ABS Agency Builder 3
step-by-step
Installation Instructions

SYSTEM REQUIREMENTS

Operating System
Windows XP, Vista, Windows7, 8, or the equivalent Windows Server operating systems. Windows 2000 and earlier is not supported. The installation program will reject those operating systems.

Server / Host computer
- 1 gigahertz (GHz) or faster 32-bit (x86) or 64-bit (x64) processor
- 4 gigabyte (GB) RAM (32-bit) or 2 GB RAM (64-bit)
- 32 GB available hard disk space (32-bit) or 40 GB (64-bit)
- Graphics device capable of 800x600 pixel resolution (higher is recommended)
- Local area network capable of 100 megabits per second minimum (gigabit is recommended for excellent performance).

Client Workstation
- 1 gigahertz (GHz) or faster 32-bit (x86) or 64-bit (x64) processor
- 2 gigabyte (GB) RAM (32-bit) or 2 GB RAM (64-bit)
- 16 GB available hard disk space (32-bit) or 20 GB (64-bit)
- Graphics device capable of 800x600 pixel resolution (higher is strongly recommended)
- Local area network capable of 100 megabits per second minimum (gigabit is recommended for excellent performance).

> *Note: the above hardware recommendations are the minimum for Windows 7 or 8. Windows XP systems may be able to get by with slightly slower processors and slightly less RAM, but not much.*

Network
For good performance, network speed should be at least 100 Mbps. Best performance will be found with Gigabit network speeds (Gbps), but that is not a requirement. We discourage wireless networks for production work. The only exception might be a laptop computer that is routinely taken out of the office. Even then, we recommend that it be plugged into the network while in the office.

INSTALLATION

Please read all of these instructions completely before beginning the installation. Note that ABS-3 can only be installed on Windows XP, Windows 7, 8, and equivalent Windows server operating systems.

Server or host installation
The host computer (or server) must be setup before any client computers. After the software is installed, there are several tasks that must be done before installing any other network computer. The

follow steps more-or-less match the steps in the installation program.

1. Obtain the setup password from Agency Business Systems, Inc. The installation program will not work without it. To save time, get a version 3 registration code while you are at it.

2. Close all applications and **restart Windows**.

3. Download and RUN the full version 3 installation from the ABS web site (www.agencybusys.com).

4. Select *Host Computer (Firebird Server, Data and Program)* as the install type.

5. By indicating if you are an independent agent or a direct writer, the setup program determines which company logos get installed, if any. You can leave all boxes unchecked if you don't wish to install logos.

6. Enter the password ABS gave you. It is case sensitive – the shift key matters.

7. The next window gives information about the installation procedure. Basically it says to install the host first.

8. Now select the folder where ABS-3 should be installed. Use the default unless you have a very good reason to change it. We strongly discourage installing into the Program Files folder.

9. The default Start Menu item is *ABS V3*. Leave this as-is unless you have a very good reason to change it.

10. The *Ready to Install* window confirms the choices you have made up to this point. This is your last chance to change a previous selection before the installation begins.

11. During the installation, the host computer's name will pop up. Make note of that name. You will need it during the client setup.

12. After the files have been installed, a Command window (black background) will open for a few seconds. This is normal, and may happen a couple of times. Do not be alarmed, and do not close those windows. They will close automatically.

13. Several more check boxes appear at the end of the installation. They control what happens immediately after setup. They are:

    (a) *Update ACORD Forms List*... **Leave checked.**

    (b) *Copy ABS 2 data into Version 3*. **Leave checked to run the Data Migration program.** Running that program copys all the version 2 data to version 3. Note, this can take a long time depending on the amount of data and the speed of the computer. *WARNING*: ***If any errors are encountered during Data Migration, do not continue and contact ABS for help.***

14. **IMPORTANT**: Some systems prevent the setup program from making needed changes to the Firewall, or Internet security software (anti-virus). This is especially true for Windows 7, 8 and most 3rd party Internet security software (such as Avast, AVG, Kaspersky, Norton and others). Below is a list of the items you must inspect, and correct, if necessary. **Contact your local IT Professional if you don't know how to do the following.**

    (a) **Port 6519 must be open** for inbound and outbound traffic. If the installation software was not blocked, there will be a firewall rule named **Firebird 214.** It opens port 6519. If that rule was not created during the install, *you* must create it.

(b) The **ABS3 folder must be shared with full read/write permission**. If the installation program was not blocked, it did this for you. If the ABS3 folder is not shared properly, *you* must do it.

(c) **The Firebird Server must be a trusted program** with your anti-virus software. The Firebird server is named **fbserver.exe** and is located in the **ABS3_FirebirdServer\bin** folder (for example; C:\ABS3_FirebirdServer\bin\fbserver.exe). If ABS Agency Builder seems abnormally slow, you must *trust* the server for better performance.

15. Register ABS Agency Builder 3.

(a) Obtain a version 3 registration code from ABS if you haven't already done so. It is not the same as version 2.

(b) Enter the code.

  i. Click *Start > All Programs > ABS V3 > Register ABS Agency Builder*

  ii. Enter the version 3 code you got from Agency Business Systems, Inc.

16. Perform ABS Administration tasks;

(a) Click *Start > All Programs > ABS V3 > ABS3 Administration*.

(b) Enter the Administration Password. It is the same one you used for version 2 admin. Remember, ABS Agency Builder is shipped with a password of *Agent* (case sensitive). If you forgot your password, and *Agent* doesn't work, call ABS for help (and a little friendly humiliation).

(c) Once the Administration program is open, check, or uncheck items to grant or revoke permissions. Note the tabs at the top of the window for Human Resources information about your employees.

17. The Server/Host must **never** Sleep, Hibernate, or stop the Hard Drive. Do this via the computer's Power Options. If this step is neglected, client computers will exhibit communication errors.

This concludes the Server/Host installation. Client installations are much less complicated.

Client (workstation) installation

A Client installation is far easier and faster than the host. The host computer (or server) must be setup before performing a client install.

1. Download and RUN the full version 3 installation from the ABS web site (www.agencybusys.com). The same installation program is used for the host and the client setup. Make sure to select the Client installation type.

2. Several check boxes let you indicate if you are an independent agent or a direct writer. This determines which company logos get installed, if any. You can leave all boxes unchecked if you don't need to install logos.

3. After the installation is finished, a program will run allowing you specify the Host computer. It lists all the network computers it can find. Highlighting the Host enters its name in the *Host Name* field. If the host computer is not listed, simply enter its name. It was given to you during the Server installation. Finally, click the Apply button.

Important: A client computer should **never** have *LOCALHOST* as the *Host Name*. That name is reserved for the host computer.

USER MANUAL

A user manual covering the major differences between version 2 and 3 can be seen on our web site under the Support menu. It can be read on-line, or can be downloaded and printed. We expect you to read the user manual before calling for help. If you call with questions that are answered in the manual, we will request you to read the manual. The roll-out of version 3 requires us to be available to people who are having legitimate technical problems.

TRANSITION TRAINING

After you have used version 3 for a short while, and have read the entire User Manual, schedule a brief training session. This training is strictly intended to make sure you understand the differences between version 2 and version 3. More in-depth training can be scheduled once the version 3 roll-out is finished, if needed. Naturally, we are available for specific questions that are not answered in the user manual.