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Installing Animal Intelligence and its Database

Revised January 17, 2001

Introduction

Animal Intelligence (AI), Animal Intelligence Software, Inc's flagship Windows application, and the Advantage Database Server (ADS) by Extended Systems, Inc. are easy to install, but require that certain procedures are followed to ensure the best operation. This document describes these steps, from network protocol considerations through final installation of the tested data files on the database server. We recommend that you read this document in its entirety before you begin the installation procedure.

Audience

This document is intended for use by experienced network personnel. It is not end-user documentation.

Installation step-by-step

These instructions are written assuming that Microsoft Windows NT or 2000 is employed as the network operating system. We make no specific recommendation of one network operating system over another; ADS runs equally well under either Windows NT, 2000, or NetWare. If Novell NetWare is used, you will have to adjust the procedures slightly. The target workstation platform for **AI** is Microsoft Windows 95 or 98.

I. On the Server

A. Network server setup issues

Our experience has taught us that the best protocol to use with the Advantage Database Server is TCP/IP. Further, network performance, especially on program startup, is greatly enhanced by the use of static IP addresses throughout the network. Therefore we strongly recommend the use of TCP/IP and static IP addresses, and will not support other protocols unless specific circumstances dictate and we have been notified in advance of installation. We suggest use of the reserved 192.168.x.x addressing scheme.

In testing your network setup, you must be able to "ping" the server by *name*, not just by IP address.

We strongly recommend you create a C: partition for system software (NTFS or FAT), and a separate, NTFS partition for data; Advantage Database Server will be installed on the C: partition, but **AI**'s data will be stored on the data partition.

Finally, the database vendor recommends setting up the cards in the server and workstations in half-duplex mode.

Once you have set up the network, move on to the next step.

B. Installing Advantage Database Server

Starting with version 2.1 of Animal Intelligence, ADS is supplied on the **AI** CD. The NT/2000 version for US and Canadian clients is stored on the CD in the folder ADS\USA_NT. To install, put the **AI** CD in the *server's* CD drive, then exit from the InstallShield setup that starts (that one is for **AI**, not for ADS). Click **Start**, then **Run**, then drill down to the folder ADS\USA_NT and double-click on the Setup.EXE file. Run this installation, and accept all of the defaults. ADS requires entry of a serial number and validation code; this was supplied to our mutual client when they purchased the software. The ADS directory need not be shared; ADS runs as an NT Service. Install ADS on the file server's C: drive.

After installation of ADS, run its configuration utility – it is found in the Advantage Database Server folder under Start/Programs.

Make the following adjustments to the configuration:

In the ADS Configuration Utility tab is a **Database Settings** sub-tab. Here, set the number of connections to twice the number of configured users, and the number of work areas to 100 times the number of configured users. Apply the changes. A dialog will appear telling you to stop, then restart the Advantage Service. Do this, and you're done.

C. Setting up the AI database folder

On the server's data partition, create a folder called "Shared", then share it. This will be used for the **AI** data files. Next, create an AISData folder in this new folder.

Using this scheme, you will map from each workstation to the file server's 'Shared' share, and to the user there will be one folder in this network drive: "F:\AISDATA". We prefer that from each workstation, you use F: as the mapped network drive letter.

II. Workstation setup

Workstation setup is an iterative process. In general, here are the steps:

1. install **AI** on one workstation, the one containing the modem and pcANYWHERE.
2. Copy the client's data files from the **AI** CD to that workstation, then test them.
3. Once you know that this local installation works, copy the data files to the **AI** database folder on the server and modify the client's .INI files to point to this folder, then test again.
4. Finally, install and test **AI** on each of the other workstation, one at a time.

These steps are detailed below.

A. Installing AI on the first workstation

Install **AI** on one workstation. Animal Intelligence Software requires that one workstation have a DOS-capable modem and pcANYWHERE installed; use this for your first workstation since there is an additional setup step required for this workstation anyway. Because pcANYWHERE is to be installed, we recommend that you set the display properties on this workstation to 256 colors and that there be no screensavers or backgrounds installed.

First, install the Advantage Remote Management Utility on this workstation. This allows you and our technical support personnel to view your Advantage Database Server stats from this workstation. To install this utility, insert the **AI** CD in the workstation's CD drive. Exit from the InstallShield setup utility that appears, then click **Start**, then **Run** and drill into the ADS\Utilities folder and choose ADSMGMT_2701.EXE. This is a self-extracting installation utility. The utility will be installed in a Start menu folder called Advantage Management Utility. When you start the utility, to view the server stats you must type in either the UNC name or the path to the server's mapped drive where the **AI** data resides. This utility will be installed *only on this one workstation*. For now, just close the utility and continue.

Now install **Animal Intelligence** on this workstation. **AI** is shipped on CD; in most machines the InstallShield setup program will automatically start when you put the CD in the drive. If not, run Setup.EXE from Start/Run. As you run the procedure, we recommend accepting the defaults.

Once **AI** is installed on this workstation you need to copy the data files we have prepared for the client to a data folder on this workstation in order to test them. You should find a file called TrData.EXE in the root folder of the **AI** installation CD. If not, *stop here, this client is a special case: call us for instructions*. Otherwise: From Start/Run, browse to it and double-click. This runs a self-extractor that will recommend extracting the files to the same **AI** data folder created by the **AI** install program if you accepted its defaults (C:\Program Files\AIS\AISData). If you installed **AI** in a different folder, type or browse to that folder, then type "AISData" under that folder to install the files there. The files will extract. If you installed **AI** in a different folder than the default, you will need to run the **AI** data diagnostics utility (next paragraph) to point to the new data folder.

Now run the **AI** Data Diagnostics Utility to setup the .INI files and file paths. From this first workstation, you start Data Diagnostics from Start/Programs/AIS, ensure that the *data path* field points to the correct path, then **Exit**. If the path is not correct, make it correct (you *may not* have a backslash at the end of the path) then click **Save** to save the path changes in the .INI files. You will see your changes reflected immediately in the two .INI file displays. Click **Exit** to quit the diagnostics utility.

Now start **AI**. The default log-in and password is AIS. From the **File** menu, choose "Operations Center." The **Lookup** tab is displayed by default. In the lower-left corner is the **Veterinarian** display area; click on the *Last* column and a list of veterinarians in last-name order should appear. Now click on the *Name* column of the **Hospital** area. A list of hospitals should appear, in name order.

Open the **Inventory** menu, then choose **Maintenance**. Click the down-arrow to the right of the Description control. An alpha-numeric list of inventory items should appear.

If all these tests work, you can assume that **AI** and the client's data is correctly installed on this workstation. Your next step is to connect to the server's Shared folder, move the data to the AISData folder you created earlier, then test the installation over the network.

B. Moving the client data to the server

From the first client workstation, map a network drive to the Shared folder on the server. Make sure that "Reconnect at logon" is checked. We strongly recommend using F: as the drive letter.

Now move the data from the test workstation's AIS data folder to the AISData folder on the network drive.

Finally, start **AI** Data Diagnostics on the workstation, then:

- modify the path to point to the network drive (you *may not* have a backslash at the end of the path), ie: "F:\AISData";
- change the Server Type radio button to Remote.

Then, choose **Store** to save the changes. You will notice the path and server type variables in the .INI file displays change to reflect your changes. Next, click **Open** in the Test Connection box. A dialog should pop up, saying that the configuration file opened successfully. If an error message pops up instead, stop and call us for assistance. Otherwise, **Exit** the utility and move on.

C. Testing the client data on the server

If you didn't move the data from the workstation but just copied it, you should rename the AISData folder on the workstation. This will prevent an accidentally "correct" run on the program if something is wrong with the connection (or whatever) between the workstation and the server.

Now, start **AI** from the first workstation. The program should start up and you should see the same data as when you ran from the workstation. If you can run through the same series of tests successfully here and see the same data, you can assume that the installation is ok.

To test that you actually have the database running in Server mode, start the Advantage Configuration Utility on the server, then look at the Current column of its Database tab. You should see one user and about 28 data files open while you have **AI** running. If you leave this utility running on the server, each workstation that starts **AI** will increase the number of users by one and the number of work areas by about 28. The number of tables will remain constant.

D. Installing AI on the other workstations

Once you have successfully completed all of the above steps, all that remains is to go around to each of the other workstations and perform the following four steps:

1. Map the server's drive to the workstation as you did above (use the same drive letter for all workstations – we strongly suggest using F: as the drive letter).
2. Install **AI** on the workstation as you did above, except don't install Data.EXE.
3. Run the **AI** Data Diagnostics utility to change the path to the server's drive and the server type to Remote, then save this new configuration (.INI files are stored on each workstation), then test it with the Open button.
4. Test the installation by starting **AI** and running the same data tests as above. Check, with the Advantage Management Utility, that the number of connections increases by one and the number of work areas increases by about 28 as each workstation is brought "on-line."

E. Final Step

Please, please please stress to the client the importance of saving their Advantage serial number/authentication code card. Whenever they need to upgrade their copy of Advantage – and as of this writing this has happened twice since **Animal Intelligence** was first released – they will need this card to re-enter their authentication code for the new version. Without the card, the upgrade process is much complicated. You might want to photocopy the card and keep the photocopy in your records for the client. Thank you for doing this.

Conclusion

Installing the Advantage Database Server and **Animal Intelligence** is not difficult, but does require several steps. This document has outlined what we have learned to be the most efficient series of steps to ensure a reliable, trouble-free installation.

If you have questions about any of the above steps, don't hesitate to call. Please ask for Karl Perry in Technology Services.