **Run**.

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

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



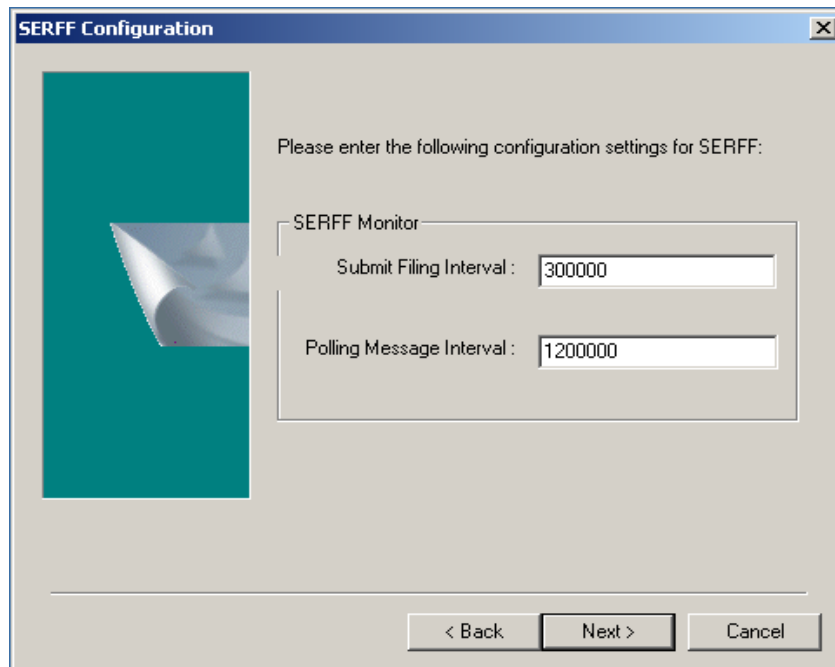
3. Click **Next**.
4. If the system detects a previous version of Tracker and you are asked if you want to upgrade it, click **Yes**.
5. On the **Registration** dialog box, enter your company name.



The dialog box is titled "Tracker - Registration/Industry/DMS Launcher Options". It contains three sections: "Registration Information" with a text field for company name; "Industry Type" with radio buttons for "Property & Casualty" (selected) and "Life & Health"; and "DMS Launcher Options" with checkboxes for "Access DMS" and "Use Launcher". Navigation buttons at the bottom are "< Back", "Next >", and "Cancel".

6. Click **Next**.

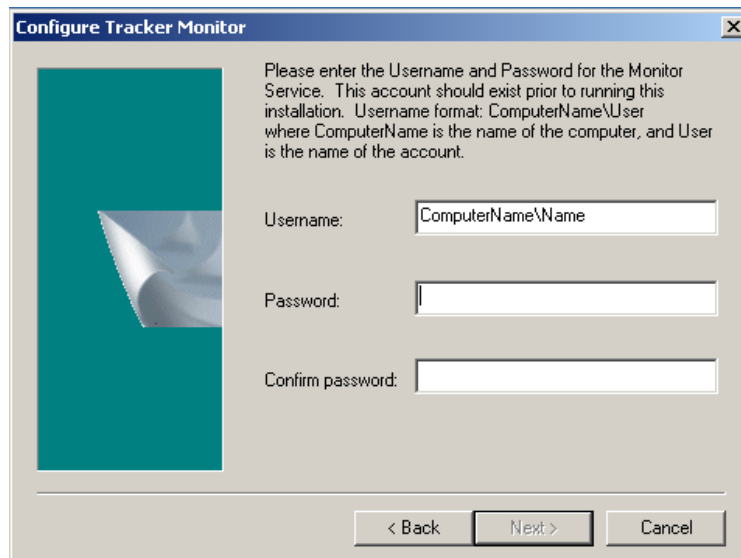
The **SERFF Configuration** dialog box opens.



The dialog box is titled "SERFF Configuration". It features a teal graphic on the left and a text prompt: "Please enter the following configuration settings for SERFF:". Below this is a "SERFF Monitor" section with two input fields: "Submit Filing Interval" (value: 300000) and "Polling Message Interval" (value: 1200000). Navigation buttons at the bottom are "< Back", "Next >", and "Cancel".

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

Important: It must be *identical* to the username you used in the previous version of Tracker Monitor.

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\tkrwmfon*

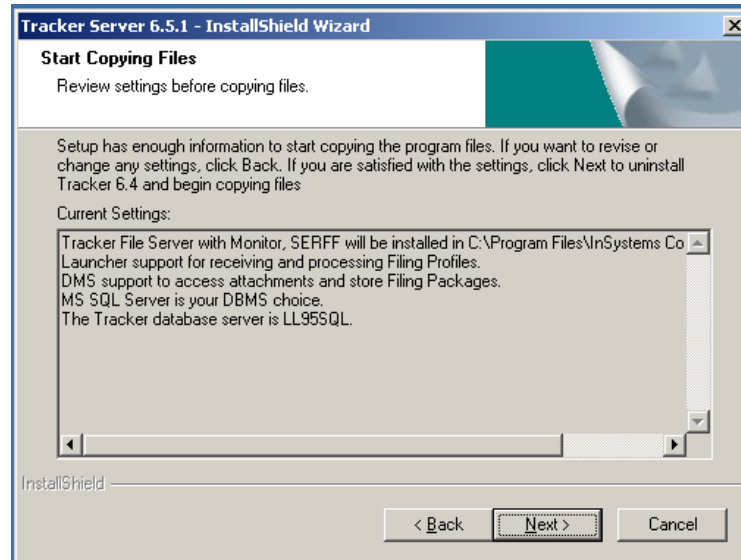
- b. Enter the **Password** assigned to the Monitor user account. (Your password will not appear when you type it, but will be displayed as asterisks.)

Important: It must be *identical* to the password used for the previous version of Tracker Monitor.

- c. In the **Confirm Password** field, enter the password again.
- d. Click **Next**.

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

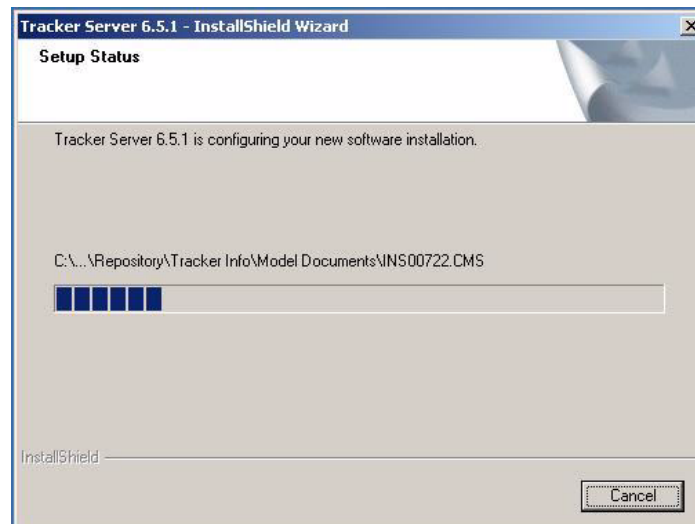
In the **Start Copying Files** dialog box, review your **Current Settings**.



8. 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 system will delete old files, but no progress display will be shown. The system will be unresponsive until the old files have been deleted.

The **Setup Status** dialog box opens.

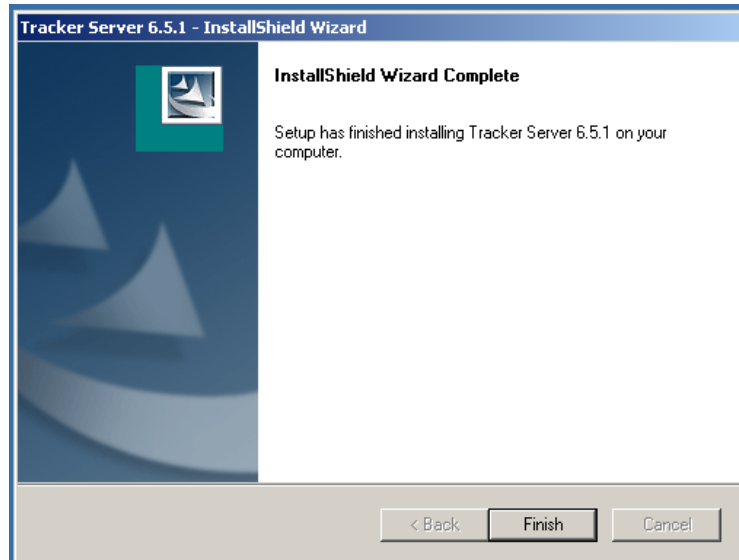


The installation program begins copying the required files. A blue progress bar indicates the progress of the installation.

9. If you are prompted to overwrite existing files, click **Yes** for each file.

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

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



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

Part 5: Upgrade the Tracker Client: Calligo Upgrade

This section describes how to upgrade the Tracker client.

The Tracker client upgrade will automatically uninstall the previous Tracker client and install Tracker 6.5.1.

Note: Complete this stage only on systems that are currently running the Tracker client.

Note: If you are using Calligo 5.3, upgrading to Calligo 5.4 is optional, and you can skip this part. Tracker 6.5.1 supports both Calligo 5.3 and Calligo 5.4.

Step A: Back Up the Current System

1. Open the InfoSource Administrator.
2. From the **InfoSource** menu, click **Backup IDB** to back up the `local.idb`.
3. Back up all repositories on the system.
4. Export the following registry key:
`HKEY_LOCAL_MACHINE\SOFTWARE\InSystems Technologies Inc.\Tracker`
5. In the Registry Key, click into a folder described above.
6. Click **Registry > Export Registry File...**
7. Enter a file name and save.

This creates a `.reg` file with all value settings within the folders.

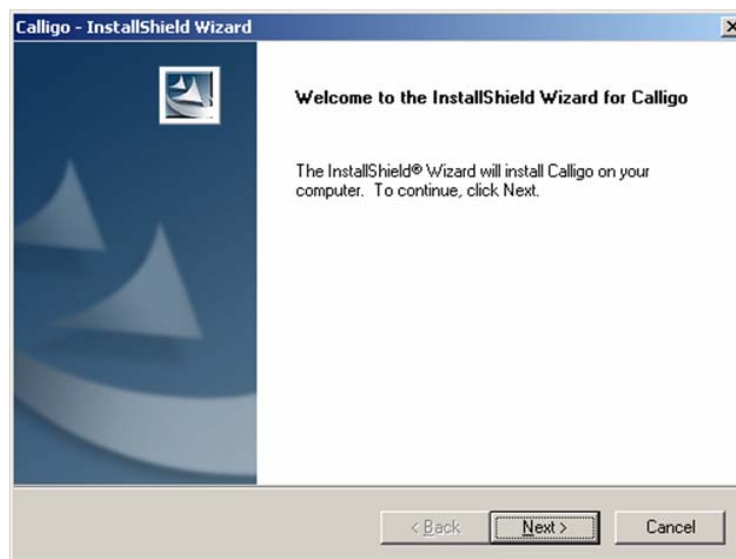
Step B: Uninstall Calligo Core

1. From the Control Panel, select **Add/Remove Programs**.
2. Select **Calligo**, then click **Remove**.
3. Delete the Calligo installation folder, which is usually:
C:\Program Files\InSystems Corporation\Calligo

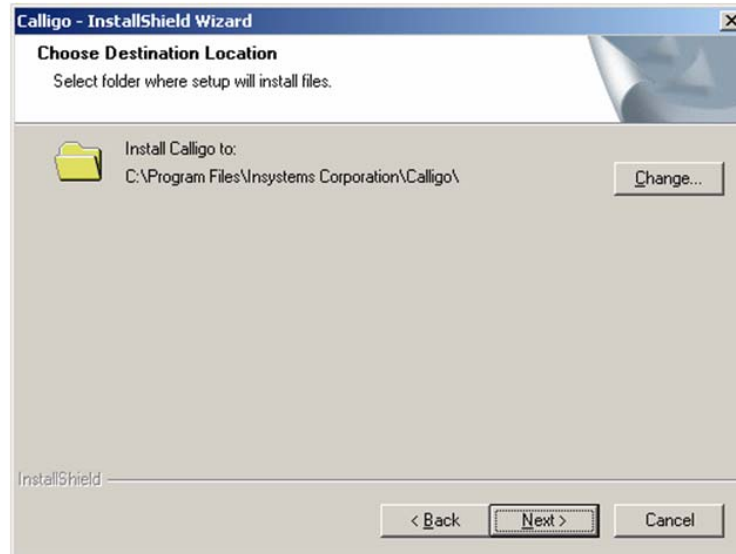
Step C: Install Calligo Core

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.

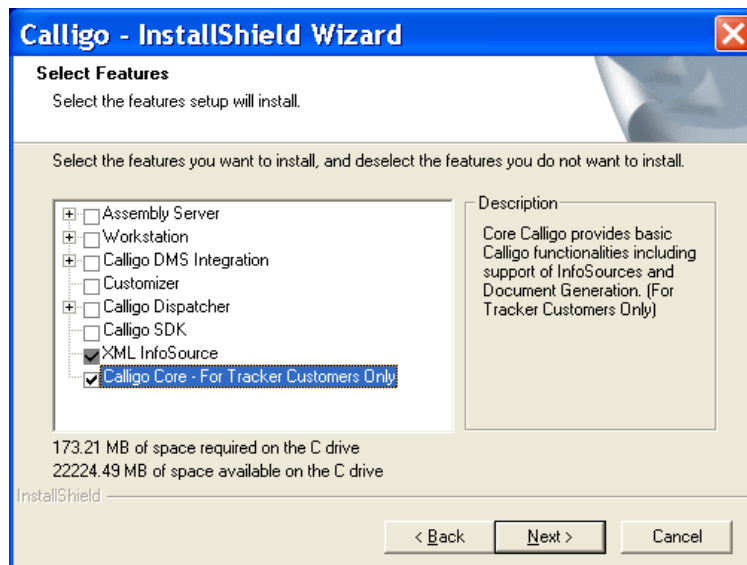


2. Click **Next**.
3. The **Choose Destination Location** dialog box displays the location where Calligo will be installed.

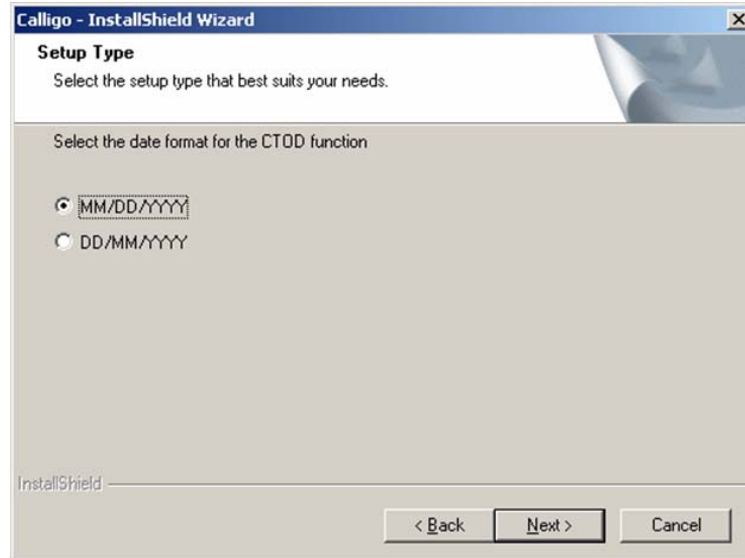


To change the location:

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



The **Setup Type** dialog box opens.

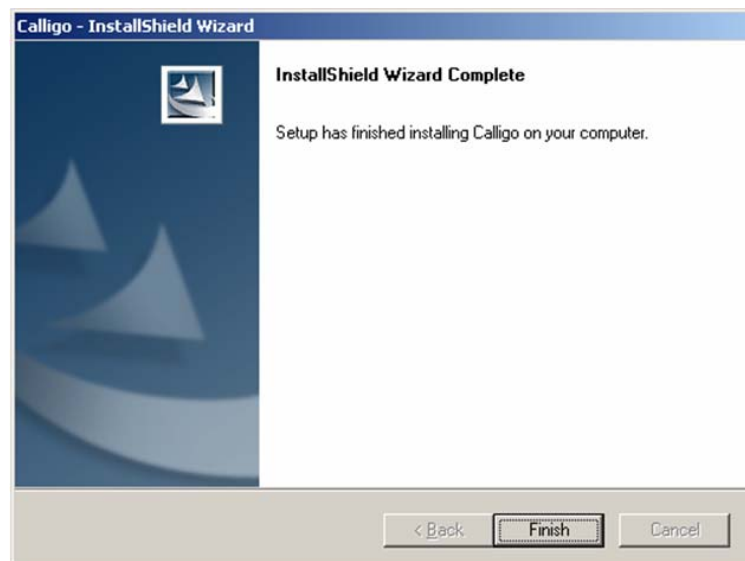


6. Choose the default date format for the CTOD function, then click **Next**.
7. In the **Start Copying Files** dialog box, review your **Current Settings**, then click **Next**.
8. If the settings are correct, click **Next**, otherwise click **Back** until you have reached the step you want to correct. Make any necessary corrections, then click **Next**.

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

9. If you are prompted to overwrite existing files, click **Yes** for each file.
To stop the installation process, click **Cancel**.

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



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

Step D: Restore Your Calligo Settings

In this step, you configure the InfoSource Administrator to point to the original `.idb` file:

1. In the InfoSource Administrator, select **InfoSource >Import**.
2. Select the `.idb` file that you previously backed up before the installation as the **Source IDB File**.
3. Select the InfoSources you want to import.
4. Ensure that the values in the registry keys described above are the same as those before upgrading. Use the `.reg` file previously created to compare values.

Step E: Run the Tracker Client Setup

In this step, you run the setup application to actually upgrade 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,

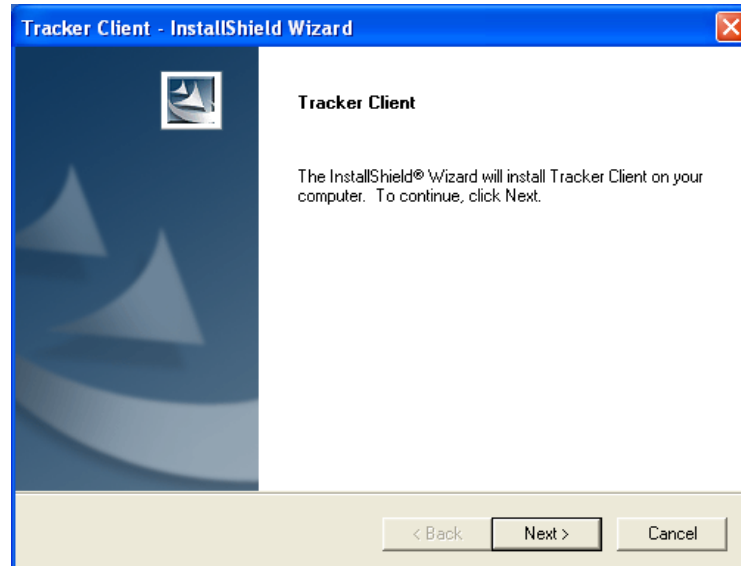
```
\\Tracker_server\shared_folder\Tracker\CliSetup\Setup.exe
```

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

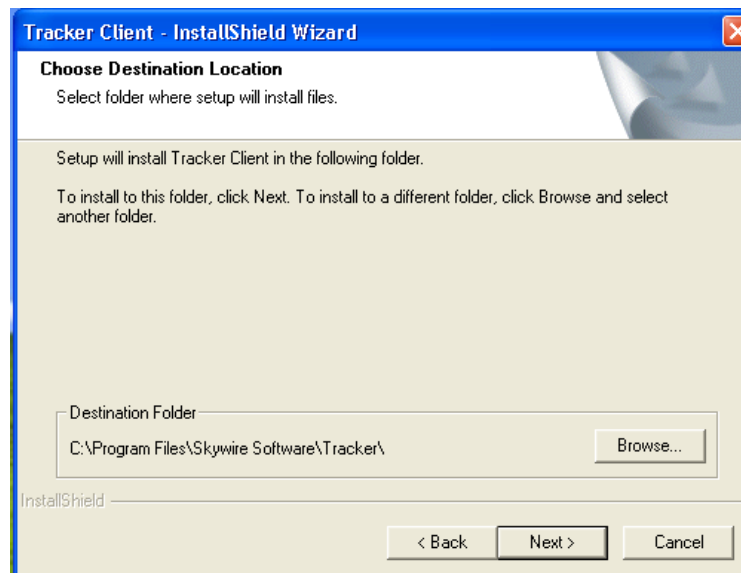
2. If the system detects a previous version of Tracker and you are asked if you want to upgrade it, click **Yes**.

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

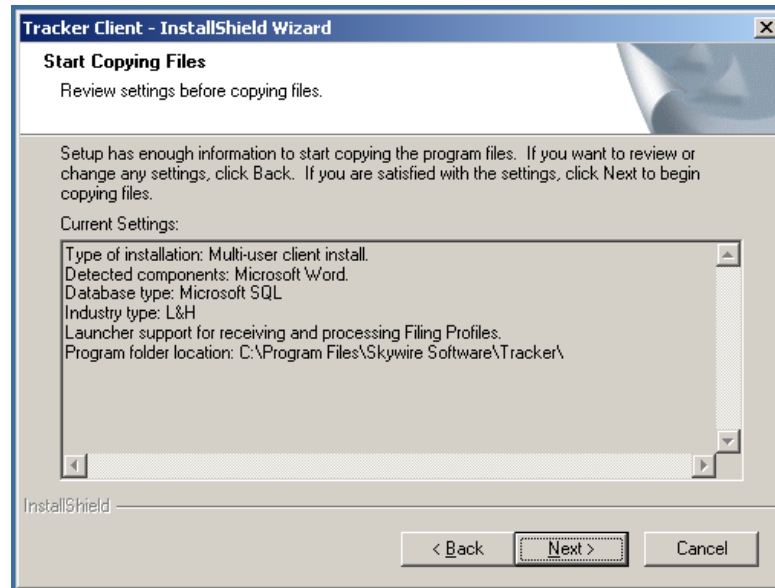
The **Tracker Client InstallShield Wizard** dialog box opens.



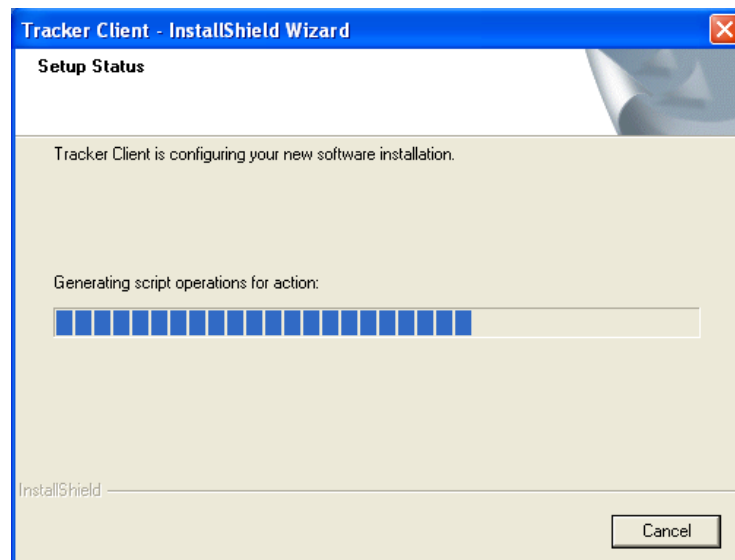
3. Click **Next**.
4. The **Choose Destination Location** dialog box opens, displaying the installation location.



5. In the **Start Copying Files** dialog box, review your **Current Settings**.



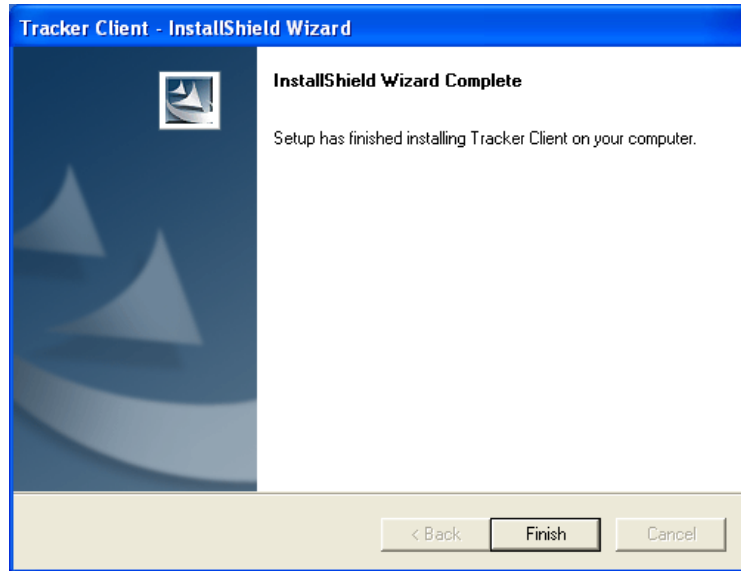
6. If the settings are correct, click **Next**, otherwise click **Back** until you have reached the step you want to correct. Make any necessary corrections, then click **Next**.
7. The **Setup Status** dialog box opens.



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

8. If you are prompted to overwrite existing files, click **Yes** for each file.
 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.

Appendix

Optional Procedures

This appendix contains the following optional procedures:

- *Converting Tracker Filing Edition to Use DMS* on page 58
- *Upgrading Tracker Filing Edition to Tracker 6.5.1 with Launcher* on page 61
- *Uninstalling Tracker Server* on page 63

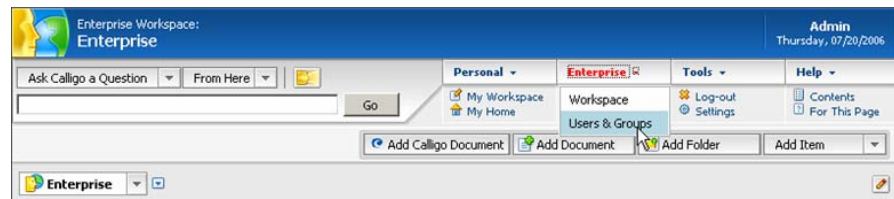
Converting Tracker Filing Edition to Use DMS

Note: Complete the following procedure only if you are upgrading Tracker Filing Edition 6.4 or 6.5 to Tracker 6.5.1 with DMS access.

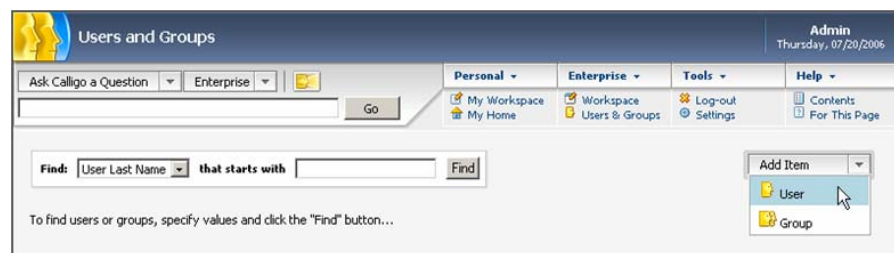
Step A: Create a Calligo User

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.

The screenshot shows a web-based 'Add New User' form. At the top, there's a navigation bar with 'Ask Calligo a Question', 'Enterprise', and a 'Go' button. To the right, there are tabs for 'Personal', 'Enterprise', 'Tools', and 'Help'. Below these are links for 'My Workspace', 'My Home', 'Workspace', 'Users & Groups', 'Log-out', 'Settings', 'Contents', and 'For This Page'. The main form area contains several input fields: 'Log-in Name' (pre-filled with 'Tracker'), 'Department' (pre-filled with 'DefaultGroup'), 'Password' and 'Verify Password' (masked with dots), 'First Name', 'Middle Initial', 'Last Name', 'Title', 'E-mail', 'Phone', 'Fax', 'Office Location', and 'Time Zone'. A 'Privileges' section follows, with checkboxes for 'Log-in enabled', 'Public Access enabled', 'Can create/modify users', 'Can create/modify groups', 'User administration rights', and 'System administration rights'. At the bottom of the form are 'Submit' and 'Reset' buttons.

6. Click **Submit**.

Step B: Create the Tracker InfoSource

Complete the following steps at all Tracker workstations and Tracker Monitor:

1. Open the InfoSource Administrator.
2. Create a new InfoSource named TrackerDMSE with a **Type** of CalligoDMS.
3. Enter the proper Calligo **Server Name**, **Port #** (usually 2099) and the **Connection** (the database name of the Calligo database) of the Calligo system.
4. Enter \ as the location.
5. Click **OK** to save your changes and close the dialog box.
6. Exit InfoSource Administrator.
7. Double-click the Config_Change\UseDMS.reg on the Tracker installation CD to import it into the registry.
8. Restart the Tracker Monitor service.
9. Restart all Tracker clients.

Step C: Install Status Plug-in

Refer to Tracker_6.5.1_Status_Plug_in_ReadMe.rtf in the Tracker Status Plug-in folder for instructions on how to install this plug-in.

Upgrading Tracker Filing Edition to Tracker 6.5.1 with Launcher

Note: Complete the following procedure only if you are upgrading Tracker Filing Edition 6.4 to Tracker 6.5.1 with Launcher.

Step A: Install Launcher

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.

Note: Usually, the schema name is the owner of the Launcher database. However, in SQL2005, they may differ.

3. Ensure that the Tracker Monitor and all Tracker clients are shut down.

Step B: Configure Tracker Monitor

Complete the following steps on the Tracker Monitor computer:

1. Create a system ODBC data source named *LauncherXXX* that connects to the Launcher database, where *LauncherXXX* is a name of your choice.
2. Copy the `Config_Change\AddLauncher_Monitor.reg` file on the Tracker installation to a temporary folder on your system.
3. Open (do *not* double-click) the copy of `AddLauncher_Monitor.reg` for editing in Notepad.
4. Locate the line with `xxxxxxx` and replace the text `xxxxxxx` with the Launcher database schema name from #2 in Step A.

Note: Usually, the schema name is the owner of the Launcher database. However, in SQL2005, they may differ.

5. Locate the line with `***`, and replace `***` with the name used in #1 in Step B.
6. Save the file, then close it.
7. Create an ODBC connection named `TkrDB` (if it does not already exist), which connects to the Tracker database.
8. From within RegEdit, import the modified `AddLauncher_Monitor.reg` file.

Step C: Configure Tracker Workstations

Complete the following steps at all Tracker workstations:

1. Create a system ODBC data source named *LauncherXXX* that connects to the Launcher database, where *LauncherXXX* is a name of your choice.

2. Copy the `Config_Change\AddLauncher_Client.reg` file on the Tracker installation to a temporary folder on your system.
3. Open (do *not* double-click) the copy of `AddLauncher_Client.reg` for editing in Notepad.
4. Locate the line with `xxxxxxx` and replace the text `xxxxxxx` with the Launcher database schema name with the name from #2 in Step A.

Note: Usually, the schema name is the owner of the Launcher database. However, in SQL2005, they may differ.

5. Locate the line with `***`, and replace `***` with the name used in #1 in Step C.
6. Save the file, then close it.
7. From within RegEdit, import the modified `AddLauncher_Client.reg` file.
8. Create a system ODBC data source named `TkrDB` (if it does not already exist), which connects to the Tracker database.

Step D: Complete the Upgrade

1. Restart the Tracker Monitor service.
2. Restart all Tracker clients.

The upgrade of Tracker is now complete.

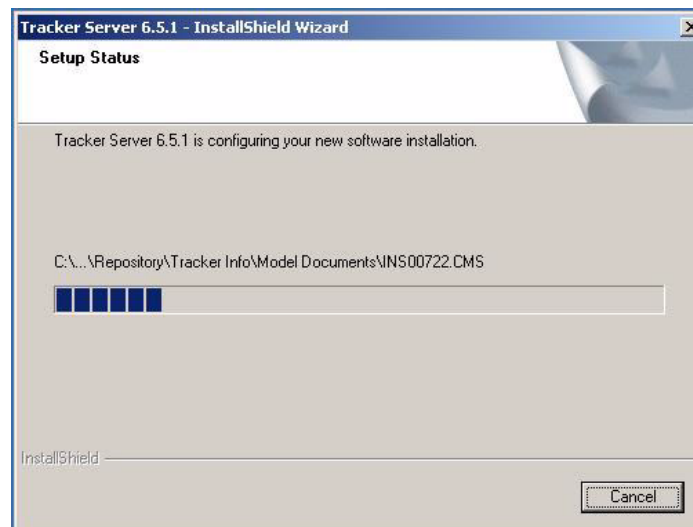
Uninstalling Tracker Server

This section describes how to uninstall Tracker server.

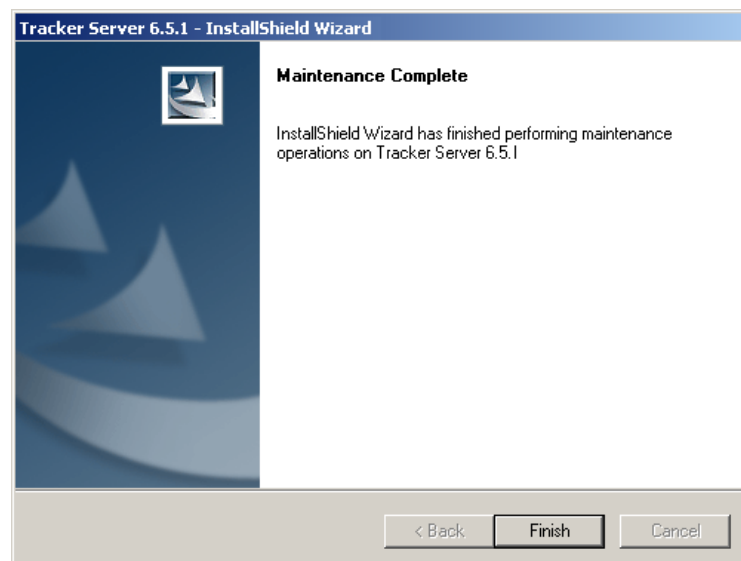
1. From the **Control Panel**, select **Add/Remove Programs**.
2. Click the **Tracker Server 6.5.1** entry to highlight it.
3. Click **Change/Remove**.

The system will delete old files, but no progress display will be shown. The system will be unresponsive until the old files have been deleted.

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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