ORACLE

Oracle Insurance Compliance Tracker

Installation Guide

Guide for New Installations for Oracle

version 6.8.2

Part number: E52503-01

February 2014

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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 2*
- *Tracker Documentation on page 3*

Document Conventions

Tag§	Description§
Note§	This tag contains special information and reminders§
Important§	This tag contains significant information about the use and understanding of the software.§
Tip§	A Tip provides a better way to use the software§
Warning§	This tag contains critical information that if ignored, may cause errors or result in the loss of information.§

Other Document Conventions

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

TRACKER DOCUMENTATION

Tracker includes the following documents and online help files:

- 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 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.
- 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, the validation process, and troubleshooting.
- The *Tracker ReadMe* contains important information about this release, including required and optional software, media package contents, known issues and limitations, and server URLs.

INSTALLING TRACKER

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

- *Introduction to the Installation Process* on page 6
- *Checking the System Requirements* on page 7
- *Planning Your Tracker Monitor Installation* on page 16
- *Creating the Tracker Database* on page 17
- *Installing Tracker Monitor and File Server on One Computer* on page 21
- *Installing Tracker Monitor and File Server on Separate Computers* on page 38
- *Installing the Tracker Client* on page 63

INTRODUCTION TO 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 steps.

Note In this documentation, all references to IStream Document Manager apply to both IStream Document Manager 6.3 and IStream Document Manager 6.3 SP2.

Before making any changes to the `install.ini` file, please contact Global Customer Support.

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 genetation.

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.

- Microsoft Windows
- Internet Explorer
- the ODBC drivers for your Oracle client
- Adobe Acrobat Reader – required to view filing packages
- Microsoft .NET Framework
- Microsoft Word
- Microsoft Excel

(The Amyuni PDF Converter is included with Tracker.)

Server Components Requirements

The Tracker Server 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 Server

- Oracle

Reports Requirements

If you have a MAPI-compliant program such as Outlook or Outlook Express, you can export reports to the email application. Select **PDF** as the **Format** and **MAPI** as the destination. Users will require Outlook or Outlook Express installed on the their computer before they can use this feature; Citrix users will require Outlook or Outlook Express installed on the Citrix Server.

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 128 MB of memory for each Tracker user. 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:Install Oracle 32-bit Version (Optional)

If you are installing Tracker on a 64-bit Oracle server, Tracker requires the 32-bit version of the Oracle client in addition to the 64-bit version of the Oracle client.

Important Complete this procedure only if you are installing Tracker on a 64-bit Oracle server.

1. Download the Oracle basic 32-bit instant client for an Oracle 10g or 11g database.
2. Download the Oracle ODBC 32-bit instant client for an Oracle 10g or 11g database.
3. Unzip both files into the same folder. Note that this folder will be the location where the client will be installed.
4. Run `odbc_install.exe`.
5. Create a system environment variable named `TNS_ADMIN`.
6. Set the value to the location of `sqlnet.ora` and `tnsnames.ora` from your original 64 bit Oracle instance:

   `[Oracle instance path]``\NETWORK\ADMIN\`

Step F: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**.

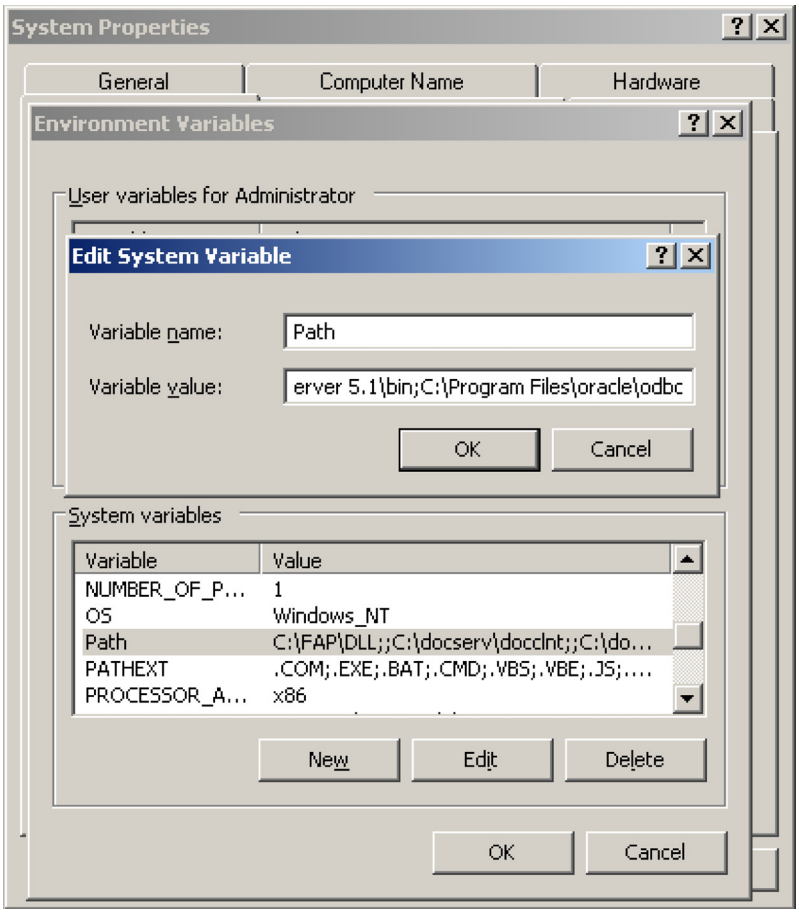
Step G:Oracle ODBC Driver Installation

In order to successfully setup connectivity to an ODBC compliant database there is a onetime ODBC connection setup routine that has to be performed for each testing system. It is required to have the proper client ODBC driver installed in the ODBC Data Source Administrator in the Administrator Tools for each test Operating System.

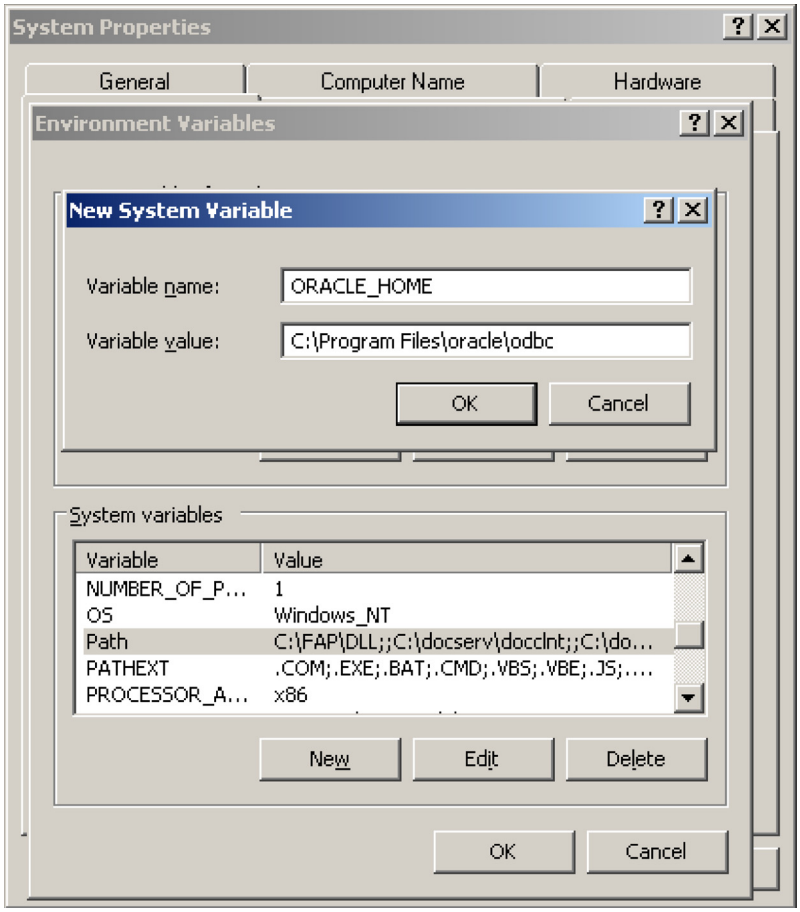
Download Oracle_instantclient_11_2.zip file and extract; it should extract all files into odbc directory. Copy odbc directory into C:\program files\oracle directory (if oracle directory doesn't exist create oracle directory).

Set Environment Variables

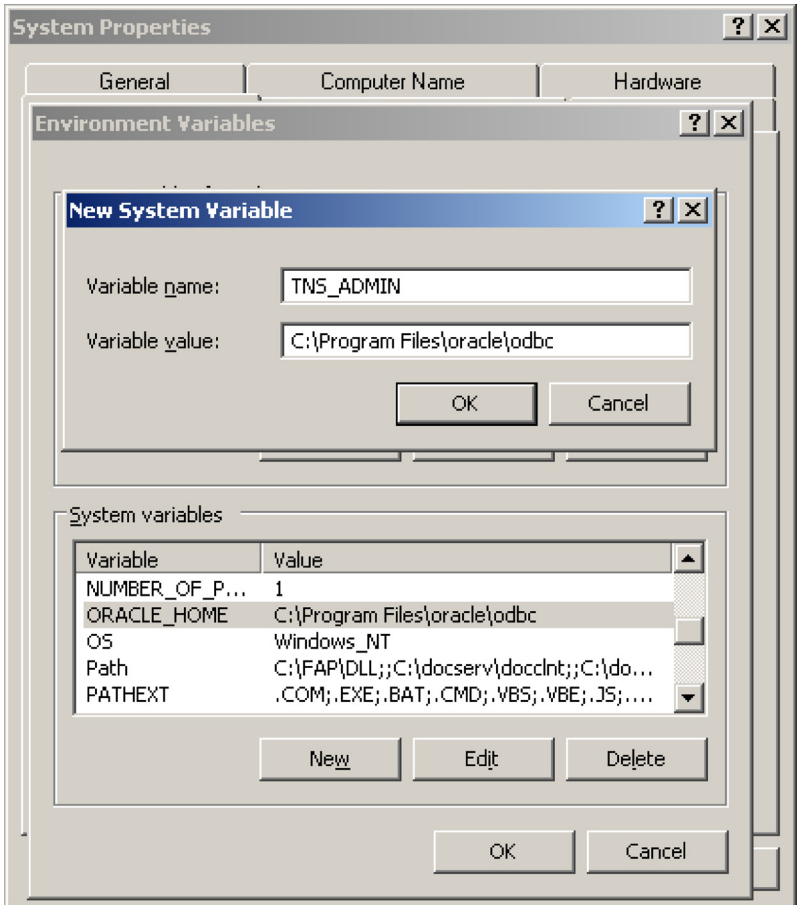
1. Click Start->Control Panel. Double-click on System. Click Advanced. Click Environment Variables.
2. Add the full path of the directory you extracted the files to the PATH environment variable. In our case it is C:\program files\oracle\odbc.



3. Under "System Variables", click New and create a new environment variable named ORACLE_HOME and set its value to the path where you extracted the files. In our case it is C:\program files\oracle\odbc.



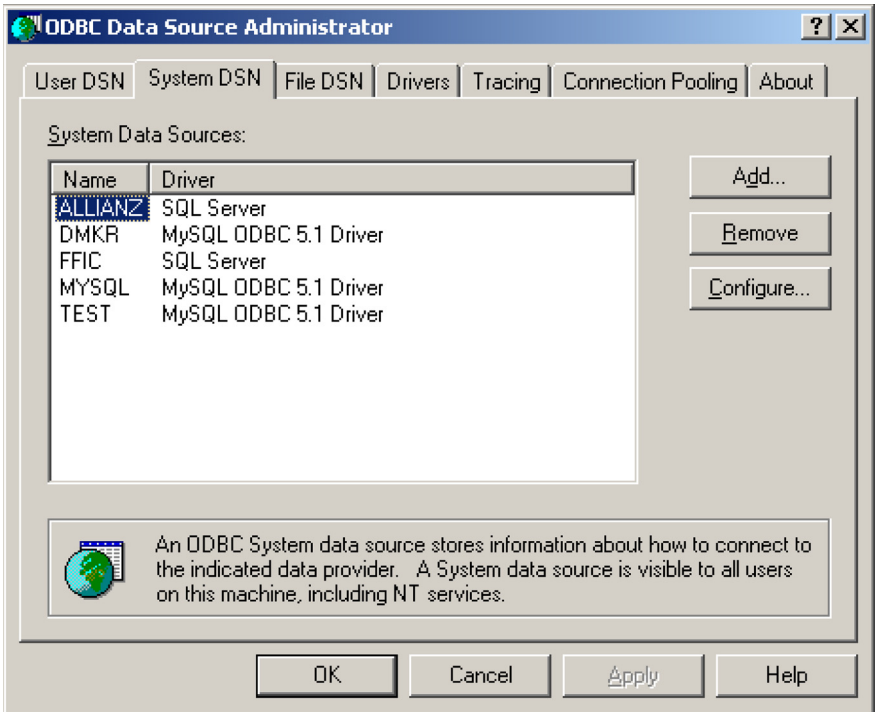
4. Under "System Variables", click New and create a new environment variable named TNS_ADMIN and set its value to the path where you extracted the files. Here it is C:\program files\oracle\odbc.



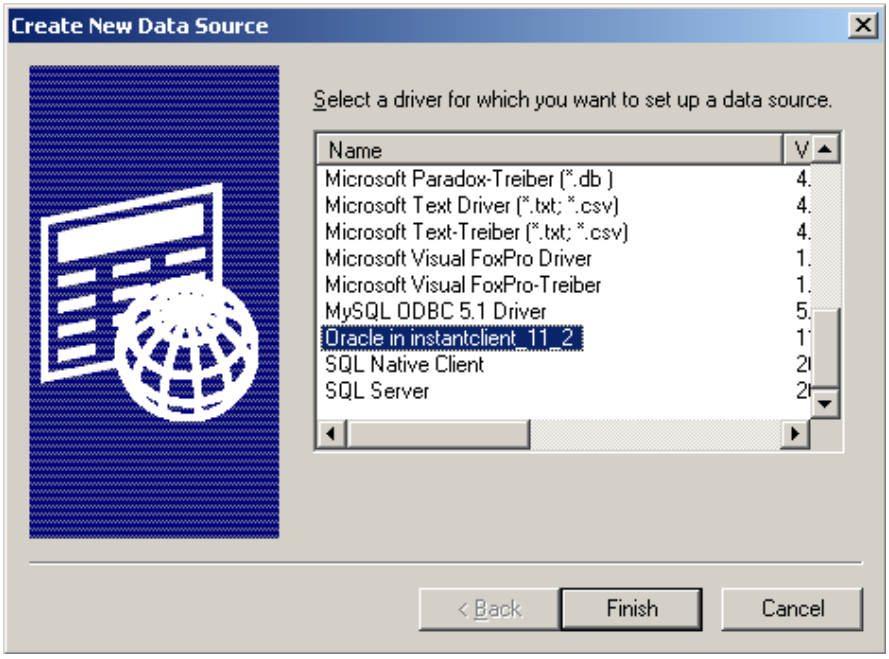
5. Browse to the directory C:\Program Files\oracle\odbc find and double click on odbc_install.exe file.

Create a System DSN

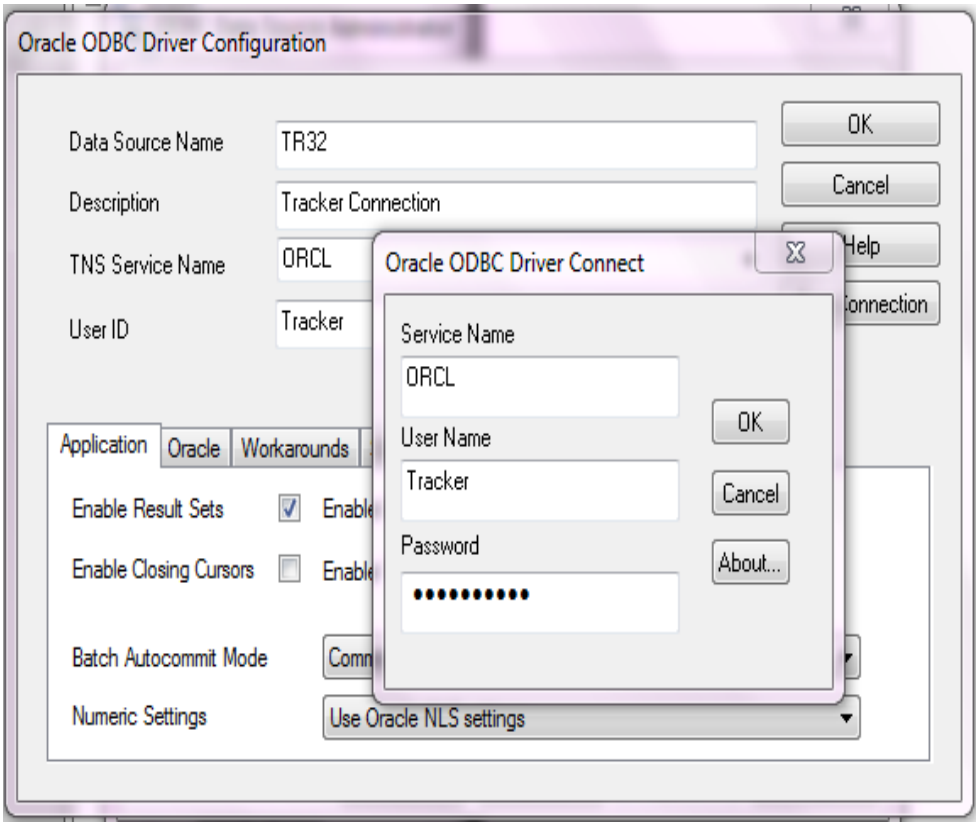
1. Open up the ODBC data sources on your computer. Start--Programs - Administrative Tools--Data Sources (ODBC).



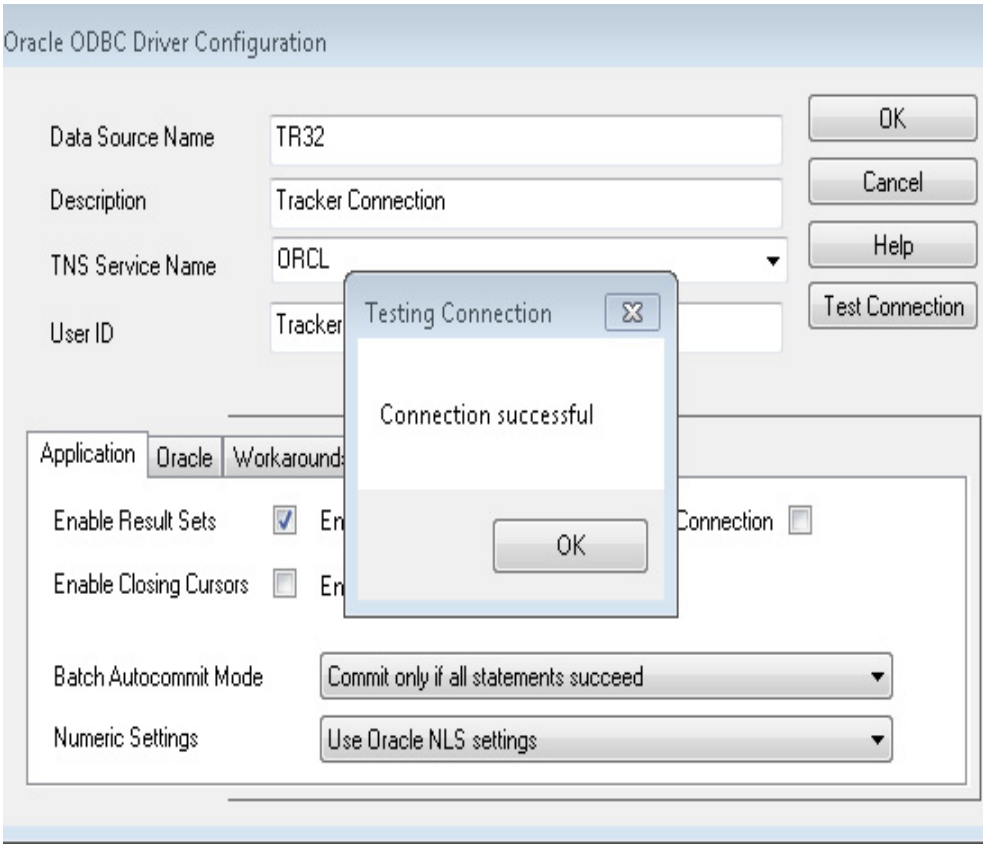
2. Go to the System DSN Tab and click on the Add button to create a new Data Source.
3. Scroll down the list of drivers until you find “Oracle in instantclient_11_2” in the list and click on Finish (Do not select the driver called "Microsoft ODBC for Oracle").



4. A window should come up that will allow you to configure the DSN. You can type anything in the Data Source Name box that you want (preferably your Schema name).



5. In the TNS Service Name dropdown list, select “ORCL” and enter user name and click on the “Test Connection” button. A dialog box should pop up and ask for credentials to authenticate. Type in a set of credentials that has access to oracle database and click OK. Those credentials usually are the concatenation of your first name initial and your last name.
6. Connection Successful message appears through a pop up box .


Oracle ODBC Driver Configuration
Data Source Name
TR32
Description
Tracker Connection
TNS Service Name
ORCL
User ID
Tracker
OK
Cancel
Help
Test Connection
Testing Connection
Connection successful
OK
Application
Oracle
Workaround
Enable Result Sets
Enable Closing Cursors
Connection
Batch Autocommit Mode
Commit only if all statements succeed
Numeric Settings
Use Oracle NLS settings

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 IStream Document Manager. You use the Tracker Monitor to monitor and facilitate communications between Tracker and SERFF when users are entering and updating SERFF filings.

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 IStream Document Manager on the same system as Tracker Monitor, you must install IStream Document Manager first. This process is described later in this chapter.

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

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

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

Creating the Tracker Database

You will need to create a new Oracle schema for Tracker in an existing Oracle database.

You will 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.

For detailed installation instructions, refer to the specific ReadMe in the Database folder of the media pack.

Installing Livelink and Setting Up theDMS

Note Do not complete this stage if you already have the DMS or you will not be using the DMS.

Livelink must be installed before you can install the DMS module. Perform the installation of Livelink. See the *Livelink First-Time Installation Guide* within the `Manuals` folder of the IStream Document Manager installation package. If this guide is missing, please contact Global Customer Support.

Step A:Create a DMS User Profile

In this step, you create an IStream Document Manager user profile that can integrate with Tracker.

1. Log in to the 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 `c0mpl1ance`. (Note that the bold characters are numbers, not letters.)

Important Creation of a DMS user called “Tracker” with password “C0mpl1ance” is mandatory for DMS connectivity.

5. Grant this user **Login** and **System Administration** privileges.
6. Click **Submit**.

Step B:Create Tracker Folders in the DMS

In this step and the following steps, you create the Tracker folders inside the DMS. You create a main folder called `Tracker Info`.

1. Click **Add Folder** at the Enterprise level.
2. Enter **Tracker Info** for **Name**, then click **Add**.
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 DMS.

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

Installing the Tracker Status Plug-in

1. On the Tracker installation package, locate the plug-in zip file in the `Tracker Status Plugin\`*`IDM or Calligo`* folder.
2. Unzip the contents to the *`[LiveLink folder]`*`\staging` folder, saving the directory tree.

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 DMS.

3. Go to the following URL:

   `http://`*`[server name]/[Livelink service name]/`*
   `livelink.exe?func=admin.index`

4. From the **Login** page, enter the Administrator password, then click **Login**.

   The **Calligo Enterprise Administration** page opens.

5. Click **Install Modules**.
6. Select **Tracker Module**, then click **Install**.
7. Follow the Livelink DMS instructions to restart the server.
8. Go to the **Admin** page.
9. In the **Tracker Administration** section, select **Tracker Insurance Type**, then click **Apply**.
10. Follow the Livelink DMS instructions to restart the server.
11. Go to the **Admin** page.
12. In the **Tracker Administration** section, select **Tracker Database Configuration**, complete all the fields, then click **Apply**.
13. Follow the Livelink DMS instructions to restart the server.

    The Tracker Status plug-in is now installed.

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 *Installing Tracker Monitor and File Server on Separate Computers* on page 38.

Note If you will be using the DMS, ensure that it is installed before proceeding.

Important Please refer the ReadMe in the Database folder of the Tracker media pack before installing the Tracker Server.

Step A:Install Microsoft .NET 2.0

For 32-bit versions of Microsoft Windows:

1. From the Tracker installation package, install DotNet 2.0:

```
\DotNet 2.0\32 bit\dotnetfx.exe
```

2. From the Tracker installation package, install DotNet 2.0 SP1:

```
\DotNet 2.0\32 bit\NetFX20SP1_x86.exe
```

For 64-bit versions of Microsoft Windows:

1. From the Tracker installation package, install DotNet 2.0:

```
\DotNet 2.0\64 bit\NetFx64.exe
```

2. From the Tracker installation package, install DotNet 2.0 SP1:

```
\DotNet 2.0\64 bit\NetFx20SP1_x64.exe
```

Step B:Install IStream Document Manager Core

1. From the IStream Document Manager installation package, run

```
\IStream Document Manager 6.3 SP2\IStream Document
Manager\setup.exe
```

The **InstallShield Wizard** opens.

2. The **Choose Destination Location** dialog displays the location where IStream Document Manager will be installed.

   To change the location:

   a. Click **Change**.

   b. In the **Choose Folder** dialog, select the folder you want to install IStream Document Manager.

   c. Click **OK**.

3. Click **Next**.

The **Select Features** dialog displays.

4. On the **Select Features** dialog, ensure that the **Core** check box is selected, then click **Next**.

   The **Setup Type** dialog opens.

5. Choose the default date format for the CTOD function, then click **Next**.
6. In the **DMS InfoSources** dialog, accept the default values, then click **Next**.

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

7. To review or change any of your installation settings, click **Back**, otherwise click **Install**.

   The **Setup Status** dialog 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 opens.

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

Important LAPI DLLs must be copied into the Istream\Components Folder (eg : "C:\Program Files\Oracle\IStream\Components") under IStream Document Manager Core installation path as these DLLs might be used by Tracker while accessing DMS.

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

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 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** dialog.
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. 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.

Note Please refer the SQL ReadMe before running the Tracker Setup.

Step F:Run the Tracker Setup

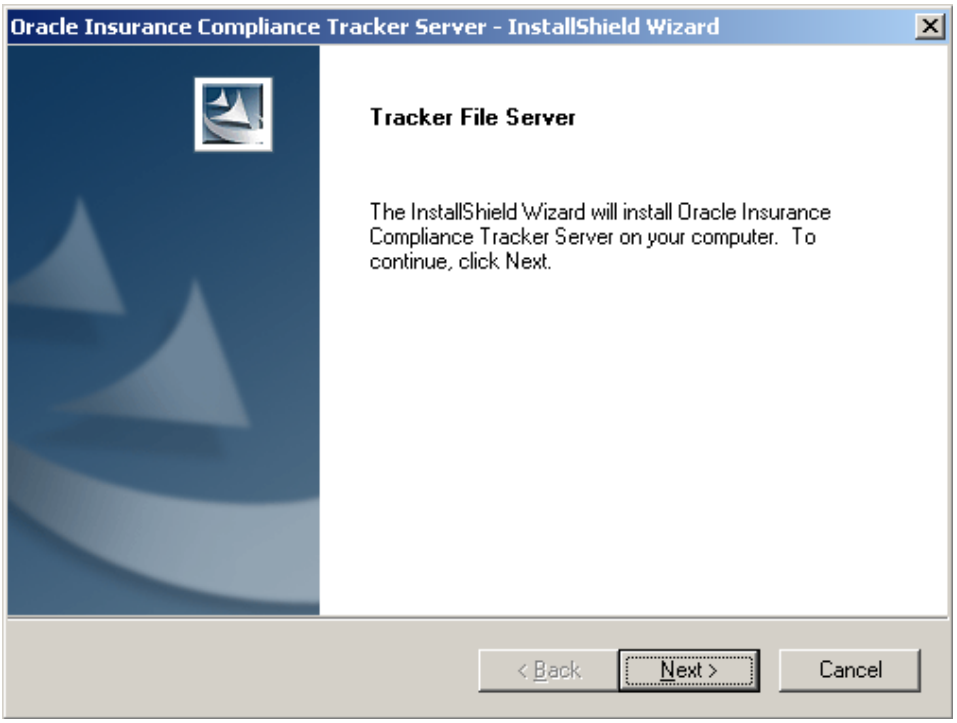
In this step, you run the setup application to install Tracker.

1. From the `Setup` folder on the Tracker installation package, run

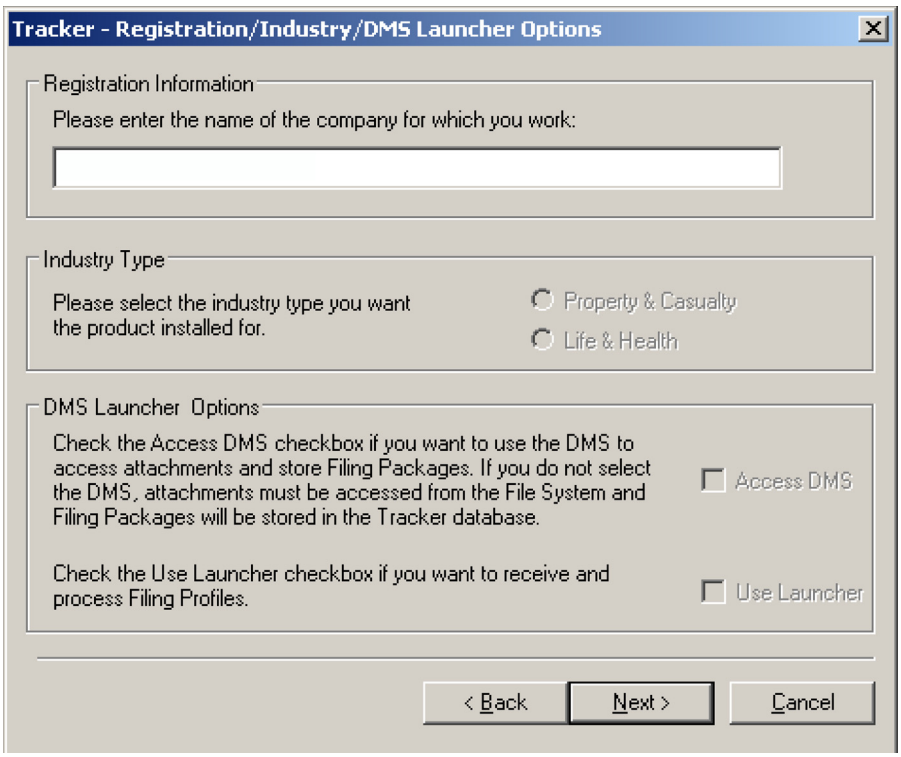
`setup.exe`. If a Security Warning dialog appears, click **Run**.

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

The **Tracker File Server** dialog displays.



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

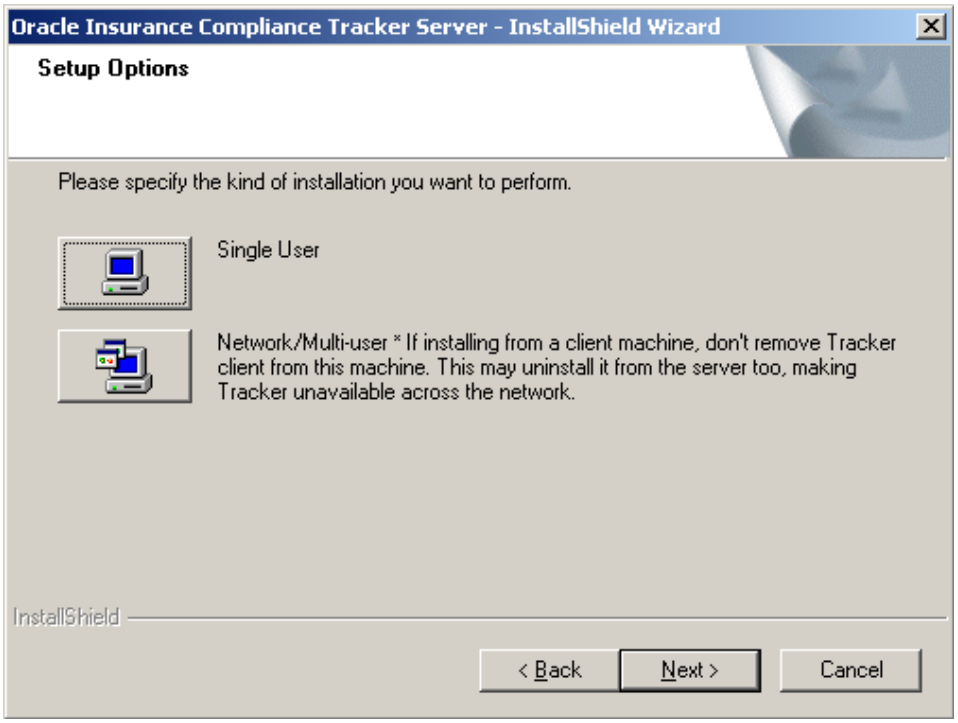


4. Choose your insurance **Industry Type**:

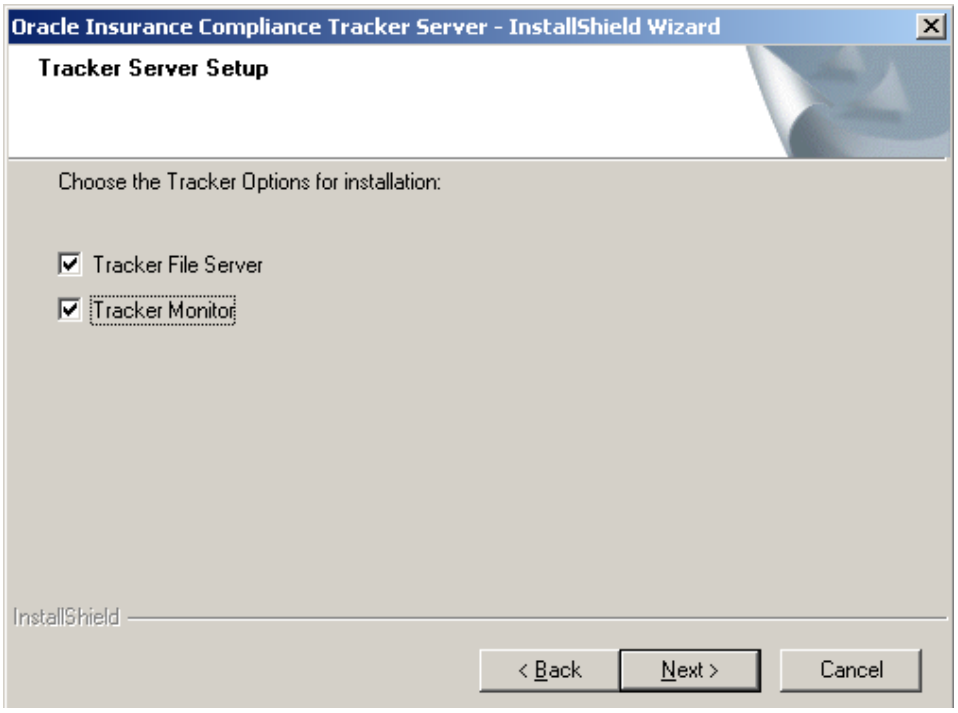
- **Property & Casualty**
- **Life & Health**

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

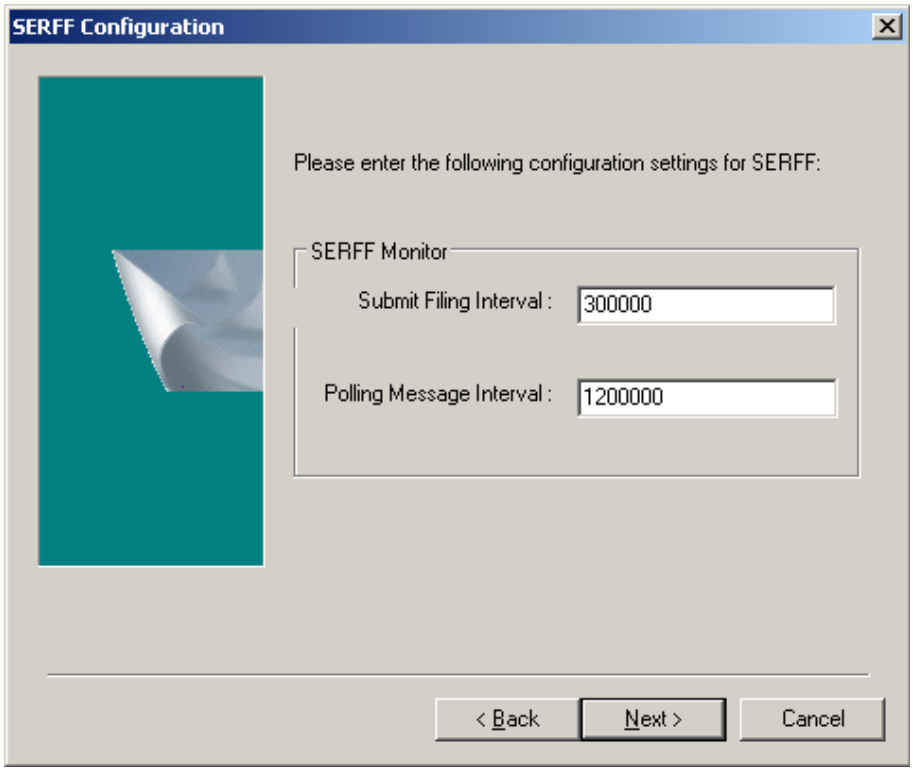
   (The **Single user** option is generally used only in a test environment.)



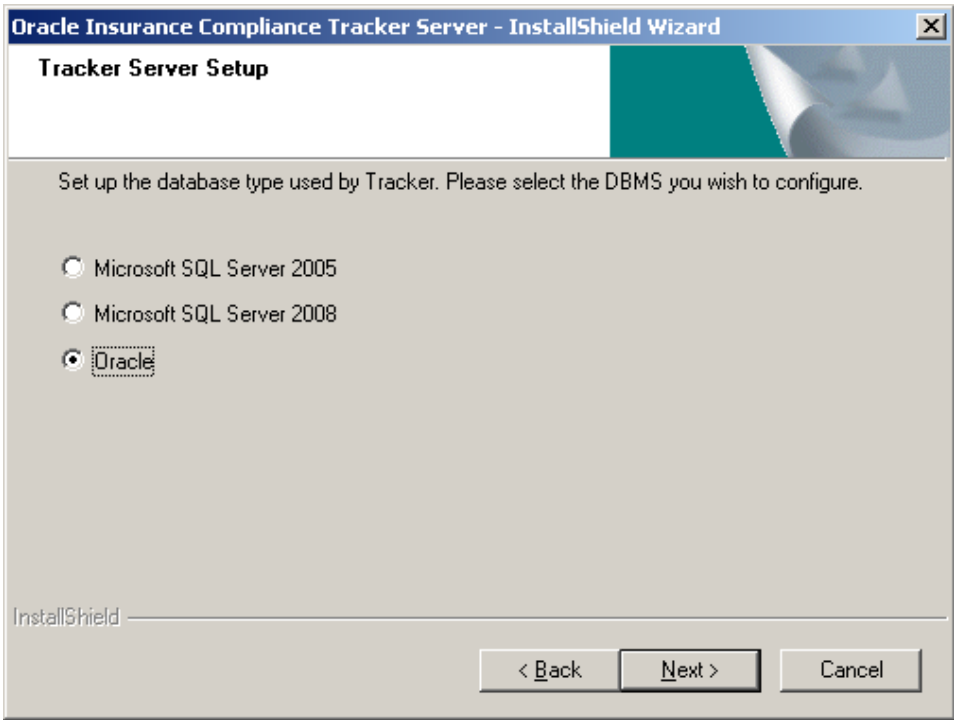
7. On the **Tracker Server Setup** dialog, select both **Tracker File Server** and **Tracker Monitor**, then click **Next**.



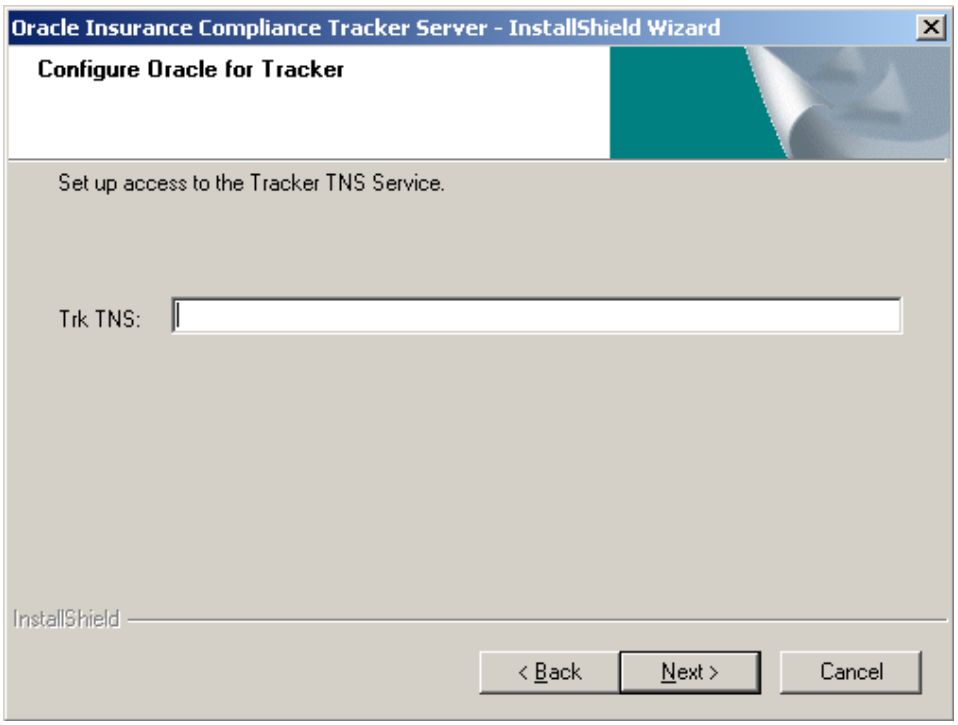
The **SERFF Configuration** dialog opens.



8. Enter the **Submit Filing Interval** and **Polling Message Interval** (in milliseconds), then click **Next**.
9. On the **Tracker Server Setup** dialog, select **Oracle** as the database type, then click **Next**.



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



Tracker will automatically detect the Oracle ODBC driver installed. However, if there is more than one instance of the Oracle driver installed, you will be prompted to enter the one to use:

11. From the ODBC Administrator, select **Add**.

    A list of ODBC drivers is displayed

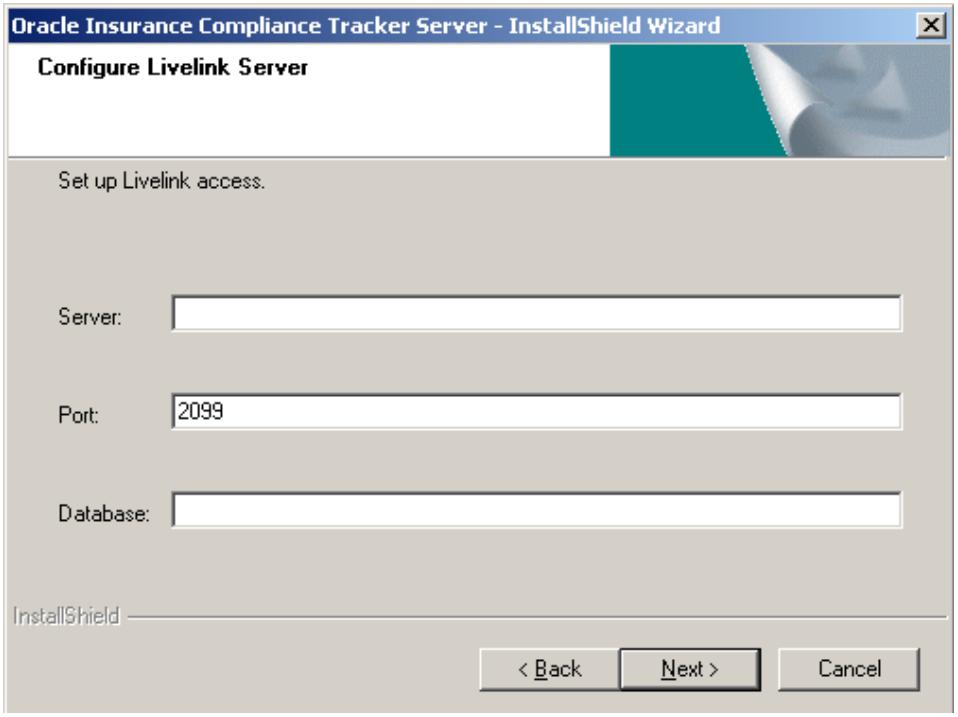
12. Select the Oracle driver instance to use.

    Note the name of the instance you selected.

13. In the **Configure Oracle ODBC** dialog, enter the instance name in the **Inst** field.

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

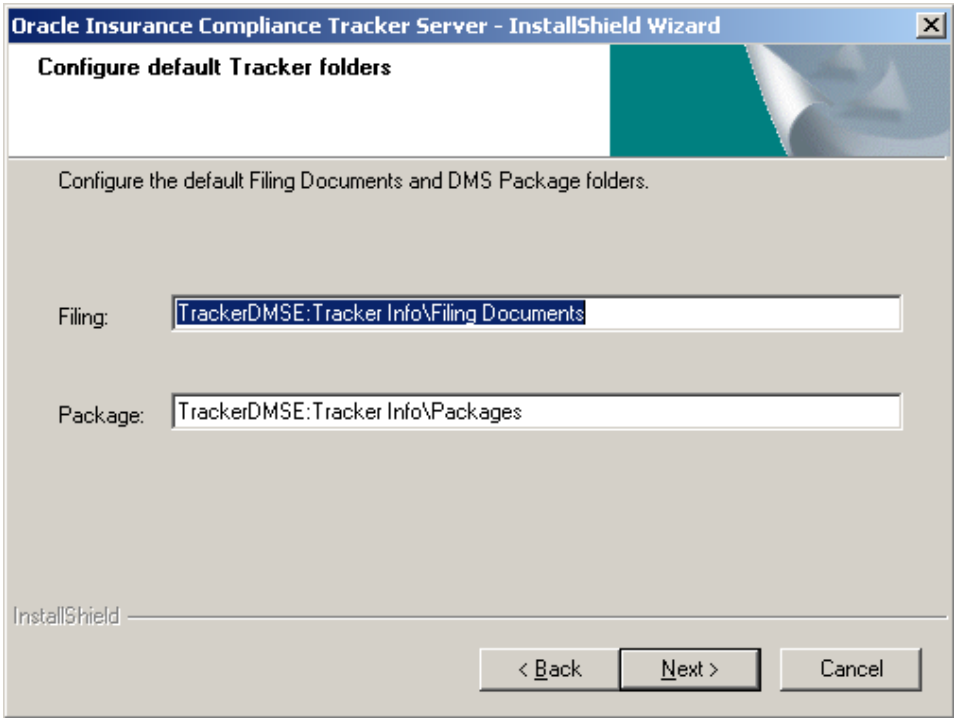
.



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

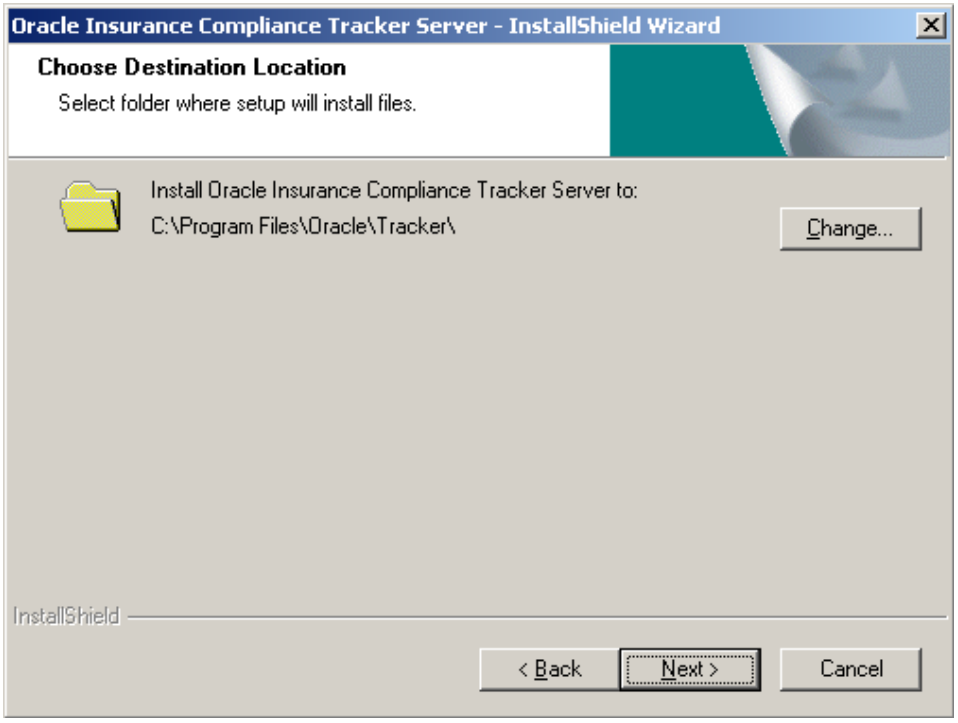
    a. In the **Filing** field, enter the default path of the filing documents folder.

    b. In the **Package** field, enter the default path of the DMS package folders.



c. Click **Next**.

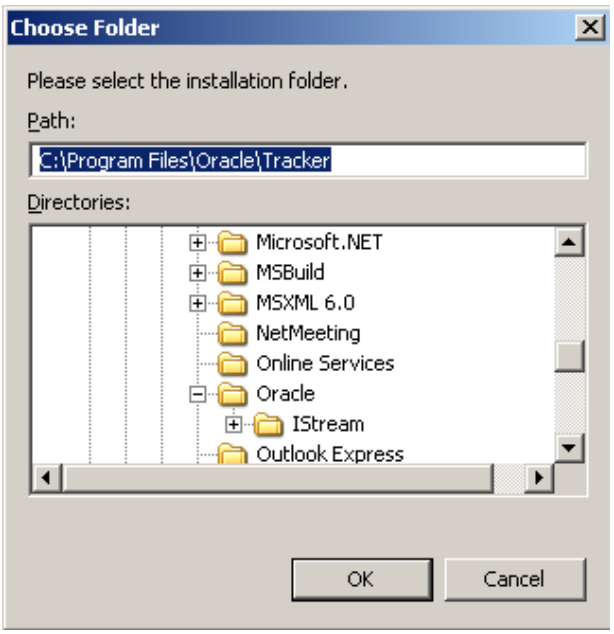
The **Choose Destination Location** dialog opens, displaying the installation location.



To change the location:

a. Click **Change**.

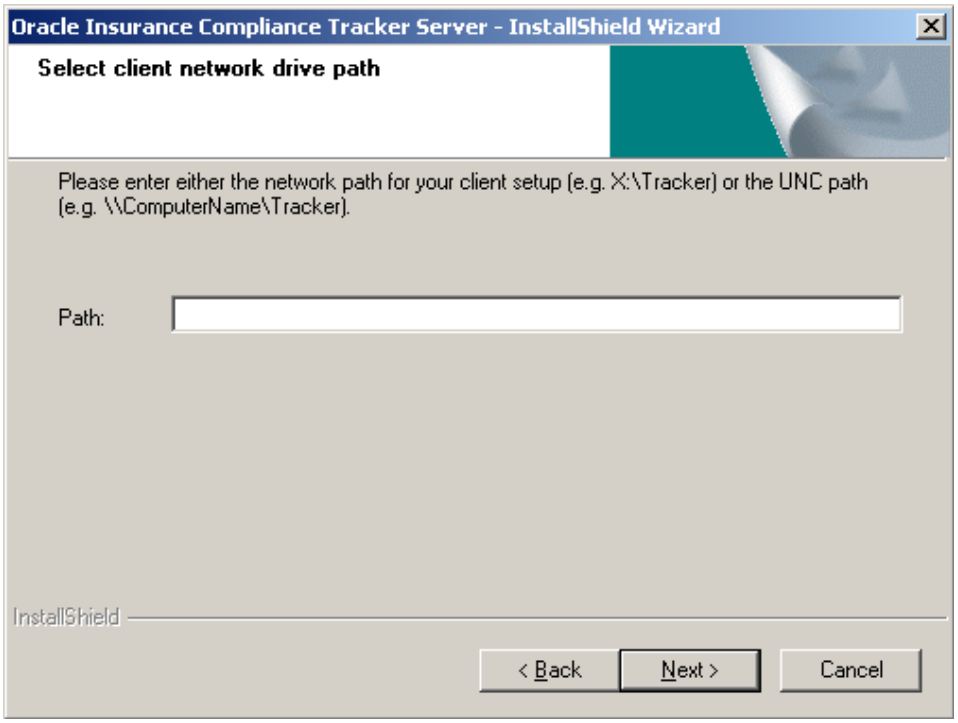
b. In the **Choose Folder** dialog, select the folder you want to install Tracker.



c. Click **OK**.

16. Click **Next**.

17. In the **Select client network drive path** dialog, 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. Note this drive letter. This drive path and letter will be used for *all* Tracker client systems.

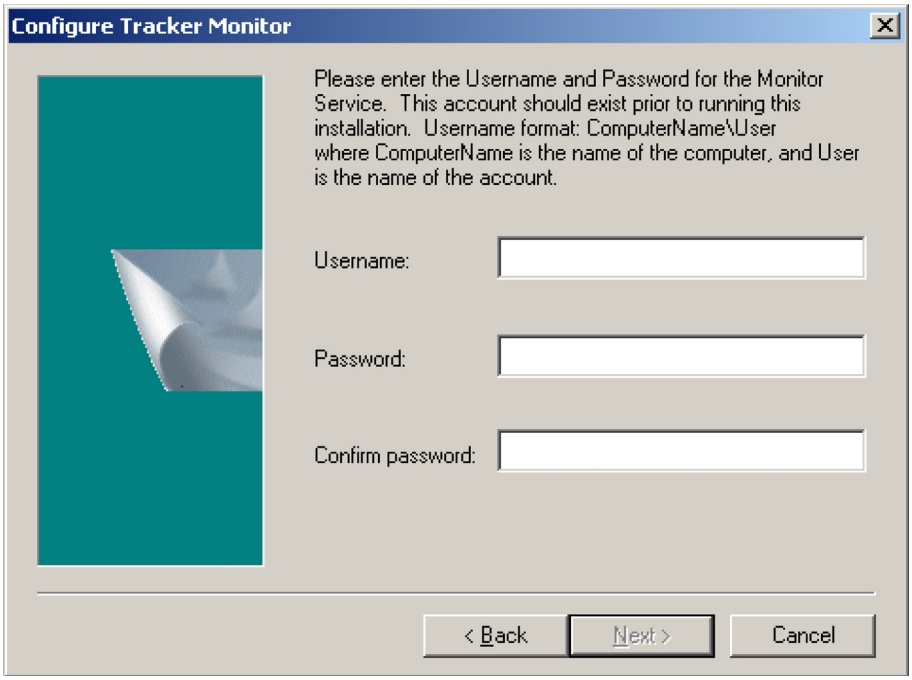
Alternatively, you can use a UNC path to specify a network location for the installation, for example *ServerName**ShareName*, where:

- *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

Note If Microsoft Windows Vista or Windows 7 is running on at least one workstation, you cannot use mapped drives. You must use a UNC path.

18. Click **Next**.

    The **Configure Tracker Monitor** dialog displays.

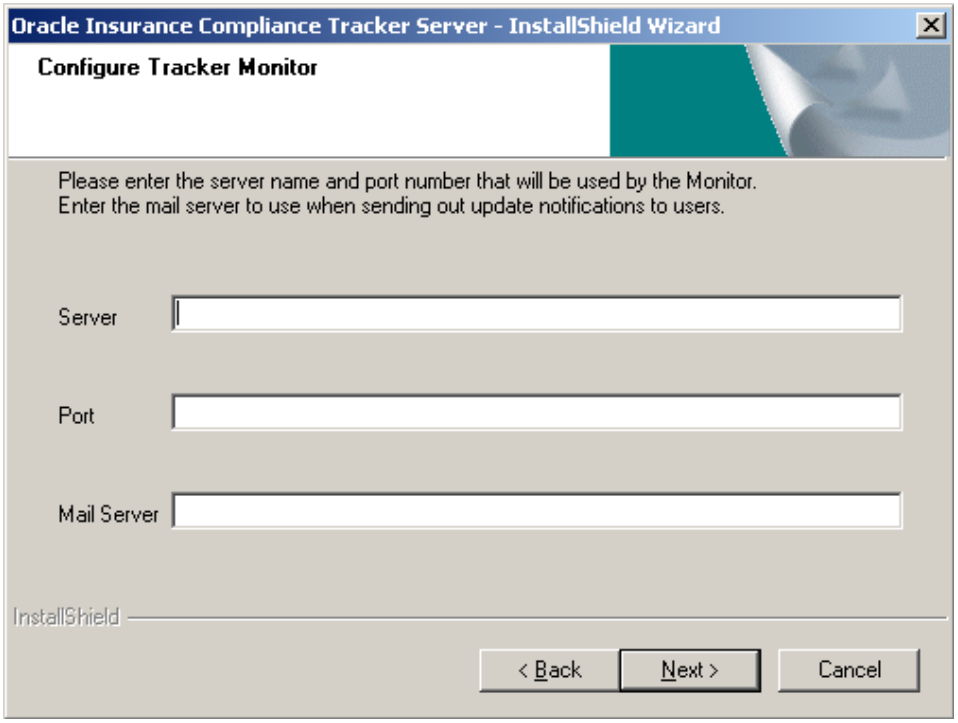


19. Enter the **Username** of the user account for the Tracker Monitor service. The format is *ComputerName**Name*, where *ComputerName* is the name of the computer and *Name* is the actual name of the account, that is, *ComputerName\tkrwfmon*

Important This user account should exist before installing Tracker.

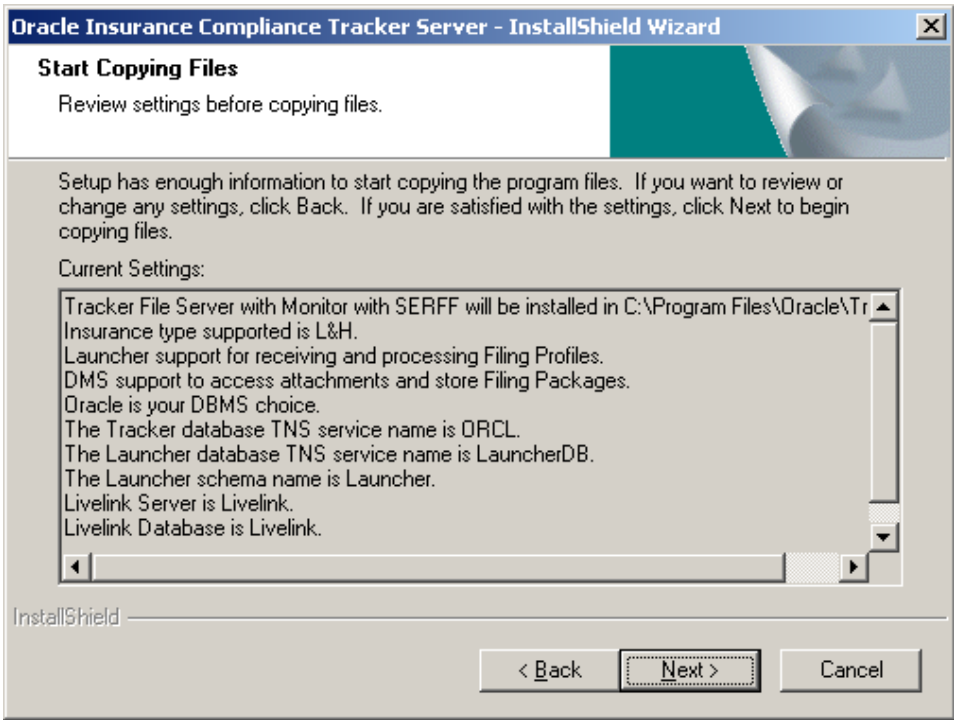
20. Enter the **Password** assigned to the Monitor user account. (Your password will be hidden when you type it.)

21. In the **Confirm password** field, enter the password again.
22. Click **Next**.



23. In this dialog:
    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. You can leave the **Mail Server** field blank.
    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 already been added to the database, it will not be overwritten and information entered in this dialog will be disregarded. For details on how to change this information after installation, please see the Tracker User Guide or Online Help.



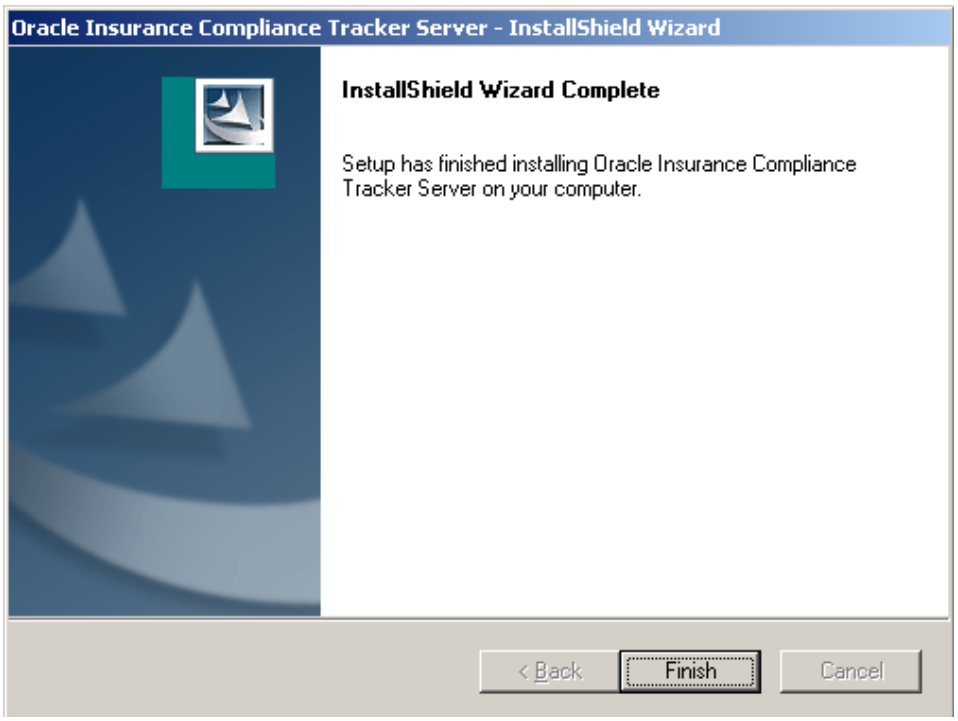
24. Review your **Current Settings**. If they are correct, click **Next**, otherwise click **Back** until you have reached the step you want to correct. Make any necessary corrections, then click **Next**.

    The **Setup Status** dialog 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 opens.



25. Click **Finish** to close the installation program.
26. If prompted, reboot the system.
27. Ensure that you share the Tracker folder on the Tracker server for the client installation. The default location is:

    C:\Program Files\Oracle
28. 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 installation package contains the Excel workbook `installed_files.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\Oracle\Tracker`) to the lists in the workbook. If there are any discrepancies, please contact Global Customer Support.

Step H:Configure the Tracker Monitor User

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

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

The **Properties** dialog opens.

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

   The **Launch Permission** dialog opens.
6. Click **Add**.
7. Enter `Everyone` in the lower list box.
8. Click **OK,** then **OK** again**.**
9. Select the option **Customize** under **Access Permissions** section, then click **Edit**.

   The **Access Permission** dialog opens.
10. Click **Add**.
11. Enter `Everyone` in the lower list box.
12. Click **OK,** then **OK** again**.**
13. Click the **Identity** tab and select **Launching User**.
14. Click **OK** to close the **TkrWF Properties** dialog.
15. Close the **Component Services** dialog.

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, replacing *{computer_name\user_name}* and *{password}* with the corresponding Monitor user name and password:

```
C:\windows\Microsoft.NET\Framework\v2.0.50727\installutil
/username={computer_name\user_name} /password={password}
/eventlogname=TrackerMonitor /eventlogsource=TkrMonitor
tkrmonitor.exe
C:\windows\Microsoft.NET\Framework\v2.0.50727\installutil
/username={computer_name\user_name} /password={password}
/eventlogname=TrackerMonitor /eventlogsource=TkrCabload
tkrcabload.exe
```

Note It is assumed that the .NET framework is installed at: C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727.

3. 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 an 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. Contact Global Customer Support to obtain the URL that is used to test SERFF. XML code is displayed when accessing this page.
9. In Internet Explorer, go to the URL given to you by Global Customer Support in the previous step. If it works, continue to the next step, otherwise, review the previous steps to ensure that you have correctly configured Internet Explorer. Contact Global Customer Support if you need further assistance.

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

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

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 *Installing Tracker Monitor and File Server on One Computer* on page 21.

Important Please refer the ReadMe in the Database folder of the Tracker media pack before installing the Tracker Server.

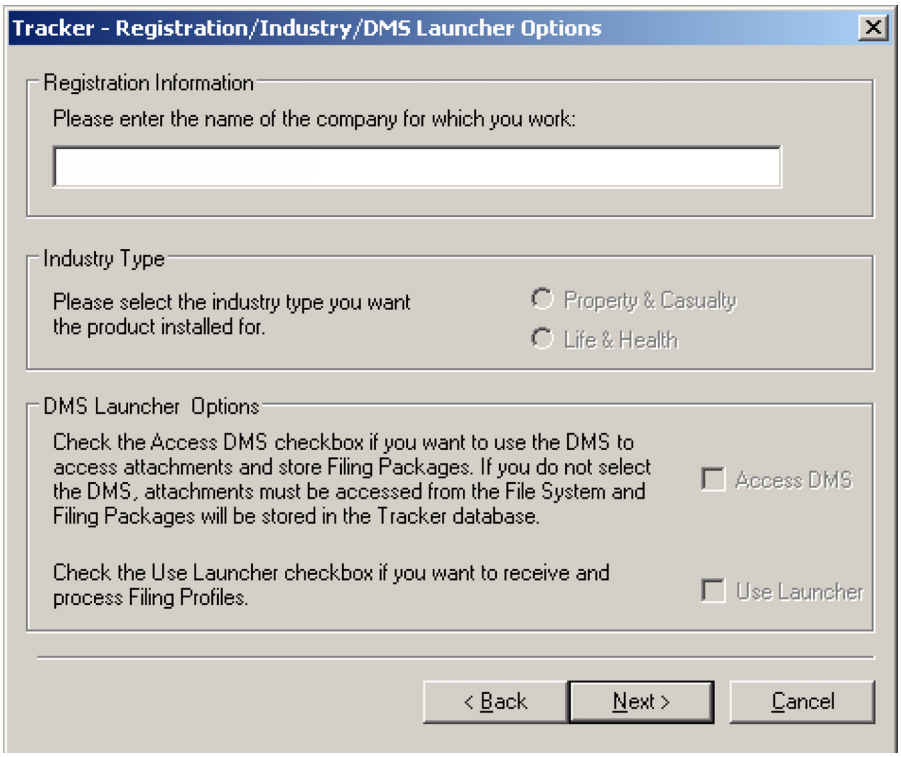
Installing Tracker Server

This section describes how to install the Tracker file server.

Step A:Run Tracker Server Setup

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

   The **InstallShield Wizard** opens. A progress window temporarily appears.
2. On the **Registration** dialog, enter your company name.



3. Choose your insurance **Industry Type**:

- **Property & Casualty**

- **Life & Health**

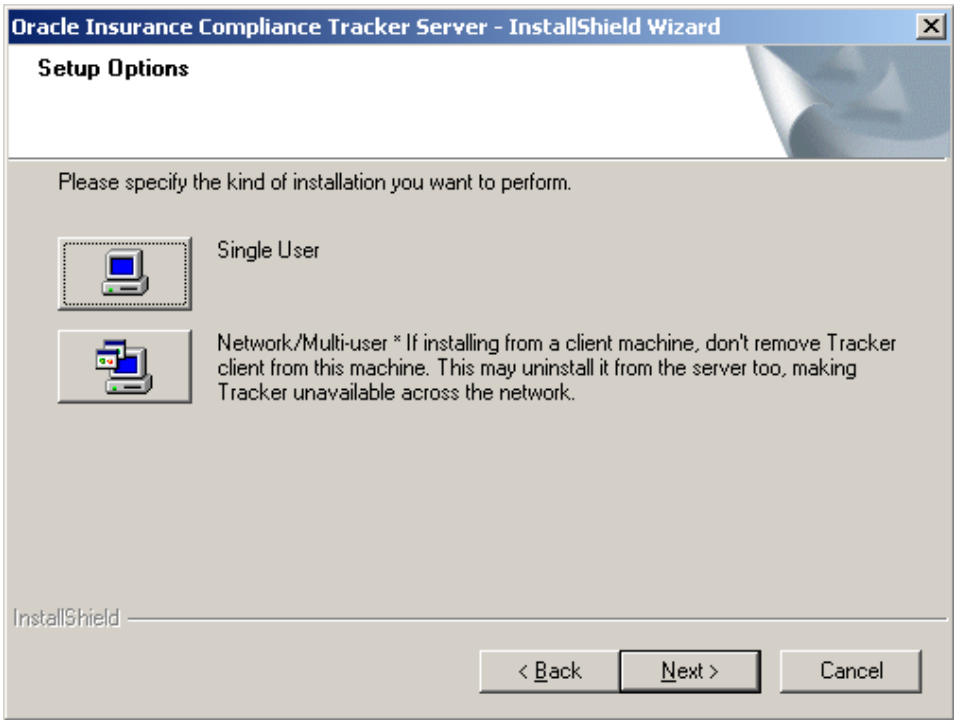
4. In the **DMS Launcher Options** section, select the **Access DMS** check box to use the DMS (Document Management System) to access filing attachments and store filing packages.

   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

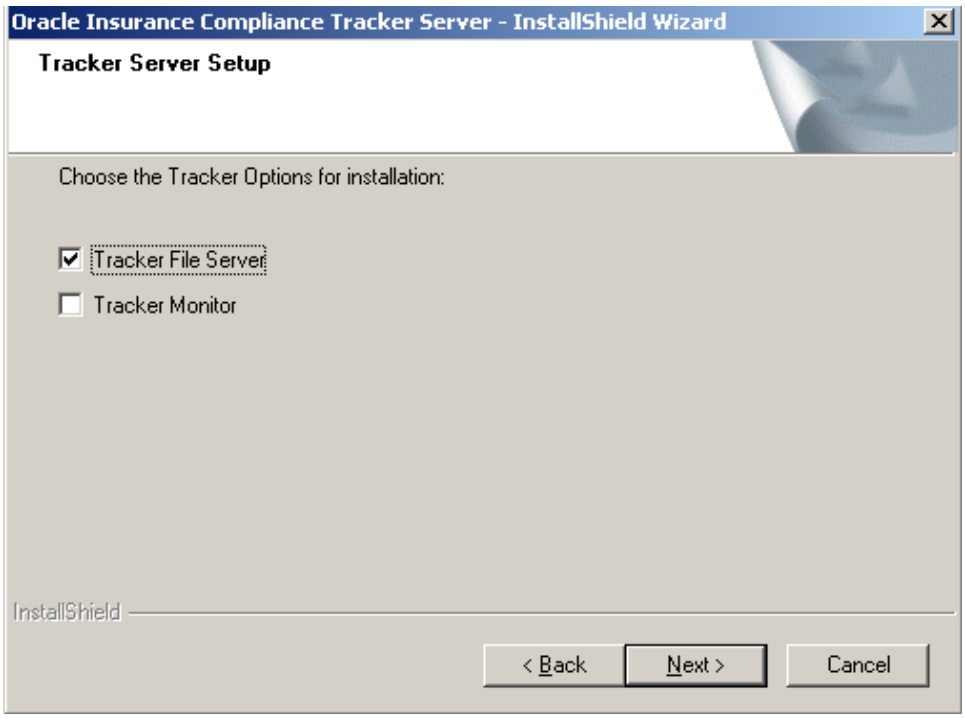
5. Click **Next**.

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

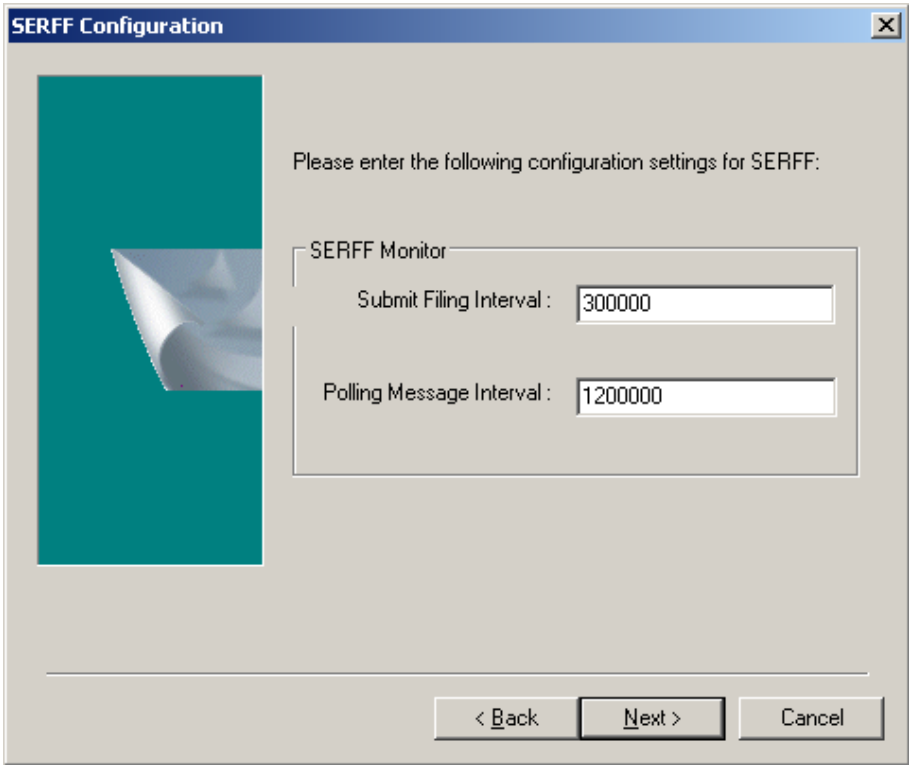
   (The **Single user** option is generally used only in a test environment.)



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

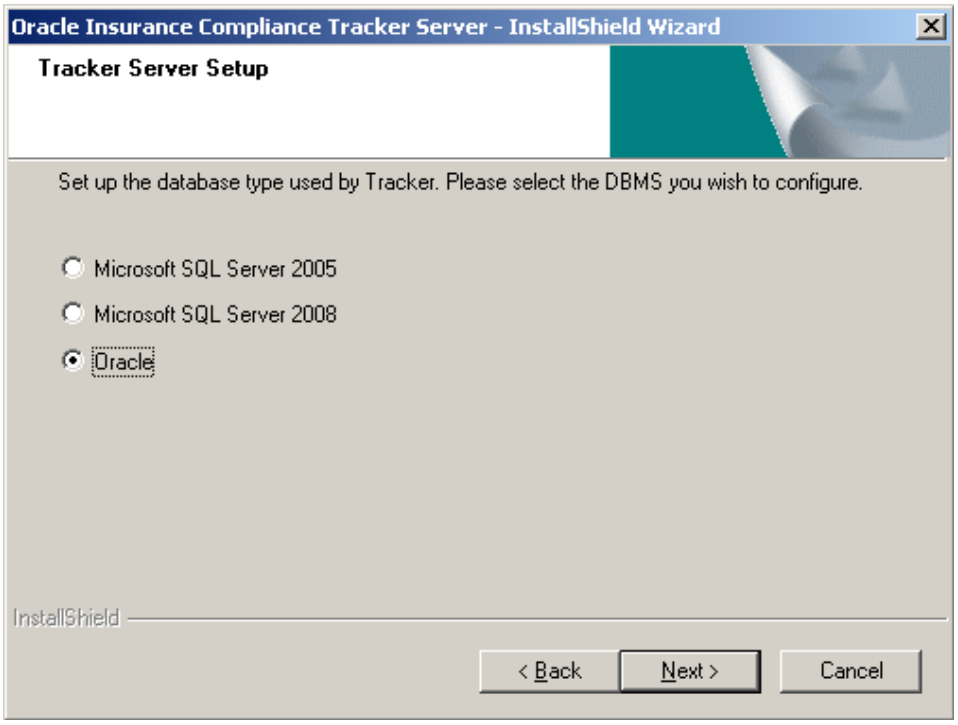


The **SERFF Configuration** dialog opens.

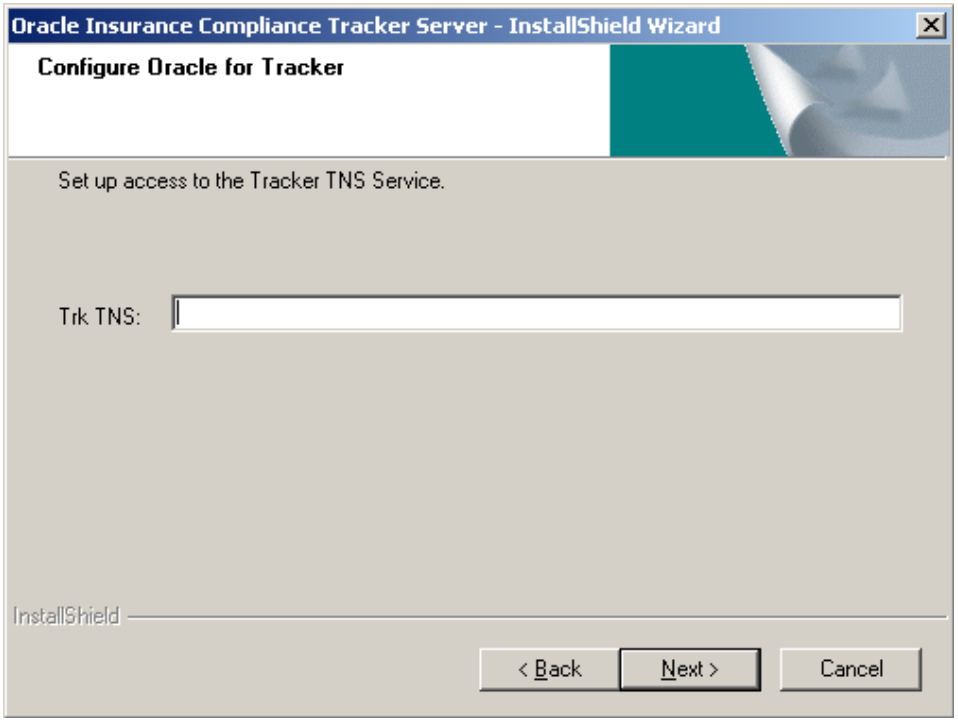


8. Enter the **Submit Filing Interval** and **Polling Message Interval** (in milliseconds), then click **Next**.

9. On the **Tracker Server Setup** dialog, select **Oracle** as the database type, then click **Next**.



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



Tracker will automatically detect the Oracle ODBC driver installed. However, if there is more than one instance of the Oracle driver installed, you will be prompted to enter the one to use:

11. From the ODBC Administrator, select **Add**.

    A list of ODBC drivers is displayed.

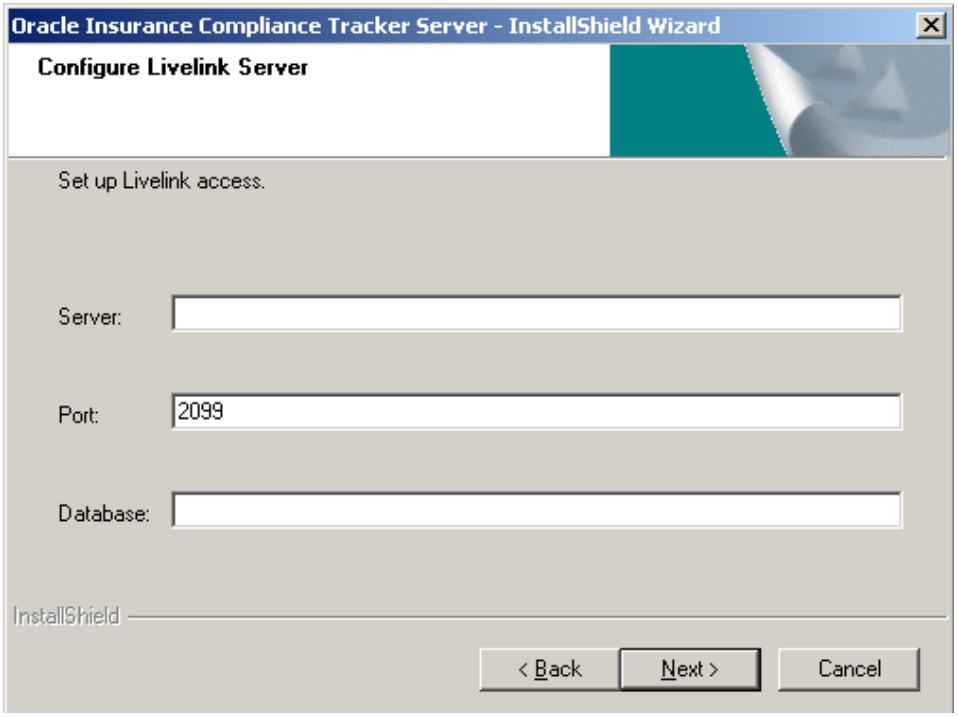
12. Select the Oracle driver instance to use.

    Note the name of the instance you selected.

13. In the **Configure Oracle ODBC** dialog, enter the instance name in the **Inst** field.

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

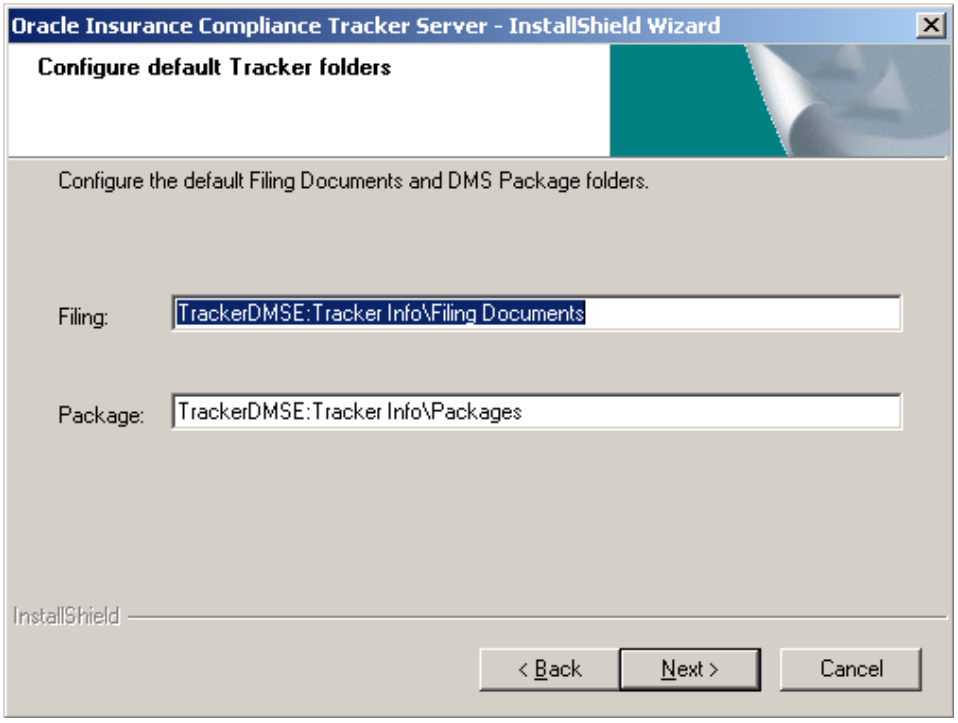
.



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

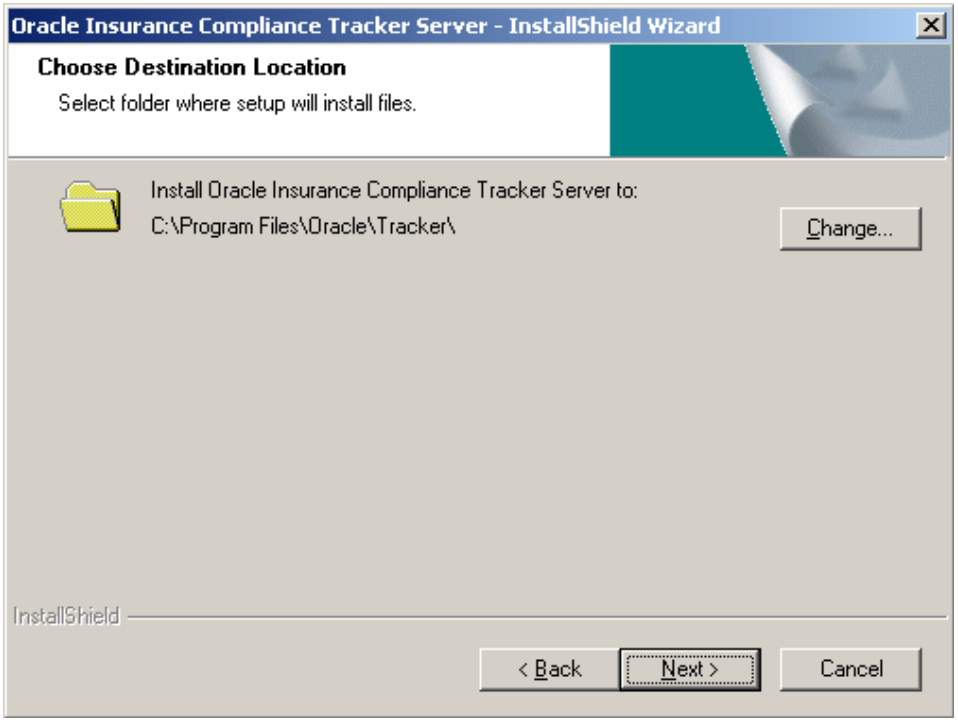
    a. In the **Filing** field, enter the default path of the filing documents folder.

    b. In the **Package** field, enter the default path of the DMS package folders.



c. Click **Next**.

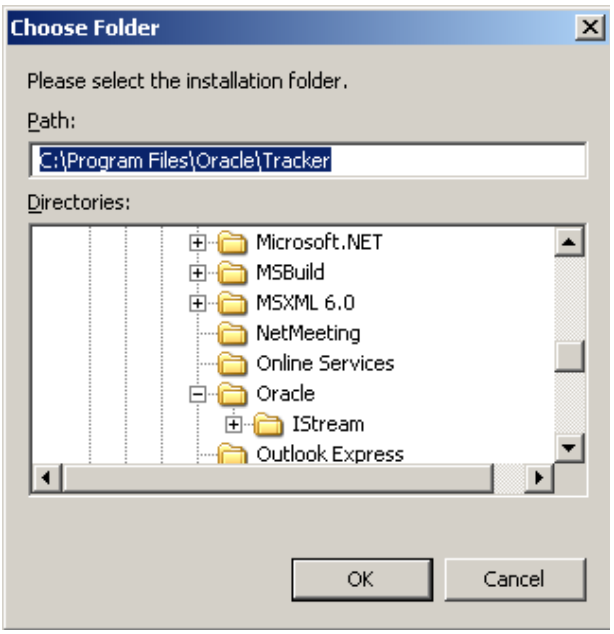
The **Choose Destination Location** dialog opens, displaying the installation location.



To change the location:

a. Click **Change**.

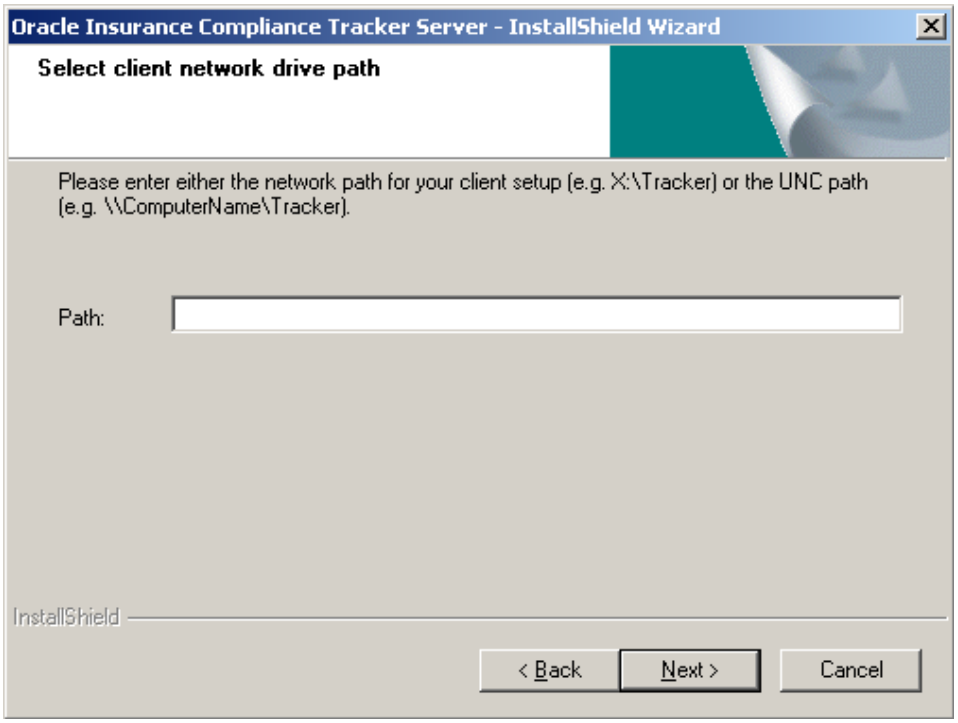
b. In the **Choose Folder** dialog, select the folder you want to install Tracker.



c. Click **OK**.

16. Click Next.

17. In the **Select client network drive path** dialog, enter the network drive path where you want to install the Tracker server software.



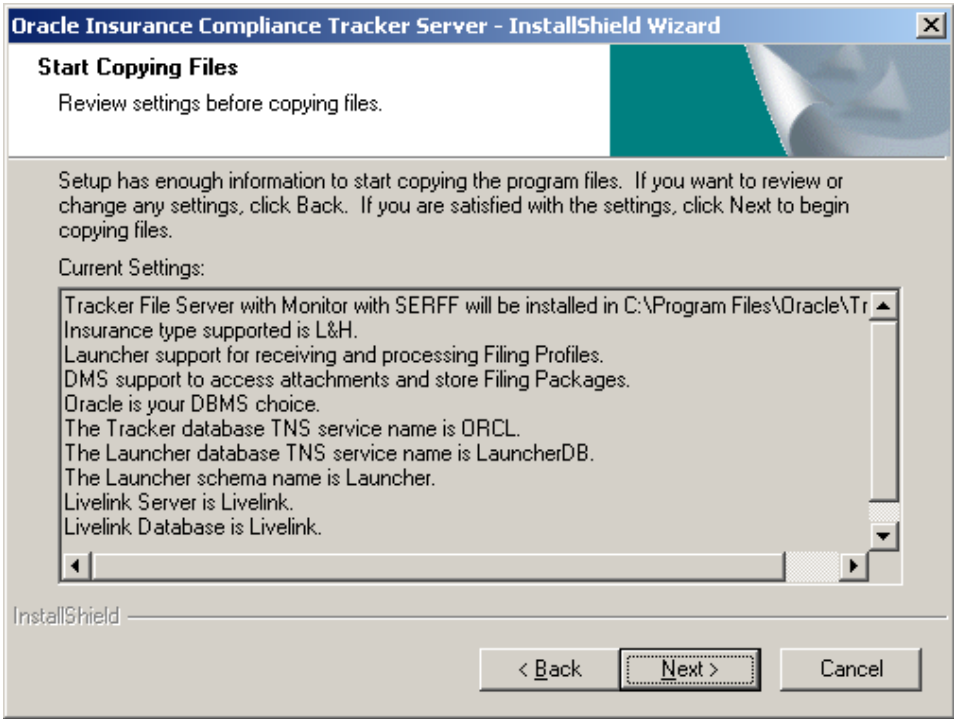
For example: `X:\Tracker`. *X* is the letter to map the Tracker installation folder on the client system. Note this drive letter. This drive path and letter will be used for *all* Tracker client systems.

Alternatively, you can use a UNC path 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

Note If Microsoft Windows Vista or Windows 7 is running on at least one workstation, you cannot use mapped drives. You must use a UNC path.

18. Click **Next**.
19. In the **Start Copying Files** dialog, review your **Current Settings**.



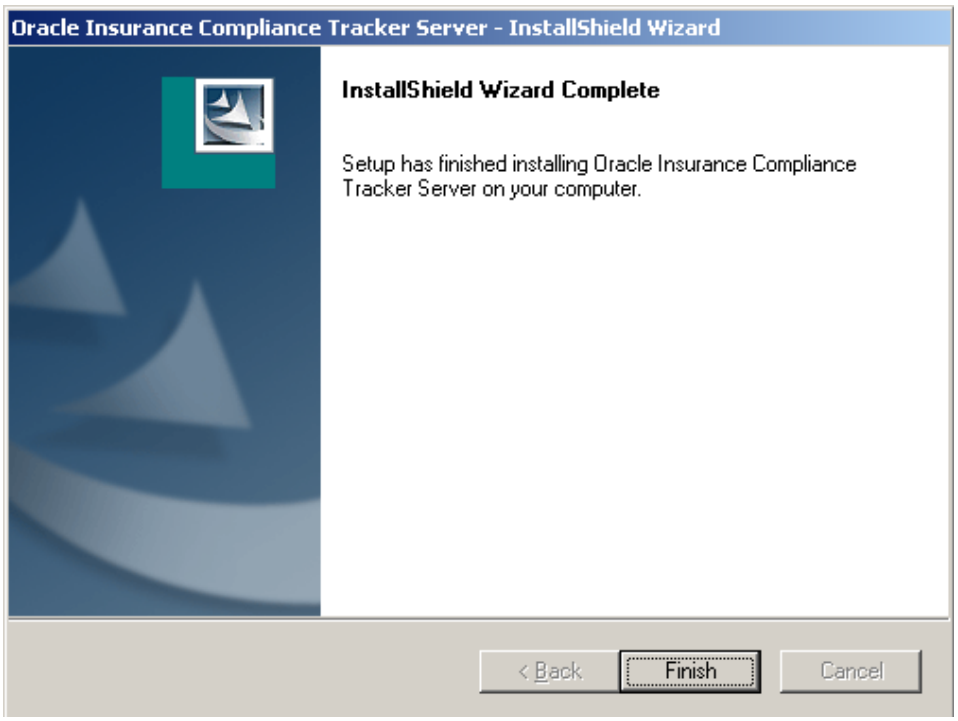
20. Click **Finish**.

    The **Setup Status** dialog 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 opens.



21. Click **Finish** to close the installation program.
22. If prompted, reboot the system.
23. Ensure that you share the Tracker folder on the Tracker server for the client installation. The default location is:

    C:\Program Files\Oracle
24. 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.
25. Reboot the system.

Step B:Verify the Installation Files

The `manuals` folder on the installation package contains the Excel workbook `installed_files.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\Oracle\Tracker`) to the lists in the workbook. If there are any discrepancies, please contact Global Customer Support.

Installing Tracker Monitor

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

Step A:Install Microsoft .NET Framework

For 32-bit versions of Microsoft Windows:

1. From the Tracker installation package, install DotNet 2.0:

```
\DotNet 2.0\32 bit\dotnetfx.exe
```

2. From the Tracker installation package, install DotNet 2.0 SP1:

```
\DotNet 2.0\32 bit\NetFX20SP1_x86.exe
```

For 64-bit versions of Microsoft Windows:

1. From the Tracker installation package, install DotNet 2.0:

```
\DotNet 2.0\64 bit\NetFx64.exe
```

2. From the Tracker installation package, install DotNet 2.0 SP1:

```
\DotNet 2.0\64 bit\NetFx20SP1_x64.exe
```

Step B:Install IStream Document Manager Core

1. From the IStream Document Manager installation package, run

```
\IStream Document Manager 6.3 SP2\IStream Document
Manager\setup.exe
```

   The **InstallShield Wizard** opens.

2. Click **Next**.

   The **Select Features** dialog displays.

3. The **Choose Destination Location** dialog displays the location where IStream Document Manager will be installed.

   To change the location:

   a. Click **Change**.

   b. In the **Choose Folder** dialog, select the folder you want to install IStream Document Manager.

   c. Click **OK**.

4. Click **Next**.

5. On the **Select Features** dialog, ensure that the **Core** check box is selected, then click **Next**.

   A warning message may appear indicating that you need to ensure that the Livelink services are stopped before proceeding to the next step.

   The **Setup Type** dialog opens.

6. Choose the default date format for the CTOD function, then click **Next**.

7. In the **DMS InfoSources** dialog, accept the default values, then click **Next**.

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

8. To review or change any of your installation settings, click **Back**, otherwise click **Install**.

   The **Setup Status** dialog 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 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)
- configured as a local administrator on both the Monitor computer and 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 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** dialog.
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.

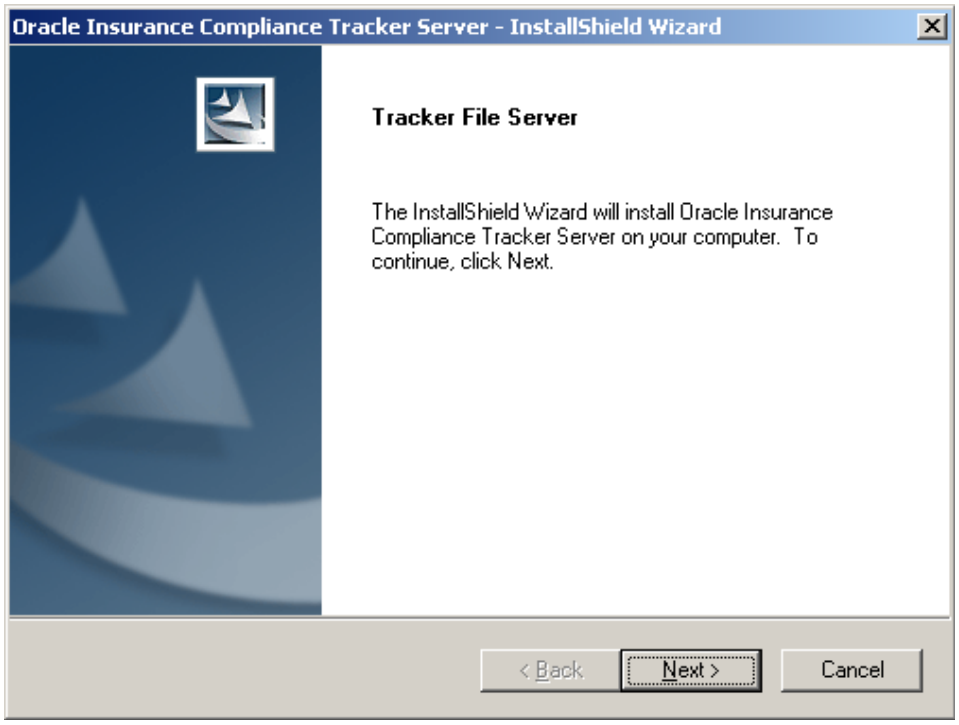
Step F:Run the Tracker Server Setup to Install Tracker Monitor

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

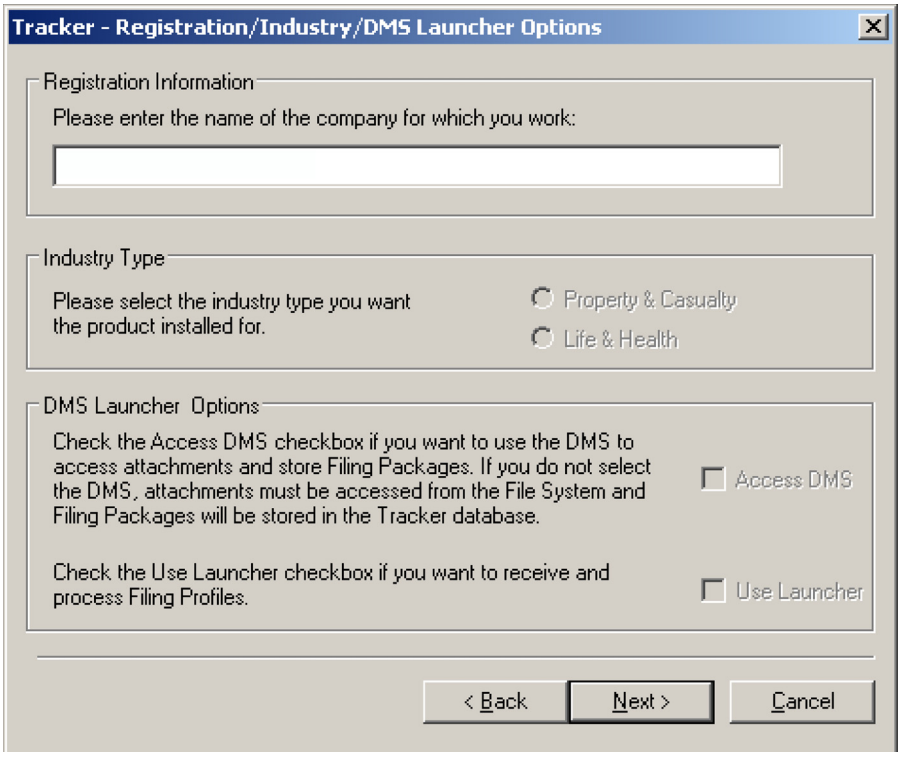
1. From the `Setup` folder on the Tracker installation package, run `setup.exe`. If a Security Warning dialog appears, click **Run**.

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

   The **Tracker File Server** dialog displays.



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



Choose your insurance **Industry Type**:

- Property & Casualty
- Life & Health

4. In the **DMS Launcher Options** section, select the **Access DMS** check box to use the DMS (Document Management System) to access filing attachments and store filing packages.

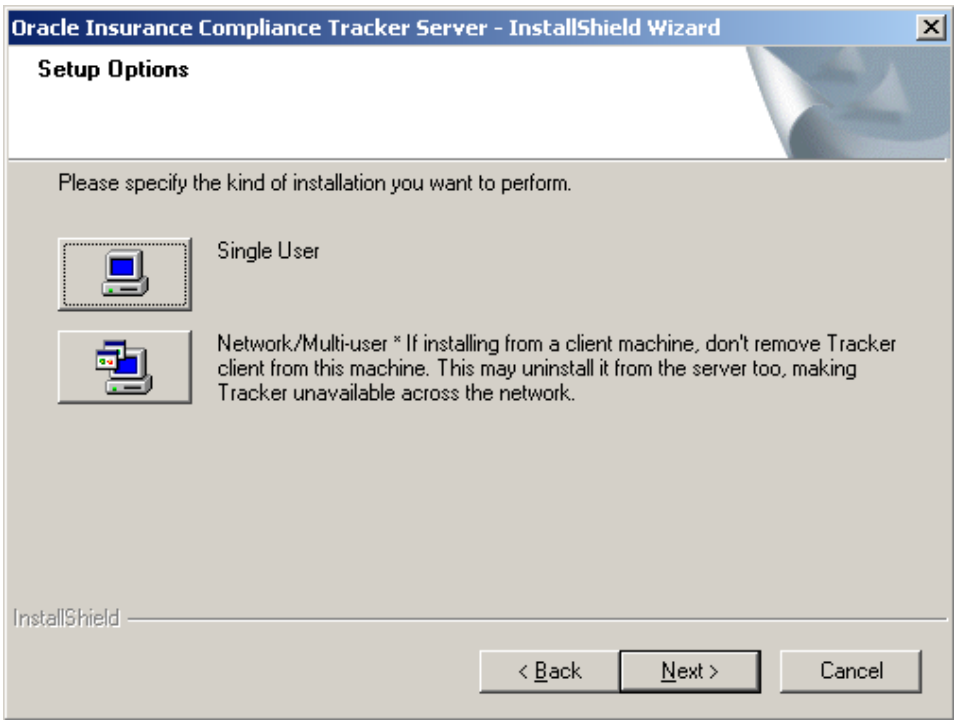
   If you do not select this option, then filing attachments must be accessed from the file system, and filing packages will be stored in the Tracker database

5. Click **Next**.

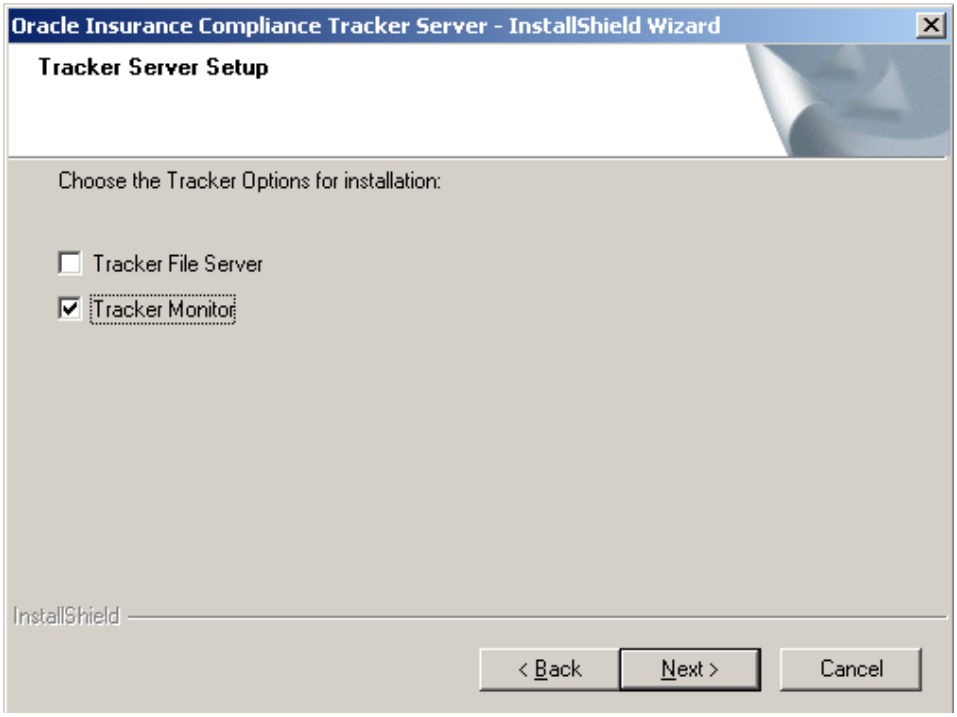
Note Ensure that the selections here are identical to the ones you made when setting up the Tracker File Server.

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

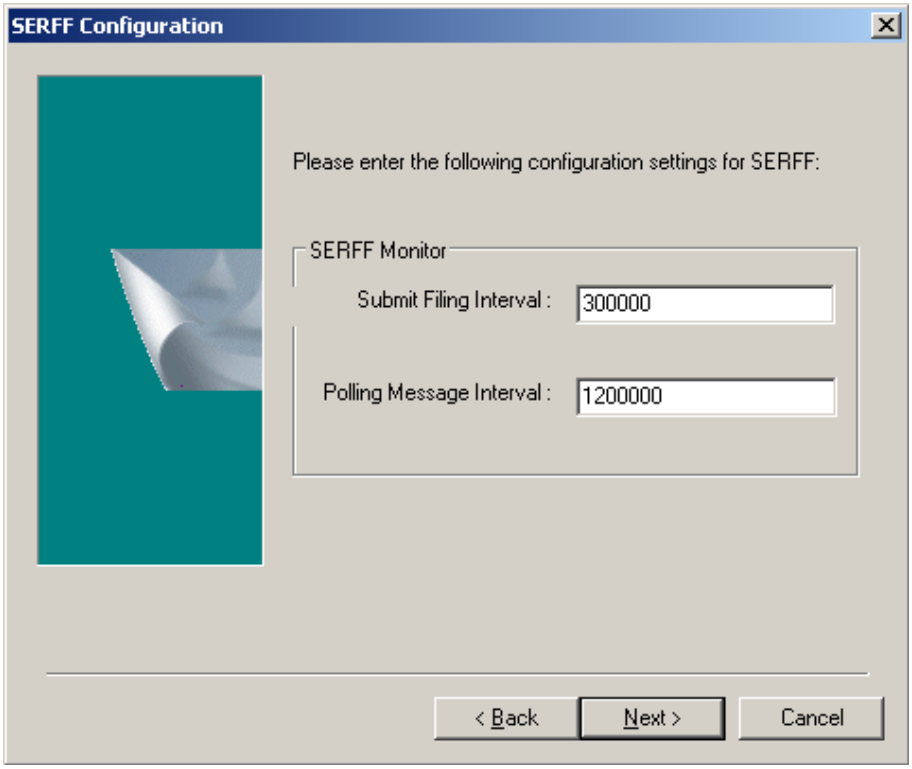
   (The **Single user** option is generally used only in a test environment.)



7. On the **Tracker Server Setup** dialog, select **Tracker Monitor** only, then click **Next**.

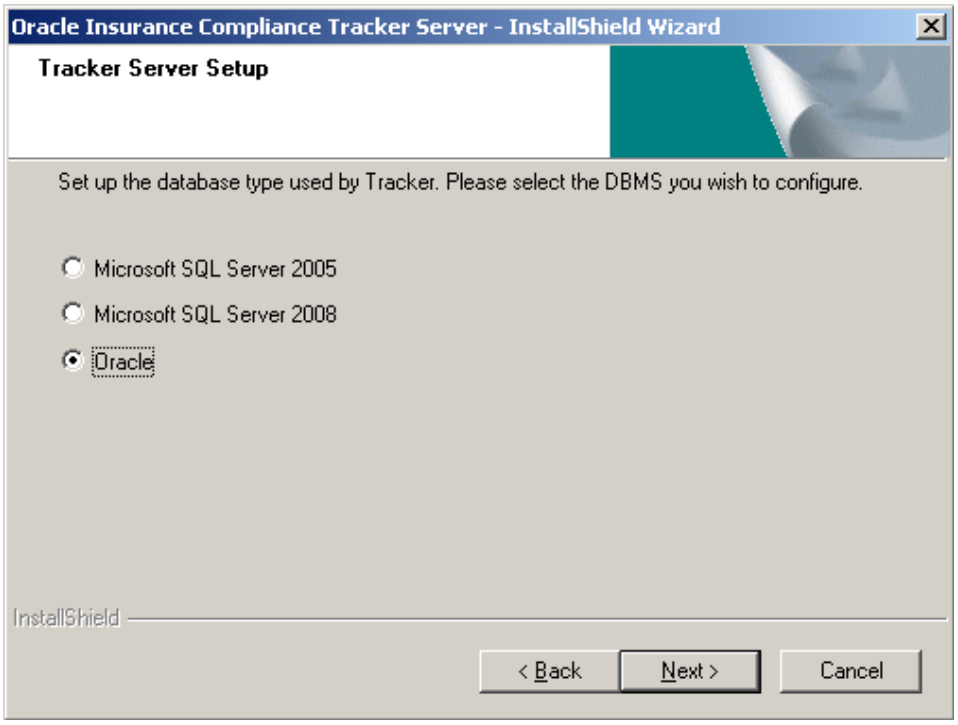


The **SERFF Configuration** dialog opens.

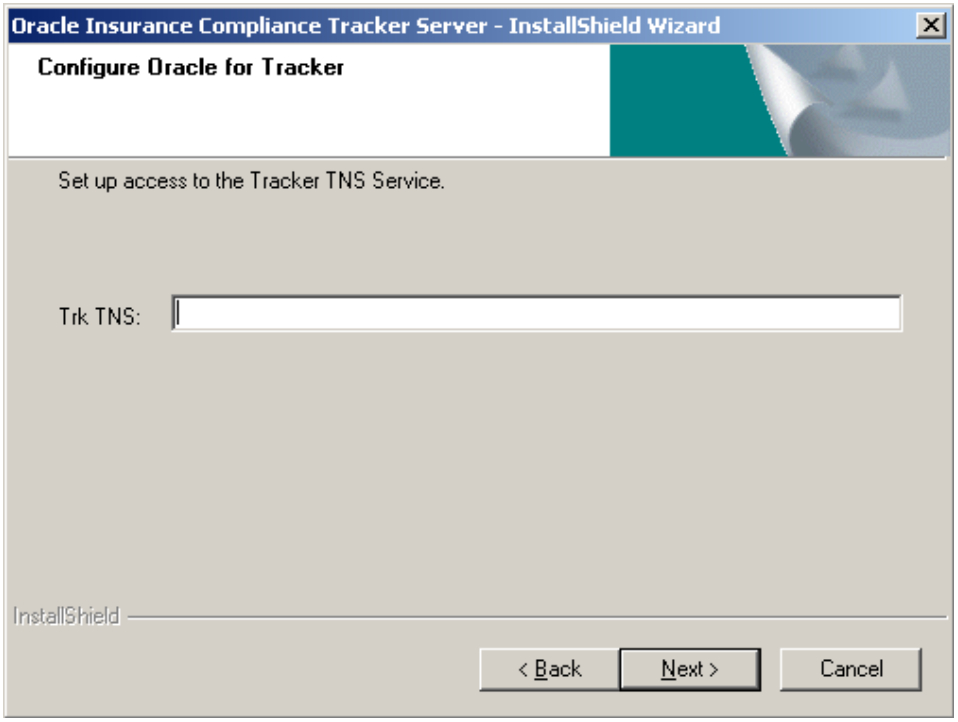


8. Enter the **Submit Filing Interval** and **Polling Message Interval** (in milliseconds), then click **Next**.

9. On the **Tracker Server Setup** dialog, select **Oracle** as the database type, then click **Next**.



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



Tracker will automatically detect the Oracle ODBC driver installed. However, if there is more than one instance of the Oracle driver installed, you will be prompted to enter the one to use:

11. From the ODBC Administrator, select **Add**.

    A list of ODBC drivers is displayed.

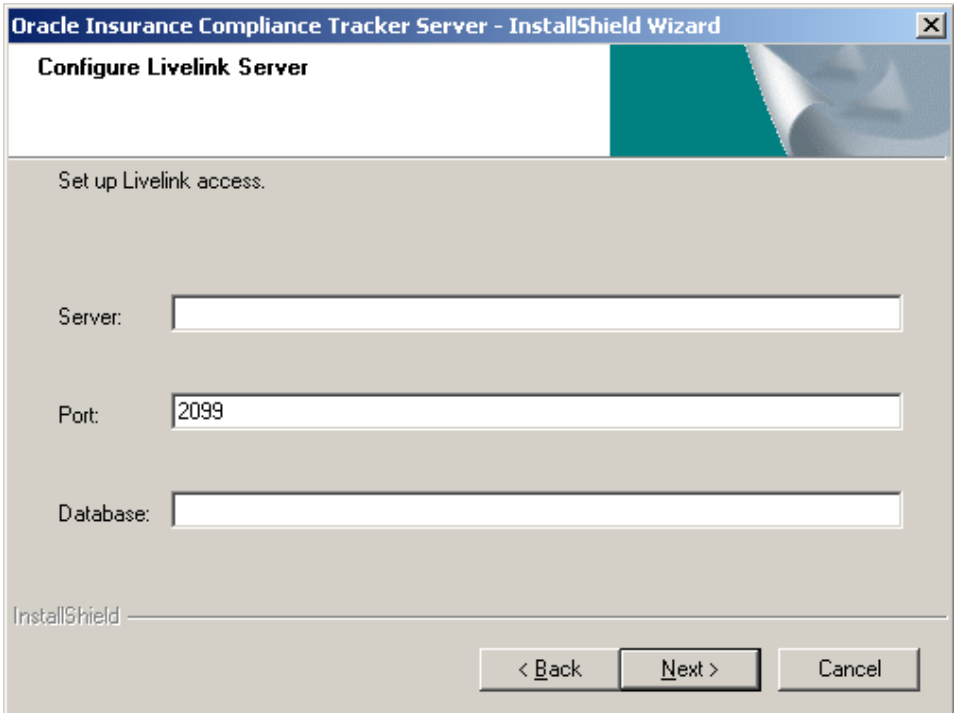
12. Select the Oracle driver instance to use.

    Note the name of the instance you selected.

13. In the **Configure Oracle ODBC** dialog, enter the instance name in the **Inst** field.

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

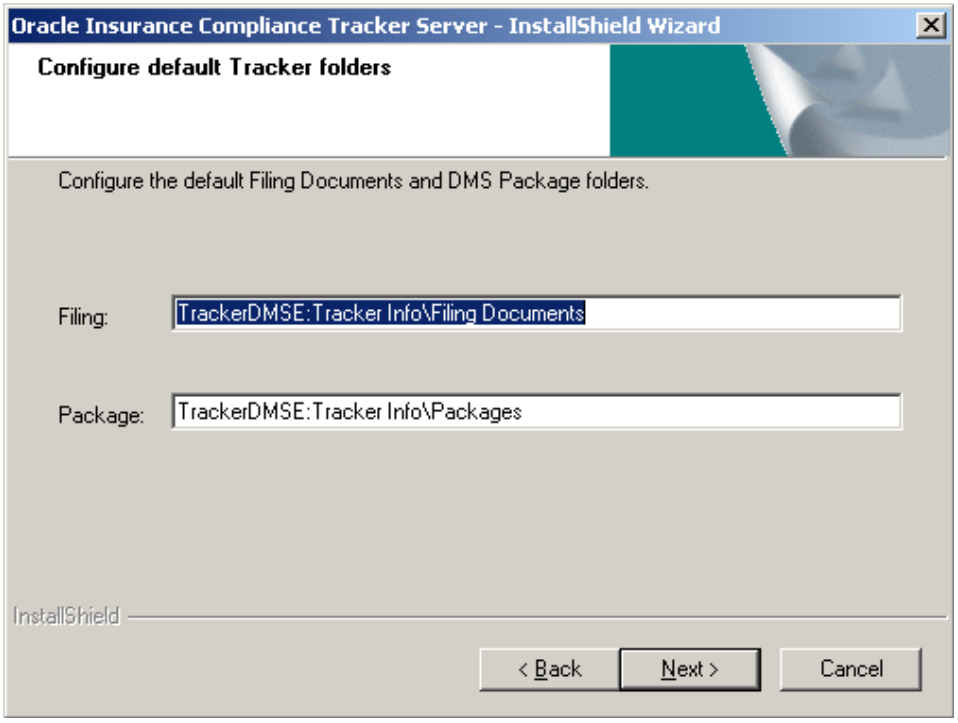
.



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

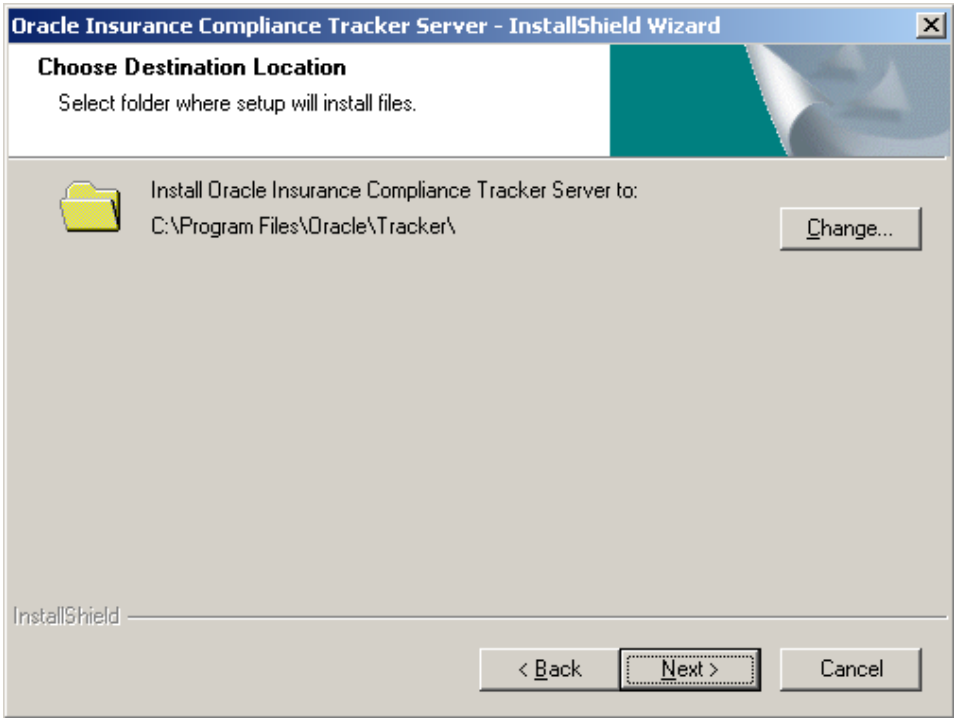
    a. In the **Filing** field, enter the default path of the filing documents folder.

    b. In the **Package** field, enter the default path of the DMS package folders.



c. Click **Next**.

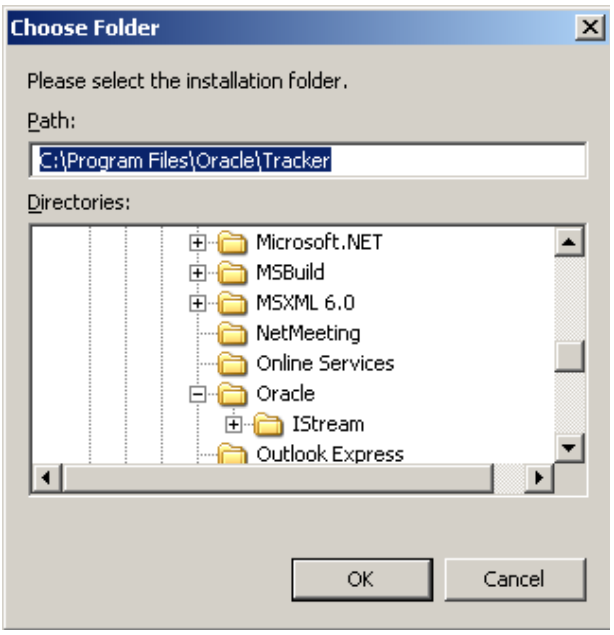
The **Choose Destination Location** dialog opens, displaying the installation location.



To change the location:

a. Click **Change**.

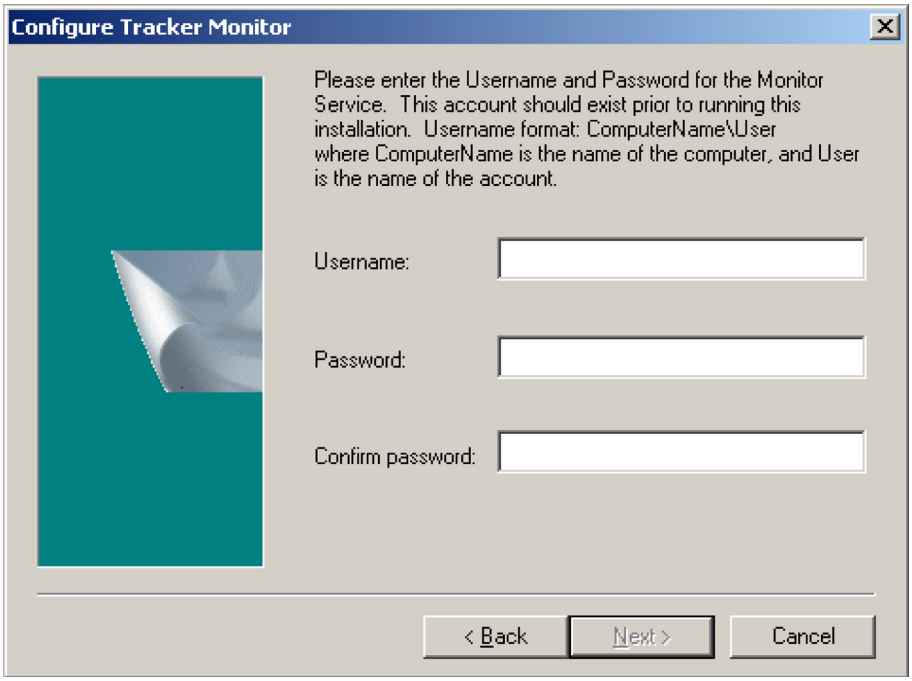
b. In the **Choose Folder** dialog, select the folder you want to install Tracker.



c. Click **OK**.

16. Click **Next**.

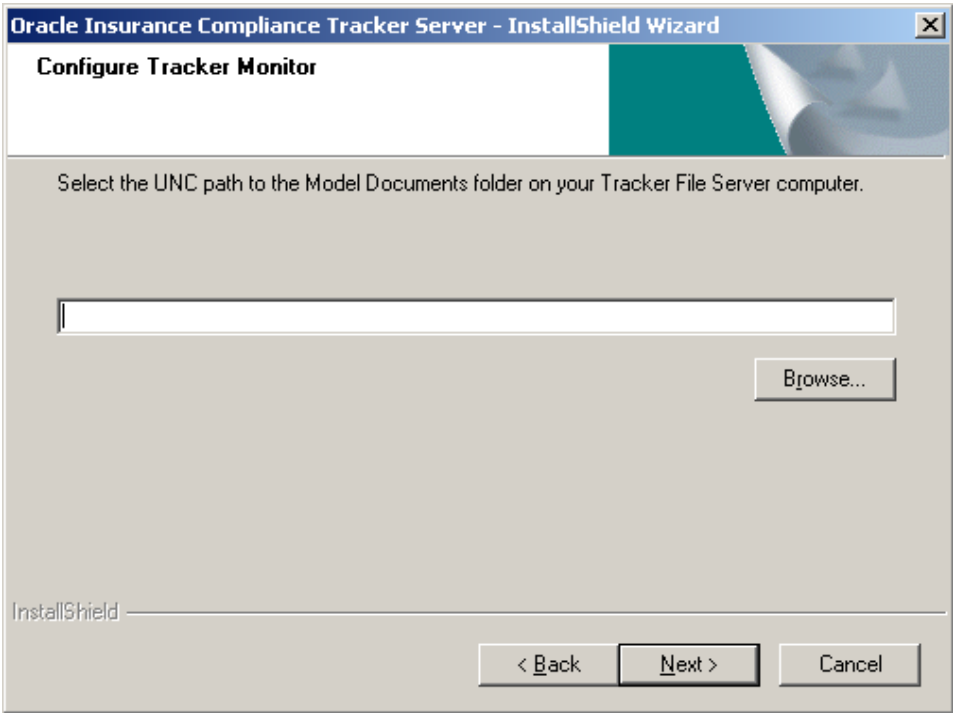
The **Configure Tracker Monitor** dialog displays.



17. Enter the **Username** of the user account for the Tracker Monitor service. 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*

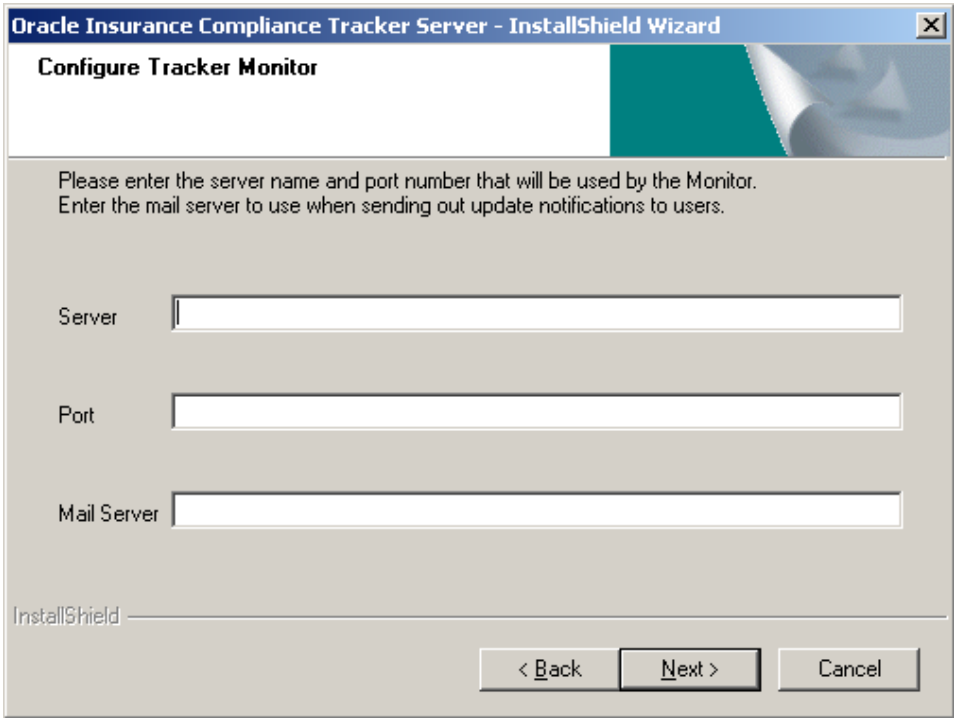
Important This user account should exist before installing Tracker.

18. Enter the **Password** assigned to the Monitor user account. (Your password will be hidden when you type it.)
19. In the **Confirm password** field, enter the password again.
20. Click **Next**.
21. Select the UNC path to the model documents folder on the Tracker file server.



22. Click **Next**

    Another **Configure Tracker Monitor** dialog 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.

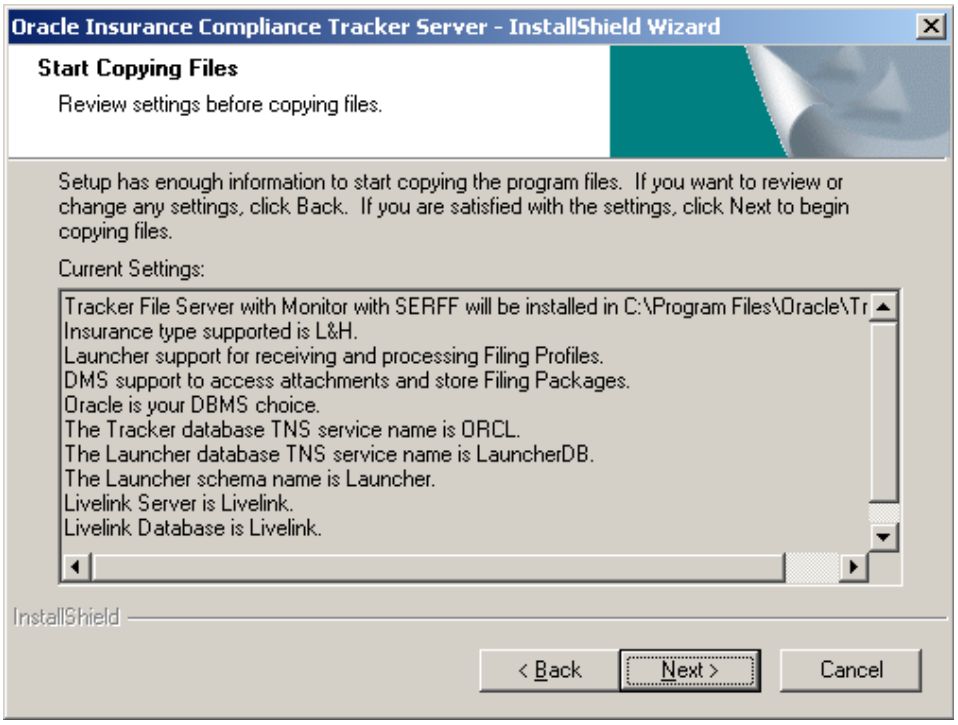
b. Enter the **Port** number that Tracker Monitor will use.

c. You can leave the **Mail Server** field blank.

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 already been added to the database, it will not be overwritten and information entered in this dialog 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, review your **Current Settings**.



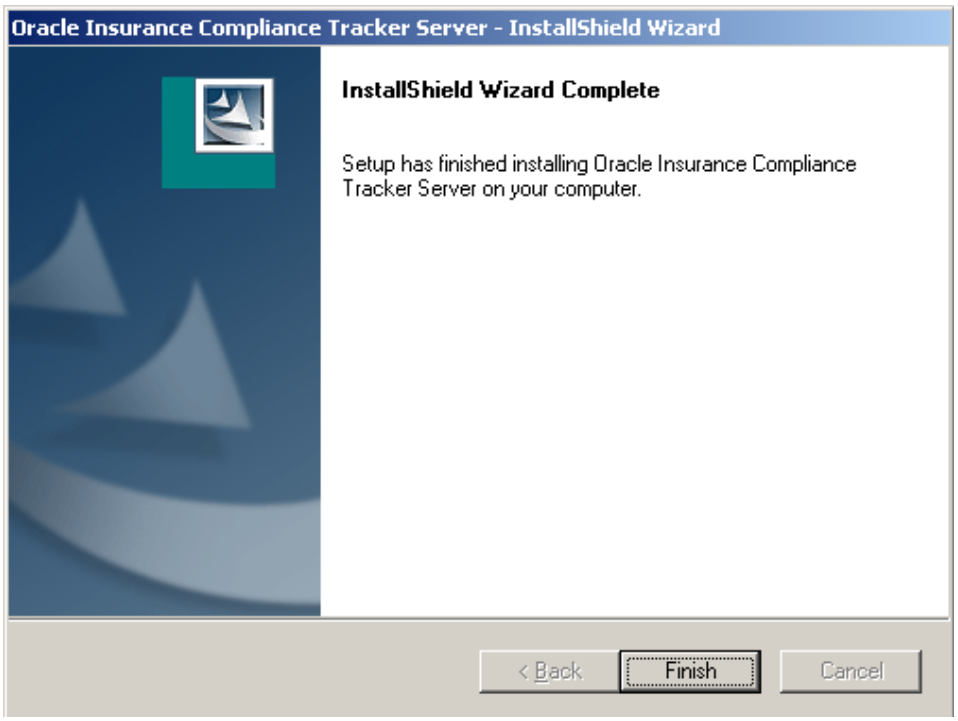
23. Review your **Current Settings**. If they are correct, click **Next**, otherwise click **Back** until you have reached the step you want to correct. Make any necessary corrections, then click **Next**.
24. Accept the confirmation dialog that displays.
25. Click **Finish**.

    The **Setup Status** dialog 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 opens.



26. Click **Finish** to close the installation program.
27. If prompted, reboot the system.
28. Ensure that you share the Tracker folder on the Tracker server for the client installation. The default location is:

    C:\Program Files\Oracle

Step G:Verify the Installation Files

The `manuals` folder on the installation package contains the Excel workbook `installed_files.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\Oracle\Tracker`) to the lists in the workbook. If there are any discrepancies, please contact Global Customer Support.

Step H:Configure the Tracker Monitor User

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

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

   The **Properties** dialog opens.
4. Click the **Location** tab and select the option **Run application on this computer**.

5. Click the **Security** tab and select the option **Customize** under **Launch and Activation Permissions** section, then click **Edit**.

   The **Launch Permission** dialog opens.

6. Click **Add**.
7. Enter `Everyone` in the lower list box.
8. Click **OK,** then **OK** again**.**
9. Select the option **Customize** under **Access Permissions** section, then click **Edit**.

   The **Access Permission** dialog opens.

10. Click **Add**.
11. Enter `Everyone` in the lower list box.
12. Click **OK,** then **OK** again**.**
13. Click the **Identity** tab and select **Launching User**.
14. Click **OK** to close the **TkrWF Properties** dialog.
15. Close the **Component Services** dialog.

Step I: Register the Tracker Monitor Services Manually

If during the Tracker Monitor installation you did not correctly enter the username 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, replacing *{computer_name\user_name}* and *{password}* with the corresponding Monitor user name and password:

```
C:\windows\Microsoft.NET\Framework\v2.0.50727\installutil
/username={computer_name\user_name} /password={password}
/eventlogname=TrackerMonitor /eventlogsource=TkrMonitor
tkrmonitor.exe
C:\windows\Microsoft.NET\Framework\v2.0.50727\installutil
/username={computer_name\user_name} /password={password}
/eventlogname=TrackerMonitor /eventlogsource=TkrCabload
tkrcabload.exe
```

Note It is assumed that the .NET framework is installed at: C:\WINDOWS\Microsoft.NET\Framework\v2.0.50727.

3. 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 an 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. Contact Global Customer Support to obtain the URL that is used to test SERFF. XML code is displayed when accessing this page.
9. In Internet Explorer, go to the URL given to you by Global Customer Support in the previous step. If it works, continue to the next step, otherwise, review the previous steps to ensure that you have correctly configured Internet Explorer. Contact Global Customer Support if you need further assistance.

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

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

Installing the Tracker Client

In this stage, you install the Tracker client.

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 Tracker installation package, install DotNet 2.0:

```
\DotNet 2.0\32 bit\dotnetfx.exe
```

2. From the Tracker installation package, install DotNet 2.0 SP1:

```
\DotNet 2.0\32 bit\NetFX20SP1_x86.exe
```

Note Ensure that the Microsoft SQL 2005 or 2008 native drivers are installed, depending on which database you are using.

Step C:Install IStream Document Manager Core

1. From the IStream Document Manager installation package, run

```
\IStream Document Manager 6.3 SP2\IStream Document
Manager\setup.exe
```

   The **InstallShield Wizard** opens.

2. Click **Next**.

   The **Select Features** dialog displays.

3. The **Choose Destination Location** dialog displays the location where IStream Document Manager will be installed.

   To change the location:

   a. Click **Change**.

   b. In the **Choose Folder** dialog, select the folder you want to install

   c. IStream Document Manager.

   d. Click **OK**.

4. Click **Next**.

5. On the **Select Features** dialog, ensure that the **Core** check box is selected, then click **Next**.

   The **Setup Type** dialog opens.

6. Choose the default date format for the CTOD function, then click **Next**.

7. In the **DMS InfoSources** dialog, accept the default values, then click **Next**.

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

8. To review or change any of your installation settings, click **Back**, otherwise click **Install**.

   The **Setup Status** dialog 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 opens.

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

Important LAPI DLLs must be copied into the Istream\Components Folder (eg : "C:\Program Files\Oracle\IStream\Components") under IStream Document Manager Core installation path as these DLLs might be used by Tracker while accessing DMS.

Step D:Run the Tracker Client Setup

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

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.

For Microsoft Windows Vista and Windows 7 you must install Tracker using the Administrator account. You cannot use any other account, even if it has administrative rights.

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. (On Windows 7 and Vista, open the mapped drive, right-click on `Setup.exe`, and click "Run as Administrator" on the context menu.).

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

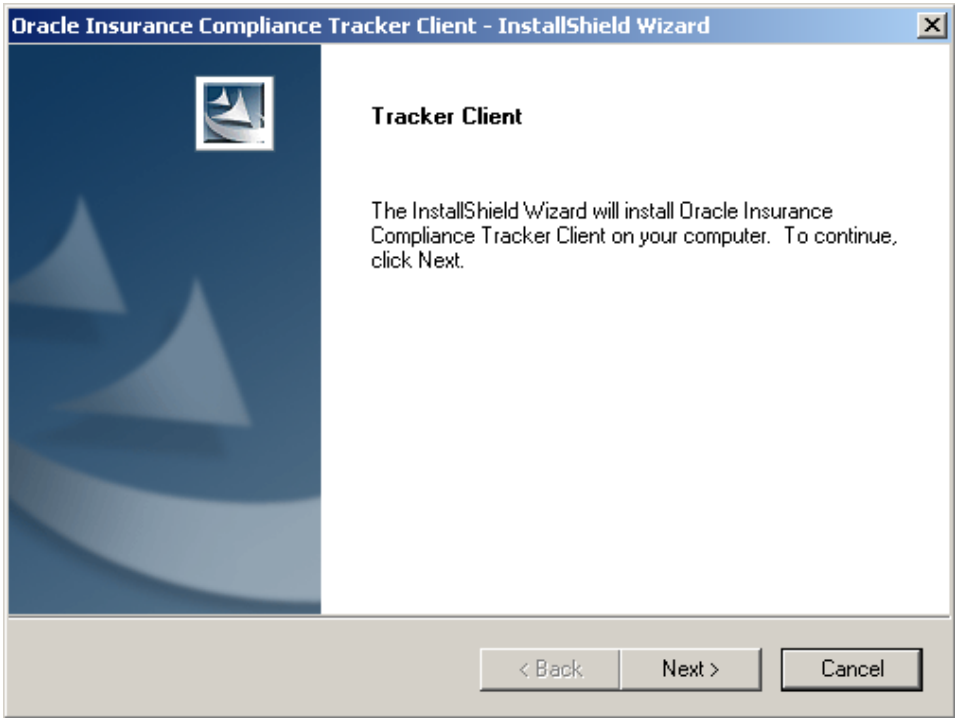
   *Tracker_server**shared_folder*\Tracker\CliSetup\

   Setup.exe

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

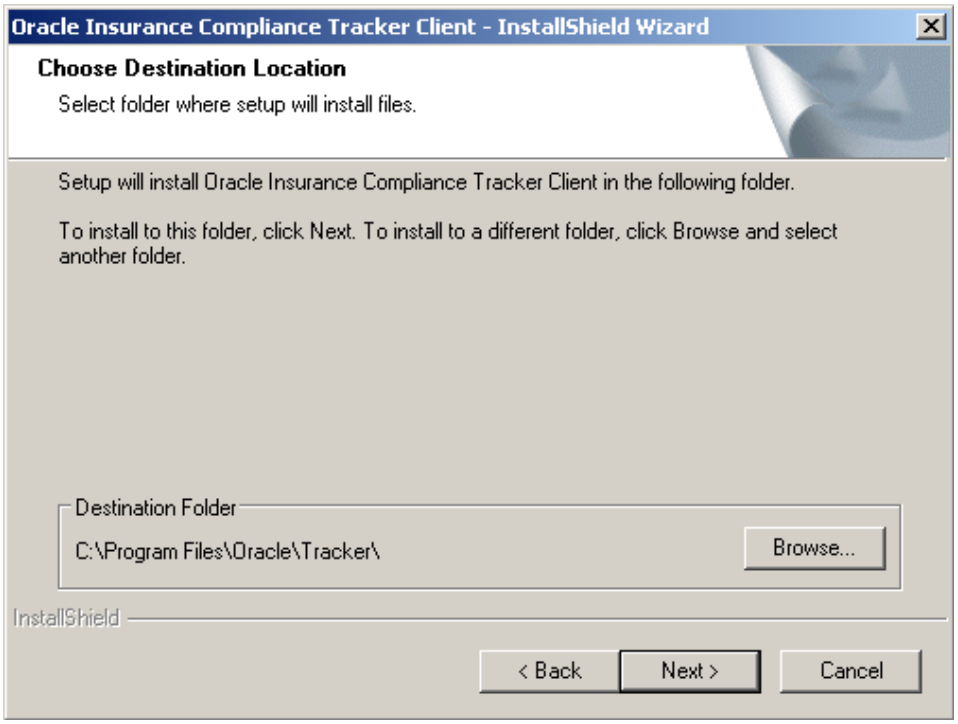
   The **InstallShield Wizard** opens. A progress window temporarily appears.

   The **Tracker Client InstallShield Wizard** dialog displays.



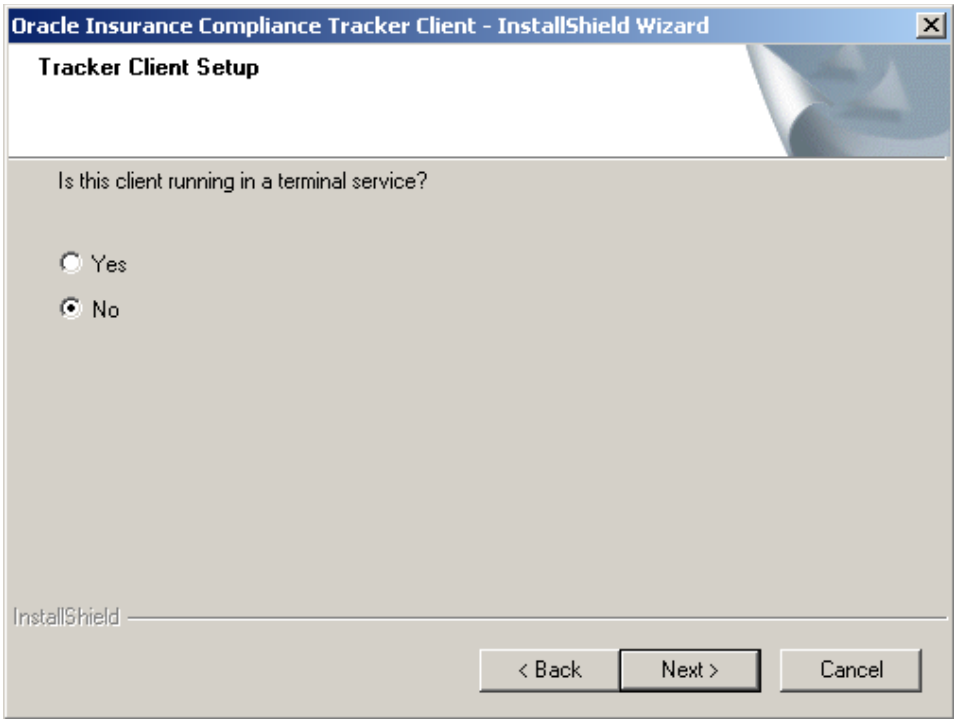
2. Click **Next**.

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

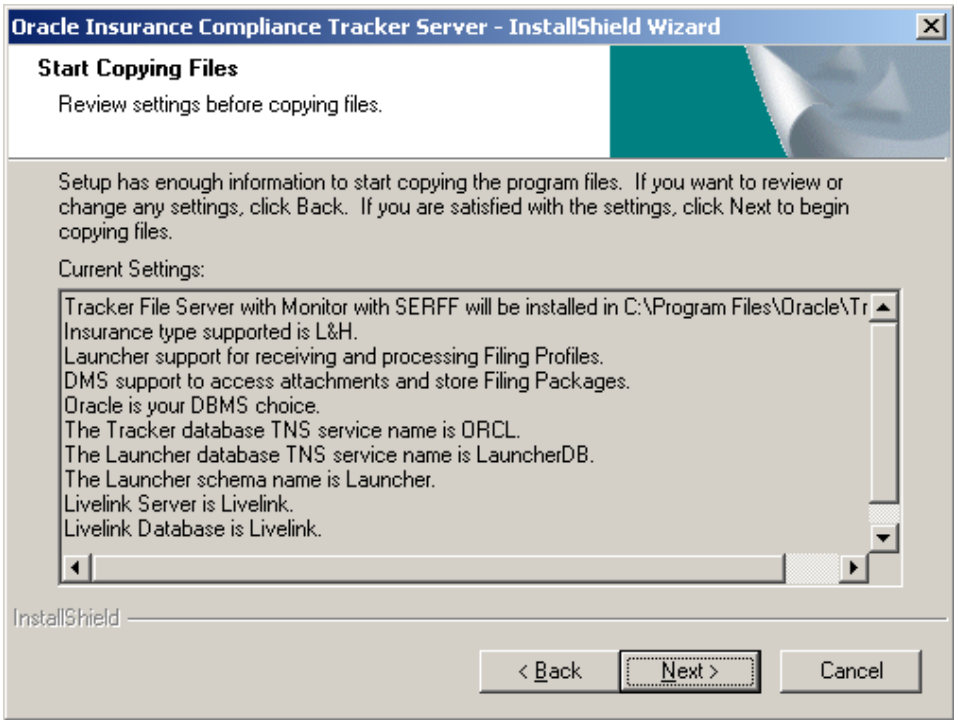


3. To change the location, click **Browse**, select another folder, then click **Next**

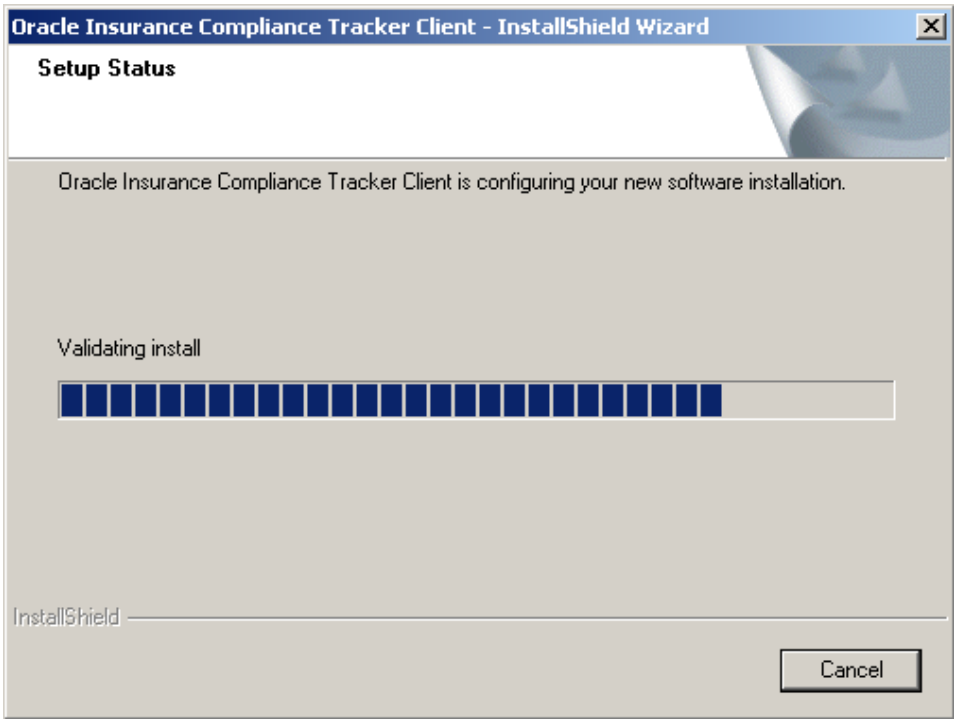
4. If you are not using the Terminal Service, in the **Tracker Client Setup** screen, select **No**, otherwise select **Yes**, then click **Next**.



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



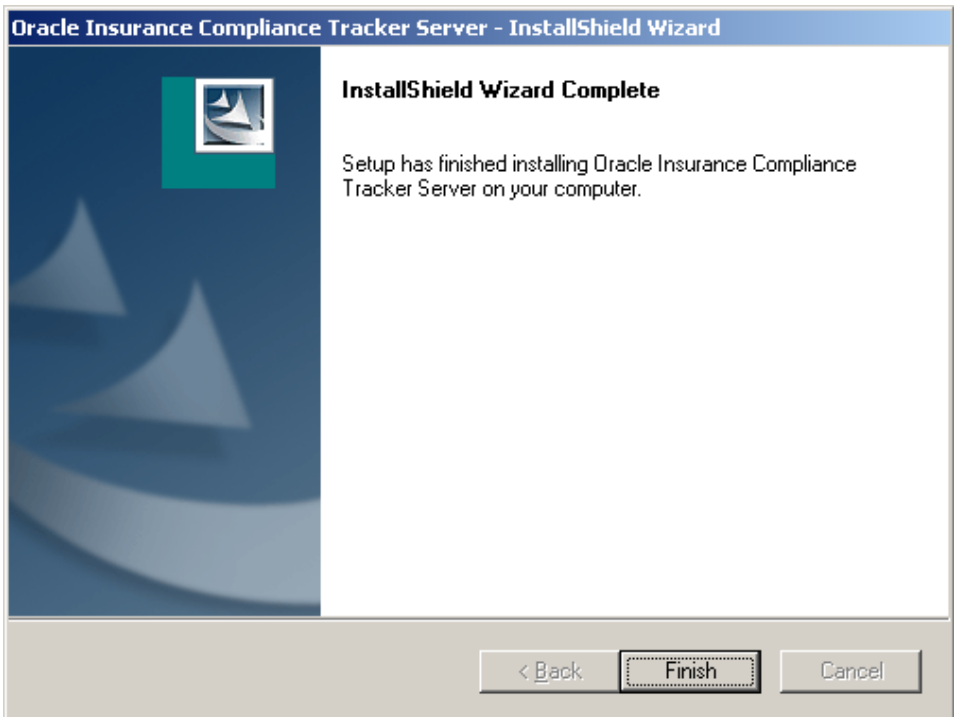
6. Review your **Current Settings**. If they are correct, click **Next**, otherwise click **Back** until you have reached the step you want to correct. Make any necessary corrections, then click **Next**.
7. Accept the confirmation dialog that displays.
8. The **Setup Status** dialog opens.



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 opens.



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

Step E:Verify the Installation Files

The `manuals` folder on the installation package contains the Excel workbook `installed_files.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\Oracle\Tracker`) to the lists in the workbook. If there are any discrepancies, please contact Global 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 an 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. Contact Global Customer Support to obtain the URL that is used to test SERFF. XML code is displayed when accessing this page.
9. In Internet Explorer, go to the URL given to you by Global Customer Support in the previous step. If it works, continue to the next step, otherwise, review the previous steps to ensure that you have correctly configured Internet Explorer. Contact Global Customer Support if you need further assistance.

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

The installation of Tracker is now complete.

Appendix A

Uninstalling Tracker

If required, you can use the step in this appendix to uninstall the Tracker Server and the Tracker Client.

The Tracker Server and the Tracker Client are separately installed applications. To completely uninstall Tracker, you need to first perform this step for the Tracker Server and the perform this step for the Tracker Client.

Step A:Uninstall Tracker

1. From the **Control Panel**, select one of the following items, depending on your operating system:

- Windows 7 and Windows Vista**: Programs and Features**
- Windows XP: **Add/Remove Programs**

2. Click the Tracker entry you want to remove.

- **Oracle Insurance Compliance Tracker Server**

or

- **Oracle Insurance Compliance Tracker Client**

3. Click **Change/Remove**. (In Windows 7, double click the entry, instead.)
4. Click **Finish**.

   The **Setup Status** dialog opens.

   A blue bar indicates the progress of the uninstallation.

   After Tracker has been completely uninstalled, the **Maintenance Complete** dialog opens.
5. Click **Finish** to close this dialog.
6. After uninstalling, you can remove the `Tracker` program folder from your system.