

Oracle Insurance Compliance Tracker

Installation Guide

Guide for New Installations for Oracle
version 6.8

Part number: E23906-01

October 2011

Copyright

Copyright © 2011, Oracle and/or its affiliates. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are “commercial computer software” or “commercial technical data” pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

This software is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications which may create a risk of personal injury. If you use this software in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure the safe use of this software. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software in dangerous applications.

Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

This software and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Where an Oracle offering includes third party content or software, we may be required to include related notices. For information on third party notices and the software and related documentation in connection with which they need to be included, please contact the attorney from the Development and Strategic Initiatives Legal Group that supports the development team for the Oracle offering. Contact information can be found on the Attorney Contact Chart.

The information contained in this document is for informational sharing purposes only and should be considered in your capacity as a customer advisory board member or pursuant to your beta trial agreement only. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described in this document remains at the sole discretion of Oracle.

This document in any form, software or printed matter, contains proprietary information that is the exclusive property of Oracle. Your access to and use of this confidential material is subject to the terms and conditions of your Oracle Software License and Service Agreement, which has been executed and with which you agree to comply. This document and information contained herein may not be disclosed, copied, reproduced, or distributed to anyone outside Oracle without prior written consent of Oracle. This document is not part of your license agreement nor can it be incorporated into any contractual agreement with Oracle or its subsidiaries or affiliates.

CONTENTS

Chapter 1 — Overview	5
Document Conventions	6
Tracker Documentation	7
Chapter 2 — Installing Tracker	9
Introduction to the Installation Process	10
Stage 1: Checking the System Requirements	11
Step A: Check the Server and Client Setup	11
Step B: Check the Software Requirements	11
Step C: Check the Hardware Requirements	12
Step D: Check the Citrix Requirements	12
Step E: Install Oracle 32-bit Version (Optional)	13
Step F: Check the Screen Resolution and Font Size	13
Stage 2: Planning Your Tracker Monitor Installation	14
About Tracker Monitor	14
Plan the Tracker Monitor Installation	14
Installing Tracker File Server with Tracker Monitor vs. Installing Tracker Monitor by Itself	14
Stage 3: Creating the Tracker Database	15
Stage 4: Installing Tracker Monitor and File Server on One Computer	16
Step A: Install Microsoft .NET 2.0	16
Step B: Install IStream Document Manager Core	16
Step C: Create a Tracker Monitor User	17
Step D: Create the Tracker Monitor User as a Local User	18
Step E: Set the Tracker Monitor User as an Administrator	18
Step F: Run the Tracker Setup	18
Step G: Verify the Installation Files	28
Step H: Configure the Tracker Monitor User	28
Step I: Register the Tracker Monitor Services Manually	29
Step J: Configure IE for Tracker Monitor	30
Stage 5: Installing Tracker Monitor and File Server on Separate Computers	31

Part 1: Installing Tracker Server	31
Step A: Run Tracker Server Setup.....	31
Step B: Verify the Installation Files	39
Part 2: Installing Tracker Monitor	39
Step A: Install Microsoft .NET Framework	39
Step B: Install IStream Document Manager Core	40
Step C: Create a Tracker Monitor User.....	40
Step D: Create the Tracker Monitor User as a Local User.....	41
Step E: Set the Tracker Monitor User as an Administrator	41
Step F: Run the Tracker Server Setup to Install Tracker Monitor	42
Step G: Verify the Installation Files	52
Step H: Configure the Tracker Monitor User.....	52
Step I: Register the Tracker Monitor Services Manually	53
Step J: Configure IE for Tracker Monitor.....	54
Stage 6: Installing the Tracker Client	55
Step A: Create a Tracker Database Alias	55
Step B: Install Microsoft .NET Framework	55
Step C: Install IStream Document Manager Core.....	55
Step D: Run the Tracker Client Setup.....	56
Step E: Verify the Installation Files	60
Step F: Configure SERFF	60
Appendix A — Uninstalling Tracker	61
Step A: Uninstall Tracker	61

Chapter 1

Overview

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

This chapter describes:

- *Document Conventions* on page 6
- *Tracker Documentation* on page 7

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 Windows 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:

- 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.

Chapter 2

Installing Tracker

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

- *Introduction to the Installation Process* on page 10
- *Stage 1: Checking the System Requirements* on page 11
- *Stage 2: Planning Your Tracker Monitor Installation* on page 14
- *Stage 3: Creating the Tracker Database* on page 15
- *Stage 4: Installing Tracker Monitor and File Server on One Computer* on page 16
- *Stage 5: Installing Tracker Monitor and File Server on Separate Computers* on page 31
- *Stage 6: Installing the Tracker Client* on page 55

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.

Please 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.

Stage 1: Checking the System Requirements

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

Step A: Check the Server and Client Setup

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

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

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

Step B: Check the Software Requirements

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

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

Client Workstation Requirements

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

- 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 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**.

Stage 2: Planning Your Tracker Monitor Installation

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

About Tracker Monitor

Tracker Monitor is a separate application from the Tracker client and 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.

Stage 3: 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.

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

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

If you want to install the Tracker File Server and Tracker Monitor on *separate* computers, please see *Stage 5: Installing Tracker Monitor and File Server on Separate Computers* on page 31.

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

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. 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**.

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)
- 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. 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.

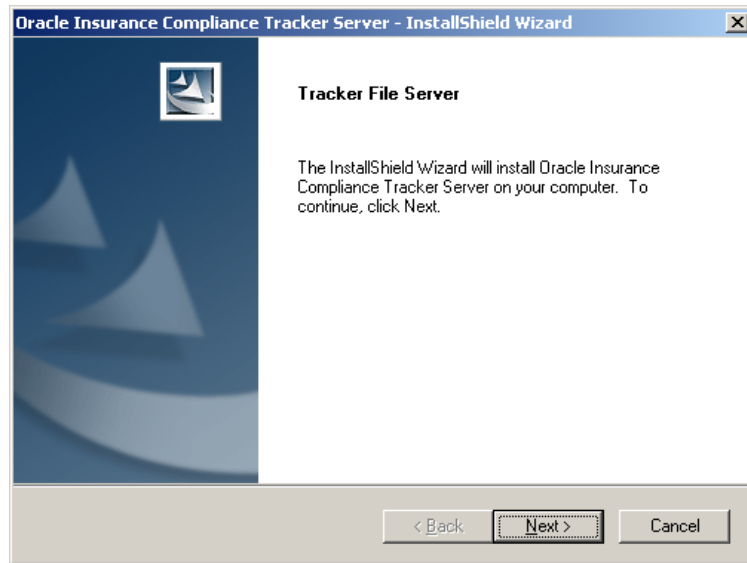
Step F: Run the Tracker Setup

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

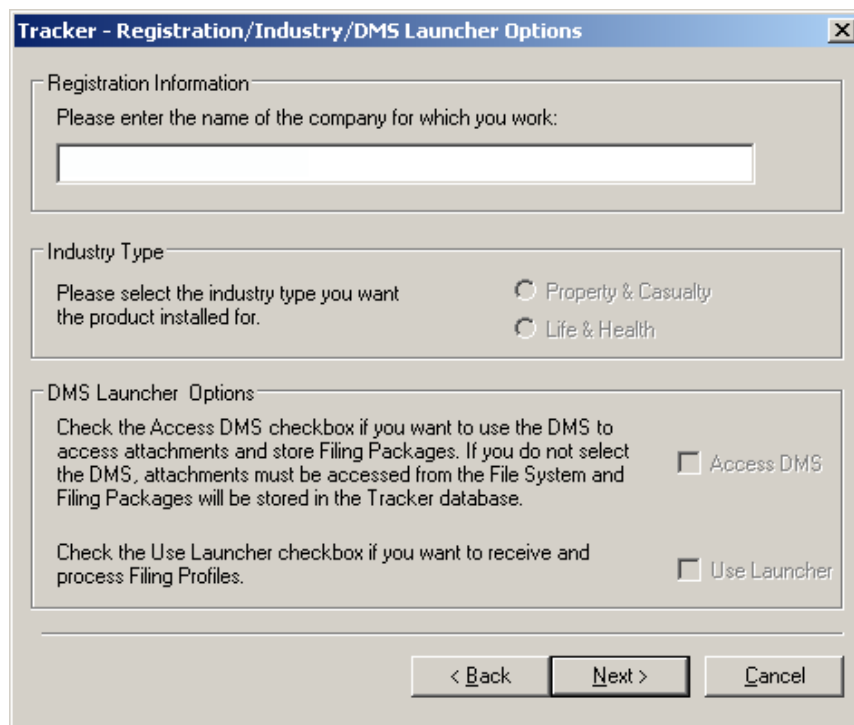
1. From the **Setup** folder on the Tracker installation package, run `setup.exe`. If a Security Warning dialog appears, click **Run**.

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

The **Tracker File Server** dialog displays.



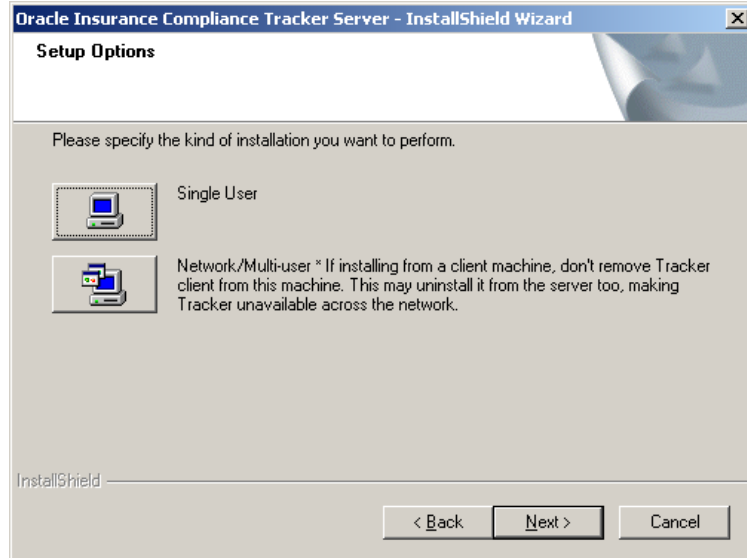
2. Click **Next**.
3. On the **Registration** dialog, enter your company name.



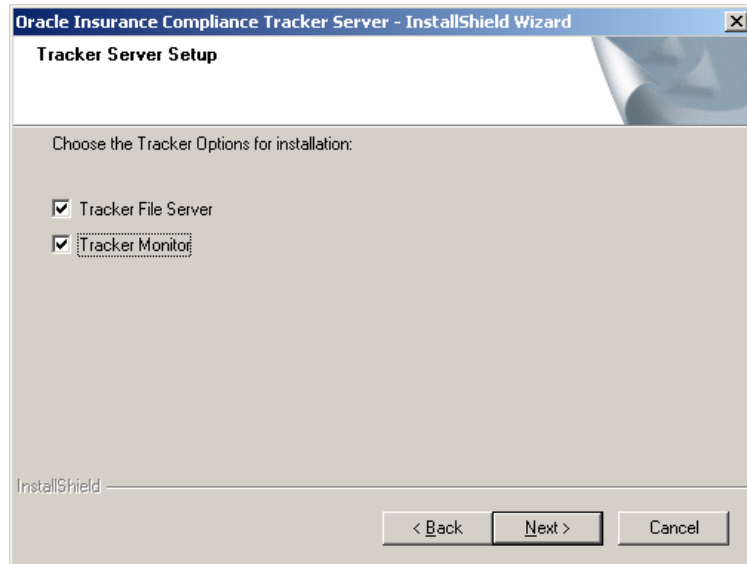
4. Choose your insurance **Industry Type**:
 - **Property & Casualty**
 - **Life & Health**

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

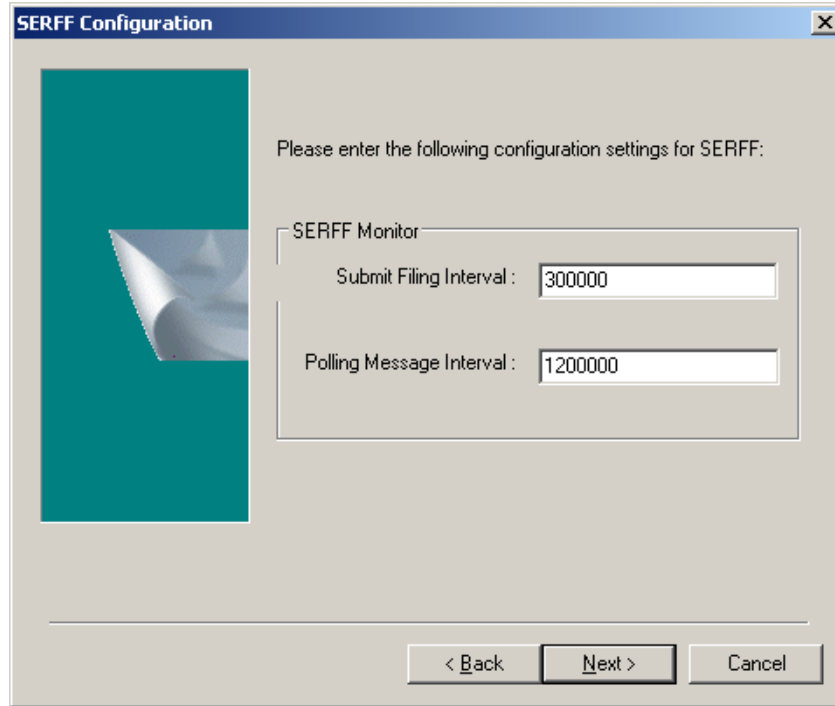
(The **Single user** option is generally used only in a test environment.)



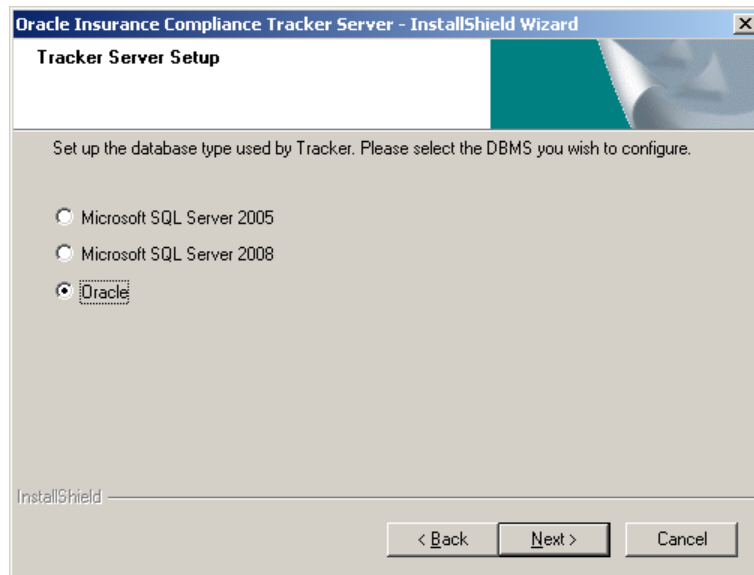
7. On the **Tracker Server Setup** dialog, select both **Tracker File Server** and **Tracker Monitor**, then click **Next**.



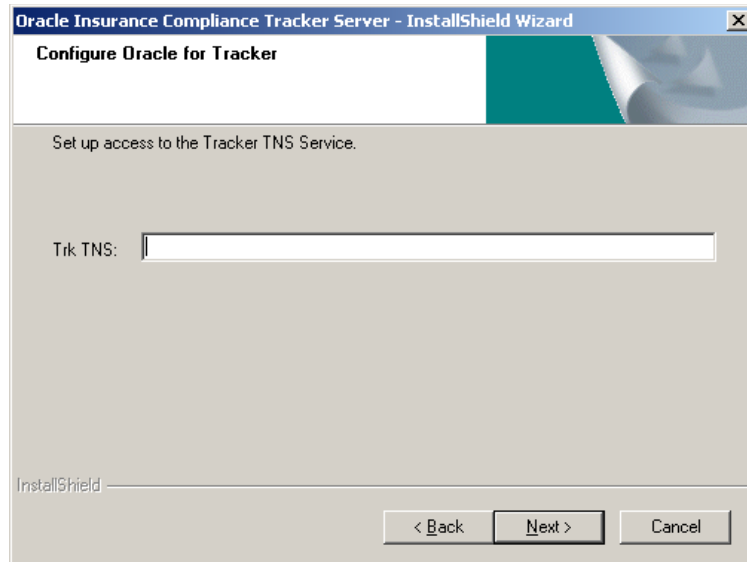
The **SERFF Configuration** dialog opens.



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**.



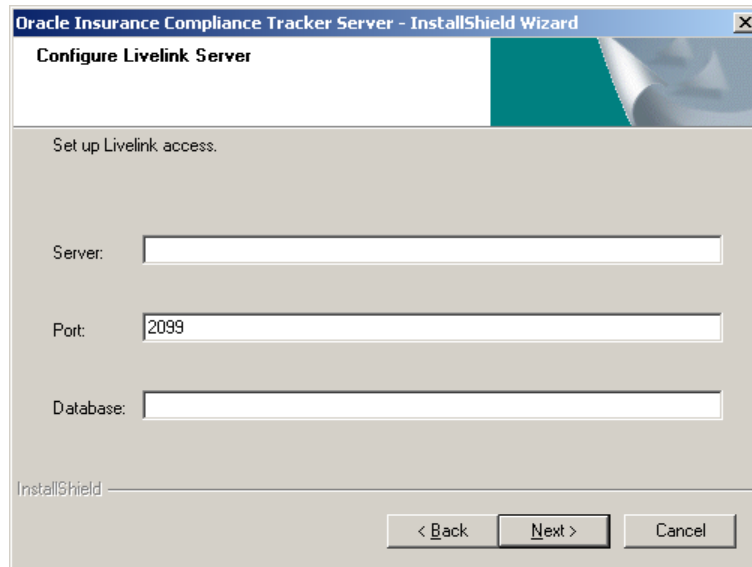
10. On the **Configure Oracle for Tracker** dialog, enter the name of the Tracker TNS service, then click **Next**.



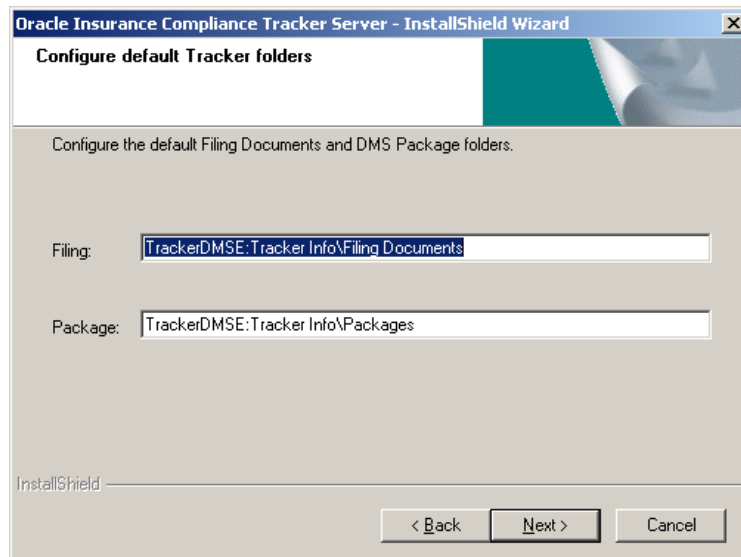
Tracker will automatically detect the Oracle ODBC driver installed. However, if there is more than one instance of the Oracle driver installed, you will be prompted to enter the one to use:

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**.

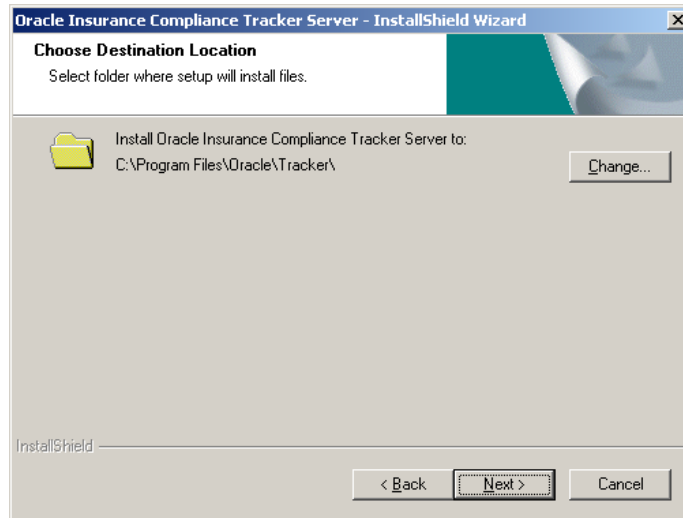


15. If you had selected **Access DMS**, the **Configure default Tracker folders** dialog opens.
 - a. In the **Filing** field, enter the default path of the filing documents folder.
 - b. In the **Package** field, enter the default path of the DMS package folders.



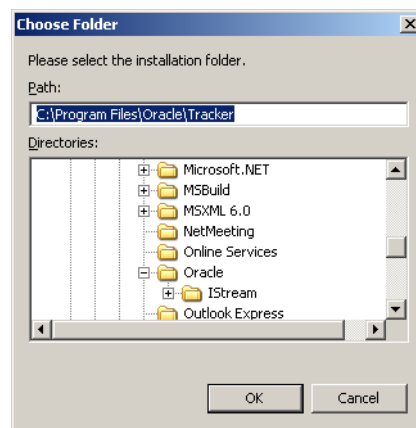
- c. Click **Next**.

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

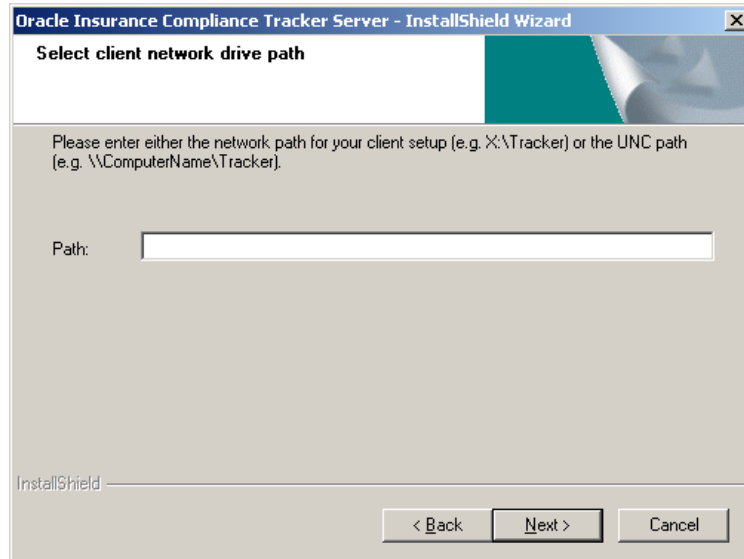


To change the location:

- 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.

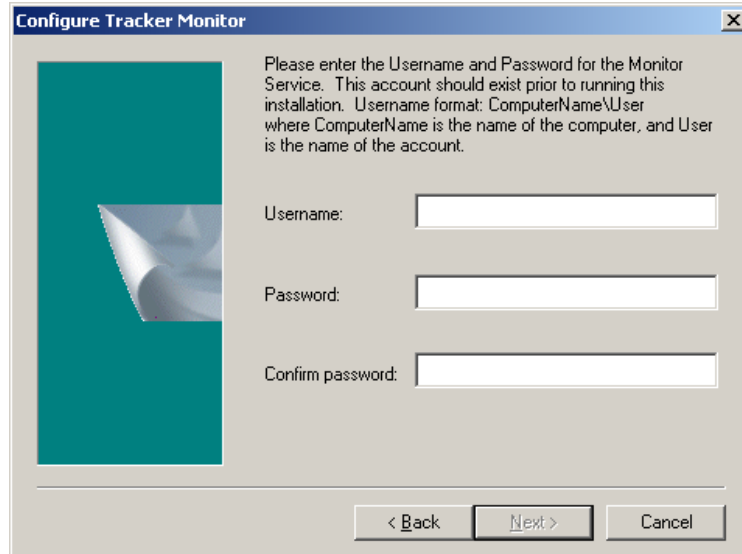
Alternatively, you can use a UNC path to specify a network location for the installation, for example `\\ServerName\ShareName`, where:

- `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**.

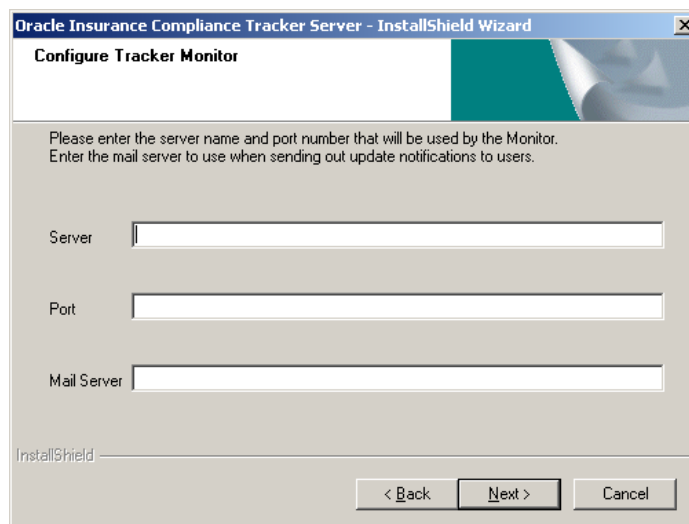
The **Configure Tracker Monitor** dialog displays.



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\tkrwmfon*

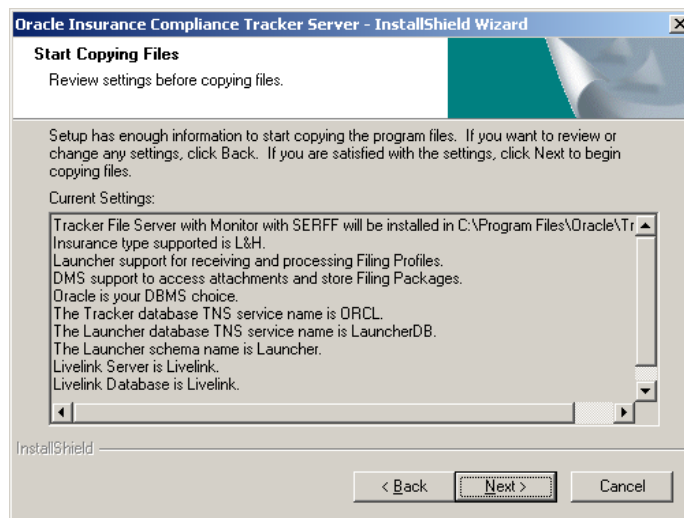
Important: This user account should exist before installing Tracker.

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.



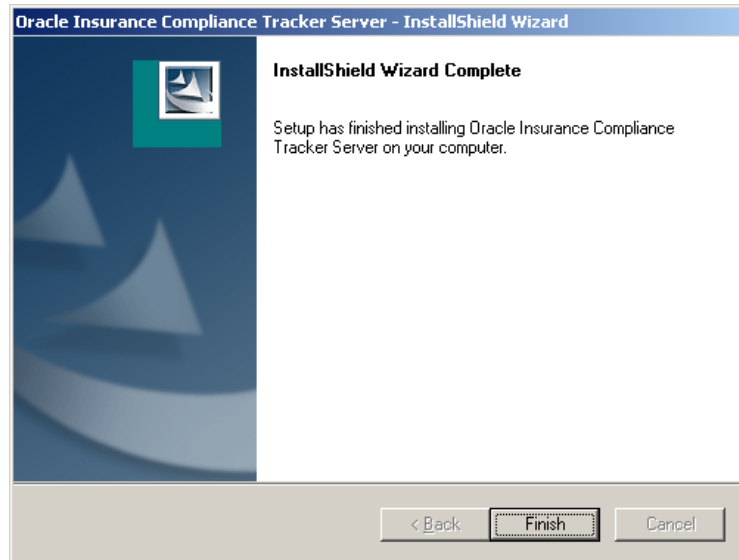
24. Review your **Current Settings**. If they are correct, click **Next**, otherwise click **Back** until you have reached the step you want to correct. Make any necessary corrections, then click **Next**.
25. Accept the confirmation dialog that displays.
26. Click **Finish**.

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.



27. Click **Finish** to close the installation program.
28. If prompted, reboot the system.
29. Ensure that you share the Tracker folder on the Tracker server for the client installation. The default location is:
`C:\Program Files\Oracle`
30. 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.

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

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

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

Part 1: Installing Tracker Server

This section describes how to install the Tracker file server.

Step A: Run Tracker Server Setup

- 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.
- On the **Registration** dialog, enter your company name.

Tracker - Registration/Industry/DMS Launcher Options

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

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

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

< Back Next > Cancel

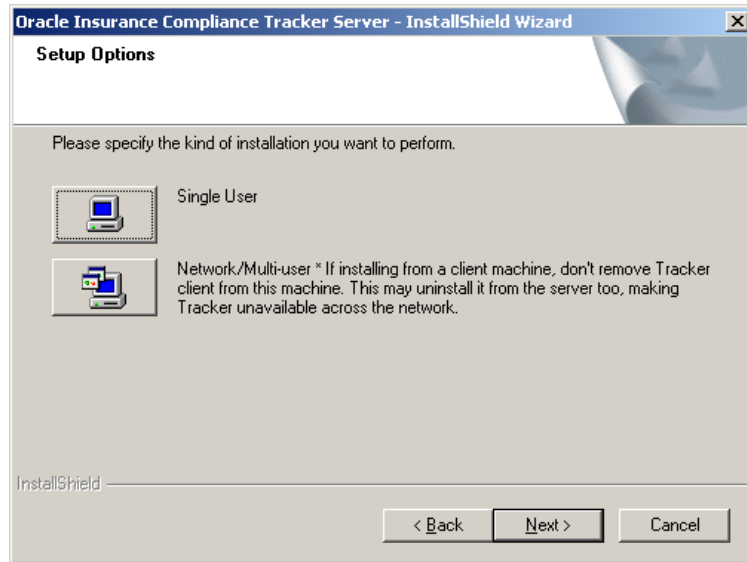
- Choose your insurance **Industry Type**:
 - Property & Casualty**
 - Life & Health**

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

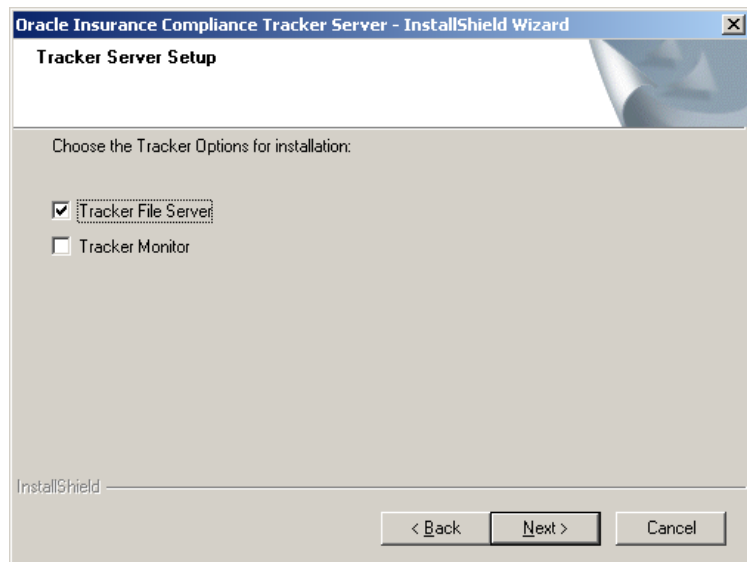
If you do not select this option, then filing attachments must be accessed from the file system, and filing packages will be stored in the Tracker database

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

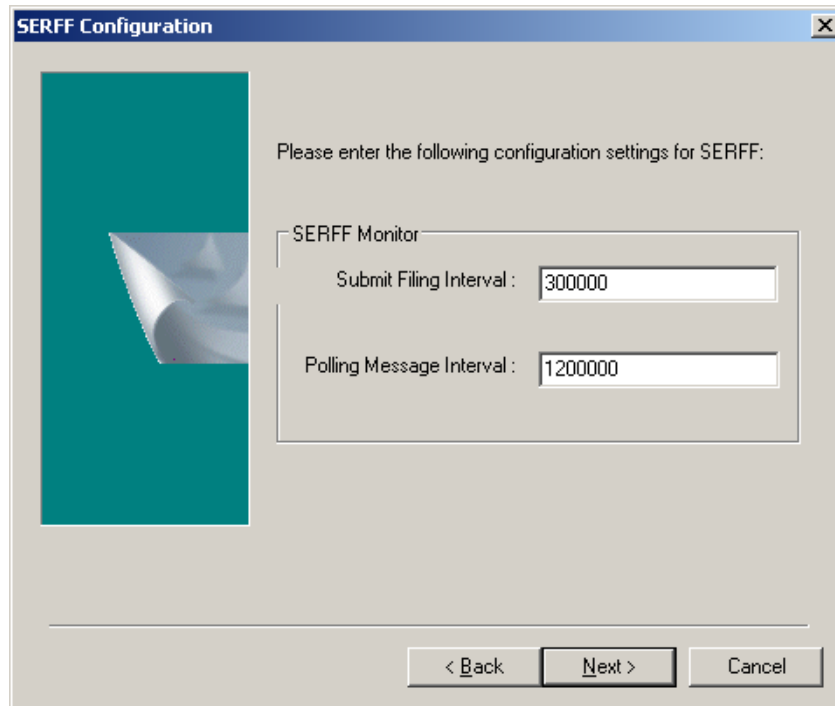
(The **Single user** option is generally used only in a test environment.)



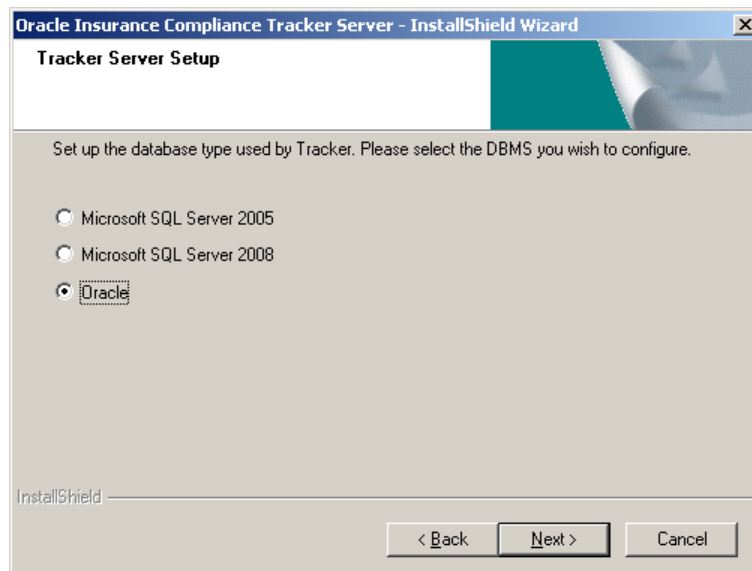
7. On the **Tracker Setup** dialog, select **Tracker File Server** only, then click **Next**.



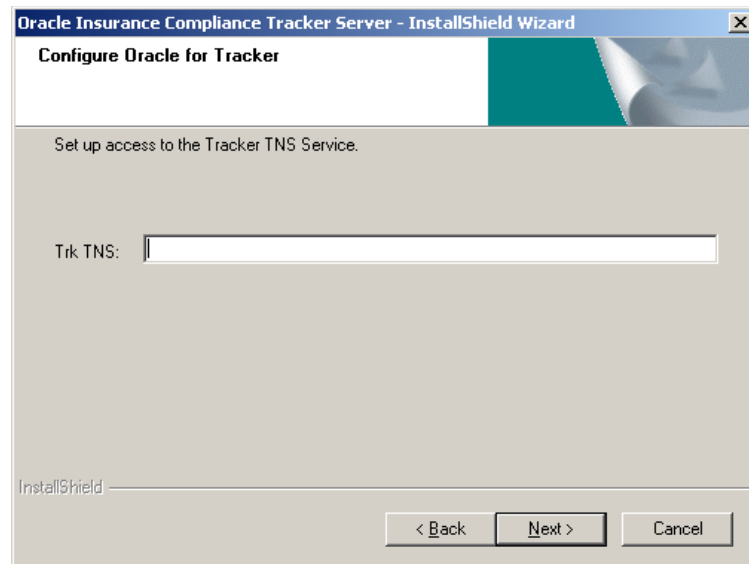
8. The **SERFF Configuration** dialog opens.



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



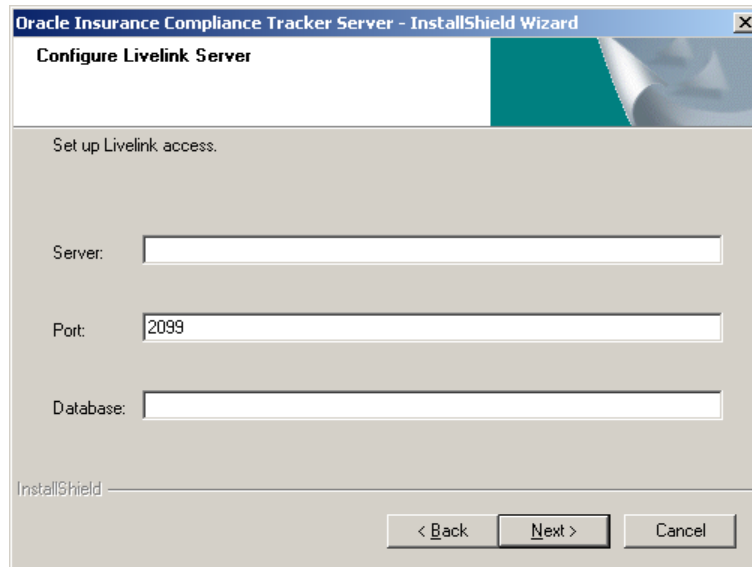
11. On the **Configure Oracle for Tracker** dialog, enter the name of the Tracker TNS service, then click **Next**.



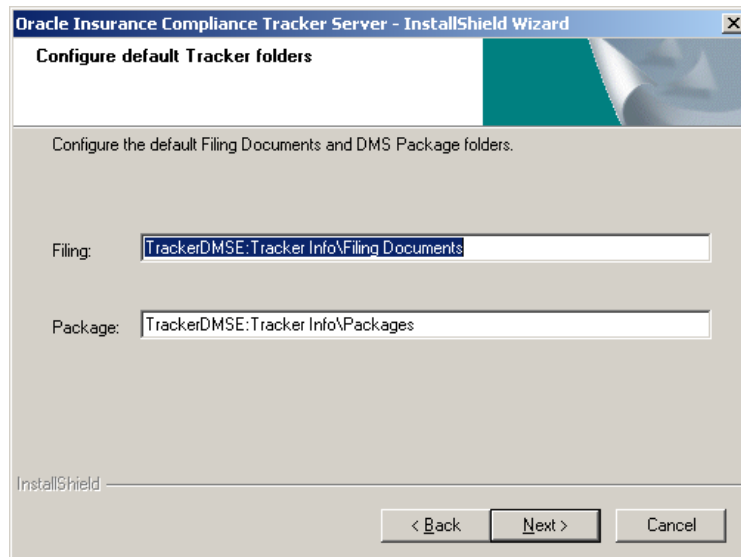
Tracker will automatically detect the Oracle ODBC driver installed. However, if there is more than one instance of the Oracle driver installed, you will be prompted to enter the one to use:

12. From the ODBC Administrator, select **Add**.
A list of ODBC drivers is displayed
13. Select the Oracle driver instance to use.
Note the name of the instance you selected.

14. In the **Configure Oracle ODBC** dialog, enter the instance name in the **Inst** field.
15. 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**.

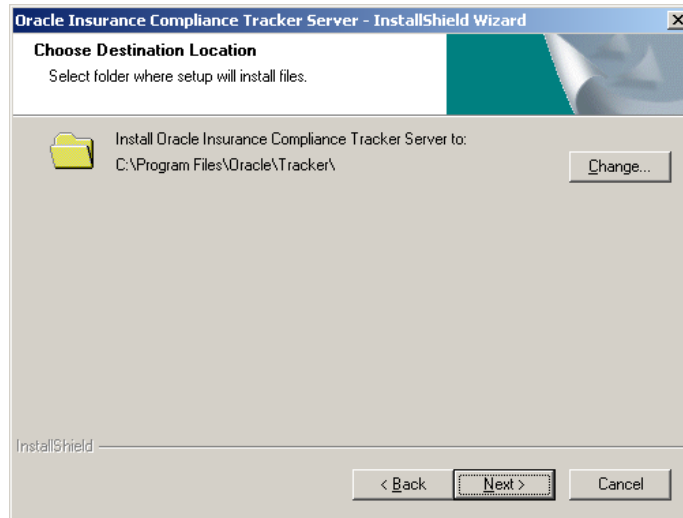


16. If you had selected **Access DMS**, the **Configure default Tracker folders** dialog opens.
 - a. In the **Filing** field, enter the default path of the filing documents folder.
 - b. In the **Package** field, enter the default path of the DMS package folders.



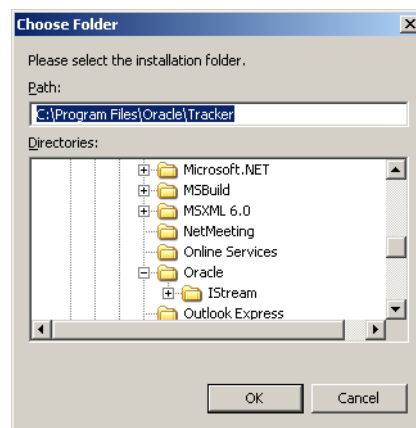
- c. Click **Next**.

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

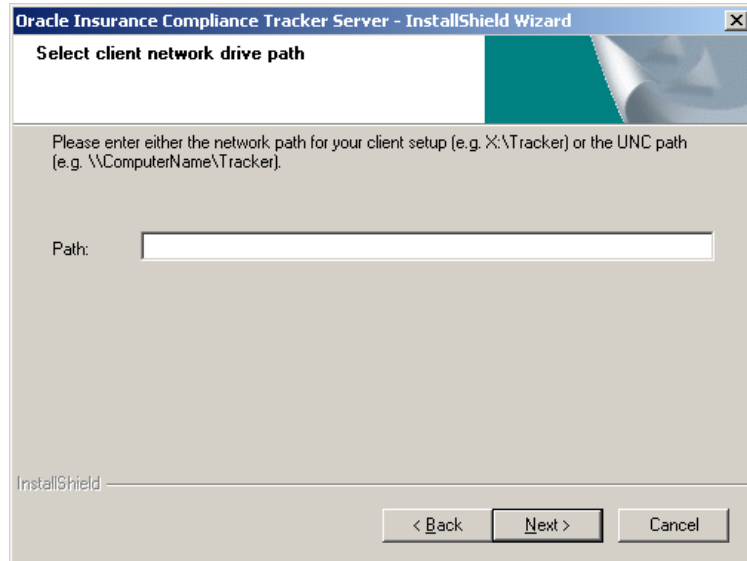


To change the location:

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



- c. Click **OK**.
17. Click **Next**.
18. In the **Select client network drive path** dialog, enter the network drive path where you want to install the Tracker server software.



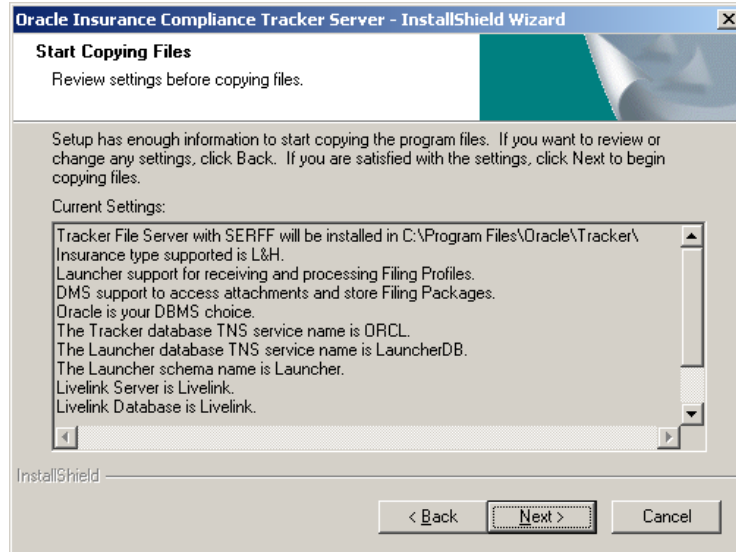
For example: `X:\Tracker`. `X` is the letter to map the Tracker installation folder on the client system. Note this drive letter. This drive path and letter will be used for *all* Tracker client systems.

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.

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



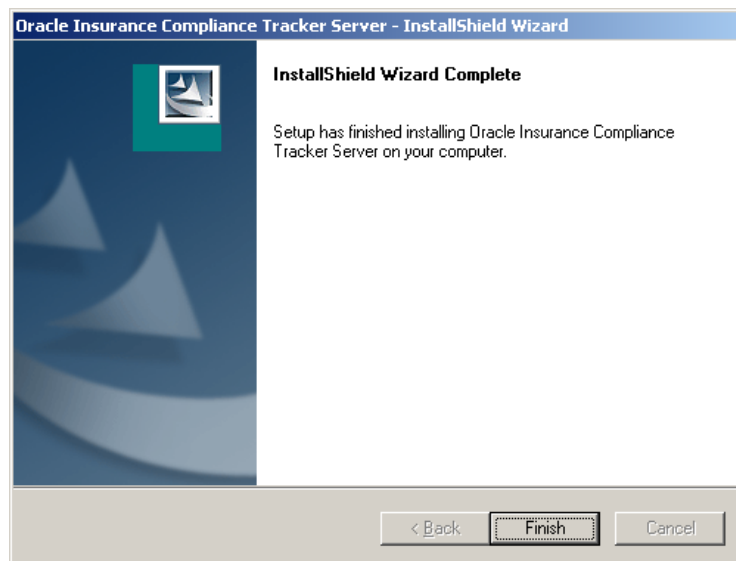
21. Click **Finish**.

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.



22. Click **Finish** to close the installation program.
23. If prompted, reboot the system.
24. Ensure that you share the Tracker folder on the Tracker server for the client installation. The default location is:
`C:\Program Files\Oracle`
25. 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.
26. 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.

Part 2: Installing Tracker Monitor

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

Step A: Install Microsoft .NET Framework

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.

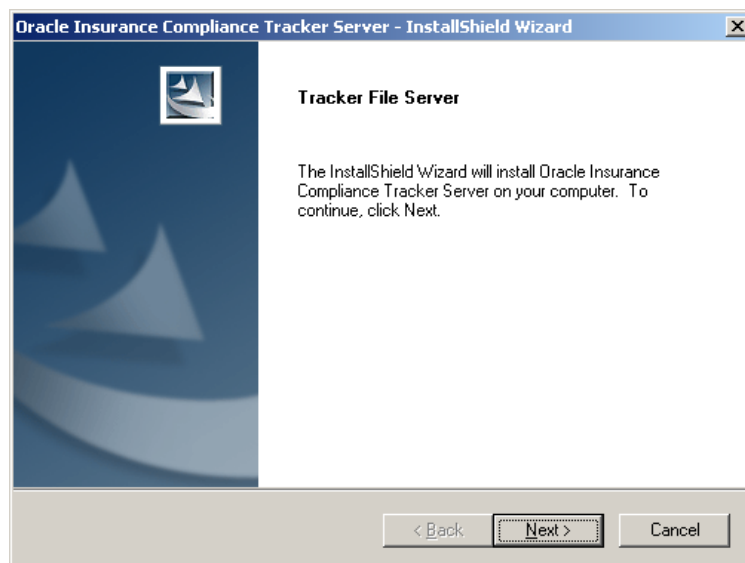
Step F: Run the Tracker Server Setup to Install Tracker Monitor

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.

The screenshot shows a Windows-style dialog box titled "Tracker - Registration/Industry/DMS Launcher Options". It contains three sections:

- Registration Information:** A text box with the prompt "Please enter the name of the company for which you work:".
- Industry Type:** Radio buttons for "Property & Casualty" and "Life & Health".
- DMS Launcher Options:** Checkboxes for "Access DMS" and "Use Launcher".

At the bottom of the dialog are three buttons: "< Back", "Next >", and "Cancel".

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

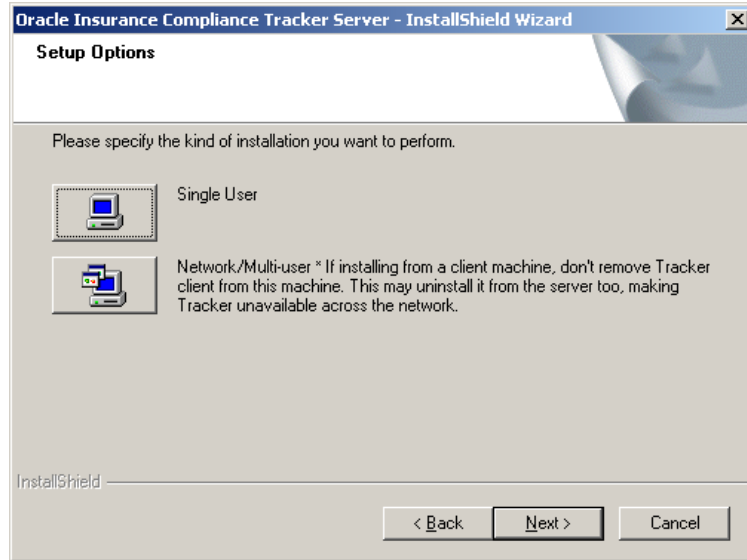
If you do not select this option, then filing attachments must be accessed from the file system, and filing packages will be stored in the Tracker database

5. Click **Next**.

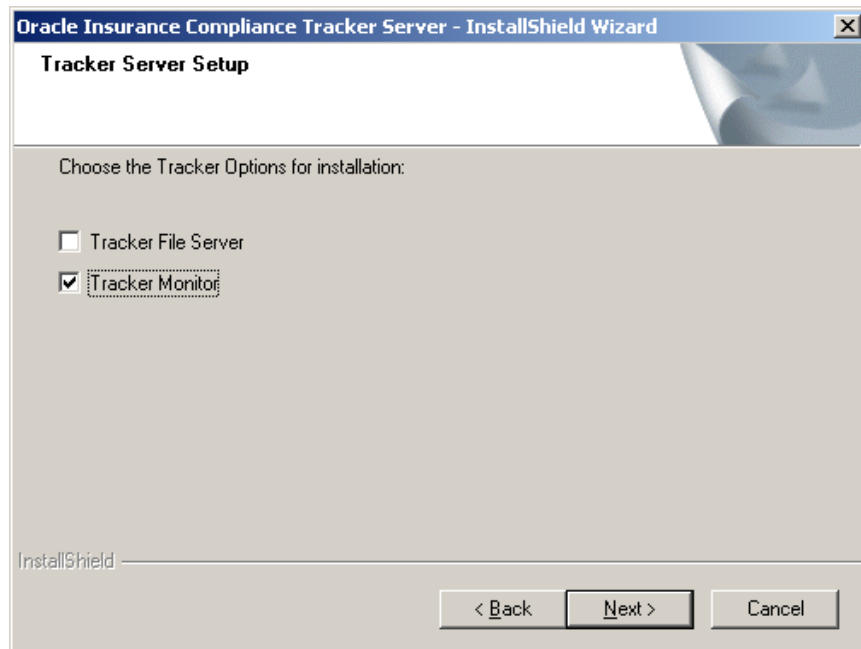
Note: Ensure that the selections here are identical to the ones you made when setting up the Tracker File Server.

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

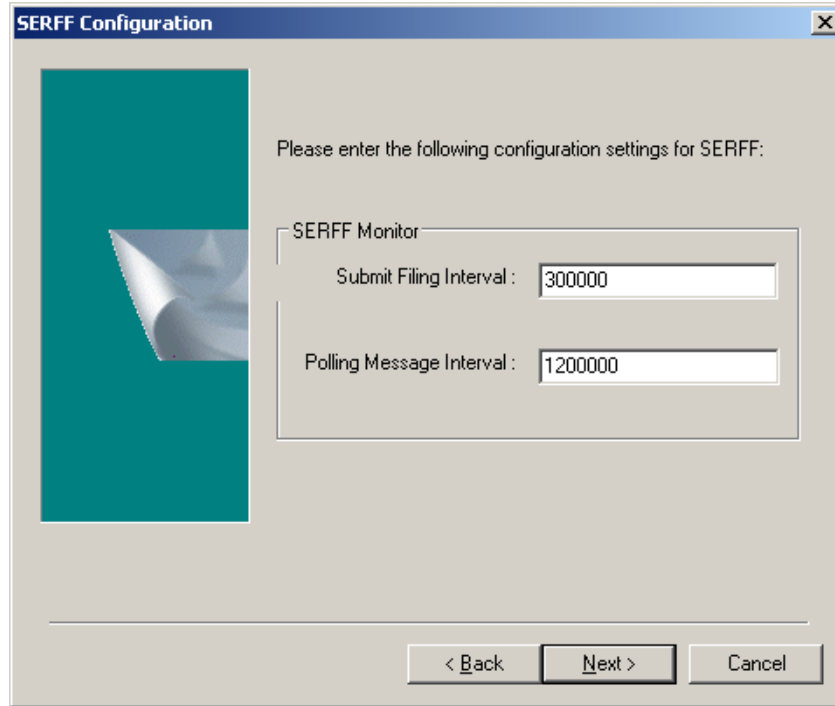
(The **Single user** option is generally used only in a test environment.)



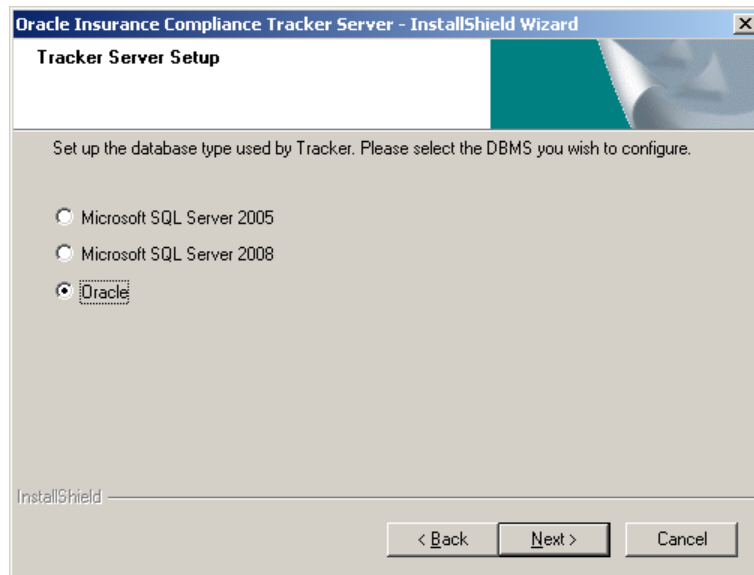
7. On the **Tracker Setup** dialog, select **Tracker Monitor** only, then click **Next**.



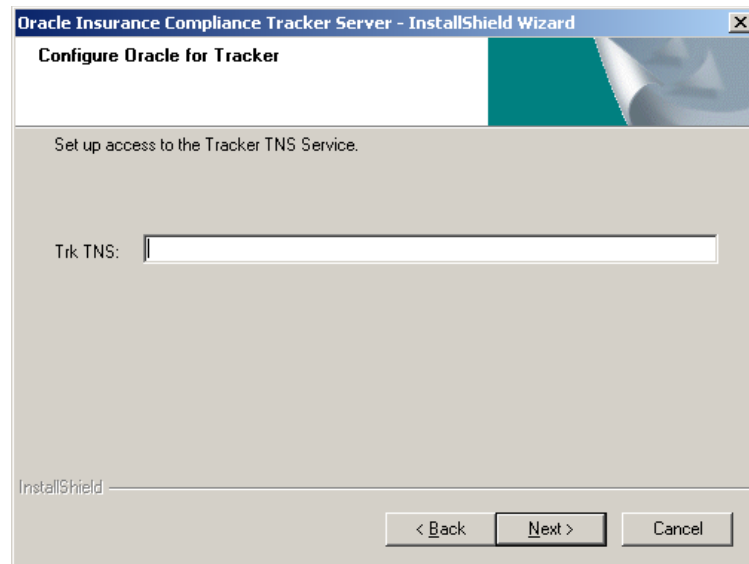
The **SERFF Configuration** dialog opens.



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**.



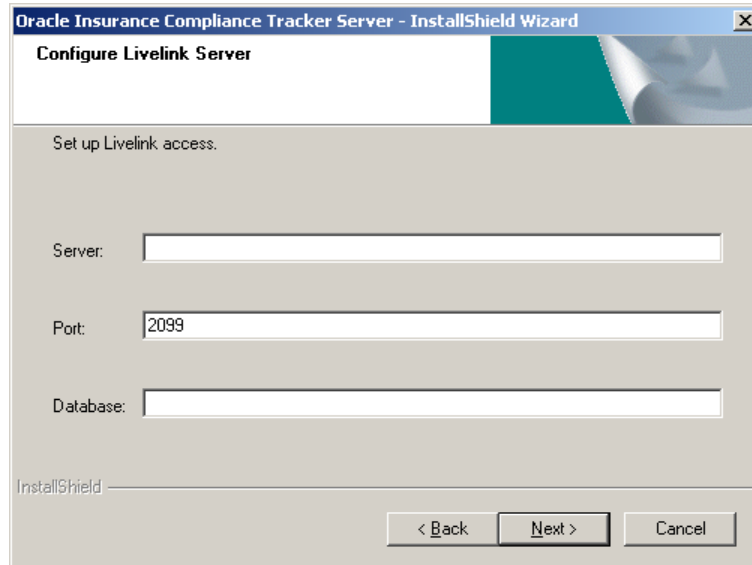
10. On the **Configure Oracle for Tracker** dialog, enter the name of the Tracker TNS service, then click **Next**.



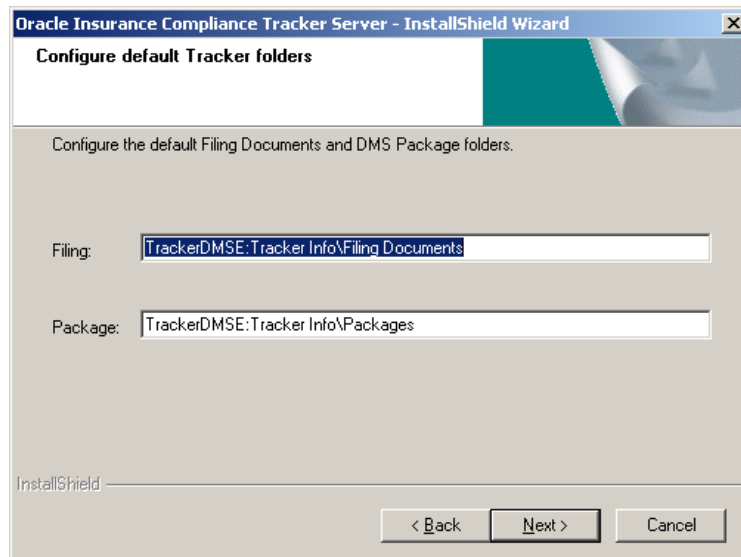
Tracker will automatically detect the Oracle ODBC driver installed. However, if there is more than one instance of the Oracle driver installed, you will be prompted to enter the one to use:

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**.

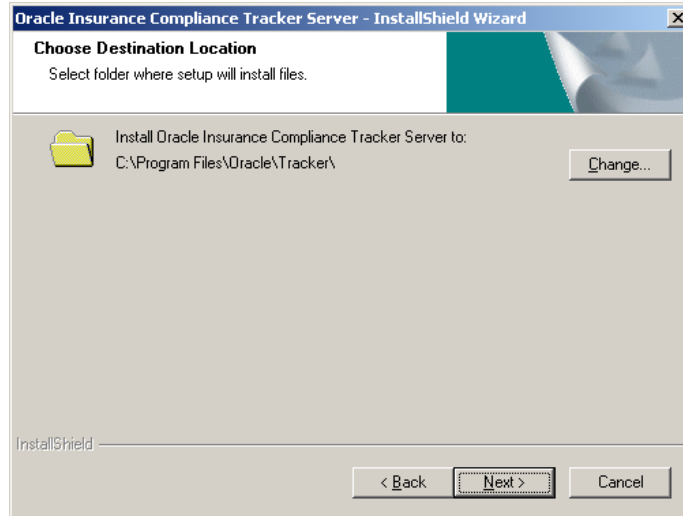


15. If you had selected **Access DMS**, the **Configure default Tracker folders** dialog opens.
 - a. In the **Filing** field, enter the default path of the filing documents folder.
 - b. In the **Package** field, enter the default path of the DMS package folders.



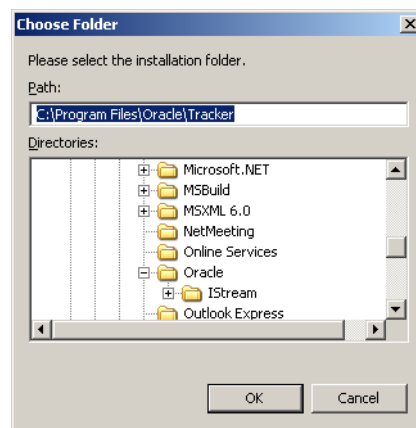
- c. Click **Next**.

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

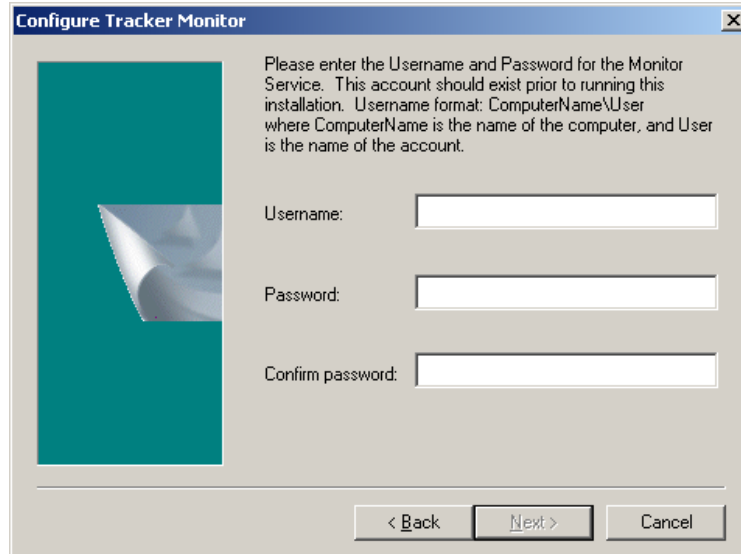


To change the location:

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



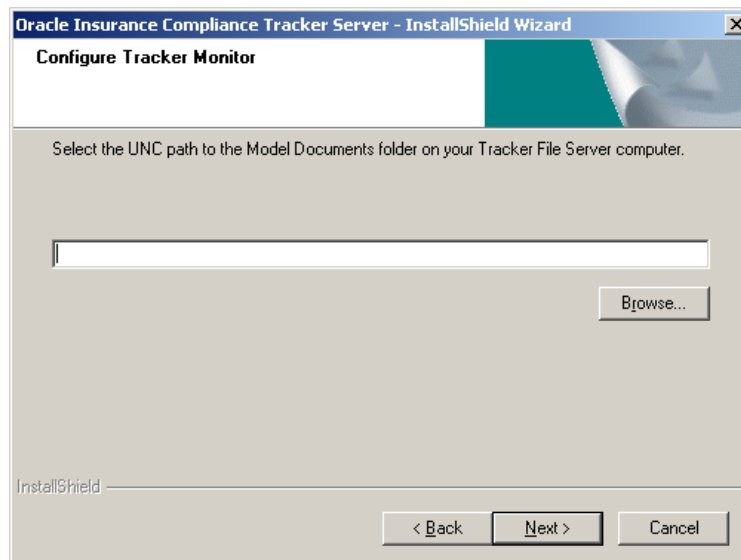
- c. Click **OK**.
16. Click **Next**.
- The **Configure Tracker Monitor** dialog displays.



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\tkrwmfon*

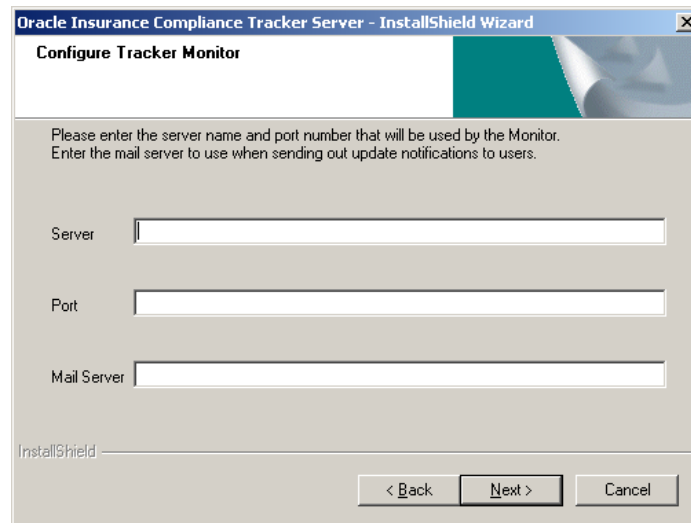
Important: This user account should exist before installing Tracker.

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.

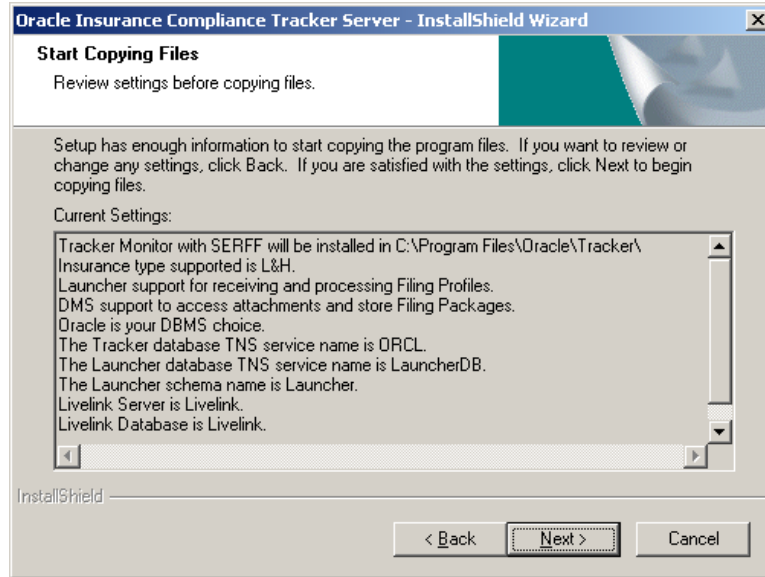
Another **Configure Tracker Monitor** dialog opens.



- 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.** The **Mail Server** field can be left 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 been populated in 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**.



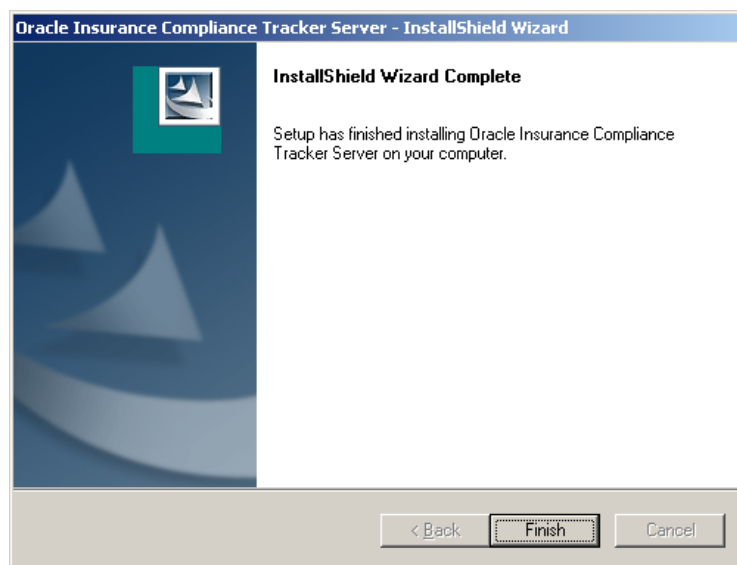
23. Review your **Current Settings**. If they are correct, click **Next**, otherwise click **Back** until you have reached the step you want to correct. Make any necessary corrections, then click **Next**.
24. Accept the confirmation dialog that displays.
25. Click **Finish**.

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 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.

Stage 6: 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 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**.
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 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.)

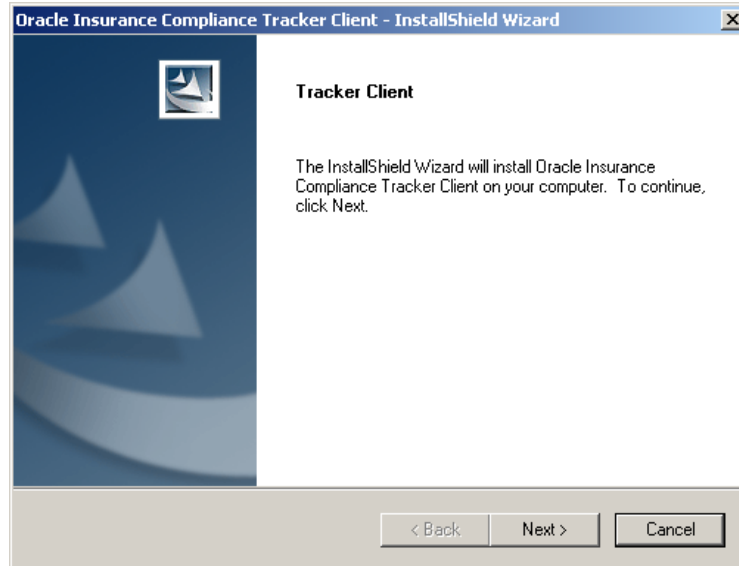
Alternatively, you can use UNC notation to specify a network location for the installation, depending on the Tracker file server setup, for example,

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

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

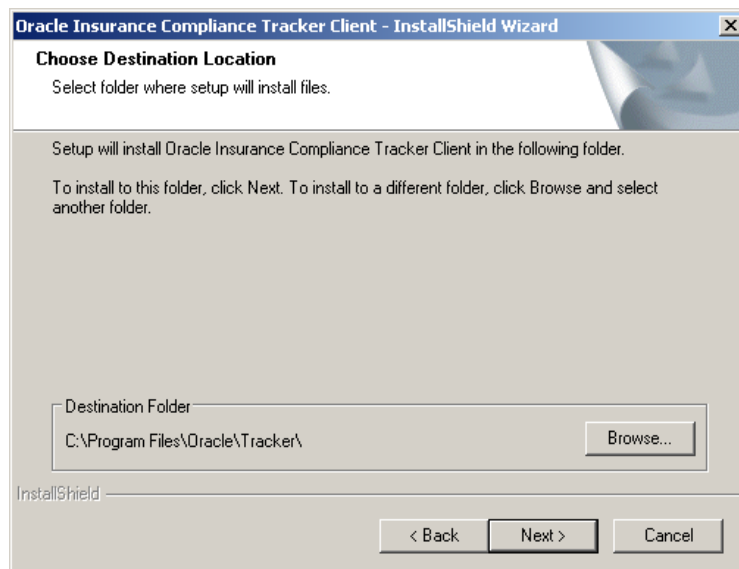
The **InstallShield Wizard** opens. A progress window temporarily appears.

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

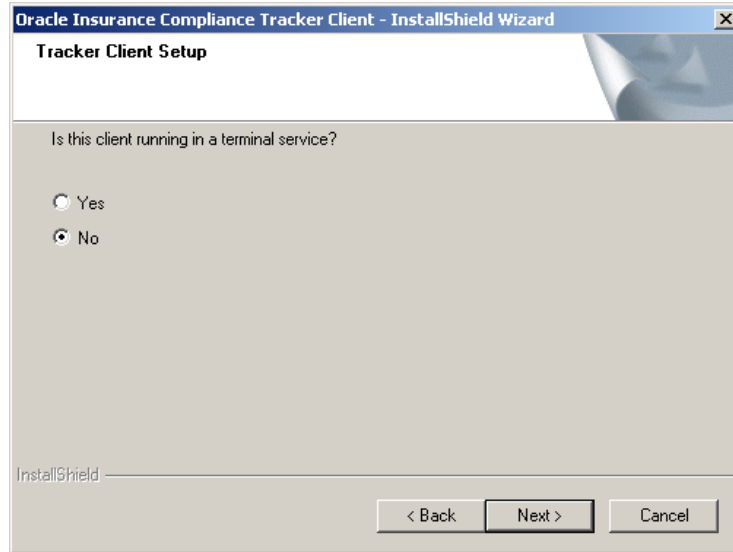


2. Click **Next**.

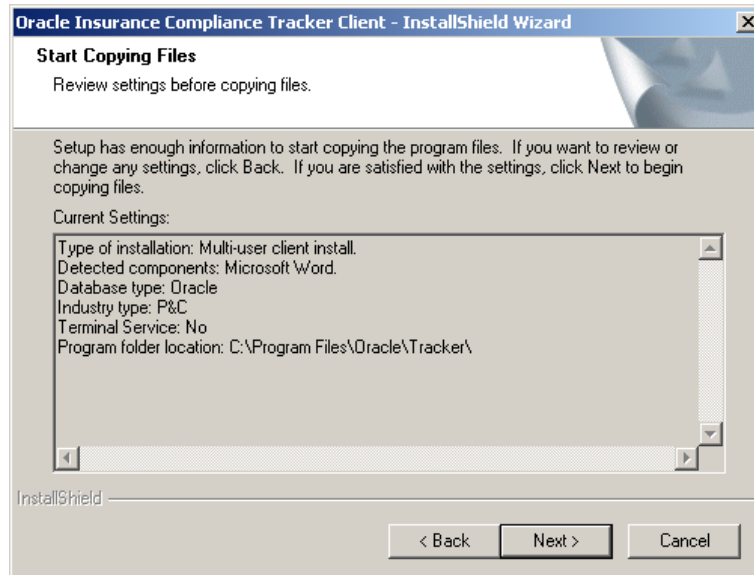
The **Choose Destination Location** dialog opens, displaying the installation location.



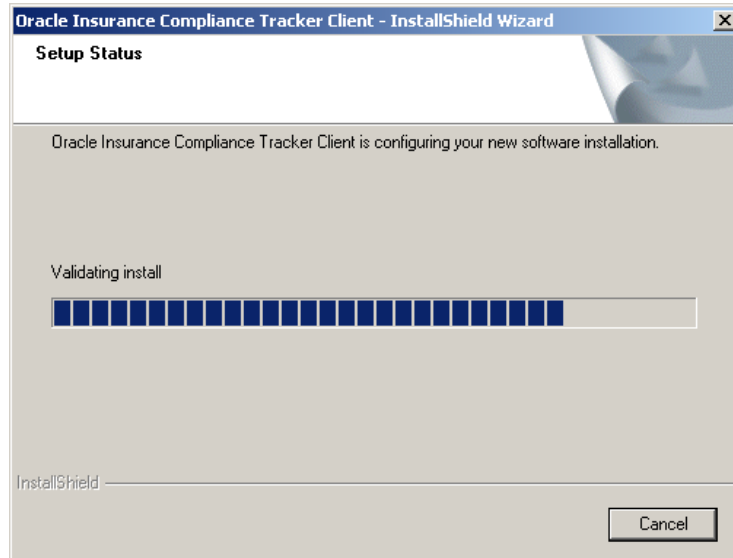
3. To change the location, click **Browse**, select another folder, then click **Next**.
4. If you are not using the Terminal Service, in the **Tracker Client Setup** screen, select **No**, otherwise select **Yes**, then click **Next**.



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



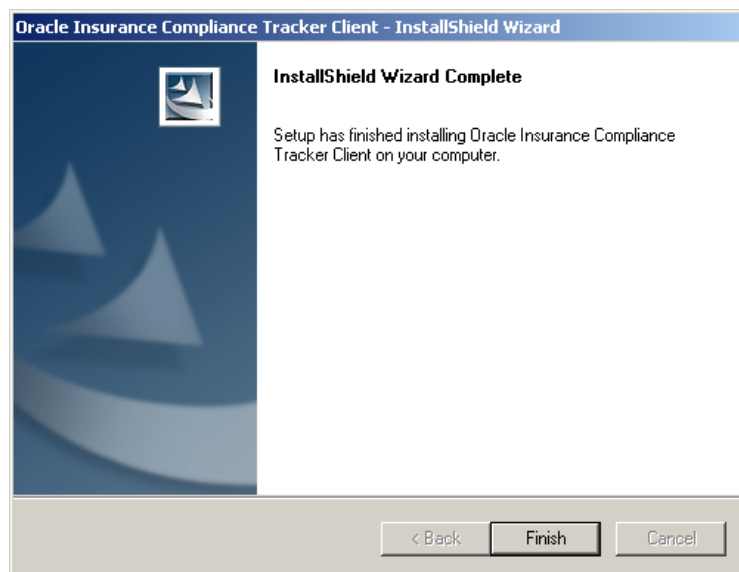
6. Review your **Current Settings**. If they are correct, click **Next**, otherwise click **Back** until you have reached the step you want to correct. Make any necessary corrections, then click **Next**.
7. Accept the confirmation dialog that displays.
8. The **Setup Status** dialog opens.



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 then 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.

