

## ASIST for Agencies – Installation Instructions

### **Create a network folder**

Create a new folder on the agency network (e.g. \\...\ASIST for Agencies\) that may be shared by all users. Each user should have read/write access to the folder.

### **Copy files to network folder**

ASIST for Agencies files come in a zip format and includes the program file (an Excel Worksheet), the data base file (MS Access data base), and help files. You may need the free utility Winzip to open (<http://www.winzip.com/downwz.htm>). Extract the files to the newly created network folder.

### **Chose an ‘admin’ computer**

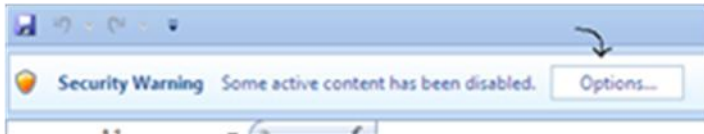
Pick one computer to be designated as the official administrator computer. This computer will be needed for the initial unlocking of the ASIST system. Client restrictions are set by default on this computer, allowing visibility of client names while disabling the electronic measures. Note: Administrator(s) may log in to the ASIST for Agencies system through other computers.

### **Running ASIST for Agencies for the first time**

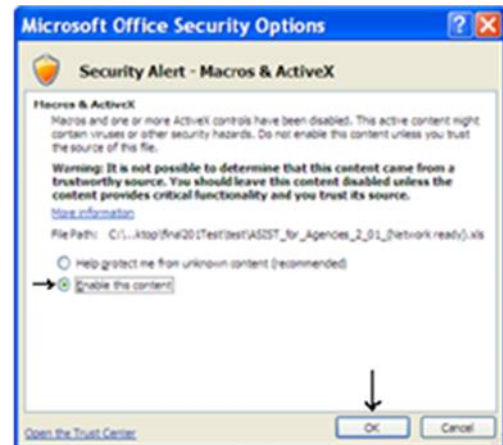
Running *ASIST for Agencies* successfully, macros must be enabled. Different versions of Excel have different methods to enable macros.

#### *Excel 2007 users:*

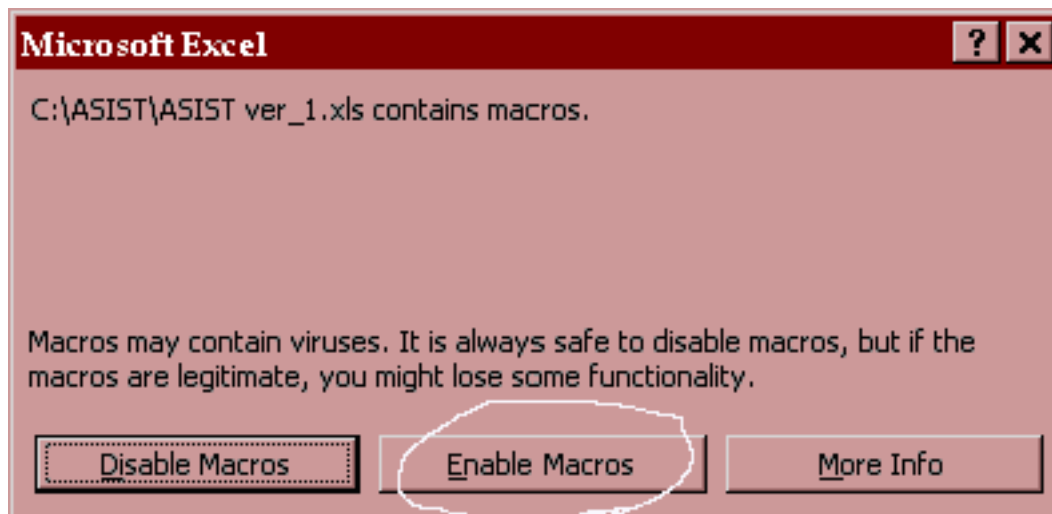
Enable macros through the security options menu. Use the help menu if you can't see the Options button.



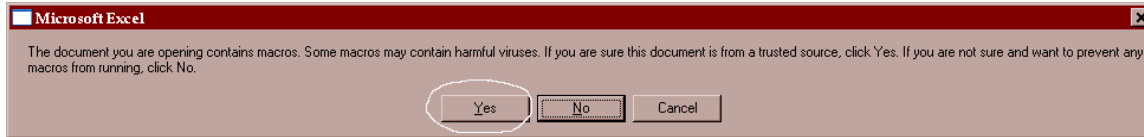
In Excel 2007 use the security options menus.



#### *Older versions of Excel:*



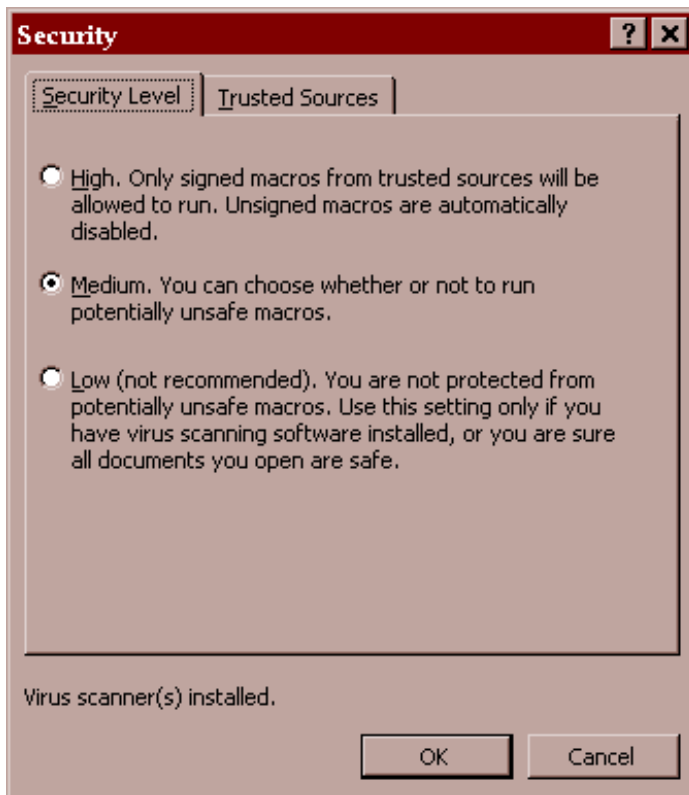
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On Excel versions prior to 2007 if *ASIST for Agencies* opens up without a banner, you probably have your macro security settings set too high or too low and should consult the “Macro Security Section” below.

### ***Macro Security Level (Excel versions before 2007)***

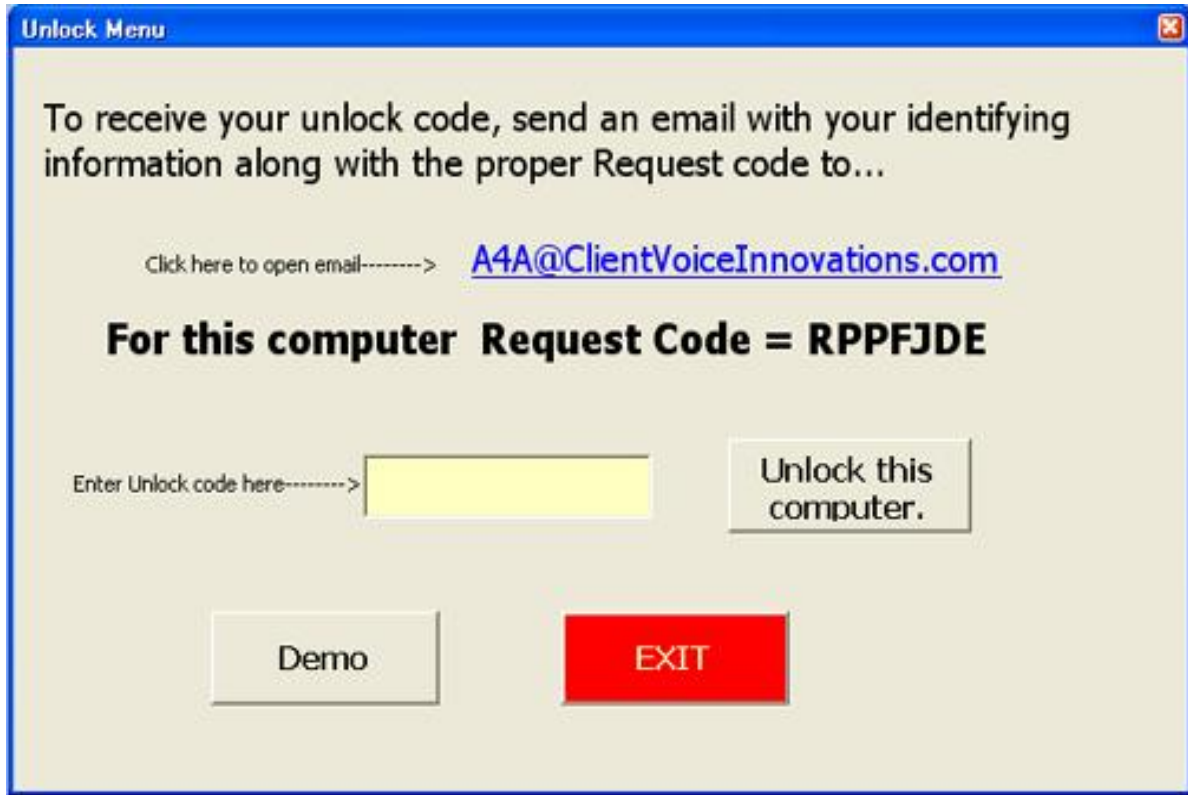
To check the macro security level on your computer, go to the Excel Tools menu. Under Tools, look for the Macro option (you may be required to click on the little down arrow to see more choices). Under Tools, Macro, click on the Security option. A Security dialog box will open similar to the one below.



To operate *ASIST for Agencies*, you should set the security option to Medium. Setting high will disable the program and it will either not run. Do not choose the Low Setting unless, as indicated above, you have taken special measures against macro viruses (e.g., operating virus protection software and not opening unsafe Excel files).

***Unlocking the ASIST for Agencies program for use***

If Macros are enabled as described in the preceding sections, then a screen similar to the one below will appear:



As the instructions on the screen indicate, operation of the *ASIST* program requires an unlock code. To receive your code, send an email to: [A4A@ClientVoiceInnovations.com](mailto:A4A@ClientVoiceInnovations.com) containing the date you purchased the program and the Request code supplied (in this example the Request code is RULUZDD). By clicking on the hyperlink, the program can open an email for you. A computer-specific unlock code will be sent to you via email. Enter the unlock code into the appropriate box on the copy protection screen and click on “unlock this computer.”

More on this can be found in the help file - “Running ASIST for Agencies for the first time.”

***Using Demo Mode***

If you are interested in running a demonstration before purchase, hit the Demo button to try the program for 30 days.

***Running ASIST as a Front End Application***

ASIST should be configured to run from users’ computers instead of the network folder. To configure create a copy of the ASIST application (Excel file) on a given user’s machine – e.g. desktop. Open the program and navigate to the network location. The program will save remembering the data base location. ASIST will add (Network Ready) at the end of the file name. Users should ensure that they run from this new version. Once the ‘network ready’ version has been created, it can be copied to the desktop of all computers.