Agency Information Manager
Software Installation with Microsoft SQL 2005
Contents

Introduction and Scope................................................................. 1
Installation Prerequisites............................................................. 1
SQL Surface Area Configuration ................................................... 2
SQL Client Configuration ............................................................. 3
AIM Database Installation........................................................... 6
  Database Verification ................................................................. 11
  Verification of Database Objects ................................................ 11
  Verification of Database Properties .......................................... 14
Creating the AIM Network Share and Mapped Drive.................... 16
AIM Shared Network Install .......................................................... 20
Workstation Installation ............................................................... 23
Post-install Steps ......................................................................... 29
  AIM Help File Fix ...................................................................... 29
  Database Updates ...................................................................... 29
  Crystal Report Utilities ............................................................. 29
  Patches and Hot Fixes ............................................................... 29
Introduction and Scope

The purpose of this document is to provide instructions and guidelines for the successful deployment of the Agency Information Manager (AIM) suite of software products. These instructions are specifically modeled for the installation of a Microsoft SQL Server running Microsoft SQL 2005. This guide is intended for IT professionals that can:

- Navigate the customer’s network
- Create, share, and assign permissions to folders
- Map a network drive
- Create user accounts in Microsoft SQL
- Use an ISO viewer utility application such as Daemon Tools
- Perform software installations on the AIM SQL server and AIM file server
Installation Prerequisites

Prior to installing AIM, the following prerequisites must be satisfied.

- The full version of Microsoft .NET Framework 4 (Extended) must be installed on all AIM workstations.
- Microsoft SQL server must be installed and running on the customer’s network. Microsoft SQL server installation must be performed using a system administrator (SA) password and user name. The SA password cannot be blank.
- Microsoft SQL server installation must be configured to use Mixed Mode. Do not choose Windows Authentication mode.
- Vertafore must have access to the customer’s SQL server, including connection information and SA password.
- SQL Server 2005 must be configured to accept remote connections using the steps below.
  1. In the SQL Server Surface Area Configuration application, select Surface Area Configuration for Services and Connections.
  2. In the Database Engine node, select Remote Connections.
  3. Select Local and remote connections.
  4. Select Using both TCP/IP and named pipes.
- If remote sites will be implemented, you, the customer, must determine the method the sites will use to connect and run the AIM applications.
  - Will the remote sites connect to the file server at the main office?
  - Will AIM be installed locally on each remote workstation?
  - Remote sites must have connectivity to the SQL server.
**SQL Surface Area Configuration**

The SQL Server 2005 Surface Area Configuration application must be set up using the steps outlined next before workstations will be able to connect to the SQL server.

1. On the Start menu on the SQL server computer, point to Microsoft SQL Server 2005, then point to Configuration Tools, and then select SQL Server Surface Area Configuration.

![SQL Server 2005 Surface Area Configuration](image)

**Figure 1:** SQL Server 2005 Surface Area Configuration splash screen

2. On the SQL Server 2005 Surface Area Configuration splash screen, shown in Figure 1, click Surface Area Configuration for Services and Connections.
3. In the Surface Area Configuration for Services and Connections dialog box, select the Remote Connections node, as shown in Figure 2.
4. Select Local and remote connections and then select Using both TCP/IP and named pipes.
5. Click Apply and then click OK.

**SQL Client Configuration**

In order for users to run Crystal Reports from AIM, the SQL Server Client Network Utility application on the workstation must be configured for connection to the SQL server. Use the process below to configure SQL Client Network Utility. We will also show you how to add the REPORTS server alias that is used by most AIM Crystal Reports.

1. On the workstation, browse to the C:\WINDOWS\system32 directory, locate the cliconfg.exe file and double-click the file to configure the SQL server client. If you are using a 64-bit operating system, a cliconfg.exe file is located in the C:\WINDOWS\SysWOW64 folder.
2. On the General tab of the SQL Server Client Network Utility dialog box, make sure that Named Pipes and TCP/IP appear under the Enabled protocols by order pane on the right. If they are not there, select them in the Disabled protocols pane on the left and click the Enable button to move them to the right panel. Use the ↑ and ↓ buttons to set the Named Pipes protocol on top, as shown in Figure 3.

3. Click the Alias tab (Figure 4).
4. Click the Add button.

![Add Network Library Configuration dialog box](image)

**Figure 5:** Add Network Library Configuration dialog box

5. In the Edit Network Library Configuration dialog box, shown in Figure 5, type REPORTS using all capital letters, in the Server alias field.
6. In the Network libraries pane, select the TCP/IP option.
7. In the Server name field, type the IP address of the SQL server.
8. Click OK.

For workstations with 64-bit operating systems, a second cliconfg.exe must be configured. To prevent seeing an error message when running Crystal Reports, locate the cliconfg.exe file in the C:\WINDOWS\SysWOW64 folder and follow the same steps we just discussed.
AIM Database Installation

1. Log on to the My Vertafore Product Portal Web site located here:
   http://myvertafore.vertafore.com
2. Click Downloads – AIM on the left side of the Web page.
3. On the Downloads & Patches page, click CD/ISO Downloads. Download the AIM ISO file for
   the version you are installing. If you do not have an ISO viewer application already, you may
   also download the Daemon Tools ISO utility by clicking the ISO Viewer link on the Web site.
   Save the AIM ISO and Daemon Tools ISO utility files to an accessible location on the local
   drive of the SQL server.

   If you are using a 64-bit version of the Windows server software, the Daemon
   Tools ISO utility will not work. You must use another ISO utility designed for
   64-bit operating systems. If you are unsure about what ISO utility to use, contact
   Vertafore for more information.

4. Install the ISO utility on the server.
5. After the ISO utility has been installed, start the utility and mount the AIM ISO.
6. Double-click Setup.exe to launch the AIM Installation wizard.

   Figure 6: AIM Installation splash screen

7. Click AIM Database Installation on the AIM Installation splash screen, shown in Figure 6, to
   begin the installation process.
8. Click Next in the Welcome dialog box (Figure 7).

9. In the Select Server dialog box (Figure 8), select the SQL server in the Select Microsoft SQL Server list. Alternatively, you can type the server name in the box.
10. In the Database Login dialog box (Figure 9), type the SA account user name in the User Name box and the SA account password in the Password box.
11. In the Select Data Directory dialog box, type the location where the AIM database files will be stored, as shown in Figure 10. As an alternative, you can click the Browse button ( ) and locate the folder.
12. In the Select Databases dialog box (Figure 11), select the databases that will be installed by checking the individual boxes beside each database listed.

13. Click Finish on the Installation Complete dialog box (Figure 12).
Database Verification

The installation of the AIM databases can be validated by logging onto the SQL server and verifying that each database has been populated with tables and views.

Verification of Database Objects

This verification process will ensure the proper database objects were correctly installed and that you are ready to proceed.

Figure 13: Microsoft SQL Server Management Studio

1. Open SQL Server Management Studio and select the AIM SQL Server in the Object Explorer pane on the left side of the application (Figure 13).
2. Click next to the Databases node to expand it, as shown in Figure 14, and display the list databases on the AIM SQL Server.

Figure 14: Databases node
3. Click to expand the CIS database node. Right-click Tables and click Refresh, as shown in Figure 15. In the Tables pane on the right, note that the CIS database tables have been created and are visible in the Name column. Also, notice that the schema owner, shown in the Schema column, is listed as dbo. In an unsuccessful installation, only the System Tables folder would be present.

Figure 15: Refresh Database Tables
4. Right-click the Views node and click Refresh, as shown in Figure 16. In the Views pane on the right, note that the CIS database views have been created and are visible in the Name column. Also, notice that the schema owner, shown in the Schema column, is listed as dbo. In an unsuccessful installation, only the System Views folder would be present.

5. Repeat the verification of database objects steps we just showed you for the AFD, and Claims (if installed) databases.

**Verification of Database Properties**

This process will ensure that the properties of the database are correctly configured and that the AIM applications will function as expected.

1. In SQL Server Management Studio, select the AIM SQL Server and expand the Databases node as explained earlier.
2. Right-click the CIS database and select Properties, as shown in Figure 17.

3. In the Database Properties dialog box (Figure 18), select Options. Verify the settings to ensure that they are configured as follows.
   - **Collation**: SQL_Latin1_General_CP1_CI_AS
   - **Recovery model**: Full
   - **Compatibility level**: SQL Server 2000 (80)

If the database installation was unsuccessful at any point, contact the Vertafore AIM Implementation Engineer for assistance.
Creating the AIM Network Share and Mapped Drive

An AIM network share must be created on the AIM file server. This is the connection that the workstations will use to install and run the AIM applications. Once the AIM folder has been created, it should be shared so that all AIM users have full access. Permissions and security should be set accordingly.

1. On the AIM file server, create a folder where the AIM files will be installed.

2. Right-click the newly created folder and click Sharing and Security, shown in Figure 19.
3. In the Properties dialog box, select Share this folder, as shown in Figure 20.
4. Click the Permissions button to assign permissions for the folder.
5. Ensure that the group Everyone is present in the Group or user names pane (Figure 21). If it is not present, add it using the Add button.
6. In the Permissions for Everyone pane, select Change and Read. Do not select Full Control.
7. Click Apply, and then click OK.
8. On the server, map a network drive to the AIM network share. This drive needs to be the same drive to which workstation users will connect. On the Tools menu, select Map Network Drive, as shown in Figure 22.

9. In the Drive list (Figure 23), select a drive letter.

10. In the Folder list, enter the path for the network share folder that you created earlier.
11. Select Reconnect at logon and click Finish.

The mapped network drive that you just created will be used when performing the AIM shared network install portion of the installation explained in this guide.

**AIM Shared Network Install**

We will now show you how to install the AIM files to the network share that you created earlier.

1. Open the AIM ISO file using the ISO viewer application.
2. Double-click Setup.exe to launch the AIM Installation wizard.

![AIM Installation splash screen](image)

**Figure 24:** AIM Installation splash screen

3. Click AIM Shared Network Install on the AIM Installation splash screen (Figure 24).
4. Click Next on the Welcome dialog box shown in Figure 25.

5. In the Choose Destination Location dialog box (Figure 26), type the letter of the mapped drive that you created earlier followed by a colon.
6. In the Select Server dialog box, enter the name of the SQL server, as shown in Figure 27, or select the server from the list.

7. Click Finish (Figure 28) to complete the installation.
Workstation Installation

The steps provided next should be followed to install the AIM programs on the workstations.

Microsoft .NET 4 Framework (Extended) prior to installing AIM on the workstation. Failure to do so will result in a failed installation.

1. On the workstation computer, map a drive, with the same drive letter that was used in the network share installation, to connect the workstation to the AIM share.
2. In the AIM directory in the network share, locate and double-click the AIMSetupW.exe file to start the workstation setup program.
3. Beginning with AIM version 6.4, if the necessary SAP Crystal Report runtime files are not already installed, you will be prompted to install them. If they are already installed on the workstation, proceed to step 9 on page 27.

Figure 29: SAP Crystal runtime engine for .NET Framework 4

4. In the SAP Crystal runtime engine for .NET Framework 4 dialog box, shown in Figure 29, click Next.
5. Read the license agreement, and then select I accept the License Agreement, as shown in Figure 30.
6. Click Next.
7. Click Next (Figure 31) to start the SAP Crystal Reports installation.
8. Click Finish, shown in Figure 32, to complete the installation of the SAP Crystal Reports runtime engine.
9. Click Next in the Welcome dialog box (Figure 33).

10. In the Select Programs dialog box (Figure 34), select the programs you wish to install.
11. Click Finish (Figure 35) to complete the installation.

12. Click OK in the Install dialog box (Figure 36) to restart the system if prompted to do so.

If you intend to run Crystal Reports from the workstation, you must follow the SQL client configuration instructions that we discussed on page 3 of this guide.

The workstation installation is now complete. The icons for the selected applications are visible on the workstation Windows Desktop.
Post-install Steps

**AIM Help File Fix**

Due to recent Microsoft security updates, CHM files were restricted when running from a network server. There is a help file fix in the AIM folder that should be executed on all workstations that will be running AIM applications in order to resolve this issue.

1. Locate the AIM_HTML_Help.exe file in the AIM folder.
2. Double-click on the file to run.

You will not see anything happen when executing this file, but the fix will be applied to the workstation.

**Database Updates**

It is important to update the databases with the latest version of the upgrade scripts after the initial installation has been completed. This is necessary so that any changes that may have occurred between the time the databases were packaged into the ISO and the release of the latest version of the AIM software are applied. Please consult with an AIM implementation technician to run the necessary SQL updates.

**Crystal Report Utilities**

1. Locate the Utilities folder on the ISO image.
2. Copy the Utilities folder to the AIM folder in the AIM share.

**Patches and Hot Fixes**

If any patches or hot fixes are released soon after the ISO has been downloaded and installed, login to My Vertafore and download the latest upgrade package from the Downloads – AIM > AIM V6.4 Downloads section and apply to the new install. Consult the AIM upgrade documentation for instructions.