

Fast Install Steps (Version 8.4)

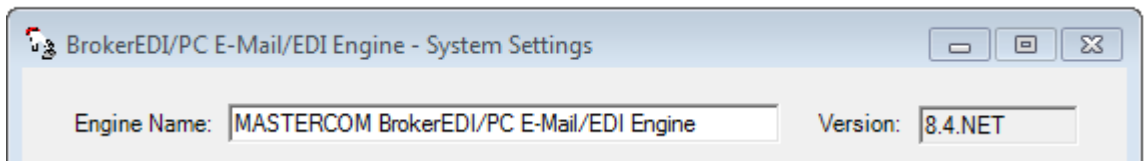
The BrokerEDIPC E-Mail-EDI Engine .NET installation consists of three installs.

- a) Install of **setup.exe** installs the engine software in an \EMAIL folder on the server and a set of shortcuts on the PC that runs the install.
- b) Install of **setupClientForEMail.EXE** on all PCs in the office so users can attach files to their CSIO e-mail messages and policy change forms.
- c) Install of **setuppc.exe** on another PC in the office to install a set of shortcuts to the \EMAIL folder on the server so the upload/download communications can be done on another PC.

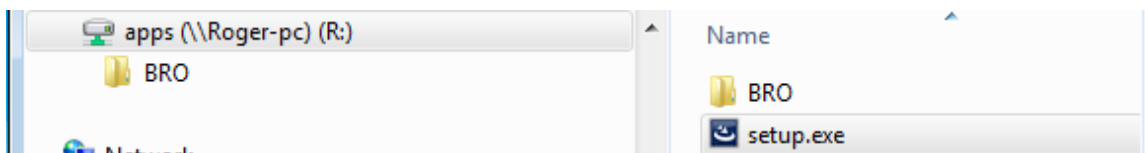
Install of Setup.exe

For an upgrade from 7.7f, 8.1 and 8.2 there is no need to uninstall just do steps 1,3,4 and 12. For an upgrade from 8.3 first uninstall 8.3 and then install 8.4.

To find the version you have installed, in the **BrokerEDIPC E-Mail-EDI Engine .NET** program folder select the **Settings – System** program-item and the version is given in the upper right hand corner as shown below.



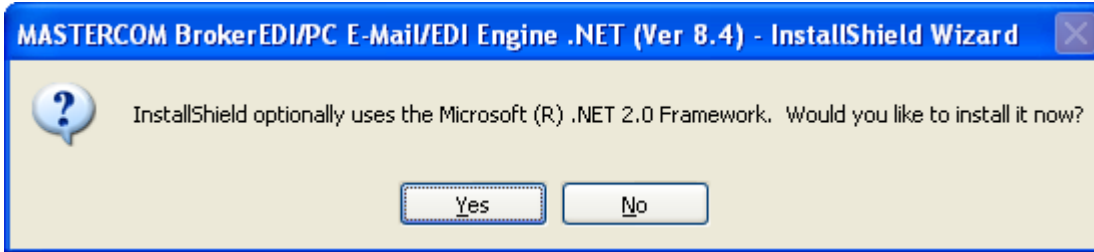
- 1) Go to the user's PC that will run the upload/download communications.
- 2) Contact the CSIONet Help Desk Phone: 1-416-360-1773 or toll free at 1-800-463-2746
Email: helpdesk@csio.com for the instructions to connect to CSIONet (<https://csionet.com>)
downloading the Juniper Networks SSL VPN Network Connect 6.1.0 application software.
- 3) Download **setup.exe** from MASTERCOM's web site and save it in the mapped drive where the folder \BRO resides, as illustrated below. In this case the mapped drive is R.



- 4) Double-click **setup.exe** to start the installation.

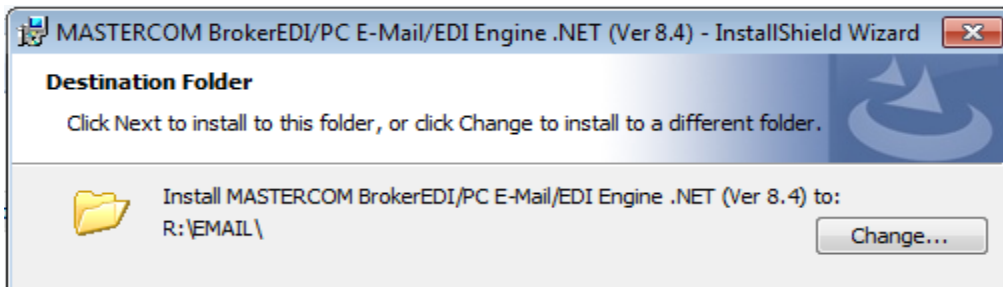
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If you get:

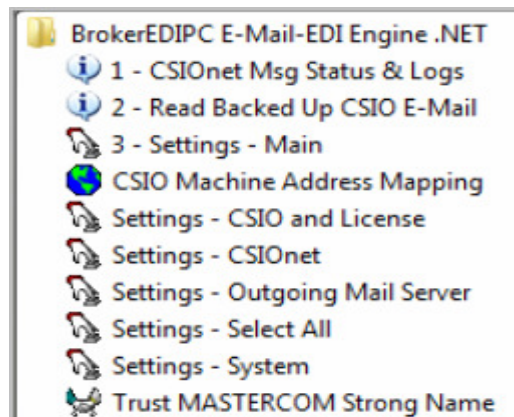


select the **Yes** button to install the .NET 2.0 Framework. Afterwards you can check the .NET Framework was installed by clicking the **Start** button, **Control Panel**, Windows XP – “**Add or Remove Programs**”, **Windows 7** – “**Programs and Features**”

After reading and agreeing to the license agreement, select **I accept ...** and the **Next** button. For a **User Name** specify the name of the user for the PC, for **Organization** specify the brokerage name and for **Serial Number** your MASTERCOM product id. Take the suggested “**Destination Folder**” as illustrated below.



The following is the **BrokerEDIPC E-Mail-EDI Engine .NET** program folder that is created.



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- 5) Click **Start, All Programs**, and in the **BrokerEDIPC E-Mail-EDI Engine .NET** program folder click the “**Trust MASTERCOM Strong Name**” program-item to modify your security policy to trust the MASTERCOM “strong name”. For **Windows 7** you must **right click** and “**Run as administrator**”. This will add MASTERCOM’s strong name to your security policy’s machine policy level. You should see the following command window open, if asked, type “**y**” and **<Enter>** to accept the policy change and you should see that “- strong” membership was added with “**Success**”, as shown below.

```
R:\EMAIL>echo off
Microsoft (R) .NET Framework CasPol 2.0.50727.1434
Copyright (c) Microsoft Corporation. All rights reserved.
Added union code group with "-strong" membership condition to the Machine level.
Success
Press any key to continue . . .
```

- 6) In the **BrokerEDIPC E-Mail-EDI Engine .NET** program folder select the **3- Settings – Main** program item.

BrokerEDI/PC E-Mail/EDI Engine (Version:8.4.NET) - Main Settings

Your Personal E-Mail Settings

Your E-Mail Address: for system error messages.

Outgoing mail server (SMTP) From your Outlook's Internet E-mail Settings

CSIONet Settings

CSIONet User Name: Lowercase

CSIONet Password: Lowercase

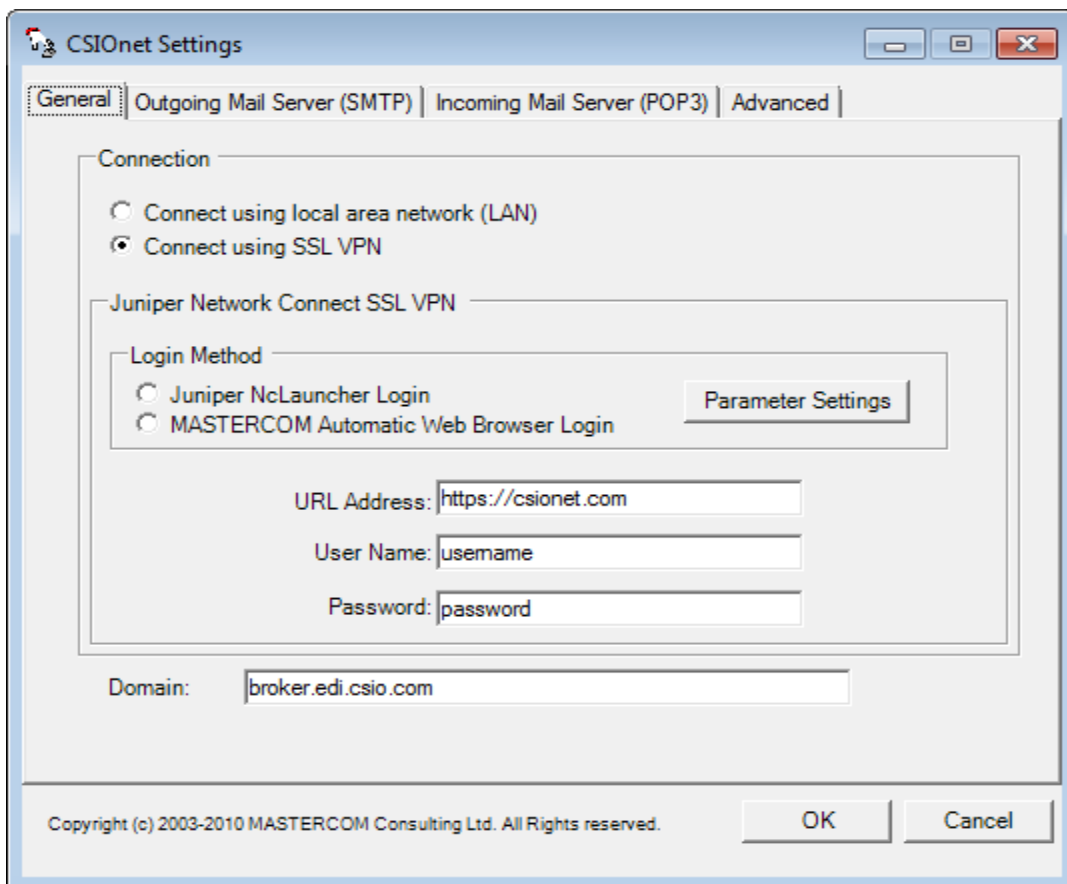
Company Name: Up to 25 characters

CSIO Source Machine Address: Must be 12 characters - Uppercase

- 7) Replace **YourE-MailAddress.com** with your open internet e-mail address you use everyday.
- 8) Replace **smtp.Your_ISP.com** with your ISP’s Outgoing mail server (SMTP) which you would find specified in your e-mail client e.g. Microsoft Outlook. If you have a Microsoft Exchange Server you would specify the IP address, of the PC that is hosting the Exchange Server.
- 9) Specify your CSIONet username, password and CSIO Source machine address etc. You would have received these values from CSIO when you subscribed to CSIONet.

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- 10) You can change your company name (up to 25 characters) used to identify you in your e-mails to your insurance companies.
- 11) Select the **OK** button to save the settings.
- 12) In the **BrokerEDIPC E-Mail-EDI Engine .NET** program folder select the “**Setting- CSIONet**” program-item. As shown below, select a **Login Method**. Typically for Windows XP you would select “Juniper NcLauncher Login”, For Windows 7 select “MASTERCOM Automatic Web Browser Login”. Select the **OK** button to save the setting.



- 13) For your Firewall/Antivirus Software: Give xmailer.exe, located in \EMAIL\EXE, rights to ports 25 and 110 and not scan incoming and outgoing e-mail. If your antivirus software does not permit you to be selective regarding certain programs then disable the antivirus software for the duration of the upload/download session.

If you cannot configure your antivirus to not scan outgoing e-mail sent by xmailer.exe and

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you do not want to disable scanning of outgoing e-mail then you must in **Settings – CSIONet** set the **Connection** to **Connect using local area network (LAN)** and make the connection to CSIONet manually before doing your Power Broker **Send and Receive E-Mail/Policies**.

- 14) You can now run a test by selecting the **3- Settings – Main** program item and click the **E-Mail** button, as shown below. This will e-mail a settings report to your e-mail address and retrieve any download from your CSIONet EDI mailbox.

The screenshot shows a dialog box titled "Display Settings in Notepad or E-Mail Settings to 'Your E-Mail Address'". It contains the following elements:

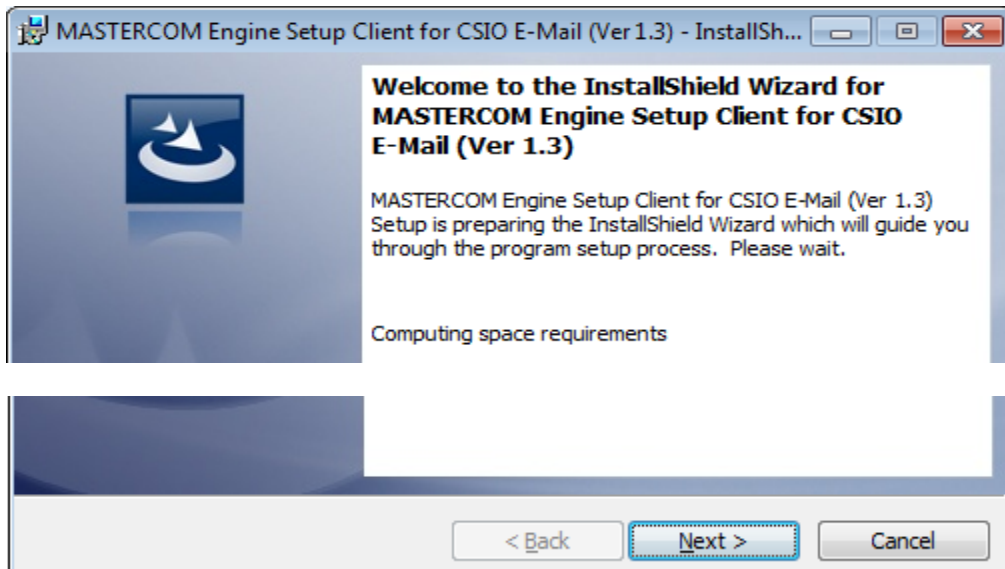
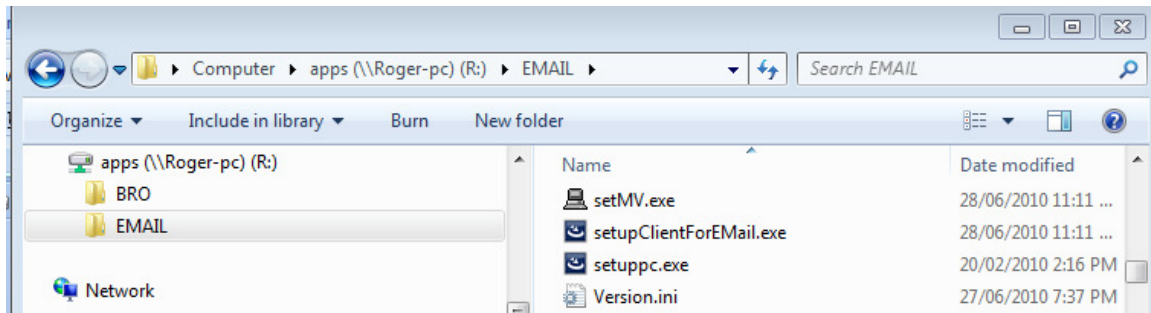
- A group box with the text "Display Settings in Notepad or E-Mail Settings to 'Your E-Mail Address'".
- Inside the group box, the text "Select" is followed by a checked checkbox for "Main Settings", the word "or", an unchecked checkbox for "All Settings", and the text "and click".
- To the right of "and click" are two buttons: "Display" and "E-Mail", separated by the word "or".
- Below the group box, the text "To view the System Run Log after an E-Mail Session click" is followed by a "System Run Log" button.
- To the right of the "System Run Log" button is the text "Logging level:" followed by a dropdown menu currently set to "Minimum".
- At the bottom left, the text "MASTERCOM Product ID:" is followed by a greyed-out text box.
- At the bottom left, below the text box, is the copyright notice: "Copyright (c) 2003-2009 MASTERCOM Consulting Ltd. All Rights reserved."
- At the bottom right are two buttons: "OK" and "Cancel".

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Install of SetupClientForEMail.exe

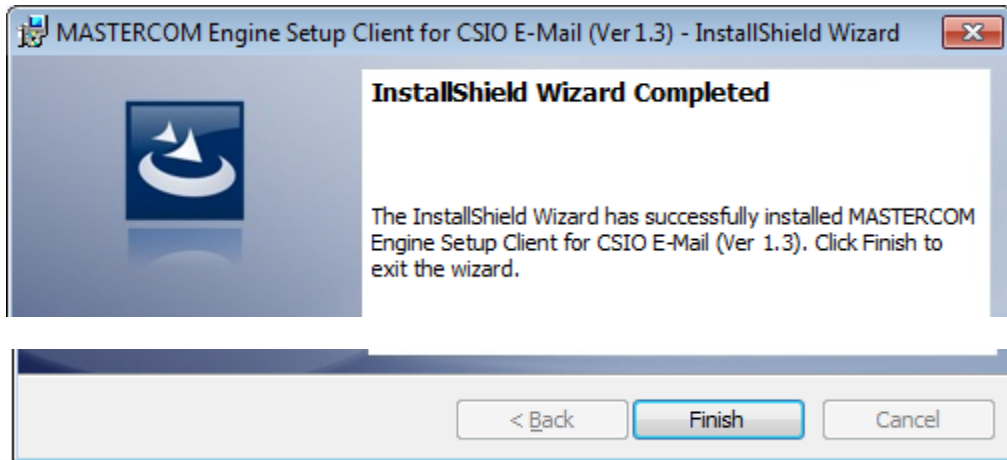
Power Broker users can now attach files to their CSIO e-mail messages and policy change forms. To install the “**Attach File Command**” program on a user’s PC do the following steps. Note: CSIO asks that only PDF and jpeg files be attached but if you wish to attach other files you should check with the insurance company to see if they can receive them.

- 1) At each user’s PC explore to the \EMAIL directory and double-click **setupClientForEMail.EXE** to start the installation, as shown below.



Click the **Next >** button to continue.

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Click the **Finish** button to finish the installation.

The following two shortcuts are placed on your desktop and in a “**BrokerEDIPC E-Mail-EDI Engine .NET**” program folder.



Use the “**Attach File Command**” icon to specify a file to be attached to your Power Broker “**Forms**” memo.

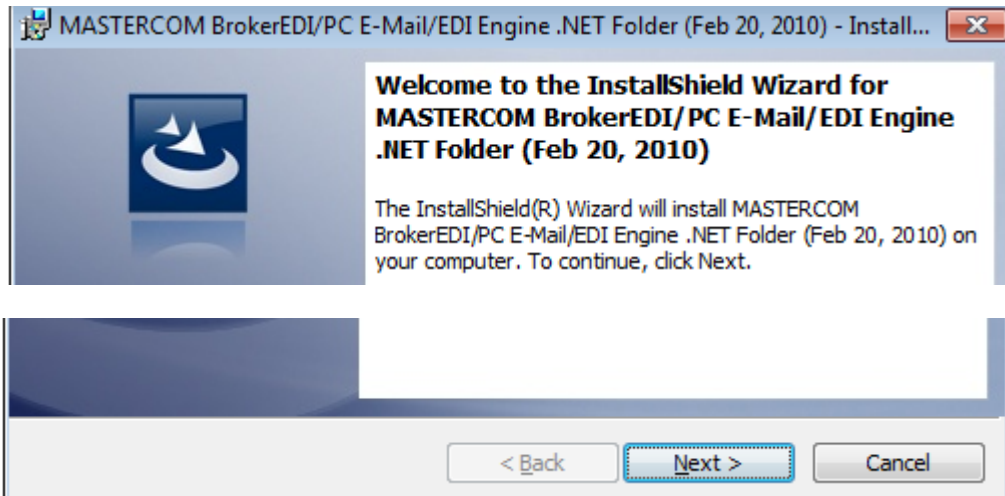
The “**Rec'd CSIO E-Mail Attachments**” icon opens the “**\EMAIL\AL3MAIL\AttachmentsRecd**” folder to access any received attachments.

See “**Adding an Attachment to a Policy Change Form**” document for a demonstration of the use of the “**Attach File Command**” to attach files.

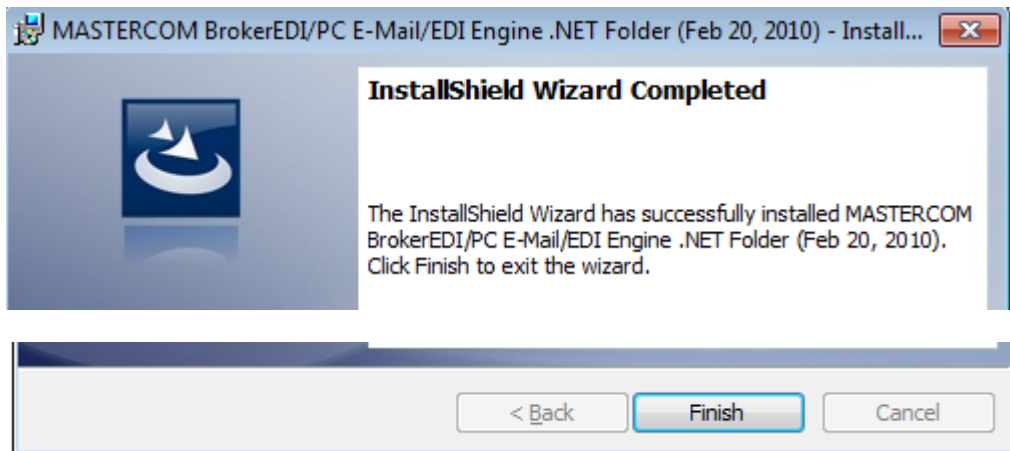
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Install of Setuppc.exe

1) At a PC explore to the \EMAIL directory and double-click **Setuppc.exe** to start the installation, as shown below. Setuppc.exe installs shortcuts to programs in the \EMAIL folder on the server.



Click the **Next >** button to continue.



Click the **Finish** button to finish the installation.

2) Reboot the PC.

3) In the "**BrokerEDIPC E-Mail-EDI Engine .NET**" program folder select "**Trust All**".

4) Connect to CSIONet (<https://csionet.com>) downloading the Juniper Networks SSL VPN Network Connect 6.1.0 application software. See step 2 of "Install of Setup.exe".