

How To - Install and configure the Symbience AL3 Download Client

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SUMMARY

This article describes how to install the Symbience AL3 Download client and how to configure a user profile. When you are finished, you should have successfully installed the software, created a user profile tested the profile and your internet connection.

Requirements

The following list outlines the recommended hardware, software, network infrastructure and service packs that are required:

- Internet connection – broadband is best
- AL3Download.exe (setup file to install the client, available from www.symbience.com)
- Agency / Producer / User Id and Password provided by the carrier that you would like to download from
- Sufficient access rights on your computer to install a new program



Installing the AL3 Download Client

You can obtain the AL3 Download Client setup program from the Symbience web site at www.symbience.com.

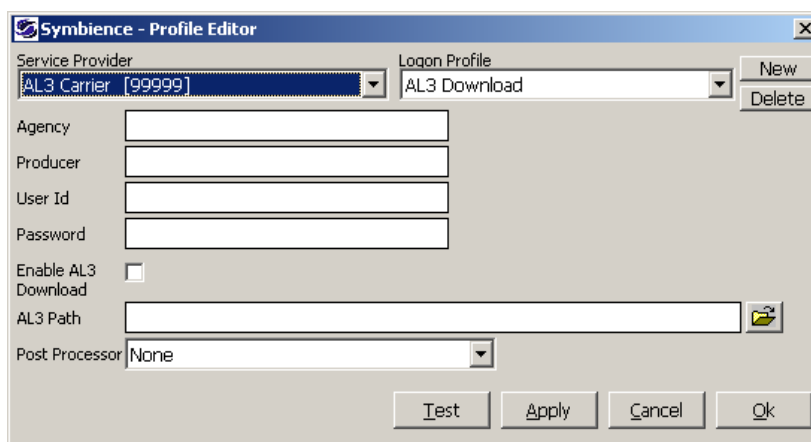
Once you have downloaded the installation program (*Note: Make a note of where you saved the AL3 Setup program*), execute the installation program by double clicking on the al3download.exe program icon from the location where you saved the file from above.

Follow the on-screen prompts (*in most cases, no changes are required*) and install the AL3 Download Client.

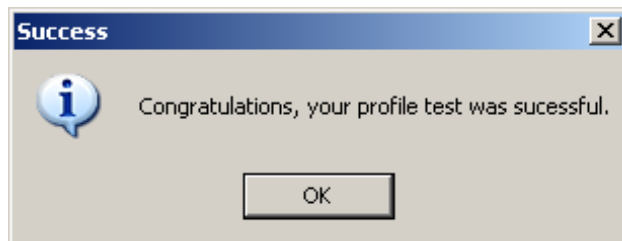
Setting up a User Profile

The user profile is used to identify you to the carrier and to select which Symbience supported carriers you would like to enable AL3 download from.

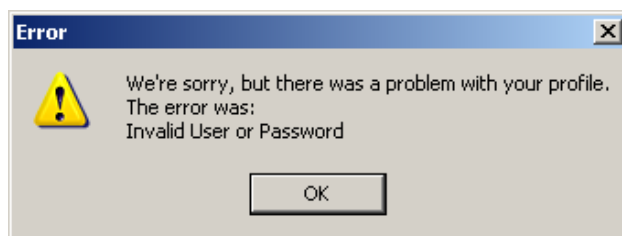
From the Start menu, All Programs, select Profile Editor from the Symbience menu.



1. Select the Service Provider that you would like to enable AL3 download with from the Service Provider drop down.
2. Click the 'New' button to setup a new Logon Profile. Enter a profile name ('AL3 Download' is preferred) and click 'Ok'.
3. Enter your Agency, Producer, User Id and Password (*These are provided to you by the Service Provider*).
4. Select the 'Enable AL3 Download' check box.
5. Enter the AL3 Path. This is the location that you would like to place the downloaded AL3 files. This must correspond with the AL3 download setup done in your agency management software. Once the AL3 Download Client retrieves the files from the service provider, they will be placed in the AL3 Path location where your agency management software can import them.
6. Double check your entries and click the 'Test' button. If your test is Successful, you will see a confirmation dialog box like the one below:



If you have made an error entering any of the information, or there is a problem with your account at the Service Provider, you will see a dialog box similar to the following:



If you receive an error, make a note of the error and take appropriate action.

- Double check your Agency, Producer, User Id and Password
- Confirm your internet connection is working properly
- Check for any Internet security devices or software that may prevent access to the internet

If you are unable to resolve your connection issues, and the error does not indicate a User or Password error, feel free to contact us for technical support at support@symbience.com.

If the error indicates a User or Password error, contact the Service Provider for assistance.

Post Processor

Some agency management software requires special or unique file handling. The Symbience AL3 Download Client supports these special cases with 'Post Processor' scripts that can be selected using the 'Profile Editor'. By default, the AL3 Download Client will create a filename similar to the one shown below.

032-33500-0196_rad3F265.al3

Agency		Producer	Unique	
		User ID		AL3 extention

If you require special file naming or handling, review the list below and select the appropriate Post Processor using the Profile Editor. If you can't find a Post Processor for your software, contact support@symbience.com for help in selecting or creating a post processor script for you situation.

Post Processor	Software	Description
<i>InStar</i>	<i>InStar – AMS</i>	<i>Files names sequentially poldata.001, .002, 003, etc...</i>



Running the AL3 Download Client

After you have setup and successfully tested your profile, you can run the AL3 Download. To run the AL3 Download, from the Start Menu, select AL3 Download from the Symbience menu. A brief splash screen will appear while your files are being retrieved from the service provider. You can view details about the download session by viewing the 'al3d.log' file. If the service provider had any AL3 files available for you, they will be in the 'AL3 Path' that you entered in the Profile Editor in the steps above. Each time you run the AL3 Download Client, AL3 files will be retrieved from each of the service providers that you configure and enable in the Profile Editor.

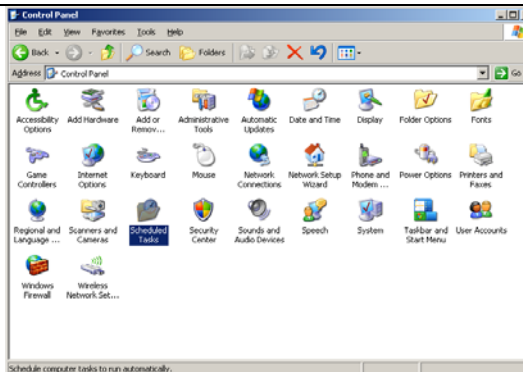


Scheduling AL3 Download with Task Scheduler

You may wish to schedule the download process so that you don't have to remember to run it each day. If you would like to schedule the download you may use any task scheduling software that you like. Microsoft Windows provides a task scheduling service called 'Scheduled Tasks' and it can be found in the Control Panel of your computer.

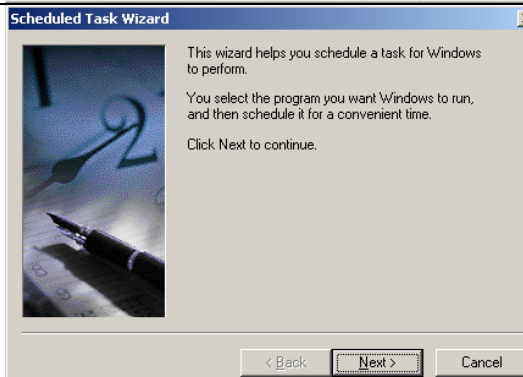
To schedule the AL3 Download, follow these steps:

Open the Scheduled Tasks control panel applet and select 'Add Scheduled Task'



The Scheduled Task Wizard will guide you through the process.

Click 'Next'



Click the 'Browse' button and location the AL3 Download program (AL3D.exe). The program is located in the

<C:\Program Files\Symbience\AL3 Download Client\AL3D.exe>

Or, if you are using the Symbience desktop for upload

<C:\Program Files\Symbience\X2C Desktop\AL3D.exe>

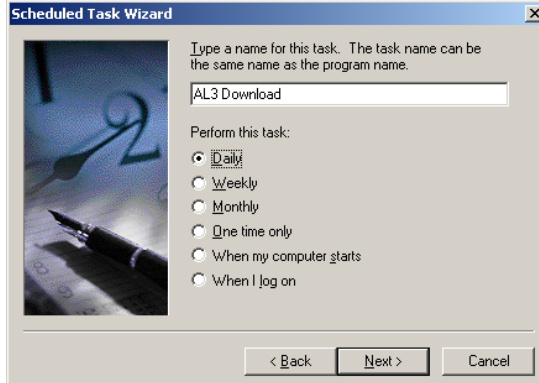
Click 'Next'



After you select the program to be scheduled, enter a name for the scheduled task. For example 'AL3 Download' is a good choice, this will help you identify your task if you have several tasks scheduled.

Next, select how often you would like the task to run. In this example, we have selected 'Daily'.

Click 'Next'



Scheduled Task Wizard

Type a name for this task. The task name can be the same name as the program name.

AL3 Download


Perform this task:

- Daily
- Weekly
- Monthly
- One time only
- When my computer starts
- When I log on

< Back Next > Cancel

Select the time that you would like to task to begin. In this example we have selected 8:30AM Mon-Sun.

Click 'Next'



Scheduled Task Wizard

Select the time and day you want this task to start.

Start time:

8:30 AM

Perform this task:

- Every Day
- Weekdays
- Every 1 days

Start date:

6/ 5/2007

< Back Next > Cancel

You must enter the user name and password for the scheduled task. This may be your own user name and password or may be the user name and password of a service account. If you are not sure, use your own user name and password or ask your IT department for guidance.

Click 'Next'



Scheduled Task Wizard

Enter the name and password of a user. The task will run as if it were started by that user.

Enter the user name: jsmith

Enter the password:

Confirm password:

If a password is not entered, scheduled tasks might not run.

< Back Next > Cancel

You are done! Your AL3 Download's should happen automatically on the schedule that you selected.

Note, you computer must be turned on in order for the scheduled task to run.



Scheduled Task Wizard

You have successfully scheduled the following task:

AL3 Download

Windows will perform this task:

At 8:30 AM every day, starting 6/5/2007

Open advanced properties for this task when I click Finish.

Click Finish to add this task to your Windows schedule.

< Back Finish Cancel