

EventPro Software Installation Guide

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Welcome to the Installation Guide

- This EventPro Software Installation Guide contains instructions that will assist you with installing your EventPro application.
- When purchasing EventPro, you chose either the **Cloud application** or the **On-Prem/Installed application**. Select the relevant link below to get started with your software:
 - o <u>Get Your Software: Cloud</u>²
 - o <u>Get Your Software: Installed</u>
- The EventPro Installation Manual was last published Wednesday, February 3, 2021.
- For more information about setting up and using EventPro Software, please consult the full <u>EventPro Software</u> <u>Manual</u>.

Get Your Software: Cloud

This chapter describes the process of accessing EventPro Software through the Cloud application.

- <u>Send Data for Conversion</u> (if required)
- <u>Review Cloud Requirements</u>
- <u>Citrix Options</u>
- Upgrade Receiver to Workspace
- Install Citrix 13
- Access from Desktop Citrix Workspace 15
- Access from Cloud Gateway Browser
- <u>Change Your Password</u> 50
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Send Data for Conversion

If you already have EventPro data, you can send it to Support in order to convert it for the EventPro cloud application.

The process of sending your data to EventPro Support will differ, depending on whether you are converting data from the EventPro **Standard** Edition (Microsoft **Access** Database) or the EventPro **Enterprise** Edition (**SQL** Database).

Check which Edition you own, and follow the applicable directions below:

- From EventPro Standard Edition
- From EventPro Enterprise Edition 3

If you will be starting from a new database, and do not require data conversion, you can skip this step.

From EventPro Standard Edition

- 1. Go into the data directory that stores your EventPro Databases.
 - a. In a multi-user network environment, this will be the server.
 - b. In a single-user environment, this will be your local drive.
- 2. Compress your main database which is named **data.mdb** by default into a zip file.

You can do this by right-clicking the file and selecting Send To > Compressed (zipped) Folder.

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		2	Mail Recipient
	Create Shortcut	-	(G:)
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	Rename		(I:)
	Properties	٠	():)

- 3. **Rename** the zip file to your 6-digit User ID number, or your company name, or the name that your Support/Training Specialist has recommended.
- 4. Your Support/Training Specialist may have provided you with a link for uploading your data.
- 5. If not, use your 6-digit User ID and 4-digit Password to log into to the Client Login area of the EventPro website.
 - a. You would have received an email from EventPro containing the User ID and Password. If you do not know your company's User ID and Password, please consult with the program administrator. If you have misplaced your User ID and Password, an authorized user can contact Support or Training to retrieve them.
 - b. Under the Upload File tab, click Browse. Select your data zip file and click Open.
 - c. Wait until the transfer is completed.
- 6. As soon as the transfer is complete, email **<u>Support</u>** to let them know that your data has been sent.
- 7. If this process does not work for you, please contact <u>Support</u> for further assistance.

From EventPro Enterprise Edition

There are two main steps to getting your EventPro Enterprise data to Support/Training.

1. First, you will create a backup of your database and compress it into a zipped folder.

Create a Database Backup

- 1. Go to your Microsoft SQL Server Management Studio.
- 2. Right-click on the database you want to backup. The database is likely called **EVENTPRODATA**, unless otherwise renamed by you.
- 3. From the right-click speed menu, select **Tasks > Backup**.

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Ready		Export Data-tier Application Register as Data-tier Application Upgrade Data-tier Application Delete Data-tier Application Import Data Export Data			

- 4. In the **Back Up Database** window, ensure that these settings have been selected:
 - a. Under the **General** page:
 - i. Backup type: Full
 - ii. Back up to: Disk

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iii. Since EventProData is the default name for all databases, you should ideally rename your backup database so that it is more easily identifiable for EventPro Support.

At the bottom of the window, click Add.

In the **Select Backup Destination** dialog, name the Destination with your **6-digit User ID**, or the name that your Support/Training Specialist has recommended.

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iv. You can then **Remove** the original name.

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- b. Under the **Backup Options** page:
 - i. Name: Also change this name to include your 6-digit User ID.
 - ii. Description: Enter a description, such as Backed up on DATE at TIME.

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- c. Click **OK**. It may take a few minutes to backup, depending on the size of your database.
- 5. Click **OK** again when the backup is complete.
- 6. Now, on your Database Server, you should have access to the **Backup** folder, which contains the backup file you just created.

On the backup file you created, right-click and select **Send To > Compressed (zipped) Folder** to create a zipped folder.

If not already done, remember to name that zipped folder as your 6-digit User ID number, or the name that your Support/Training Specialist has recommended.



2. Then, you will transfer the zip file to EventPro Support.

Send Data to Support

- 1. Your Support/Training Specialist may have provided you with a link for uploading your data.
- 2. If not, use your 6-digit **User ID** and 4-digit **Password** to log into to the **Client Login** area of the **EventPro** website.
 - a. You would have received an email from EventPro containing the User ID and Password. If you do not know your company's User ID and Password, please consult with the program administrator. If you have misplaced your User ID and Password, an authorized user can contact Support or Training to retrieve them.
 - b. Under the **Upload File** tab, click **Browse**. Select your data zip file and click **Open**.
 - c. Wait until the transfer is completed.
- 3. As soon as the transfer is complete, email <u>Support</u> to let them know that your data has been sent.
- 4. If this process does not work for you, please contact <u>Support</u> for further assistance.

If something in this process does not work for you, please contact <u>Support</u> for further assistance.

Review Cloud Requirements

• You can find the **technical requirements** for EventPro Software at:

https://www.eventpro.net/technical-requirements.html

- As noted in the technical requirements, **Citrix Workspace** allows you to easily and securely access your EventPro application.
 - NOTE: Citrix Workplace has replaced Citrix Receiver, the application previously used to access EventPro Cloud. Workspace has the same functionality as Receiver, but with more capabilities. Workspace is backward compatible with all Citrix solutions. If you already have Citrix Receiver installed, you can simply <u>Upgrade</u> <u>Receiver to Workspace</u>.
- There is also an option to run the "Light Version" of Citrix in a browser, although this does not allow access to local drives or local printers. This is explained in more detail under <u>Citrix Options</u>.

Citrix Options

- The **EventPro Cloud** application is accessed through **Citrix Workspace**, a software product that allows you to connect remotely to applications.
- To connect to EventPro Cloud, you can go through:
 - the Desktop Citrix Workspace Application

or

- the EventPro Cloud Gateway in an internet browser.
- To use the **desktop** Citrix Workspace, you must **install** Citrix Workspace on your machine.
- If accessing EventPro through the Cloud Gateway, you are still most likely going to install Citrix Workspace locally on your computer or device.
 - However, with the Cloud Gateway, you have a second option, which is to access EventPro using the "Light Version" of Citrix (also called "Citrix Receiver for HTML5").
 - The **Light Version** of Citrix allows you to access the EventPro Cloud application **within a web browser**, which means you do not need to install Citrix to your computer.
 - This is useful if you have trouble installing Citrix, or if your browser doesn't enable the correct extensions to use EventPro Cloud.
 - However, there are some limitations with the Light Version. It does not currently offer any access to your local drives (which means you will not be able to access local drives in order to import/export reports, contacts, *etc.*), and it does not offer printing to your local printers.
 - Therefore, Citrix recommends using the full-featured, installed **Citrix Workspace** if possible. If you want to be able to access your **local drives** and print to **local printers**, you need to install **Citrix** Workspace.
- We will first look at **installing Citrix Workspace**, assuming you want to use the full-featured version to access EventPro. Go to Install Citrix 13.
- Later, when accessing EventPro Cloud application from a browser, we will look at the option of using the Light <u>Version</u> of Cloud Application from a browser, we will look at the option of using the Light
- There is also a mobile Citrix Workspace app that allows you to access EventPro Cloud on your mobile device. See <u>EventPro Cloud on Mobile Device</u> 6.

Upgrade Receiver to Workspace

- **Citrix Receiver** is being replaced by the new **Citrix Workplace**. Citrix Workspace has the same functionality as Receiver, but with more capabilities, and is backward compatible with all Citrix solutions.
- The following topic is for clients who are **already running EventPro in Citrix Receiver**, and need to switch to the new Citrix Workspace for <u>Desktop</u> or/and <u>Mobile</u> 11. (If you are installing Citrix for the first time, you can begin at <u>Install Citrix</u> 13.)
- In many cases, you will not need to uninstall your existing Citrix Receiver before installing Citrix Workspace.
 However, Citrix has noted that some versions will need to be removed manually before you can install Citrix Workspace.
- To upgrade to Citrix Workspace for Desktop, go to https://www.citrix.co.in/downloads/workspace-app.
 Download and install the app for your operating system.
- 2. During installation, **Citrix Workspace** should automatically replace your existing **Citrix Receiver**.

You will notice that the Citrix desktop icon turns from black to blue, the color of the new Workplace app.

3. When you run Citrix Workspace for the first time, you will receive this dialog:



- a. The Learn More button will direct you to a website with more information about Citrix Workspace.
- b. Click **Got It** to go to the Citrix Workspace app.
- 4. Citrix Workplace should remember your Account and go directly to the login dialog.

However, if you need to add your Account again, review Run Citrix Workspace & Add Account 15.

5. When **Citrix Workspace** opens, you can log in as usual.

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	Password:	•••••				
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6. Once logged in, your EventPro app should still be there, as before. If not, you can review how to <u>Add Apps to Citrix</u> <u>Workspace</u> 17. You can now run EventPro, and continue to work as usual.

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- 7. The process of upgrading to Citrix Workspace on your smartphone or tablet will vary, depending on your device, its operating system, and its settings.
 - a. Typically, you can update or install the **Citrix Workspace app** from the iTunes App Store (Apple iOS devices) or Google Play (Android devices), but if neither of those options are applicable to you, there are other versions available for download on the Citrix website.
 - b. If your device is set to **automatically install app updates**, Citrix Receiver may have already been upgraded automatically for you.
 - c. When you run Citrix Workspace on your mobile device for the first time, you may get a notification that Citrix Receiver has been upgraded to Citrix Workspace.



d. If your account and favorite apps have not been preserved during the upgrade, you can review how to <u>Add an</u> <u>Account</u> **57**, <u>Log In/Sign In</u> **57**, <u>Add Apps to Favorites</u> **58**, <u>Adjust Settings</u> **60**, and more under <u>EventPro</u> <u>Cloud on Mobile Device</u> **56**.

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0	EventPro		
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Install Citrix

- The following instructions describe how to install Citrix Workspace on a **computer**.
- To learn how to install and use the Citrix Workspace mobile app on a smartphone or tablet, see <u>EventPro Cloud on</u> <u>Mobile Device</u> 56
- 1. Download the relevant version of Citrix Workspace from www.citrix.com/downloads/workspace-app.
- 2. Install Citrix Workspace, following the Citrix Workspace installation wizard.



3. When the installation is complete, you can just click **Finish**. We will learn how to add an Account later.

If you want to add an Account now, click **Add Account**. See <u>Run Citrix Workspace & Add Account</u> for further instructions.



4. When you are finished installing Citrix Workspace, you can decide whether you want to access EventPro Cloud application through the **desktop Citrix Workspace** or the **Cloud Gateway in a browser**.

- a. Access from Desktop Citrix Workspace 15
- b. Access from Cloud Gateway Browser 26

Access from Desktop Citrix Workspace

These instructions describe how to access EventPro Cloud through the **installed Citrix Workspace application on your computer**.

The first time you run Citrix Workspace after installing it, you need to take a few steps in order to set up access to EventPro. Subsequent logging in to EventPro will be much more simple.

- Run Citrix Workspace & Add Account 15
- Add Apps to Citrix Workspace 17
- Run EventPro 19
- <u>Subsequent EventPro Login</u> 2

Run Citrix Workspace & Add Account

- 1. Assuming it is already <u>installed</u> ¹³, run **Citrix Workspace** from your **Start** menu or desktop shortcut.
- 2. If you have not already added an account, the **Add Account** window will appear when you run Citrix Workspace for the **first time** after installation.

(NOTE: There is also a way to add an account to the Citrix Receiver through the Cloud Gateway, in which you activate Citrix Receiver for desktop. We will look at that option <u>below</u> 37.)

3. Enter cloud.eventpro.net in the field and click Add.

Citrix Workspace	\times
Add Account	
Enter your work email or server address provided by your IT department:	
cloud.eventpro.net	
Do not show this window automatically at logon.	
Add Close	

4. The next window asks for your login credentials.

a. If you are the **Admin User** logging in for the **first time**, your EventPro cloud application will have a **default Admin User** already created. Log in with these default credentials:

User Name: admin_X (where the X represents your company's 6-digit User ID number. So, for example, if your User ID is 123456, you would log in with the user name admin_123456).

Password: EventPro1234 (Once you are in EventPro, you will want to change this password - see <u>Change Your</u> <u>Password</u> 50.)

b. If you are a **regular, non-Admin User**, your Admin User should have provided you with your **User Name** (in the format namel_000000, where "name" is your first name, "I" is your last name initial, and 000000 represents your organization's 6-digit User ID) and your **Password**.

Enter those credentials now.

c. Click Log On.

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User name:	UserA_000000
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	Add Close

5. The Citrix Receiver window opens.



6. Next, go to Add Apps to Citrix Workspace 17.

Add Apps to Citrix Workspace

When you open and log into Citrix Workspace for the first time, there won't be any apps on the screen.
 You can add your EventPro app now.

Citrix Workspace		- 🗆 X
Workspace	000000 v Q	
+ Add your favorite apps		

- 2. Click the plus sign (+) along the left sign of the screen.
- 3. Select your **EventPro** application icon from the list. Depending on your region, it will be **EventPro**, **EventPro** AU or **EventPro** EU.

The **EventPro** icon will be added to the Citrix Workspace home screen.

4. Click anywhere on the page to close the apps menu and view your Citrix Workspace screen.

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Workspace	000000 ~	Q		
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+ Ev	entPro			

5. Next, go to <u>Run EventPro</u> ¹⁹.

Run EventPro

1. Click the **EventPro** icon.

The loading spinner icon indicates that it is working, and you **do not** need to click the icon again.

2. The **EventPro Starting** dialog will appear. Continue to wait, and do not click the program icon again.

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3. The **EventPro Starting** dialog will disappear, and the **EventPro splash screen** will appear, indicating that EventPro is starting up.

The EventPro splash screen may open **behind** the Citrix window, so you may need to **move or minimize the Citrix window** to see EventPro starting up.

Do not click the program icon a second time once EventPro is already loading up; give the loading screen a few moments to appear.

Event Managemen	
Generating application UI structure	
Copyright © 2000-2018	Profit Systems inc

4. If there is more than one database to choose from, select the relevant database from the drop-down list and click **Log On**.

If you only have one available database, you won't have to perform this step.

5. The EventPro application will load for a few more seconds, and then appear in its own window separate from the Citrix Workspace window.

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	 ⓓ My Workplace ✔ Events			
	E Lodging			
	◯ Communications☑ Tasks			
	🗐 Finance			
	User: AliceK_001000 Client ID: PSI001000AK2 Memory Usage: 153MB	Version: 18.1.3		

Subsequent EventPro Login

After you have installed **Citrix Workspace** and completed the other setup described above, there will be fewer steps to logging into EventPro Cloud.

- 1. Run Citrix Workspace from your Start menu or desktop shortcut.
- 2. If the login dialog doesn't pop up right away, click the **Log On** link.
- 3. Enter your User Name and Password, and click Log On.

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+	Citrix Workspace User name: Password: Log On Cancel Secure connection	

4. In the Citrix Workspace window, click the EventPro icon.

The loading spinner icon indicates that it is working, and you **do not** need to click the icon again.

5. The **EventPro Starting** dialog will appear. Continue to wait, and do not click the program icon again.

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Starting	
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6. The **EventPro Starting** dialog will disappear, and the **EventPro splash screen** will appear, indicating that EventPro is starting up.

The EventPro splash screen may open behind the Citrix window, so you may need to move or minimize the Citrix window to see EventPro starting up.

Do not click the program icon a second time once EventPro is already loading up; give the loading screen a few moments to appear.

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Copyright © 2000-2018	Profit Systems ic

7. If there is more than one database to choose from, select the relevant database from the drop-down list and click **Log On**.



8. The EventPro application will appear in its own window separate from the Citrix Workspace window.

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	Finance		
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Access from Cloud Gateway Browser

These instructions explain how to access EventPro Cloud through the EventPro Cloud Gateway in an internet browser.

The first time you access Citrix through the Cloud Gateway, you need to take a few steps in order to set up access to EventPro. Subsequent logging into EventPro will be much more simple.

- Login to Cloud Gateway 26
- <u>Run Citrix</u>²⁹
- Add Apps to Citrix StoreFront 35
- Activate Desktop Citrix 37
- <u>Run EventPro</u> 40
- <u>Subsequent EventPro Login</u> 4

Login to Cloud Gateway

1. In your internet browser, go to:

https://cloud.eventpro.net

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Event Pro' Cloud Gateway	
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You can also access the **Cloud Login** link from the EventPro **My Account** page.

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2. The EventPro Cloud Gateway asks for your login credentials.

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a. If you are the **Admin User** logging in for the **first time**, your EventPro cloud application will have a **default Admin User** already created.

Log in with these default credentials:

- i. **User Name**: admin_X (where the X represents your company's 6-digit User ID number. So, for example, if your User ID is 123456, you would log in with the user name admin_123456).
- ii. **Password**: EventPro1234 (Once you are in EventPro, you will want to change this password see <u>Change</u> <u>Your Password</u> (50).)
- b. If you are a **regular, non-Admin User**, your Admin User should have provided you with your **User Name** (in the format namel_000000, where "name" is your first name, "I" is your last name initial, and 000000 represents your organization's 6-digit User ID) and your **Password**.

Enter those credentials now.

- 3. Click Log On.
- 4. Next, proceed to **Run Citrix** 2, where you will either use the **installed Citrix Workspace** application or the "Light Version" **Citrix Receiver for HTML5** through a web browser.

Run Citrix

1. When you **first login** to the EventPro Cloud Gateway, it will look for the installed **Citrix Workspace**. What it finds determines your options for proceeding.

NOTE: As mentioned earlier, **Citrix Receiver** has been upgraded to **Citrix Workspace**. This webpage currently refers to Citrix "Receiver", but it will detect and use **Citrix Workspace**, if applicable.

- 2. If you want to use the **full-featured**, **installed** version of **Citrix Workspace** (formerly Receiver), ensure that you have **already installed it**, following the instructions <u>above</u> 13.
 - Use Installed Citrix

3. If you already have <u>Citrix Workspace installed</u> 13, the browser should detect it after you login to **https://cloud.eventpro.net**, and you should go straight to the **Citrix StoreFront** home screen.

However, if your **browser history has been cleared** since the last time you logged into Citrix, you may need to **detect/allow/activate** it again. The process of detecting Citrix will differ slightly, depending on the browser you are using. We will look at the examples of **Firefox** and **Chrome**.

4. In **Firefox** and **Chrome**, you will probably end up at the **Welcome to Citrix Receiver** screen. (Again, note that **Citrix Receiver** is now **Citrix Workspace**, although this webpage still refers to the "Receiver".)



Click Detect Receiver.

In Chrome, you may receive an Open Citrix Workspace Launcher dialog. To continue, click the Open Citrix Workspace Launcher button.

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	Open Citrix Workspace Launcher?	
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	Open Citrix Workspace Launcher	
citrix Receive	Just a moment, we're detecting if Citrix Receiver is already installed. If Citrix Receiver is detected, you will see a window in a few seconds. Please choose Launch Application . If no window appears, select from the options below. Use light version Already installed	

5. You will arrive at the Citrix StoreFront.



- 6. If you do not want to detect or install Citrix Workspace, you can use the **Light Version** within an internet browser. Also, if Citrix Workspace is installed, but fails for some reason, the EventPro Cloud application will use the Light Version.
 - Use Light Version (No Install)

1. The process of **bypassing installation** may be slightly different, depending on the Internet browser you are using. We will look at the examples of **Firefox** and **Chrome**.



2. Click the Use Light Version link below the Detect Receiver button.

3. You will go to the **Citrix Receiver StoreFront**.
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7. The **Citrix StoreFront** opens to the **Favorites** page.

If you haven't logged into Citrix before, the **Favorites** page will be blank.



8. You have the option to access EventPro from the **Apps** page. Click the **Apps** icon at the top of the webpage.

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9. However, if you want the EventPro app to be readily accessible, you can add it to your Citrix StoreFront **Favorites** page.

See Add Apps to Citrix StoreFront 351.

Add Apps to Citrix StoreFront

1. When you log into the Citrix StoreFront for the first time, there won't be any apps on your Favorites page.

You can always access EventPro from the **Apps** page, but you may find it convenient to add EventPro and any other frequently used apps to your **Favorites** pages so that they appear first whenever you log into Citrix.

2. In the top navigation ribbon, click **Apps** to open the **All Apps** page.

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3. Find the **EventPro** application icon and click the **Details** link to the right of the icon.

Depending on your region, your program icon will be called EventPro, EventPro AU or EventPro EU.

4. In the EventPro icon page, click Add to Favorites.

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5. View your **Favorites** page.

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6. If you need to, you can now <u>Activate Desktop Citrix</u> 37.

If you wish to skip that step, you can proceed to **Run EventPro** 40.

Activate Desktop Citrix

You may have already activated the Desktop Citrix Workspace and added an account; review Access from Desktop Citrix Workspace > $\frac{\text{Run Citrix Workspace & Add Account}}{15}$.

However, if you haven't, you can do so here from the Citrix StoreFront through the Cloud Gateway.

1. In the **Citrix Storefront**, open the drop-down menu under your username in the upper right corner, and select **Activate**.

You may notice that the hover hint text for this command says, "Activate Citrix Receiver on your desktop".

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You will be prompted to Open or Save the receiverconfig.cr file, and click OK.
 (Note that although the dialog still refers to "receiver", it will use the new Citrix Workspace application.)
 If you Save the file, go to the folder where you saved it and double-click to run it.

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3. The prompt from Citrix asks if you want to add "Store Service" provided by "*.eventpro.net".

If you want to proceed, click Add.

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4. In the next dialog, enter your User Name and Password, and click Log On.

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5. The **desktop Citrix Workspace** will appear in a separate window, containing the **"Favorite**" app you selected in the Citrix Storefront.

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6. If you select **Accounts** under the Username menu, you will see that the Store Service account has been added to the desktop Citrix Workspace, so you won't be prompted to add an account when you subsequently run it.



Run EventPro

1. In the **Citrix StoreFront** page, click the **EventPro** icon.

The loading spinner icon indicates that it is working, and you **do not** need to click the icon again.

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2. The EventPro Starting dialog should appear. Continue to wait, and do not click the EventPro icon again.

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3. The **EventPro Starting** dialog will disappear, and the **EventPro splash screen** will appear, indicating that EventPro is starting up.

It may take a few moments for the EventPro splash screen to appear, and it may open **behind** the Citrix window, so you may need to **move or minimize the Citrix window** to see EventPro starting up. Do not click the program icon a second time once EventPro is already loading up; give the loading screen a few moments to appear.



4. If there is more than one database to choose from, select the relevant database from the drop-down list and click **Log On**.

If you only have one database, you will not have to perform this step.



5. The EventPro application will load for a few more moments, and then appear.

a. If you are using the installed **Citrix Workspace**, the EventPro application will appear in its own window that is **separate from the browser** in which you launched Citrix StoreFront.



b. If you are using the "Light Version" of **Citrix Receiver** (*i.e.* bypassing Citrix installation), the EventPro application will open in a new tab **within the same browser**.

You can move the EventPro window around and even open multiple EventPro windows within the browser window's confines.

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Click the menu icon at the top center of the browser window to access options for **Full Screen**, **Clipboard**, and more.

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Subsequent EventPro Login

After you have completed the setup described above, there will be fewer steps to logging in to EventPro Cloud.

- 1. Go to **cloud.eventpro.net**, or access the **Cloud Login** link from **myaccount.eventpro.net** under the **Downloads** tab.
- 2. Enter your **User Name** and **Password**, and click **Log On**.

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3. If you have **Citrix Workspace installed**, the browser should remember it, but if your browser history has since been cleared, you may need to click **Detect Receiver** again.

If you do not want to install Citrix Workspace, remember that you click the Use Light Version link instead.



4. Once you are in the **Citrix StoreFront**, click your **EventPro** app icon. The loading spinner icon indicates that it is working, and you **do not** need to click the icon again.

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5. The EventPro Starting dialog should appear. Continue to wait, and do not click the program icon again.

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6. If there is more than one database, select the correct database from the drop-down list, and click **Log On**. If you only have one database, you won't need to select one.

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- 7. The EventPro application opens.
 - a. If using the **installed Citrix Workspace**, the EventPro application will appear in its own window that is **separate from the browser** in which Citrix StoreFront was launched.



b. If using the **Light Version** of Citrix, the EventPro application will open in a new tab **within the same browser**. You can move the EventPro window around and even open multiple EventPro windows within the browser window's confines.

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Click the menu icon at the top center of the browser window to access options for **Full Screen**, **Clipboard**, **Log Off**, and more.

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Change Your Password

Once you have logged into the EventPro Cloud application for the first time, the first thing you should do is **CHANGE YOUR PASSWORD!** Especially if you are the Admin User!

Please do not leave the password as the default, as all default admin users created for the cloud have the same default password, making it very easy for unscrupulous types to guess what your default admin password would be.

- 1. In EventPro, click My Details under My Workplace in the Navigation menu or left-hand Navigation panel.
- 2. The Security User edit form opens.
- 3. In the ribbon above, click the Change My Password button.
- 4. In the **Change Password** dialog, enter the **Old Password**, and type the new password in the **New Password** and **Confirm Password** fields. Click **OK**.

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Review the requirements for a cloud password under <u>Cloud Password Policy</u> 50¹.

5. If you want to change any other information in your Security User account, review the instructions under **Security Setup > Users** in the **EventPro User Manual**.

Cloud Password Policy

When setting your password for the EventPro Cloud login, please note that your password must meet certain minimum requirements for security reasons.

- The password **must not** contain your User Name
- The password must contain characters from at least 3 of these 5 categories:
 - o Uppercase characters
 - o Lowercase characters

- Digits 0 through 9 (Base 10 digits)
- o Non-alphanumeric characters ~ ! @ # \$ % ^ & * _ + = ` | \ () { } [] : ; " ' < > , . ? /
- Unicode character that is categorized as alphabetic but is not uppercase or lowercase, including Unicode characters from Asian languages
- Minimum Password Length: 7 characters
- **Password History Remembered**: 24 passwords, meaning that you cannot reuse a password that you used in the last 24 times you changed your password.
- **Minimum Password Age**: 1 day, meaning you cannot change your password more than once a day, which prevents users from repeatedly changing passwords in a short period of time to get back to an old password.

Exit EventPro Cloud

The method of exiting the EventPro Cloud application will differ, depending on whether you are using the installed **Citrix Workspace** or the **Light Version**.

- Installed Citrix Workspace:
 - When using the installed Citrix Workspace, whether accessing EventPro from the desktop Citrix Workspace or the Cloud Gateway in a browser, the EventPro application opens in its own window.
 - To close EventPro, click the **X** in the upper right corner of the main EventPro application window.

The dialog will confirm that you want to exit the application. Click Yes to close EventPro.

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• If you want, you can then **log out of Citrix Workspace**, and exit the Citrix Workspace application window or the internet browser, depending on how you accessed EventPro.

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Citrix Workspace may still be running in the background. If you need to completely exit Citrix Workspace, you can
do so by right-clicking the icon in your Task Bar, and selecting Exit.



- Light Version of Citrix (Not Installed):
 - With the Light Version HTML5 Receiver, the EventPro application window stays confined within the browser window.
 - To close EventPro in the HTML5 Receiver, you need to click the X in the upper right corner of the main EventPro **application** window **not** the browser window or tab.

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• You should see the EventPro dialog asking "Are you sure you want to exit the application?". Click Yes.

The EventPro application will close, leaving the browser tab open and blank for a few moments, after which the tab will automatically close, and you will return to the Citrix StoreFront.

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• **NOTE**: If you see the **Confirm Navigation** dialog, it means you are attempting to close the browser tab or window without closing EventPro.

Opt to stay on the page. Then, to ensure that you have logged out properly, click the X in the upper right corner of the **EventPro application window**, as noted above.

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Task Calendar	Leave Page Stay on Page	
EventPro		

Update Cloud Software

You will not need to download and install anything to update the EventPro Cloud application.

If there has been a software update since you last logged in, a dialog will inform you that the database version is older than the application and needs to be updated. You simply need to click **OK** to initiate the update.



Note, however, that as long as you continue a logged in session (some users prefer to stay logged from day to day), the software will not update. You need to log out and log back in again to see the notification dialog and initiate the update.

Therefore, to ensure that all of your users are always working in the most up-to-date version of the software, you should:

- 1. Sign up to receive software update notifications from EventPro.
- 2. Upon receiving a notification, instruct all users to log out and log back in so that they confirm the software update.

EventPro Cloud on Mobile Device

- You can access your EventPro Cloud application from mobile devices such as iPhones, iPads, Android Tablets & Phones, *etc*.
- This topic will describe the general process of installing Citrix Workspace and accessing EventPro Cloud on a mobile device, but please note that the specific process will vary, depending on the make, model and functions of your device.
- 1. Your first step is to download Citrix Workspace.

Typically, you can find the **Citrix Workspace app** on the iTunes App Store (Apple iOS devices) or Google Play (Android devices), but if neither of those options are applicable to you, there are other versions available for download on the Citrix website.

- 2. After you install the app, tap to open it.
- 3. If this is the first time opening the Citrix Workspace app, you may get a screen explaining that Citrix Receiver has been upgraded to Citrix Workspace.
 - a. The Learn More button will direct you to a website with more information about Citrix Workspace.
 - b. Tap Got It to continue to the Citrix Workspace app.

Citrix Receiver is now Citrix Workspace app
Citrix Workspace app extends the capabilities of Citrix Receiver, making it even easier for you to stay productive.
Got it
Learn More

4. On initial opening, you may also get the Citrix Workspace introduction screen. Tap **Get Started**.

Citrix Workspace	
Securely access your favorite apps and services in one place and access them anytime on any device	
Get Started	
Don't have an account? Try the demo .	

5. The **Welcome** or **Add Account** screen asks you to enter your company email address or Store URL.

Enter cloud.eventpro.net (or https://cloud.eventpro.net, depending on which format your device accepts), and tap Continue.

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6. Next, the Sign In page asks for your Username and Password.



a. **User Name**: Your EventPro Cloud **Login User Name**, which typically combines your User Name, an underscore (_), and your 6-digit Client ID, *e.g.* name_000000.

You can review the default credentials under **Run Citrix Workspace & Add Account** above.

- b. **Password**: Your EventPro Cloud login password.
- c. Tap **Sign In** or **Log On**, or the applicable button on your device.
- 7. You will then go to the main page of the app, which could be **Home** or **Apps**, depending on your device.

In our example, Workspace opens to the **Apps** page, which displays all of the apps available to you on Citrix Workspace.

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- 8. You can add your EventPro app to your **Favorites** page so that it is easily accessible.
 - a. Check the **Favorites** area of the Citrix Workspace app.

If you have logged into Citrix Workspace and configured it before, even just on the desktop application, your **EventPro** app may already be added to your **Favorites** page.

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b. If the Favorites screen is empty, you can add the EventPro app now.



c. The method of adding favorite apps will vary, depending on your device.

In our example, we return to the Apps screen, and tap the plus sign (+) next to the EventPro app icon. Depending on your region, your program icon will be called **EventPro**, **EventPro** AU or **EventPro** EU.

A checkmark will appear next to the EventPro app icon, indicating that it has been added to Favorites, and if you go to the **Favorites** page, you will see the EventPro app there.

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9. Before starting the EventPro app, you should probably adjust your Settings.

The available **Settings** will vary depending on the make of your mobile device. You may need to experiment with using EventPro Cloud on your device to determine which settings work the best.

a. Go to the **Settings** area in the Citrix Workspace app.

	Settings	Log Off
GENERAL		
Display Options		>
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Audio		
Advanced		>
Citrix X1 Mouse		>
SECURITY		
Security Token		>
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Support		>
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- b. Three areas under which you will likely need to adjust settings are Keyboard, Advanced, and Display.
 - i. If there is some sort of "**Extended Keyboard**" option, you will probably find it useful to turn it on. You may need to enable various extended keyboard functions individually under the **Keyboard** settings.

You may also want to enable the clipboard, which may involve turning on an "**Enable clipboard**" setting, or enabling various clipboard functions individually (**Cut**, **Copy**, **Paste**, *etc*.).

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ii. Under Advanced settings, you may want to turn on the "Ask Before Exiting" option, if available.



iii. Choosing a **Display** option is up to your personal preference. If you want the EventPro window to adjust to your device screen automatically, look for some sort of "**Auto-Fit**" setting.

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Auto-fit Screen	I	
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10. You can now start EventPro Cloud.

Go to your **Favorites** page, and **tap** your EventPro Cloud app icon to begin.

The EventPro application will start.

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11. You may need to wait a few moments as EventPro loads.



12. If you have more than one database to choose from, select the relevant database from the drop-down list and tap Log On. If you only have one database, you will not have to perform this step.



13. When EventPro opens, the size of the application window will vary, depending on your **Display** settings.You can tap the **Maximize** and **Restore Down** commands in the upper right corner of the application window.



14. Tap the grid icon at the bottom middle of the screen to open the Citrix Workspace toolbar.





15. To log out of the EventPro application, either tap the "x" in the upper right corner of the application window, or use the **Close** command in the Citrix Workspace toolbar. (*The* **Home** command takes you back to the Workspace home screen, but leaves the EventPro application running in the background.)

The **Confirmation** dialog asks if you are sure that you want to exit the application. Tap **Yes** to exit EventPro, and return to the Citrix Workspace app.



Get Your Software: Installed

- This chapter describes the process of installing EventPro Software on a computer or network.
- **NOTE**: EventPro Software installation should only be done by an **IT Specialist** with sufficient IT knowledge and understanding of your organization's network. Installing EventPro Software requires knowledge of SQL Server, and sometimes Active Directory.
- First, review the introductory information under <u>Options and Requirements</u> 661:
 - o Options and Requirements 6
 - <u>Minimum System Requirements</u> ল
 - Installation Types 67
 - Authentication Modes
 - <u>Active Directory Integration</u>
- Then, after determining the type of installation you will be performing, proceed to the chapter relevant to your installation:
 - o <u>Standalone Install</u>
 - **Network Installation**: There are several different options for Network Installation.
 - The network installation of EventPro involves a multiple-user network environment in which the EventPro application is hosted on the **application server**, the EventPro database is hosted on the **database server**, and the Users run EventPro from their **Workstations**. Your administrator will install EventPro to the application server, and then go through a separate installation process for each Workstation.
 - A network installation of EventPro Software requires knowledge of SQL Server and, in some cases, Active Directory, which are best managed by an IT Specialist familiar with your organization's computer system. If you are not certain about how to proceed with a network installation, please contact your EventPro Implementation & Training Specialist or EventPro Support.
 - <u>Network Install: Windows Authentication</u>
 - <u>Network Install: Active Directory Integration</u> (requires EventPro Active Directory Module)
 - o <u>Network Install: SQL Authentication</u> [231]
- Once you have installed EventPro Software, there are some other topics you may want to review:
 - o <u>EventPro Desktop Shortcuts</u> 288
 - o Update Software License 288
 - o <u>Update Your Software</u> 291

Options and Requirements

Before installing EventPro, review the following topics for important information about installation options and requirements:

- <u>Minimum System Requirements</u>
- Installation Types 67
- Authentication Modes
- Active Directory Integration 67

Minimum System Requirements

• You can find the technical requirements for EventPro Software at:

https://www.eventpro.net/technical-requirements.html

 In particular, look for the requirements under EventPro Local Network Installed Edition (Hosted on your server/desktop), Optional Module Suites (Installed Edition), and Administrator Requirements (Installed Edition).

Installation Types

When installing EventPro Software, you can choose between two different installation types:

- Stand Alone Installation: This is a single-user environment where the application is installed on one machine.
- Server/Workstation (Network) Installation: This is a multiple-user network environment where the EventPro application is hosted on the application server, the EventPro database is hosted on the database server, and the Users run EventPro from their Workstations.

In this situation, you need to install EventPro to the application server, and then go through a separate installation process for each Workstation.

- **Application Server**: This is the computer on which you install the EventPro application.
- o Database Server: This is the computer that runs SQL Server and hosts your EventPro database.
- Application Workstations: These are the computers from which Users will be logging into EventPro.
- **Domain Controller**: If you are working in a domain environment, the Domain Controller hosts the domain in which you will be creating User Security Groups.

Authentication Modes

EventPro Software uses SQL databases, which means you need SQL Server.

SQL Server supports two Authentication Modes.

The Authentication Mode determines how the Users connect to SQL Server and validate their credentials:

- Windows Authentication Mode: With Windows Authentication, the Users connect to the SQL Server using their Windows user accounts. SQL Server validates the User accounts and passwords using information from the Windows operating system.
- **Mixed Mode** (which enables both **SQL Server Authentication** and **Windows Authentication**): With SQL Server Authentication, Users connect to SQL Server with logins that are created by and stored in SQL Server, not based on Windows user accounts.

Active Directory Integration

The optional EventPro Active Directory module provides for Active Directory Integration.

Active Directory is sub-divided into one or multiple **Domains** (a collection of network objects that share a common directory database), with each Domain hosted by a server computer called a **Domain Controller**.

Within a **Domain**, you can organize users into **Security Groups**, and then assign each Security Group the appropriate **user rights** to access specified domain resources, such as data and applications.

With EventPro's Active Directory Integration, you can map those **Active Directory Security Groups** to **EventPro Security Roles**. When a User runs EventPro, he/she will be automatically assigned the correct user permissions in EventPro according to his/her Active Directory group membership. The advantage of Active Directory Integration for the EventPro administrator is the efficiency of account administration. Instead of manually entering users in EventPro, the administrator can create a login for an entire User Security Group at once. When Active Directory Users run EventPro for the first time, an EventPro User will be created with select information passed from Active Directory, including the relevant EventPro Security Role.

The advantage of Active Directory for the EventPro end users is the single sign-on capability. When a user logs onto a computer (workstation) in the domain, Active Directory authenticates the user - *i.e.* confirms the user's identity - and grants the user authorization to access the appropriate domain resources. In other words, once users log on to the domain, they can run EventPro without logging in a second time.

Please note that Active Directory Integration requires the separately purchased EventPro Active Directory module.

Standalone Install

- A **Standalone Install** occurs in a single-user environment where the EventPro application is installed on only one machine.
- Although a standalone installation is less complex than network installation, it still requires knowledge of SQL Server, which is best managed by your organization's IT Specialist. If you do not have in-house IT to assist you with EventPro installation, the instructions below will guide you through the general process, but if you have any doubts about how to proceed, please contact EventPro Support.
- These instructions only cover one standard set of options that typically work under normal circumstances. For more options, you will require assistance from an IT specialist who is familiar with your organization's computer system.
- Also note that these instructions describe the installation of the base EventPro application. You may have purchased additional modules that also require installation. Unless otherwise advised, you should download all of the software components available to you, and consult with your Support or Training Specialist for assistance with installation.
- Installation Instructions:
 - 1. Download EventPro Components
 - 2. Install SQL Server 70
 - 3. Configure SQL Server 73
 - 4. Install Data Updater 77
 - 5. <u>Create New Client Database</u> 79
 - 6. <u>Restore Existing Database over New</u>
 - 7. Install EventPro 89
 - 8. First Login to EventPro 94
- In this sample installation process, we follow a particular sequence of steps to prepare your EventPro database. We run
 the EventPro Database Utility Wizard to create two databases: EventProMaster, a required database that controls
 program licensing, and a named database, typically called EventProData, which is initially blank. This new, blank
 EventProData database is essentially just a "placeholder" database. You most likely have received and saved a backup
 of an existing, prepared database from your EventPro Training or Support Specialist. We will restore that existing,
 prepared EventPro database backup over the blank "placeholder" database, so that EventProData will then contain your
 existing information. After that, we will install EventPro.
- Note that there is another slightly different sequence of steps that you can follow after installing the Data Updater. You can consult with your IT department and/or EventPro Support or Training Specialist to determine which sequence to follow. In this alternate process, you first restore the backup of the existing, prepared EventPro database, typically naming it EventProData. You then install EventPro Software to add the EventProMaster database, although you do not yet run the EventPro program. You then run the Database Utility Wizard to link the client database to the EventProMaster database ("Create Master Database Client ID"). Finally, you can run EventPro. For more details about this process, see <u>Alternate Database Restore Process</u> ²²⁰.
Download EventPro Components

- 1. Log on to the computer on which you will be using EventPro Software.
- 2. Proceed to the EventPro website and login to the Client Login area with your 6-digit license User ID.

3. Go to the **Downloads** area.

Downloads	× +							— C	ב
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- 4. If you haven't already, download all of the EventPro components that you see in the Downloads grid.
 - a. The components you see in your **Downloads** grid represent the EventPro application and modules that you have purchased, so your screen may look different than the example screenshot.
 - b. The installation instructions below will describe the main components required for the core EventPro program: EventPro (EventPro.Win.Setup.exe), EventPro License Updater/Database Tool (EventPro.EPDataUpdater.Setup.exe), and EventPro Licence (Licence.ini).

However, depending on your purchase, you may have additional components to download.

Download all components that you see, and if you have any questions about installing additional components or modules, contact your Support or Training Specialist.

c. Note that you will need to accept the License Agreement before you can download files.

If you want to review the content of the License Agreement, click the **Get License Agreement** button to retrieve the agreement in .RTF format. This is the same License Agreement that must be agreed to during EventPro installation.

- While downloading the files, take note of the folder to which you save these files so that you can later retrieve them.
 Do not open or run the files yet. The instructions below will inform you when you need each file.
- 6. Proceed to Install SQL Server 70.

Install SQL Server

EventPro Software uses **SQL databases**, meaning you will need to install **SQL Server** to your computer, if it is not installed already.

You can buy an edition of SQL Server, or download the free edition, SQL Server Express, from the Microsoft website. Also, be sure to review the <u>minimum technical requirements</u> for EventPro Software.

- 1. Download the **SQL Server** installation file and run the installer.
- 2. Follow the installation documentation provided with your edition of SQL Server.
 - a. The instructions below will simply note the critical settings for SQL Server when used for EventPro Software.
 - b. The screenshots below demonstrate SQL Server Express, although regardless of which edition you use, the important settings will be the same.
 - c. There are other settings and options in the installation process that these instructions will not describe, as they will vary, depending on the IT needs of your organization. Please consult with your IT Department for further guidance on installing and configuring SQL Server.
- 3. Feature Selection:

	髋 SQL Server 2017 Setup				-		\times
SQL Server Instal	Feature Selection Select the Express features to in	ıstall.					
Maintenance Tools Resources Options	License Terms Global Rules Microsoft Update Product Updates Install Setup Files Install Rules Feature Selection Feature Rules Instance Configuration Server Configuration Database Engine Configuration Feature Configuration Rules Installation Progress Complete	 Looking for Reporting Service Features: Database Engine Services SQL Server Replication Machine Learning Service Python Full-Text and Semanti PolyBase Query Service Shared Features Client Tools Connectivity Client Tools Backwards Co Client Tools SDK SQL Client Connectivity SI LocalDB Redistributable Features 	rices (In-Database) = Extractions for Search e for External Data ompatibility	web Feature description: The configuration and operating SQL Server instance is isolated SQL Server instances can oper computer. Prerequisites for selected feature Already installed:	l from other SQL Serve ate side-by-side on th res: i Redistributable or higher k 4.6	er instance	
Microsoft SQI		Select All Unselect All Instance root directory: Shared feature directory: Shared feature directory (x86):	C:\Program Files\Microsoft C:\Program Files\Microsoft C:\Program Files (x86)\Micr	SQL Server\	Next >	 Cance	

a. You should select the checkboxes for:

i. Database Engine Services

ii. Client Tools Connectivity

iii. Client Tools Backward Compatibility

b. Depending on the edition of SQL Server you are installing, there may be a checkbox for **Management Tools**; if so, **select** that checkbox, as well.

If there is not a Management Tools option in the edition you are installing, you can download and install **SQL Server Management Studio (SSMS)** after installing SQL Server.

- c. Whether you select the other Feature checkboxes is up to your IT department.
- d. The default **directories** are typically fine as they are, unless your IT department says otherwise.

4. Instance Configuration:

	🏗 SQL Server 2017 Setup							\times
📸 SQL Server Install	Instance Configuration							
Planning Installation			QL Server, Instance ID becomes par	t of the installation path.				
Maintenance License Terms Tools Global Rules Resources Microsoft Update Product Updates Product Updates	Global Rules Microsoft Update	 Default instance Named instance: 	SQLExpress					
Options	Options Install Setup Files Instance ID: Install Rules Feature Selection Feature Rules SQL Server of Instance Configuration	Instance ID:	SQLEXPRESS					
F		SQL Server directory: Installed instances:	C:\Program Files\Microsoft SQL Se	erver\MSSQL14.SQLEXPRESS				
	Database Engine Configuration Feature Configuration Rules Installation Progress Complete	Instance Name	Instance ID	Features	Edition		/ersion	
Microsoft SQL					< Back N	lext >	Cance	e

- a. Select the radio button next to "Named Instance".
- b. You can leave the **Named Instance** and **Instance ID** as **SQLExpress**, unless there is another name you prefer to use.
- c. The **Installed Instances** grid at the bottom of this page would display any instances already installed. If there is already an installed instance, check with your IT Department whether you should use that instance.

5. Server Configuration:

	髋 SQL Server 2017 Setup				-	• >
SQL Server Instal Planning Installation	Server Configuration Specify the service accounts a	nd collation configuration.				
Installation Maintenance Tools Resources Options	License Terms Global Rules Microsoft Update Product Updates Install Setup Files Install Rules Feature Selection Feature Rules Instance Configuration Server Configuration Database Engine Configuration Feature Configuration Rules Installation Progress Complete	Service SQL Server Database Engine SQL Server Browser	a separate account for each SQL Server servic Account Name NT Service\MSSQLSSQLEXPRESS NT AUTHORITY\LOCAL SERVICE ce Task privilege to SQL Server Database Eng initialization by avoiding zeroing of data page accessed.	Password	Startup Automat Automat	ic ~
Microsoft SQ				< Back N	lext >	Cancel

a. The Startup Type for both SQL Server Database Engine and SQL Server Browser must be set to Automatic.

b. If not already done, you may need to switch the SQL Server Browser Start Type to Automatic.

6. Database Engine Configuration:

SQL Server Installation Center		
Database Engine Confi	guration	
Specify Database Engine authe	ntication security mode, administrators, data directories and TempDB settings.	
License Terms Global Rules	Server Configuration Data Directories TempDB User Instances FILESTREAM	
Microsoft Update Product Updates	Specify the authentication mode and administrators for the Database Engine.	
Install Setup Files	Windows authentication mode	
Install Rules Feature Selection	O Mixed Mode (SQL Server authentication and Windows authentication)	
Feature Rules	Specify the password for the SQL Server system administrator (sa) account.	
Instance Configuration Server Configuration	Enter password:	
Database Engine Configuration Feature Configuration Rules	Confirm password:	
Installation Progress	Specify SQL Server administrators PSI\Sample (Sample) SQL	L Server administrators have
Complete	uni	L server administrators have restricted access to the tabase Engine.
	Add Current User Add Remove	
	< Back	Next > Cancel

a. Under the Account Provisioning tab, indicate which Authentication Mode the administrator will use to access the Database Engine: Windows Authentication or Mixed Mode (SQL Server Authentication and Windows Authentication).

Because this is a standalone, single-user environment, we would typically select Windows Authentication.

- b. Also, under the Specify SQL Sever Administrators grid, click the Add Current User button.
- 7. Complete the rest of the installation process as recommended by your IT Department.
- 8. As noted <u>above</u> 71, if there isn't a **Management Tools** option in the edition you are installing, you can download and install **SQL Server Management Studio (SSMS)** after installing SQL Server.

There may be a prompt to **Install SSMS** at the end of the SQL Server Installer, or you can download **SQL Server Management Studio (SSMS)** from the Microsoft website.

- 9. It is recommended that you restart your computer once SQL Server is installed. If you install SQL Server Management Studio separately, you will be prompted to restart your computer at the end of the installation process.
- 10. You can then proceed to **<u>Configure SQL Server</u>** 73.

Configure SQL Server

- 1. After restarting the computer, open the Start menu, and run SQL Server Configuration Manager.
- 2. The SQL Server Configuration Manager opens.

- a. In the left-hand panel, go to **SQL Server Network Configuration > Protocols for SQLEXPRESS** (or whatever you named the SQL Server Instance <u>earlier</u> 71).
- b. In the right-hand selection grid, you need to enable **both TCP/IP** and **Named Pipes**.
- c. Right-click **TCP/IP** and select **Enable**.

Sql Server Configuration Manager				_	\times
File Action View Help					
🗢 🔿 🚈 🖾 🔒 🛛					
 SQL Server Configuration Manager (Local) SQL Server Services SQL Server Network Configuration (32bit) SQL Native Client 11.0 Configuration (32bit) Client Protocols Aliases SQL Server Network Configuration Protocols for SQLEXPRESS SQL Native Client 11.0 Configuration Client Protocols Aliases Aliases 	Protocol Name Shared Memory Named Pipes	Status Enabled Disable	I		
Enable selected protocol.][

d. The **Warning** dialog informs you that changes will not take effect until the service is restarted, which we will do shortly.

🔚 Sql Server Configuration Manager				_	\times
File Action View Help					
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 SQL Server Configuration Manager (Local) SQL Server Services SQL Server Network Configuration (32bit) SQL Native Client 11.0 Configuration (32bit) Client Protocols Aliases SQL Server Network Configuration Protocols for SQLEXPRESS 		Protocol Name Shared Memory Named Pipes	Status Enabled Enabled Disabled		
SQL Native Client 11.0 Configur				×	
ঞ্চু Client Protocols ₽ Aliases		es made will be saved; ho the service is stopped ar	owever, they will not take nd restarted. OK		
		11			

- e. Click **OK**, and you will see that **TCP/IP** is now **Enabled**.
- f. Now, if necessary, repeat the process with **Named Pipes**. Right-click **Named Pipes** and select **Enable**. Click **OK** in the **Warning** dialog that follows.
- g. Both TCP/IP and Named Pipes should now be Enabled.

If applicable, you may also want to check the Protocols under SQL Native Client Configuration and SQL Native Client Configuration (32bit) to ensure that **TCP/IP** and **Named Pipes** are **Enabled** there, as well.



3. In the left-hand panel, go to SQL Server Configuration Manager (local) > SQL Server Services.

In the selection grid to the right, select **SQL Server (SQLEXPRESS)** and click the **Restart** button **C** above. The service will stop and restart.

🚟 Sql Server Configuration Manager					_		×
File Action View Help							
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SQL Server Configuration Manager (Local) Restar	rt service	State	Start Mode	Log On As	Process ID	Service Ty	pe
SQL Server Services	SQL Server (SQLEXPRESS)	Running	Automatic	NT Service\MSSQL\$SQLEXPRESS	2652	SQL Server	
SQL Server Network Configuration (32bit)	SQL Server Agent (SQLEXPRESS)	Stopped	Other (Boot, Sys	NT AUTHORITY\NETWORKSERVICE	0	SQL Agent	t
 SQL Native Client 11.0 Configuration (32bit) Client Protocols 	o SQL Server Browser	Running	Automatic	NT AUTHORITY\LOCALSERVICE	4732	-	
🖶 Aliases							
SQL Server Network Configuration							
Generation SQLEXPRESS ✓ SQL Native Client 11.0 Configuration							
Scenario Configuration							
Aliases							
,							
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4. Check to ensure that the **SQL Server Browser** is **Running**.

If it is not, you can try to start it by clicking the **Start** button above. This may not work, however, as there could be other reasons that the SQL Server Browser is not running. For example, you may need to go to the **Services** area to manually enable it there.

If you run into any issues here or any other part of SQL Server Configuration, please **contact Support** for assistance.

5. You can now close the **SQL Server Configuration Manager** window.

6. Next, proceed to Install Data Updater 77.

Install Data Updater

- 1. Navigate to the **EventPro.EPDataUpdater.Setup.exe** that you downloaded <u>earlier</u> (6), and double-click to run it.
- 2. The installation wizard will begin. Click Next to continue.



3. Select Installation Folder: If you don't want to use the default path, you can enter a different folder path.

Click Next.

🐻 EventPro Data Updater Setup		_		\times
Select Installation Folder			<	1
This is the folder where EventPro Data Updater will be	e installed.		X	
To install in this folder, click "Next". To install to a diffe "Browse".	erent folder, ente	er it bel	ow or click	
Folder:				
C:\PSI APPLICATIONS\EventPro Software\DataUp	odater		Browse	
dvanced Installer				
< Bac	k Next >		Cance	4
the next window, click Install .				
b EventPro Data Updater Setup				×
Ready to Install			<	
The Setup Wizard is ready to begin the EventPro Data	a Updater installa	tion	N	-22
				*
Click "Install" to begin the installation. If you want to installation settings, click "Back". Click "Cancel" to exi	review or change t the wizard.	e any o	f your	
dvanced Installer				
avanced Installer	k 💡 Insta		Cance	J
< 840		211	Cance	

You may encounter a security warning, for which you may need to click **Yes** or **OK**.

5. When the installation completes, click **Finish** in the final window.

4.



6. Next, proceed to <u>Create New Client Database</u> 79.

Create New Client Database

In most cases, an existing database will be prepared for you, containing information that has been converted from a previous database or added under the guidance of your EventPro Training & Implementation Specialist. That database will be sent to you so that you can restore it.

Before restoring the database, however, this process requires that you first **create a new database** with the EventPro Database Utility. The new database you are creating here is essentially a **placeholder**. Later, you will restore your existing database over this new "placeholder" database.

- 1. Run the **EventPro Database Utility Wizard** by selecting **EventPro Data Updater** from your **Start** Menu, or doubleclicking the **EventPro Data Updater application file** in the folder to which you installed it.
- 2. On the first page of the wizard, select Create a New Client Database, and click Next.



3. Target Database:

Enter the target database information.

E 10	D 1 1	Distance.
EventPro	Database	Utility

Target Database

Enter the target database information.

Database Type	MS-SQL	•
Server	MYDBSERVER\SQLEXPRESS	
Authentication		
User name		
Password		
Database	EventProData	•
Settings		
Client I.D.	000000	
Cloud Data		
Database Data Type	Standard	•
License File	C:\PSI APPLICATIONS\EventPro 19\EventPro\Licence.ini	

- a. Database Type: Choose MS-SQL.
- b. Server: Enter the SQL Server Named Instance, identifying the network name of the computer plus the instance name you specified earlier when <u>installing SQL Server</u> [71] (*i.e.* "SQLEXPRESS").

It will look something like this: MYDBSERVER\SQLEXPRESS

- c. **Authentication**: Leave the **Authentication** checkbox unselected, indicating that the User will connect to the SQL Server instance using **Windows Authentication**.
- d. **Database**: Type in (*don't select from the drop-down*) the name of the new database you are creating, *e.g.* **EventProData**.

The Data Updater will create 2 databases:

- i. This named database (*i.e.* EventProData), over which you will later restore the existing, prepared database from your Training or Support Specialist.
- ii. An EventProMaster database to control licensing.
- e. Client I.D.: Typically, you would use your six-digit License ID for the Client I.D.
- f. Cloud Data: Leave this unselected, as you are installing EventPro to your computer.
- g. Database Data Type: From the drop-down list, choose Blank or Standard.

×

- i. **Standard** means the database will be populated with some basic default data, namely Statuses, Titles, Communication References, Booth Types, Budget Types, Payment Types, Location Features, and Location Setup Types. Clients typically choose **Standard**, as they find it easier than starting from a completely blank database that has no frame of reference. The pre-entered status, titles, *etc.* can easily be edited to suit your organization's terminology.
- ii. Blank means a completely blank database, with no pre-entered data.

Since you will be restoring an existing database over this new database, it doesn't really matter which data type you select.

- h. License File: Click the ellipsis (...) and browse to your license file (Licence.ini). This is the license file you downloaded earlier
- i. When you have entered all of the target database information, click Next.
- 4. The last page of the wizard will inform you that the process is complete. Click **Finish**.
- 5. You can now proceed to **<u>Restore Existing Database over New</u>** 2.

Restore Existing Database over New

In most cases, an EventPro Training or Support Specialist will provide you with a **database** that has been converted from a previous database and/or filled with information that you have provided.

You need to restore that database to the SQL Server before proceeding with EventPro installation.

With this process, you will be restoring the existing database **over** the new "**placeholder**" database you just created in the previous step.

Typically, the database is sent as a .BAK file, which you can restore in SQL Server Management Studio (SSMS).

1. Run SQL Server Management Studio.

You may have a different version of SQL Server Management Studio than that depicted below, but the functions and settings should be essentially the same.

- 2. The **Connect to Server** dialog appears.
 - a. Ensure that the correct **Server name** is selected. The format will be Network Computer Name\Named Instance, *e.g.* MYDBSERVER\SQLEXPRESS, if you called the Instance SQLEXPRESS when installing SQL Server <u>earlier</u> 71.
 - b. Select **Windows Authentication**, assuming that you selected Windows Authentication as the Authentication Mode.
 - c. Click Connect.

Microsoft SQL Server Management Studio File Edit View Project Tools Window Image: Image	Query 📄 🕅 DAY DAY XMLA DAY	X □ A 9 • C • 図 ♬ 29 82 副 国 国 国 □ 国 国 王 王 • ∓ ×		• _ ۹	×
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	Server name:	MYDBSERVER\SQLEXPRESS			
	Authentication:	Windows Authentication	~		
	User name:	PSI\Sample	~		
	Password:				
		Remember password			
	[Connect Cancel Help (Options >>		
🗇 Ready					

- 3. In the **Object Explorer** panel of **Microsoft SQL Server Management Studio**, expand the **Databases**. You should be able to see the **EventProData** and **EventProMaster** databases, which you would have created in the previous step (<u>Create New Client Database</u> 79).
- 4. Right-click on **EventProData**, and select **Tasks > Restore > Database**.

File Edit View Pro	er Management Studio oject Tools Window H ~ 🎦 🔛 🍟 🖨 New Query ~ 📋 🕨 Execute	elp ● & & & & & & & & & & & & & & & & & & &	Quick Launch (Ctrl+Q) ▼ ↓ Ξ Ξ= 100 ↓	P = □ × F = ▷ · ;
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- 5. The **Restore Database** window appears.
- 6. Under **Source**, select **Device**, and click the ellipsis next to the field.
 - a. The Select Backup Devices dialog appears.

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P Rea	Conn VH F I View Progr	Backup media:	File		OK Can	Add Remove Contents		> dia p	

- b. Click the Add button. The Locate Backup File window appears.
- c. In the **Locate Backup File** window, locate the **existing database** that your EventPro Trainer sent to you, and which you saved to your computer.

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G T	Select a page General Files	🗊 Script 🕞 🖌 😧 Help	<u>ب</u> ش م
Object		Source	
Conne		O Database:	
3 =	 Select backup devices Specify the backup media and its 	location for your restore operation.	
	Backup media type:		×
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	view connection properties Progress Done Done	Windows Photo Viewer Windows Pottable Devices Windows PowerShell ProgramData PSI APPLICATIONS EventPro Software Data Updater Data Updater Downloads EventPro Windowsextant Windowsextant SQLServer2017Media System Volume Information VirtualBox Windowsextant Windowsextan	
		File name: 000000_Sample.bak Backup Files(*.bak;*.tm;*.log)	~
		OK Cancel	
🗁 Read	dy		

- d. Click **OK** in the **Locate Backup File** window, and again in the **Select Backup Devices** window to return to the **Restore Database** dialog.
- 7. Back in the Restore Database dialog, under Destination, the Database should be set to EventProData.

. <mark></mark> N	💀 Restore Database - EventProDat	3	-		х		×
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8. Ensure that **Source Device Database** and **Destination Database** have been set correctly.

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	Connection Y# MYDBSERVER\SQLEXPRESS [PSI\Sample] View connection properties Progress One	<									>	
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- 9. Under Select a Page in the left-hand panel, click Options. Select the Overwrite the Existing Database (WITH REPLACE) checkbox. (You want the restored, prepared database from EventPro Training/Support to overwrite the blank "placeholder" database that we created in the previous step.)
- 10. Click **OK** at the bottom of the **Restore Database** dialog to begin the restore process.

- 🌄	Microsoft SQL Server Management	Studio		Quick Launch (Ctrl+Q)	ρ	. 🗆	×	
File	💀 Restore Database - EventProDa	ta		_	- 🗆	Х		
š (Ready						≞ ‡	
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Obje Cor	e General Files Options		tabase (WITH REPLACE) settings (WITH KEEP_REPLICATION) istored database (WITH RESTRICTED_USE	R)				
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	6 6 6 6 6	Tail-Log backup Taik- tail-log backup bef Leave source data (WITH NORECO) Backup file: Server connections	iore restore abase in the restoring state /ERY) C:\Program Files\Microsoft SQL Se	erver\MSSQL14.SQLEXPRESS\M	MSSQL\E			
		Close existing connection	ns to destination database					
	Connection	Prompt Prompt before restoring e The Full-Text Upgrade database.	each backup e server property controls whether full-text ind	exes are imported, rebuilt, or reset	for the restore	d		
				OK Cancel	Help			
	Ready							

- 11. When the restore is complete, you should receive a dialog indicating "Database 'EventProData' restored successfully". Click OK.
- 12. You can now proceed to Install EventPro

Install EventPro

1. On your computer, navigate to the **EventPro.Win.Setup.exe** you <u>downloaded earlier</u>, and double-click to run it.

Depending on the security settings on your computer, you may receive a warning about installing software, and you may need to click **Run** or **OK** to continue the installation.

2. The installation wizard will begin. Click **Next** to continue.



3. End-User License Agreement:

- a. Please read the EventPro Software Program License Agreement.
- b. Select **I ACCEPT** or **I DO NOT ACCEPT** below. If you do not accept the license agreement, you cannot continue with the installation process.
- c. Click Next to continue.

🗟 EventPro Setup 🛛 🗙					
End-User License Agreement					
Please read the following license agreement carefully					
EventPro Software Program License					
Agreement					
READ THE FOLLOWING TERMS AND CONDITIONS BEFORE INSTALLING THIS SOFTWARE. INSTALLATION OR USE INDICATES YOUR ACCEPTANCE OF THESE TERMS AND CONDITIONS. IF YOU DO NOT AGREE WITH THEM, PROMPTLY					
I accept the terms in the License Agreement					
○ I <u>d</u> o not accept the terms in the License Agreement					
Advanced Installer					
< Back Next > Cancel					

4. Installation Type:

- a. Choose Stand Alone Installation.
- b. Click Next.

Installation Type	2
Select the type of installation to perform.	9
Stand Alone Installation	
O Server Installation	
O Workstation Installation	
Advanced Installer	
< Back Next > Cancel	

5. Installation Options:

- a. **Do not** select the checkbox next to **Use Active Directory to log into EventPro**. (*That option requires the EventPro Active Directory Module.*)
- b. Click Next.



6. Select Installation Folder:

- a. You can use the default **Program Files** path or enter a different path for the **Installation Folder**.
- b. It depends on your organization's requirements, but we usually recommend setting a **custom path** to a **new folder** typically on the root of the primary drive *e.g.* **C:\EventPro**\
- c. Click Next.

👼 EventPro Setup	_			×
Select Installation Folder			<	Ver
This is the folder where EventPro will be installed.			X	0
To install in this folder, click "Next". To install to a different folder, ent "Browse". Folder:	ter it	belov	v or clic	k
C:\EventPro\		Br	owse	
Advanced Installer				
< Back Next >	>		Cano	el

7. SQL Database:

- a. Server: Enter the SQL Server Named Instance, identifying the network name of the computer plus the instance name you specified <u>earlier</u> when installing SQL Server. It will look something like this: MYDBSERVER\SQLEXPRESS.
- b. **Authentication**: Select the radio button next to **Windows Authentication**, assuming that you selected Windows Authentication as the Authentication Mode when installing SQL Server <u>earlier</u> **72**.
- c. Click Next.

👼 EventPro Setup	×
SQL Database	
Configure SQL Co	innection
Before updatin backup of the o	g an existing database you should first make sure you have a latabase.
Server:	MYDBSERVER \SQLEXPRESS
Authentication:	Windows Authentication
	○ SQL Authentication
Username:	
Password:	
Advanced Installer —	
	< Back Next > Cancel

8. The Installer will test the connection to the database before you can proceed with the installation.

When the connection test is completed, click Install.

🕾 EventPro Setup 🗙
Ready to Install The Setup Wizard is ready to begin the EventPro installation
Click "Install" to begin the installation. If you want to review or change any of your installation settings, click "Back". Click "Cancel" to exit the wizard.
Advanced Installer

- 9. Depending on the security settings on your network or computer, you may encounter a warning, and you may need to click **Yes** or **OK** to continue the installation.
- 10. In the final window, click **Finish**.

둸 EventPro Setup		×
	Completing the EventPro Setup Wizard	
	< Back Finish Cancel	

11. The EventPro installer will automatically create a desktop **shortcut icon** pointing to the 32-bit version of EventPro.

Typically, 32-bit version of EventPro is suitable for most users. There is usually no reason to use the 64-bit version of EventPro, unless you are integrating EventPro with Outlook 64-bit.

If your installation will be integrated with Outlook 64-bit, or there are other reasons you require EventPro 64-bit, please ask your EventPro Trainer or contact EventPro Support to change the target of the desktop shortcut.

12. You can now log into EventPro for the first time, using the default credentials. See First Login to EventPro 94.

First Login to EventPro

You can log into EventPro for the first time using the default Administrator User that has been pre-set in EventPro.

- 1. Run EventPro.
- 2. In the Log On dialog, enter these default Administrator credentials:
 - a. User Name: Admin
 - b. Password: EventPro1234

(Passwords are case-sensitive.)

- 3. The **EventPro** program opens.
- Click My Details under My Workplace in the left-hand navigation pane. Your Security User edit form opens.
 You will note that the Admin user has been assigned the Administrator Security Role by default.

2 0 1 ≤ 0 0	で目間り				Admin	- Security l	Jser - EventPi									
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 My Workplace ✓ Events □ Lodging □ CRM/Sales ○ Communications 	User Name:* User Code:* Change Password O Inactive Font Color: Back Color: Api Key:	A In First Logon	dmin Black UghtGray				*	Open Defau Close Exit E Previe Edit F Wizar Defau Defau	an Data of the Joint of In Existing Tab (faster): In Existing Tab (faster): Report Preview When Prin mail Recipient Selection On ew Row Line Count: orm Style: d Form Style: d Form Style: dt Task Time From: it Task Time To: eacy Skins	nted	Non Modal Pop Default 3:00 AM 9:00 AM	pup			5 ÷	•
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- 5. One of the first things you will want to do is change the **Password** for the Admin User, since it is the EventPro default that many people will know.
 - a. In the navigation ribbon above your Security User details, click the **Change My Password** button.



b. The Change Password dialog appears. Enter the Old Password (EventPro1234). Enter and confirm your New Password.

REMEMBER THIS PASSWORD!

<u></u> 0 ≞ ≃ e e) 😋 📕 😤 🤊 🔹 Admin - Security User - EventPro — 🗆 🗙
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My Workplace <	Definition - Security User X
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 ☆ My Workplace ✓ Events ⇒ Lodging ➡ CRM/Sales , Communications ♡ Tasks 	Change Password On First Logon Inactive Font Color: Back Color: Old Password: New Password: Confirm Pa
 Finance Reports Mail Merge Import/Export Dashboards 	Security Roles User Groups Image: Image
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User: Admin Client ID: 000000	Memory Usage: 177MB Version: 19,1.2

- c. Click OK.
- 6. You can make other changes to your Admin account as required.

If required, review Security Setup > Users > Create New User in the EventPro User Manual.

7. Installation is complete and EventPro is now ready to use.

Network Install: Windows Authentication

- This type of EventPro network installation requires knowledge of **SQL Server and Active Directory**. Your organization's EventPro installation should be done by an **IT Specialist** who has sufficient **technical knowledge** and is familiar with your organization's computer network.
- If you do not have in-house IT to assist you with EventPro installation, the instructions below will guide you through the general process, but if you have any doubts about how to proceed, please contact <u>EventPro Support</u>.
- These instructions only cover one standard set of options that typically work under normal circumstances. For more options, you will require assistance from an IT specialist who is familiar with your organization's network.
- Note that these instructions describe the installation of the base EventPro application. You may have purchased
 additional modules that also require installation. Unless otherwise advised, you should download all of the software
 components available to you, and consult with your Support or Training Specialist for assistance with installation.
- Installation Instructions:
 - 1. <u>Create Active Directory Groups</u>
 - 2. Install SQL Server 105
 - 3. Configure SQL Server
 - 4. Download EventPro Components 112
 - 5. Install Data Updater 113
 - 6. <u>Create New Client Database 115</u>

- 7. Restore Existing Database over New 118
- 8. Give Database Rights to Users 125
- 9. Install EventPro to Server 135
- 10. Share Installation Folder 141
- 11. Install EventPro to Workstations 147
- 12. Admin First Login to EventPro 153
- 13. User First Login to EventPro 160
- In this sample installation process, we follow a particular sequence of steps to prepare your EventPro database. We run
 the EventPro Database Utility Wizard to create two databases: EventProMaster, a required database that controls
 program licensing, and a named database, typically called EventProData, which is initially blank. This new, blank
 EventProData database is essentially just a "placeholder" database. You have most likely received and saved a backup
 of an existing, prepared database from your EventPro Training or Support Specialist. We will restore that existing,
 prepared EventPro database backup over the blank "placeholder" database, so that EventProData will then contain your
 existing information. Installing EventPro Software will occur later in the process.
- Note that there is another slightly different sequence of steps that you can follow after installing the Data Updater. You can consult with your IT department and/or EventPro Support or Training Specialist to determine which sequence to follow. In this alternate process, after installing the Data Updater, you first restore the backup of the existing, prepared EventPro database, typically naming it EventProData. You then install EventPro Software to add the EventProMaster database, although you do not yet run the EventPro program. You then run the Database Utility Wizard to link the client database to the EventProMaster database ("Create Master Database Client ID"). There will then be several other steps to complete before running EventPro. For more details about this process, see <u>Alternate Database Restore</u> <u>Process</u> [280].

Create Active Directory Groups

In Active Directory, you need to create User Security Groups, to which you will later assign permissions on the SQL Server.

1. Log on to the **Domain Controller**, and go to **Server Manager**.



2. In Server Manager, select Local Server from the left-hand panel.

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	File and Storage Services	Windows Firewall	Domain: On	Windows Error
		Remote management	Enabled Disabled	Customer Expe IE Enhanced Se
		Remote Desktop NIC Teaming	Disabled	Time zone
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3. From the Tasks drop-down next to the server PROPERTIES, select Active Directory Users and Computers.

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	Dashboard	For WINSRVR2012		TASKS 🔻
	Local Server			Shut Down Local Server
	All Servers	Computer name Domain	WINSRVR2012 MyVMD.local	Windows PowerShell Computer Management
	B DNS ■ File and Storage Services ▷	Windows Firewall Remote management Remote Desktop NIC Teaming Ethernet	Domain: On Enabled Disabled Disabled 192.168.56.50, IPv6 e	Active Directory Administrative Center Active Directory Domains and Trusts Active Directory Module for Windows PowerShell Active Directory Sites and Services Active Directory Users and Computers ADSI Edit Dcdiag.exe DNS Manager
		Operating system version Hardware information	Microsoft Windows S innotek GmbH Virtua	Dsacls.exe Dsdbutil.exe Dsmgmt.exe Gpfixup.exe
		<	ш	Ldp.exe
		EVENTS All events 37 total	▼ (ii)	Netdom.exe Nitest.exe Ntdsutil.exe Repadmin.exe W32tm.exe
		Server Name ID S	everity Source	Refresh
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4. The Active Directory Users and Computers are displayed.

In the left panel, ensure that you have selected the correct domain, and click on the Users folder.

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		Enterprise Read-only Domain Controllers EP Users EventPro Administrators Forup Policy Creator Owners Guest Pearl Delany Protected Users RAS and IAS Servers	Security Group - Universal Security Group - Global Security Group - Global Security Group - Global User User Security Group - Global Security Group - Global Security Group - Domain L	Designated administrators of the enterprise Members of this group are Read-Only Dom EventPro Users Members in this group can modify group p Built-in account for guest access to the co Members of this group are afforded additio Servers in this group can access remote acc						
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5. Create a **New Group**. You can go to **Action > New > Group** in the main menu, or click the **New Group** icon above the selection grid, or right-click in the grid and select **New > Group** from the speed menu.

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						User		Security Group - Global	All workstations and servers joined to the d	
						Shared Folder		Security Group - Global	All domain controllers in the domain	
						Shared Folder		Security Group - Global	All domain guests	
						🍇 Domain Users		Security Group - Global	All domain users	
						Liliot P. Smith		User		
						Senterprise Admins		Security Group - Universal	Designated administrators of the enterprise	
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6. Name this group **EventPro Users**.

You can leave the Group Scope as Global, or select a different option if recommended by your IT Department.

IMPORTANT: You must set the Group Type to Security.

Click OK.

		Active Directory Users and Computers	₩
Recycle	File Action View Help		
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7. Create another New Group, this time called **EventPro Administrators**.

Once again, make sure that you set the **<u>Group Type</u>** to **<u>Security</u>**. Click **OK**.

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	Active Directory Users and Computers	Name Administrator Administrator Administrator Cert Bublicher Create in: MyVMD.local/Users Group name: EventPro Administrators Group name (pre-Windows 2000): EventPro Administrators Group scope O Domain local	User Security Group - Domain I	Description Built-in account for administering the com Members in this group can have their passw Members of this group are permitted to pu ers of this group that are domain con ers in this group cannot have their pa dministrators Group ients who are permitted to perform d ated administrators of the domain rkstations and servers joined to the d nain controllers in the domain main guests nain users ated administrators of the enterprise ers of this group are Read-Only Dom ers of this group can access remote acc Members of this group are afforded additio in this group can access remote acc	×
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Now, you need to decide whether you want to **nest** the **EventPro Administrators** Security Group within the **EventPro Users** Security Group.

If you want EventPro Administrators nested within EventPro Users, you need to make the **EventPro Administrators** Security Group a **member of** the **EventPro Users** Security Group. In the **EventPro Administrators Properties**, select the **Member Of** tab, and **Add** the EventPro Users group there.
EventPro	Administrators Properties 2
General Members Memb	per Of Managed By
Member of:	
	ive Directory Domain Services Folder
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Add Remo	ove
This list displays only group in the Global Catalog, such	os from the current domain and groups maintained n as universal groups.
	2.
L	OK Cancel Apply
	····

If you don't want EventPro Administrators nested within EventPro Users, leave the Security Groups separate.

8. You can then create your **Active Directory Users**, if they do not already exist, and assign them as Members of the **EventPro User Security Group**.

The best way to create and configure Active Directory Users will vary from organization to organization, so we will not attempt to describe a general process.

9. When you are done creating Users and Groups, you can proceed to Install SQL Server 1051.

Install SQL Server

EventPro Software uses **SQL databases**, meaning you will need to install **SQL Server** to your **database server**, if it is not installed already.

You can buy an edition of SQL Server, or download the free edition, SQL Server Express, from the Microsoft website. Also, be sure to review the <u>minimum technical requirements</u> for EventPro Software.

- 1. Download the **SQL Server** installation file to your **database server** and run the installer.
- 2. Follow the installation documentation provided with your edition of SQL Server.
 - a. The instructions below will simply note the critical settings for SQL Server when used for EventPro Software.
 - b. The screenshots below demonstrate SQL Server Express, although regardless of which edition you use, the **important settings** will be the same.
 - c. There are other settings and options in the installation process that these instructions will not describe, as they will vary, depending on the IT needs of your organization. Please consult with your IT Department for further guidance on installing and configuring SQL Server.
- 3. Feature Selection:

- a. You should select the checkboxes for:
 - i. Database Engine Services
 - ii. Client Tools Connectivity
 - iii. Client Tools Backward Compatibility
- b. Depending on the edition of SQL Server you are installing, there may be a checkbox for **Management Tools**; if so, **select** that checkbox, as well.

If there isn't a Management Tools option in the edition you are installing, you can download and install **SQL Server Management Studio (SSMS)** after installing SQL Server.

- c. Whether you select the **other Feature** checkboxes is up to your IT department.
- d. The **default directories** are typically fine as they are, unless your IT department says otherwise.

🚼 SQL Server Installation Center			– – ×	
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Feature Selection Select the Express features to in	stall.			
License Terms Global Rules Microsoft Update Product Updates Install Setup Files Install Rules Feature Selection Feature Rules Instance Configuration Server Configuration Database Engine Configuration Feature Configuration Rules Installation Progress Complete	 Ooking for Reporting Service Features: Instance Features Database Engine Services SQL Server Replication Machine Learning Service R Python Full-Text and Semantic PolyBase Query Service Shared Features Client Tools Connectivity Client Tools Backwards Co Client Tools SDK SQL Client Connectivity SD LocalDB Redistributable Features	rices (In-Database) : Extractions for Search e for External Data ompatibility	The web Feature description: The configuration and operation of each insifeature of a SQL Server instance is isolated fi other SQL Server instances. SQL Server instances on operate side-by-side on the same composition of the same composition of the same composition of the same composition. Prerequisites for selected features: Already installed: Microsoft Visual C++ 2015 Redistributate Windows PowerShell 3.0 or higher Microsoft .NET Framework 4.6 Disk Space Requirements Drive C: 1195 MB required, 321866 MB availation	rom nces puter.
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			< Back Next > C	ancel .:

4. Instance Configuration:

- a. Select the radio button next to "Named Instance".
- b. You can leave the **Named Instance** and **Instance ID** as **SQLEXPRESS**, unless there is another name you prefer to use.

c. The **Installed Instances** grid at the bottom of this page would display any instances already installed. If there is already an installed instance, check with your IT Department whether you should use that instance.

🚼 SQL Server Installation Center				_		×	
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Instance Configuration Specify the name and instance		QL Server. Instance ID bea	comes part of the instal	llation path.			
License Terms Global Rules Microsoft Update	 Default instance Named instance: 	SQLEXPRESS					
Product Updates Install Setup Files Install Rules Feature Selection	Instance ID:	SQLEXPRESS					
Feature Rules Instance Configuration Server Configuration	SQL Server directory: Installed instances:	C:\Program Files\Micros	soft SQL Server\MSSQL	14.SQLEXPRESS			
Database Engine Configuration Feature Configuration Rules Installation Progress Complete	Instance Name	Instance ID	Features	Edition	V	ersion	
			< 6	Back Next	>	Cance	ł .

5. Server Configuration:

- a. The Startup Type for both SQL Server Database Engine and SQL Server Browser must be set to Automatic.
- b. If not already done, switch the SQL Server Browser Start Type to Automatic.

SQL Server 2017 Setup				- 0	×
Server Configuration	1				
Specify the service accounts	and collation configuration.				
icense Terms	Service Accounts Collation				
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atabase Engine Configuration	Click here for details				
atabase Engine Configuration eature Configuration Rules istallation Progress omplete					

6. Database Engine Configuration:

- a. Under the **Account Provisioning** tab, indicate which **Authentication Mode** the administrator will use to access the Database Engine: **Windows Authentication** or **Mixed Mode** (SQL Server Authentication and Windows Authentication).
 - i. Windows Authentication: You will connect to SQL Server using Windows Authentication.
 - ii. **Mixed Mode** (SQL Server Authentication and Windows Authentication): You will connect to SQL Server using Windows Authentication or SQL Server Authentication.

If you select **Mixed Mode** here, you need to enter a **Password** for the **SQL Server system administrator** (**sa**) account. When you later connect to SQL Server, if you choose to use SQL Server Authentication, you will need these sa credentials.

b. Also, under the Specify SQL Sever Administrators grid, click the Add Current User button.

SQL Server 2017 Setup		- 🗆 X
Database Engine Cor	figuration	
Specify Database Engine aut	hentication security mode, administrators, data directories and TempDB settings.	
icense Terms Iobal Rules	Server Configuration Data Directories TempDB User Instances FILESTREAM	
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roduct Updates	Authentication Mode	
nstall Setup Files	Windows authentication mode	
nstall Rules eature Selection	\bigcirc Mixed Mode (SQL Server authentication and Windows authentication)	
eature Rules	Specify the password for the SQL Server system administrator (sa) account.	
stance Configuration	Enter password:	
erver Configuration	Confirm password:	
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eature Configuration Rules Installation Progress	Specify SQL Server administrators	
complete	PSI\Sample (Sample)	SQL Server administrators have unrestricted access to the Database Engine.
	Add Current User Add Remove	
		ack Next > Cancel

- 7. Complete the rest of the installation process as recommended by your IT Department.
- 8. As noted above, if there isn't a **Management Tools** option in the edition you are installing, you can download and install **SQL Server Management Studio** (SSMS) after installing SQL Server.

There may be a prompt to **Install SSMS** at the end of the SQL Server Installer, or you can download **SQL Server Management Studio** (SSMS) from the Microsoft website.

- 9. It is recommended that you **restart** your computer once SQL Server is installed. If you install SQL Server Management Studio separately, you will be prompted to restart your computer at the end of the installation process.
- 10. You can then proceed to Configure SQL Server 109.

Configure SQL Server

- 1. After restarting the computer, open the Start menu, and run SQL Server Configuration Manager.
- 2. The SQL Server Configuration Manager opens.
 - a. In the left-hand panel, go to **SQL Server Network Configuration > Protocols for SQLEXPRESS** (or whatever you named this SQL Server Instance <u>earlier</u> 106).
 - b. In the right-hand selection grid, you need to enable both TCP/IP and Named Pipes.
 - c. Right-click **TCP/IP** and select **Enable**.



d. The **Warning** dialog informs you that changes will not take effect until the service is restarted, which we will do next.

Sql Server Configuration Manager				_	\times
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- e. Click **OK**, and you will see that **TCP/IP** is now **Enabled**.
- f. If necessary, repeat the process with **Named Pipes**. Right-click **Named Pipes** and select **Enable**. Click **OK** in the **Warning** dialog that follows.

g. Now, both TCP/IP and Named Pipes should be Enabled.

If applicable, you may also want to check the Protocols under SQL Native Client Configuration and SQL Native Client Configuration (32bit) to ensure that **TCP/IP** and **Named Pipes** are **Enabled** there, as well.

Sql Server Configuration Manager File Action View Help Image: Sql Server Configuration Manager (Local) SQL Server Configuration Manager (Local) SQL Server Network Configuration (32bit) SQL Server Network Configuration Aliases	- - Protocol Name Status Shared Memory Enabled Fnamed Pipes Enabled TCP//P Enabled Sql Server Configuration Manager File Action View Help ← ☆	Name Order Enable			
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			<		>

3. In the left-hand panel, go to SQL Server Configuration Manager (local) > SQL Server Services.

In the selection grid to the right, select **SQL Server (SQLEXPRESS)** and click the **Restart** button **(e)** above. The service will stop and restart.

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	٢					

4. Check to ensure that the **SQL Server Browser** is **Running**. If it is not, you can try to start it by clicking the **Start** button above.

This may not work, however, as there could be other reasons that the SQL Server Browser is not running. For example, you may need to go to the **Services** area to manually enable it there.

If you run into any issues here or any other part of SQL Server Configuration, please contact Support for assistance.

- 5. You can close the SQL Server Configuration Manager window.
- 6. Next, proceed to **Download EventPro Components** 112.

Download EventPro Components

- 1. Log on to the **Application Server** as the **Domain Administrator**.
- 2. Proceed to the **EventPro website** and login to the **Client Login area** with your 6-digit license **User ID**.
- 3. Go to the **Downloads** area.

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- 4. If you haven't already, download all of the EventPro components that you see in the Downloads grid.
 - a. The components you see in your **Downloads** grid represent the EventPro application and modules that you have purchased, so your screen may look different than the example screenshot.
 - b. The installation instructions below will describe the main components required for the core EventPro program: EventPro (EventPro.Win.Setup.exe), EventPro License Updater/Database Tool (EventPro.EPDataUpdater.Setup.exe), and EventPro Licence (Licence.ini).

However, depending on your purchase, you may have additional components to download.

Download all components that you see, and if you have any questions about installing additional components or modules, contact your Support or Training Specialist.

c. Note that you will need to accept the License Agreement before you can download files.

If you want to review the content of the License Agreement, click the **Get License Agreement** button to retrieve the agreement in .RTF format. This is the same License Agreement that must be agreed to during EventPro installation.

- 5. While downloading the files, take note of the folder to which you save these files so that you can later retrieve them.
- 6. Do not open or run the files yet. The instructions below will inform you when you need each file.
- 7. You will use the Data Updater .exe in the next step (Install Data Updater 113)), but you will need the EventPro License, EventPro Windows Install .exe, and other components (if applicable) later.

Install Data Updater

- 1. Navigate to the downloaded EventPro.EPDataUpdater.Setup.exe and double-click to run it.
- 2. The installation wizard will begin. Click Next to continue.



3. Select Installation Folder: If you don't want to use the default path, you can enter a different folder path. Click Next.

b EventPro Data Updater Setup —		×
Select Installation Folder	<	2
This is the folder where EventPro Data Updater will be installed.		- Con
To install in this folder, click "Next". To install to a different folder, enter it b "Browse".	below or click	
Folder:		
C:\PSI APPLICATIONS\EventPro Software\DataUpdater	Browse	
dvanced Installer		
< Back Next >	Cance	1
the next window, click Install.		
EventPro Data Updater Setup		\times
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EventPro Data Updater Setup Ready to Install The Setup Wizard is ready to begin the EventPro Data Updater installation		×
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The Setup Wizard is ready to begin the EventPro Data Updater installation Click "Install" to begin the installation. If you want to review or change any installation settings, click "Back". Click "Cancel" to exit the wizard.		×
Ready to Install The Setup Wizard is ready to begin the EventPro Data Updater installation Click "Install" to begin the installation. If you want to review or change any		5

You may encounter a security warning, for which you may need to click Yes or OK.

5. When the installation completes, click **Finish** in the final window.

4.



6. Next, go to Create New Client Database 115.

Create New Client Database

In most cases, an existing database will be prepared for you, containing information that has been converted from a previous database or added under the guidance of your EventPro Training & Implementation Specialist. That database will be sent to you so that you can restore it.

Before restoring the database, however, this process requires that you first **create a new database** with the EventPro Database Utility. The new database you are creating here is essentially a **placeholder**. Later, you will restore your existing database over this new "placeholder" database.

- 1. Run the **EventPro Database Utility Wizard** by selecting **EventPro Data Updater** from your **Start** Menu, or doubleclicking the **EventPro Data Updater application file** in the folder to which you installed it.
- 2. On the first page of the wizard, select Create a New Client Database, and click Next.



3. Target Database:

Enter the target database information.

EventPro	Database	Utility
LVCHUFIO	Database	ounty

Target Database

Enter the target database information.

Database Type	MS-SQL	•
Server	MYDBSERVER\SQLEXPRESS	
Authentication		
User name		
Password		
Database	EventProData	•
Settings		
Client I.D.	000000	
Cloud Data		
Database Data Type	Standard	-
License File	C:\PSI APPLICATIONS\EventPro 19\EventPro\Licence.ini	

- a. Database Type: Choose MS-SQL.
- b. **Server**: Enter the SQL Server Named Instance, identifying the network name of the computer plus the instance name you specified earlier when <u>installing SQL Server</u> [106] (*i.e.* "SQLEXPRESS").

It will look something like this: MYDBSERVER\SQLEXPRESS

- c. Authentication: Because Users will be using Windows Authentication to connect to SQL Server instance, leave this checkbox unselected.
- d. **Database**: **Type in** (*don't select from the drop-down*) the name of the new database you are creating, *e.g.* **EventProData**.

The Data Updater will create 2 databases:

- i. This named database (*i.e.* EventProData), over which you will later restore the existing, prepared database from your Training or Support Specialist.
- ii. An EventProMaster database to control licensing.
- e. Client I.D.: Typically, you would use your six-digit License ID for the Client I.D.
- f. Cloud Data: Leave this unselected, as you are performing a Network Install of EventPro.
- g. Database Data Type: From the drop-down list, choose Blank or Standard.

×

i. **Standard** means the database will be populated with some basic default data, namely Statuses, Titles, Communication References, Booth Types, Budget Types, Payment Types, Location Features, and Location Setup Types.

Clients typically choose **Standard**, as they find it easier than starting from a completely blank database that has no frame of reference. The pre-entered status, titles, *etc*. can easily be edited to suit your organization's terminology.

ii. **Blank** means a completely blank database, with no pre-entered data.

If you are planning to restore an existing database over this new database, it doesn't really matter which data type you select.

- h. License File: Click the ellipsis (...) and browse to your license file (Licence.ini). This is the license file you downloaded earlier 12.
- i. When you have entered all of the target database information, click Next.
- 4. The last page of the wizard will inform you that the process is complete. Click **Finish**.
- 5. Now, if you have an existing database that needs to be restored, proceed to **Restore Existing Database over New** [118]

(If you are starting from a new database - *i.e.* you do not have an existing database that was sent from your EventPro Trainer, you can skip to <u>Give Database Rights to Users</u> [125].)

Restore Existing Database over New

In most cases, an EventPro Training or Support Specialist will provide you with a **database** that has been converted from a previous database and/or filled with information that you have provided.

You need to restore that database to the SQL Server before proceeding with EventPro installation.

With this process, you will be restoring the existing database **over** the new "**placeholder**" database you just created in the previous step.

Typically, the database is sent as a .BAK file, which you can restore in SQL Server Management Studio (SSMS).

Ensure that the existing database is stored on the same machine as SQL Server.

1. Run SQL Server Management Studio.

You may have a different version of SQL Server Management Studio than that depicted below, but the functions and settings should be essentially the same.

2. In the **Connect to Server** dialog, ensure that the correct **Server name** is selected (Network Computer Name\Named Instance, *e.g.* MYDBSERVER\SQLEXPRESS).

Select either **Windows Authentication** or **SQL Server Authentication**. If you choose SQL Server Authentication, enter the **User Name** and **Password**.

(Remember that when <u>installing SQL Server</u> 108), you chose between **Windows Authentication** and **Mixed Mode** (SQL Server and Windows Authentication), and set the password for the **sa** - SQL Server System Administrator - account.)

Click Connect.

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		SQL Server			
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	Authentication:	Windows Authentication	~		
	User name:	MyVMD\Administrator	~		
	Password:	Remember password			
	E	Connect Cancel Help (Options >>		

3. In the **Object Explorer** panel of **Microsoft SQL Server Management Studio**, expand the Databases so that you can see **EventProData**.

Right-click on EventProData, and select Tasks > Restore > Database.

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- 4. The **Restore Database** window appears.
- 5. Under **Source**, select **Device**, and click the ellipsis next to the field.
 - a. The Select Backup Devices dialog appears.

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+		Specify the backup media and	l its location for your restore opera	ation.			t LSN	
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b. Click the Add button. The Locate Backup File window appears.

	Database - EventProData					- 0	×	□ ×
File 🔞 No backu	pset selected to be restored.							
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Specify th	e backup media and its locatio	n for your restore operation.				-		
Backup m	edia type: Fil	📔 Locate Backup File - MYI	DBSERVER\SQLEXPF	RESS				×
Backup m	edia:	Backup File location:	C:\PSI APPLICA	TIONS\EventPro Software\Da	C			
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- c. In the **Locate Backup File** window, locate the existing database that your EventPro Trainer sent to you, which should have been saved on the same machine as SQL Server, as noted above.
- d. Click **OK** in the **Locate Backup File** window, and again in the **Select Backup Devices** window to return to the **Restore Database** dialog.
- 6. Back in the **Restore Database** form, under **Destination**, the **Database** should be set to **EventProData**.

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+		Backup sets to restore:					
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7. Ensure that you have selected the correct Source and Destination.

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8. In the left **Select a Page** panel, click on **Options**.

Select the **Overwrite the Existing Database (WITH REPLACE)** checkbox. (In this situation, we want the restored, prepared database from EventPro Training/Support to overwrite the blank "placeholder" database that we created in the previous step.)

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		Standby file:	C:\Program Files\Microsoft SQL Se	erver\MSSQL14.SQLEXPRESS\N	ISSQL\E		
L I	6	Leave the database ready to	use by rolling back uncommitted transaction	s. Additional transaction logs canr	not be restore	d.	
	C G G G	Tail-Log backup Tail-Log backup Take tail-log backup befor Leave source data (WITH NORECOV Backup file: Server connections	ore restore abase in the restoring state (FRY) C:\Program Files\Microsoft SQL Se	erver\MSSQL14.SQLEXPRESS\M	1SSQL\E		
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	YI MYDBSERVER\SQLEXPRESS [PSI\Sample] View connection properties	Prompt Prompt before restoring e	ach backup server property controls whether full-text ind	exes are imported, rebuilt, or reset	for the restore	ed.	
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- 9. Click **OK** at the bottom of the **Restore Database** dialog to begin the restore process.
- 10. When the restore is complete, you should receive a success dialog. Click OK.
- 11. You can now proceed to Give Database Rights to Users 125.

Give Database Rights to Users

1. If you are not already in SQL Server Management Studio, run it now.

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	Authentication:	Windows Authentication	~		
	User name:	MyVMD\Administrator	\sim		
	Password:				
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☐ Ready					

- a. In the **Connect to Server** dialog, ensure that the correct **Server name** is selected (Network Computer Name\Named Instance, *e.g.* MYDBSERVER\SQLEXPRESS).
- b. Select either **Windows Authentication** or **SQL Server Authentication**. If you choose SQL Server Authentication, enter the **User Name** and **Password**.

(Remember that when <u>installing SQL Server</u> 108), you chose between **Windows Authentication** and **Mixed Mode** (SQL Server and Windows Authentication), and set the password for the sa - SQL Server System Administrator - account.)

- c. Click **Connect**.
- 2. In the Object Explorer panel of SQL Server Management Studio, go to Security > Logins.
- 3. Right-click the **Logins** folder and select **New Login**.

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4. The Login - New form appears.

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+ + +	Connection	 User must change passw Mapped to certificate Mapped to asymmetric key 	vord at next login		~			
€	Server: MYDBSERVER\SQLEXPRESS Connection: MyVMD\Administrator Wew connection properties	Map to Credential Mapped Credentials	Credential	Provider	~	Add		
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- 5. Select the radio button next to **Windows Authentication** to indicate that you want **Users** to connect to the SQL Server Instance using **Windows Authentication**.
- 6. You now need to search for the EventPro Security Groups that you created back in <u>Create Active Directory</u> <u>Groups</u> of .
 - a. Click the Search button next to the Login Name field. The Select User or Group window appears.
 - b. Click the Object Type button. In the Object Types window, select the Groups checkbox and click OK.

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+ =	C Enter the object name to select (Diject Types Select the types of objects	you want to find.		×		
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c. Back in the **Select User or Group** window, click the **Locations** button. Select the correct **Domain** in the **Locations** window, and click **OK**. This is the Domain in which you created the EventPro User Security groups.

🔀 Mici		Login - New				_		×		x
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8 ¥ ` ¥	2	Server Roles User Mapping	Login name:				Search	h		Ŧ
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E ≡	5	Select User or Group		×						
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d. Finally, enter a search term in the bottom field of the **Select User or Group** window, *e.g.* **EventPro**, and click the **Check Names** button.

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Server Roles	Login name:				Search	
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Connect -	SQL Server authentication					
	Password:					
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.	Enforce password policy					
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* •	User must change passwo					
Select User, Service Account	t, or Group	×		\sim		
🗄 📃 C Select this object type:				\sim		
User, Group, or Built-in securit	y principal	Object Types		\sim	Add	
From this location:			rovider			
MyVMD.local		Locations				
Enter the object name to select	t (examples):					
EventPro		Check Names				
P					Remove	
Advanced		OK Cancel		~		
Caller.	Default language:	<default></default>		~		
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e. If there are multiple matching results in the **Multiple Names Found** window, select the group(s) for which you want to assign database rights, and click **OK**. In this example, we will select the **EventPro Users** security group.

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8 # 1 9		Mapping	Login name:				Search	
	Judius		Windows authentication QL Server authentication					
			Password:					
•			Confirm password:					
+		lect User, Service Accou	nt, or Group	×				
÷		elect this object type: Iser or Built-in security princ	ipal	Object Types				
÷	Fr	Multiple Names Found	1		×	1		
+	F	More than one object ma	tches the following object name: "Even	ntPro". Select		~		
÷ 🗐	Con E	an object from this list or,	to reenter the name, click Cancel.			~	Add	
+ 4	PSI Cor	Matching names:	Logon Name (pre	Windows 2000)	E-Mail Address		Add	
	PSI	🕾 EventPro Admi	nistrators EventPro Admin					
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l l	Progres						Remove	
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- f. Click **OK** in the **Select User or Group** form to return to **Login New**.
- 7. The Login Name will now be populated with the group you selected.
- 8. Ensure that the **Windows Authentication** radio button is selected, which you probably did earlier.
- 9. Near the bottom, you can set the **Default Database** to **EventProMaster**.

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Server Roles	Login name:	MyVMD\EventPro Us	ers		Search	
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Connect •	SQL Server authentication					
🖃 🔂 PS	Password:					
• •	Confirm password:					
	Specify old password					
+ +	Old password:					
Ð	Enforce password policy	/				
E	Enforce password expiration	ation				
÷	User must change pass	word at next login				
± ≡	 Mapped to certificate 			\sim		
	 Mapped to asymmetric key 			\sim		
Server: MYDBSERVER\SOLEXPRESS	Map to Credential			~	Add	
Connection:	Mapped Credentials	Credential	Provider			
MyVMD\Administrator						
View connection propertie	<u>s</u>					
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Ready	Default database:	EventProMaster		~		
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	Default language:					
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10. Next, in the Select a Page panel of the Login - New form, select the User Mapping page.

Select the Map checkboxes for the EventProData and EventProMaster databases.

You need to set the **database role membership** for each database.

a. Select **EventProMaster** in the top grid, and select the checkboxes next to **db_datareader** and **db_datawriter** below.

. <mark>.</mark>	Login - New					_		×	×
File	Select a page	Script	🕶 🕜 Help						
8 †	 Server Roles User Mapping 	Users map	Users mapped to this login:						
Object	 Securables Status 	Map	Database	User	Default Schema				
Conne	- Status		EventProData	MyVMD\EventPro Users					
			EventProMaster	MyVMD\EventPro Users					
= 🗟			master						
+			model						
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			tempdb						
+ + +	Connection Server: MYDBSERVER\SQLEXPRESS		account enabled for: EventProMaster						
÷	Connection: MyVMD\Administrator # <u>View connection properties</u>	db_ac db_ba db_da db_da db_da db_da	role membership for: EventProMaster ccessadmin ackupoperator atareader atawriter Illadmin nrydatareader nrydatareader nrydatareater						
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	Ready	db_se ✓ public	scurityadmin ;						
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b. Next, select **EventProData** in the top grid, and select the checkboxes next to **db_datareader** and **db_datawriter** at the bottom.

	Login - New					-		×	×
File	Select a page General	Script	🕶 🕜 Help						
8 ¥ ′	 Server Roles User Mapping 	Users map	oped to this login:						Ĺ
Object	 Securables Status 	Map	Database	User	Default Schema				
Conne			EventProData	MyVMD\EventPro Users					
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= 🗟			master						
ŧ			model						
			msdb						
			tempdb						
+ + +	Connection Server: MYDBSERVER\SQLEXPRESS		account enabled for: EventProData role membership for: EventProData						
	Connection: MyVMD\Administrator	db_ba	ccessadmin ackupoperator						
	₩ <u>View connection properties</u>	db_de							
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c. You also need to give the **db_owner** right to at least one Login group, since the **db_owner** right to **EventProData** is required for **updating** EventPro Software with new releases.

How you assign the db_owner right depends on who will be performing software updates.

- i. Some organizations want only the Administrator to update EventPro Software. In this case, you would typically have an EventPro Administrators Security Group that is separate from an EventPro Users Security Group. You would give db_owner to the EventPro Administrators Login only.
- ii. On the other hand, some organizations allow any User administrator or otherwise to update EventPro Software. In this case, you would typically create an EventPro Users Group with the EventPro Administrators nested as a sub-group within it. You would then assign db_owner to the EventPro Users Login, thereby giving the ability to update the software to all Users, regular or administrator.

To review how you set up Active Directory Groups, see Create Active Directory Groups

- 11. When you are done with the Login edit form, click OK. The Login will be added under Security > Logins.
- 12. If necessary, you can add another New Login.

Again, it depends on whether you have the EventPro Administrators Security Group set up as a separate group or nested within the **EventPro Users Security Group**. If the EventPro Administrators Security Group is separate, you now need to create a **Login** for it, repeating the steps above.

13. When you are done creating Logins in the SQL Server Management Studio, you can exit it, and proceed to Install EventPro to Server

Install EventPro to Server

Because you are performing a **Network Installation**, this installation process must first be done from the **Application Server**.

1. Navigate to the **EventPro.Win.Setup.exe** you <u>downloaded earlier</u> [112], and double-click to run it.

Depending on the security settings on your network or computer, you may receive a warning about installing software, and you may need to click **Run** or **OK** to continue the installation.

2. The installation wizard will begin. Click Next to continue.



3. End-User License Agreement:

- a. Please read the EventPro Software Program License Agreement.
- b. Select **I ACCEPT** or **I DO NOT ACCEPT** below. If you do not accept the license agreement, you cannot continue with the installation process.
- c. Click Next to continue.

_	ement	
Please read the following	g license agreement carefully	
EventPro	Software Program	License
	Agreement	
BEFORE INSTALLI	E FOLLOWING TERMS AND NG THIS SOFTWARE. INSTALL & ACCEPTANCE OF THESE	ATION OR USE TERMS AND
	OU DO NOT AGREE WITH TH	EM, PROMPTLY
CONDITIONS. IF		EM, PROMPTLY

4. Installation Type: Choose Server Installation, and click Next.

(You can review Installation Types 67 above, if necessary.)

🐁 EventPro Setup		×
Installation Type		
Select the type of installation to perform.		
Stand Alone Installation		
 Server Installation 		
O Workstation Installation		
Advanced Installer		
	< Back Next >	Cancel

5. Installation Options: Do not select the checkbox next to Use Active Directory to log into EventPro. (That option requires the EventPro Active Directory Module, and is covered under <u>Network Install: Active Directory Integration</u> [162] .)

Click Next.

EventPro Setup Installation Options These are options for running EventPro.	×
Use Active Directory to log into EventPro. (This requires a license that supports a	
Advanced Installer	ck Next > Cancel

6. Select Installation Folder:

- a. You can use the default **Program Files** path or enter a new path for the Installation Folder.
- b. If you do enter a different folder path, take note of it, as you will need it again for the workstation installs.
- c. Click Next.

👼 EventPro Setup	_		×
Select Installation Folder		5	Ve
This is the folder where EventPro will be installed.			
To install in this folder, click "Next". To install to a different folder, en "Browse".	ter it b	elow or clic	k
Folder:			
C:\Program Files (x86)\EventPro Software\EventPro\		Browse	
Advanced Installer	>	Can	cel

7. SQL Database:

- a. Enter the SQL Server Named Instance, identifying the network name of the computer plus the instance name you specified earlier when installing SQL Server (*i.e.* "SQLEXPRESS"). It will look something like this:
 MYDBSERVER\SQLEXPRESS.
- b. Select the radio button next to **Windows Authentication**. (As you will recall from <u>above</u> [125], you set up the **SQL Server Logins** to use **Windows Authentication**.)
- c. Click Next.

둸 EventPro Setup	X
SQL Database	
Configure SQL Co	onnection
Before updatin backup of the o	g an existing database you should first make sure you have a database.
Server:	MYDBSERVER \SQLEXPRESS
Authentication:	Windows Authentication
	○ SQL Authentication
Username:	Administrator
Password:	
Advanced Installer —	
	< Back Next > Cancel

- 8. The Installer will test the connection to the database before you can proceed with the installation.
- 9. When the connection test is completed, click **Install**.

🗟 EventPro Setup X
Ready to Install
The Setup Wizard is ready to begin the EventPro installation
Click "Install" to begin the installation. If you want to review or change any of your installation settings, click "Back". Click "Cancel" to exit the wizard.
Advanced Installer
< Back Sack Cancel

Depending on the security settings on your network or computer, you may encounter a warning, and you may need to click **Yes** or **OK** to continue the installation.

10. In the final window, click **Finish**.



11. Now the Server installation process is complete. Before moving on to Workstation Installations, you first need to <u>Share</u> the Installation Folder [14[†]].
Share Installation Folder

On the server to which you just installed EventPro, locate the folder in which EventPro was installed. By default, it would be **C: \ProgramFiles (x86)\EventPro Software\EventPro**, but you may have selected a different folder path in the <u>Select</u> Installation Folder are provided by the installation wizard.

You need to **share this Installation Folder** so that network Users installing EventPro to their workstations have **Read** and **Change** access to it.

The exact process of sharing the folder will vary, depending on the network environment in which you are working.

The instructions below provide an example, but you may have to consult the documentation for your network and operating system to determine how to share the Installation Folder from the Application Server to Workstations.

1. Right-click on the **EventPro** folder, and select **Share With > Advanced Sharing**.



The folder's Properties will appear. Initially, the Sharing tab will indicate that the folder is Not Shared.
 Click the Advanced Sharing button.



3. In the Advanced Sharing dialog, select the checkbox next to Share this Folder.

You can leave the Share Name as EventPro.

Recycle Bin	EventPro Properties General Sharing Security Previous Versions Customize Network File and Folder Sharing EventPro Not Shared Not Shared Network Path: Not Shared Share Share Advanced Sharing Set custom permissions, create multiple shares, and set other advanced sharing options. @Mdvanced Sharing ØK Cancel Ap MVDBSERVER MVDBSERVER PSI-23 VBOXSVR WINDSVE2012 PSI-23	Advanced Sharing	Le La X
	1 item 1 item selected		;:= 1
		- 🕞 🔞	ENG 12:42 PM US 2015-11-23

4. Click the Permissions button to view the Share Permissions for the EventPro folder.
 Users installing EventPro to their workstations require Read and Change permissions to this folder.
 Click OK, and OK again to return to the EventPro folder Properties.

Recycle Bin	EventPro Properties General Sharing Security Previous Versions Cus Network File and Folder Sharing EvertPro Not Shared Network Path: Not Shared Share Advanced Sharing Set custom permissions, create multiple shares, and advanced sharing options. @ Advanced Sharing Close Cancel	Advanced Sharing	Share Permissions	Software P Size
		₩ VBOXSVR ₩ WINSRVR2012 1 item 1 item selected		ENG 1:15 PM
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5. Go to the **Security** tab in **EventPro Properties**, and click the **Edit** button to open the **Permissions for EventPro** window.

	<u>∭</u> ⊃ <u></u>	EventPro Softwa			_ D X	
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-	File Home Share	View			_	
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	PerfLogs	To change per	missions, click Edit.	Edit		
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	Common Files	Full control	110101025			
	EventPro Software	Modify				
	EventPro	Read & exec		✓ =		
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	WindowsPowerShel					
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	1 item 1 item selected		OK Car	ncel Apply	=	
						 Image: Image: Image Image: Image: Imag

6. In **Permissions for EventPro**, click the **Add** button to open the **Select Users, Computers, Service Accounts, or Groups** window.

	3 1 2 1 2 1 2 1 2 1 2 1 2 1 2 1 2 1 2 1	EventPro Software
	File Home Share View	~ 0
Recycle Bin	🕞 🍥 👻 🕇 퉬 « Local Disk (C:) 🕨 Program Files (x	86) > EventPro Software v C Search EventPro Software P
	Downloads ^ Name	Date modified Type Size
	EventPro	EventPro Properties
	🖳 This PC	General Sharing Security Previous Versions Customize
	Desktop	Object name: C:\Program Files (x86)\EventPro Software\EventPr
	Downloads	Group or user names:
	₩ Music E Pictures	REFACE OWNER
	Videos	SYSTEM Security Security Object name: C\Program Files k86\\EventPro Software\EventPr
	📥 Local Disk (C:) DerfLogs	Collect name: C:\Program Hies (x86)\EventPro Software\EventPr To change permissions, click Edit. Group or user names:
	Program Files Program Files (x86)	Permissions for ALL
	Common Files	Full control
	EventPro Software	Modify & Administrators (MYVMD\Administrators) Read & execute & Users (MYVMD\Users) v
	Internet Explorer	List folder contents
	Microsoft.NET	Add Remove
	Windows NT	For special permissions or advanced sett Clerk Advanced.
	WindowsPowerShell	Read & execute
	1 item 1 item selected	Uist folder contents
		OK Cancel Apply
		OK Cancel Apply
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		▲ 100 1021 AM

7. In the **Select Users, Computers, Service Accounts, or Groups** window, ensure that **Users** and **Groups** are selected under **Object Types**, and that the **Location** is correct (*i.e.* the Domain in which you created the EventPro User Security groups).



- х | 🛃 🚺 = | EventPro Software Home Share View v ? **Recycle Bin** (⇐) ⇐ ↑ ↓ ≪ Local Disk (C:) ► Program Files (x86) ► EventPro Software ✓ ♂ Search EventPro Software Q x Size Name **EventPro Properties** 쑦 Favorites Desktop EventPro General Sharing Security Previous Versions Custor 退 Downloads х Recent places Ob Permissions for EventPro Security 💻 This PC 膧 Desktop Object n X Select Users, Computers, Service Accounts, or Groups Documents Group o 退 Downloads 🖶 ALL Select this object type Music То SR CR Users, Groups, or Built-in security principals Object Types... Pictures SYS SYS Per AP From this location Sec. Videos MyVMD.local Locatio & Eve Local Disk (C:) x Multiple Names Found Enter the object name: 🥸 CD Drive (D:) VirtualBox Guest SharedVM (\\vboxsrv) (E;) More than one object matched the name "eventpro". Select one or more names from this list, or, reenter the name. APPI ICA 📬 Network Full o Matching names Advanced... For clic Modify Logon Name (pre-Windo... E-Mail Address Description In Fol 🔼 EventPro Admir EventPro Administrators MyVN List folder contents Read 1 item 1 item selected OK ОК Cancel ENG 3:00 PM , de $\mathbf{\Sigma}$ - 😼 🖬 🕼 US 2015-11-09

Type EventPro in the field below and click Check Names.

In the **Multiple Names Found** window, select the correct Security Group(s). As noted before, you may have nested the EventPro Administrators group within the EventPro Users group, or created the two groups separately. Whichever way you chose to create your security groups, just ensure that you select the correct groups when assigning rights and permissions.

Click OK.

Click OK in the Select Users, Computers, Service Accounts, or Groups window.

8. In **Permissions for EventPro**, select the relevant security group, and ensure that the **Allow** checkboxes for **Read & Execute**, **List Folder Contents**, and **Read** are selected.

Users will also require Write permissions for the installation process, in order to write to the directory.

For normal operation, Users do not require **Modify** and **Write** permissions. However, if Users do not have **Modify** and **Write** permissions, they will not be able to automatically update EventPro on their workstations; they would require assistance from an Admin User. If you want Users to be able to automatically update EventPro themselves, they require **Modify** and **Write** permissions.

Click **OK**, and **OK** again.

	<mark>⊯ ⊇ ∏</mark> = File Home Share View	EventPro Software
Recycle Bin	(€) ♥ ↑ ↓ Cocal Disk (C:) ▶ Program Files	(x86) → EventPro Software → ¢ Search EventPro Software
Recycle Bin	 	Date modified Type Size EventPro Properties EventPro Properties Collect name: C·\Program Files (x86)\EventPro Software\EventPr Group or user names: Collect name: C·\Program Files (x86)\EventPro Software\EventPro Collect name: C·\Program Files (x86)\EventPro Software\EventPro Collect name: C·\Program Files (x86)\EventPro Software\EventPr Collect name: C·\Program Files (x86)\EventPro Software\EventPro SySTEM Collarge permissions, click Edit. Permissions for ALL APPLICATION PACKAGES Full control Modify Read & execute List folder contents Read Write For special permissions or advanced set click Advanced. OK
		OK Cancel Apply
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9. Now that you have shared the folder with the EventPro Users, you can proceed to <u>Install EventPro to</u> <u>Workstations</u> [147].

Install EventPro to Workstations

- 1. Login to the **Workstation** computer as the Administrator.
- 2. Navigate to the **EventPro.Win.Setup.exe** you <u>downloaded earlier</u> [112], and double-click to run it.

Depending on the security settings on your network or computer, you may receive a warning about installing software, and you may need to click **Run** or **OK** to continue the installation.

3. The installation wizard will begin. Click **Next** to continue.



4. End-User License Agreement:

- a. Please read the EventPro Software Program License Agreement.
- b. Select **I ACCEPT** or **I DO NOT ACCEPT** below. If you do not accept the license agreement, you cannot continue with the installation process.
- c. Click Next to continue.

👼 EventPro Setup	×
End-User License Agreement	
Please read the following license agreement carefully	
	•
EventPro Software Program Lic	ense
Agreement	
READ THE FOLLOWING TERMS AND CO BEFORE INSTALLING THIS SOFTWARE. INSTALLATION	
INDICATES YOUR ACCEPTANCE OF THESE TE	
CONDITIONS. IF YOU DO NOT AGREE WITH THEM,	PROMPTLY
I accept the terms in the License Agreement	
\bigcirc I do not accept the terms in the License Agreement	
Advanced Installer	
< Back Next >	Cancel

5. Installation Type:

- a. This time, choose **Workstation Installation**.
- b. Click Next.

EventPro Setup		×
Installation Type		
Select the type of installation to perform.		
Stand Alone Installation		
O Server Installation		
 Workstation Installation 		
Advanced Installer		
	< Back Next >	Cancel

6. Installation Options:

a. Do not select the checkbox next to Use Active Directory to log into EventPro.

(That option requires the EventPro Active Directory Module, and is covered under <u>Network Install: Active</u> <u>Directory Integration</u> 1621.)

b. Click Next.



7. Select Installation Folder:

a. You can use the default **Program Files** path for the Installation Folder, or enter a different folder path, if you prefer.

b. Click Next.



8. SQL Database:

- a. Enter the SQL Server Named Instance, identifying the network name of the computer plus the instance name you specified earlier when installing SQL Server (*i.e.* "SQLEXPRESS"). It will look something like this:
 MYDBSERVER\SQLEXPRESS.
- b. Select the radio button next to **Windows Authentication**. (As you will recall from <u>above</u> 12⁵), you set up the **SQL Server Logins** to use **Windows Authentication**.)
- c. Click Next.

The Installer will test the connection to the database before you can proceed with the installation.

🐁 EventPro Setup	×
SQL Database	
Configure SQL Co	nnection
Before updating backup of the d	g an existing database you should first make sure you have a latabase.
Server:	MYDBSERVER \SQLEXPRESS
Authentication:	Windows Authentication
	O SQL Authentication
Username:	
Password:	
Advanced Installer —	
	< Back Next > Cancel

9. Select Server Path:

- a. Enter the path to the installation on the server. This is the <u>Installation Folder [138]</u> you selected during the Server Installation, and **shared** with the EventPro User Group in the <u>previous step [141]</u>.
- b. Click the **Browse** button, locate that folder on the Network, and click **Select Folder**.
- c. Click Next.

EventPro Setup		×
Select Server Path		
Enter the path to the installation on the server.		
To install in this folder, click "Next". To install to a "Browse".	a different folder, enter	it below or click
Server Folder:		
		Browse
Advanced Installer		
	Back Next >	Cancel

10. Ready to Install: Click Install.

👼 EventPro Setup	\times
Ready to Install	2 9
The Setup Wizard is ready to begin the EventPro installation	2
Click "Install" to begin the installation. If you want to review or change any of your installation settings, click "Back". Click "Cancel" to exit the wizard.	
Advanced Installer	

Depending on the security settings on your network or computer, you may encounter a warning, and you may need to click **Yes** or **OK** to continue the installation.

11. In the final window, click **Finish**.



- 12. Now the workstation installation process is complete.
- 13. Repeat this process on the other workstations in your network.
- 14. You may want to create an **EventPro shortcut** on each User's desktop so that they can easily locate and run EventPro.
- 15. When you are done installing EventPro on the Server and Workstations, proceed to <u>Admin First Login to</u> <u>EventPro</u>

Admin First Login to EventPro

Once EventPro has been installed on your network, you can log in using the **default Administrator account** that has been pre-set in EventPro.

- 1. Run EventPro.
- 2. In the Log On dialog, enter these default Administrator credentials:
 - a. User Name: Admin
 - b. Password: EventPro1234

Passwords are case-sensitive.

3. The **EventPro** program opens.

Click My Details under My Workplace in the left-hand navigation pane. Your Security User edit form opens.

You will note that this Admin user has been assigned the Administrator Security Role by default.

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	v Tools	Save and Cancel Clone	Change My Password	Reset Password	Add Note Edit	ABC Check Spelling	X Delete			Key Record	Refresh	Audit Log	Reco	ous Next Record rd Navigation	Close Close	^
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- 4. One of the first things you will want to do is change the **Password** for the Admin User, since it is the EventPro default that many people will know.
 - a. In the navigation ribbon above your Security User details, click the **Change My Password** button.



b. The Change Password dialog appears. Enter the Old Password (EventPro1234). Enter and confirm your New Password.

REMEMBER THIS PASSWORD!

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- c. Click OK.
- 5. You can make other changes to your Admin account as required. See **Security Setup > Users > Create New User** in the **EventPro User Manual** to review the various fields in the **Security User edit form**.
- 6. As the Administrator, there are several actions you will probably need to complete before other Users log into EventPro:
 - a. <u>Create Security Roles</u> 155
 - b. Create Users 158
 - c. Create Internal Company & Contacts 100
- 7. When you have finished the steps described above, you can allow other Users to log into EventPro. See <u>User First</u> Login to EventPro 160.

Create Security Roles

A **Security Role** allows you to define a standard set of permissions for each category of Users according to their ability to access data in EventPro.

You may find it convenient to have your Security Roles set up and defined before you create Users. That way, when you add new Users, you can simply select the applicable Security Role.

- 1. In EventPro, go to Setup > Security > Roles.
- 2. There are several different Role Types: Administrator, Default, Other, and Online.

(Review Security Setup > Roles (Security Permissions) > Create Security Roles > Role in the <u>EventPro User</u> <u>Manual</u>.)

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EventProConnect Setup		■ ∞ ◎ ◎ ? • ⊡ • ◎ ⊴ ₽			
🔅 Virtual Assistant Setup	Name	Role Type			
🍰 User Field Definition	Administrator	Administrator			
💞 Model Management	Catering	Other			
	Default	Default			
# Sequence Numbers	Default-Other	Other			
🛱 Security	Events Finance	Other			
	Online	Other			
	Sales	Other			
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		ser: Admin			

- 3. The **Administrator Security Role** is assigned to the default EventPro Admin User. Typically, very few Users should get this Security Role, as it allows full access to the program.
- 4. If you do not create any other Security Roles, any other Users you create in EventPro will be assigned the **Default** Security Role. If all of your EventPro Users - besides Administrators - will have the same security rights in EventPro, then having just the **Default Security Role** may be sufficient.

If you haven't already, you can **adjust the Default Security Role** so that it provides the correct permissions for the EventPro Users you plan to assign to this role.

(Review Security Setup > Roles > Create Security Roles > Permissions in the EventPro User Manual.)

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🐉 EventProConnect Setup						
🐉 Virtual Assistant Setup	Name	A Role Type				
🍰 User Field Definition	Administrator	Administrator				
🧬 Model Management	Catering Default	Other Default				
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	Access User Field Setup: None					-
	Time Zones					
	Access Set Time Zones: Deny					
	User: Admin					

5. If one Default Security Role for all Users is not sufficient, and you want to further compartmentalize User security permissions in EventPro - for example, differentiating rights based on department or management hierarchy - you need to create **additional EventPro Security Roles** of the "**Other**" type.

You could, for example, have Security Roles called **Event Managers**, **Finance**, and **Catering**. Those Security Roles would all be of the **Role Type** "**Other**", but would have different assigned permissions, depending on the information that staff members in those roles need to access.

Additionally, there is the **Role Type "Online**", which you use to set permissions related to online activities in EPConnect. If you want a User to be able to log into EPConnect, they must be assigned an Online-type security role. If a User needs to log into both the EventPro application **and** EPConnect, the User must be assigned an Online-type role **and** another type of security role (*i.e.* Default, Other, or Administrator).

(Review Security Setup > Roles (Security Permissions) > Create Security Roles in the EventPro User Manual.)

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	Allow Open Object on Event Items:	liew			*	í II
	User: Admin					

6. When you are done editing and/or creating Security Roles, you can proceed to Create Users 158.

Create Users

- 1. You can now create the Security Users to match the staff members that will be using EventPro. Review the instructions under **Security Setup > Users > Create New User** in the <u>EventPro User Manual</u>.
- 2. Make sure that you assign each User the correct **Security Role**, particularly if you created customized Security Roles in addition to the built-in Default Security Role.
- 3. Ensure that you adjust the User's **Password** so that the User can log in for the first time. In the User's edit form, you can choose one of two options: **Change Password on First Logon** or **Reset Password**.
 - a. Select the Change Password on First Logon checkbox.

The User will be able to log in the first time with just the User Name, leaving the Password blank. EventPro will then ask the User to set a new Password.

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b. Click the **Reset Password** button, and assign a default **Password**.

The User will be able to log in the first time with this temporary password, and EventPro will ask the User to set a new Password.

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4. One other optional step is attaching EventPro Users to Contacts in CRM: Create Internal Company & Contacts 160.

Create Internal Company & Contacts

1. You do not need to attach Security Users to CRM Accounts in EventPro, but you may find it useful for internal processes.

NOTE: In EventPro, a CRM Account can be either a Contact or a Company. A Contact does not need to be attached to a single Company; a Contact can be an independent Account, or be linked to multiple companies.

- 2. You can create your internal Contacts and Company, if applicable, by following these instructions:
 - a. Company/Contact Management (CRM) > Add New Company (Company Edit Form) in the <u>EventPro User</u> <u>Manual</u>.
 - b. Company/Contact Management (CRM) > Add New Contact (Contact Edit Form) in the EventPro User Manual.
- 3. Once you have Accounts set up in CRM, you can then edit each User's profile under Security Setup.
- 4. In the **Security User edit form**, use the **Account** drop-down to find and select the correct Contact or Company for the User. **Save and Close** each User's edit form when you are done.

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5. When you are done assigning Accounts to Users, you can proceed to First User Login to EventPro 1001.

User First Login to EventPro

- 1. When you are done creating Users, you can distribute **User Names** (and default **Passwords**, if applicable) to the relevant members of your organization, and ask them to run EventPro on their workstations.
- 2. The **Log On** dialog appears. What the User enters for the Password depends on how you set up the User profile, *i.e.* choosing to **Change Password to First Logon** or **Reset Password**.

a. If you selected the **Change Password on First Logon** checkbox in the User's profile, the User can simply enter the **User Name** and click **OK**, leaving the password blank.

🔒 Log On		×
	Please enter your login information below. User Name: PearlDelany Password: (Passwords are case sensitive)	
	Log In Cancel	

b. If you **Reset** the Password on the User's profile, the User can enter the User Name and the temporary password that you set on the User's profile.

🔒 Log On			×
	Please enter your login in User Name: PearlDelan Password: ******** (Passwords		
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3. Either way, the **Change Password on First Logon** dialog appears.

The User must enter and confirm a **New Password**, and click **OK**.

🕐 Change passw	rord on first logon	_		×
🔥 pa	r security reasons, you must now set your own password. F ssword in the two text fields below, and be sure not to reus fore.	Vease enter yo e a password y	ur new you used	
New Password:	**********			
Confirm Password:	**********			
		OK	Cance	

4. Once in EventPro, the User can view his/her profile by clicking **My Details** in the left navigation panel.

Installation is complete and EventPro is now ready to use.

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Network Install: Active Directory Integration

- These instructions describe the installation of EventPro using Active Directory Integration. This type of EventPro
 network installation requires knowledge of SQL Server and Active Directory. Your organization's EventPro installation
 should be done by an IT Specialist who has sufficient technical knowledge and is familiar with your organization's
 computer network.
- If you do not have in-house IT to assist you with EventPro installation, the instructions below will guide you through the general process, but if you have any doubts about how to proceed, please contact <u>EventPro Support</u>.
- These instructions only cover one standard set of options that typically work under normal circumstances. For more options, you will require assistance from an IT specialist who is familiar with your organization's network.
- Note that these instructions describe the installation of the base EventPro application. You may have purchased
 additional modules that also require installation. Unless otherwise advised, you should download all of the software
 components available to you, and consult with your Support or Training Specialist for assistance with installation.
- Installation Instructions:
 - 1. <u>Create Active Directory Groups for Integration</u>
 - 2. Install SQL Server 175
 - 3. Configure SQL Server 179
 - 4. Download EventPro Components 182
 - 5. Install Data Updater 183
 - 6. <u>Create New Client Database</u> 185

- 7. <u>Restore Existing Database over New</u> 188
- 8. Give Database Rights to Users 195
- 9. Install EventPro to Server 208
- 10. Share Installation Folder 211
- 11. Install EventPro to Workstations 217
- 12. Admin First Login to EventPro 223
- 13. User First Login to EventPro 229
- 14. Active Directory/EventPro Sync 230
- In this sample installation process, we follow a particular sequence of steps to prepare your EventPro database. We run
 the EventPro Database Utility Wizard to create two databases: EventProMaster, a required database that controls
 program licensing, and a named database, typically called EventProData, which is initially blank. This new, blank
 EventProData database is essentially just a "placeholder" database. You have most likely received and saved a backup
 of an existing, prepared database from your EventPro Training or Support Specialist. We will restore that existing,
 prepared EventPro database backup over the blank "placeholder" database, so that EventProData will then contain your
 existing information. Installing EventPro Software will occur later in the process.
- Note that there is another slightly different sequence of steps that you can follow after installing the Data Updater. You can consult with your IT department and/or EventPro Support or Training Specialist to determine which sequence to follow. In this alternate process, after installing the Data Updater, you first restore the backup of the existing, prepared EventPro database, typically naming it EventProData. You then install EventPro Software to add the EventProMaster database, although you do not yet run the EventPro program. You then run the Database Utility Wizard to link the client database to the EventProMaster database ("Create Master Database Client ID"). There will then be several other steps to complete before running EventPro. For more details about this process, see <u>Alternate Database Restore</u> <u>Process</u> [280].

Create Active Directory Groups for Integration

In Active Directory, you will create Security Groups.

Remember that EventPro's Active Directory Integration Module allows you to map EventPro Security Roles to Active Directory Security Groups, which may influence how you want to set up your Active Directory groups. For example, you may want to create a broad User Security Group for the purpose of assigning database permissions, and nest within it multiple sub-groups based on departmental divisions for the purpose of mapping EventPro security roles. This will be covered in more detail below.

1. Log on to the **Domain Controller**, and go to **Server Manager**.



2. In Server Manager, select Local Server from the left-hand panel.

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3. From the Tasks drop-down next to the server PROPERTIES, select Active Directory Users and Computers.

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		Server Name ID Severity S	Source	Duna Soo
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4. The Active Directory Users and Computers are displayed.

In the left panel, ensure that you have selected the correct domain, and click on the Users folder.

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5. Create a **New Group**.

You can go to **Action > New > Group** in the main menu, or click the **New Group** icon ³ above the selection grid, or right-click in the grid and select **New > Group** from the speed menu.

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6. In our example, we name this group **EventPro Users**.

You can leave the Group Scope as Global, or select a different option if recommended by your IT Department.

IMPORTANT: You must set the Group Type to Security.

Click OK.

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7. Create another New Group, this time called **EventPro Administrators**.

Once again, make sure that you set the **<u>Group Type</u>** to **<u>Security</u>**. Click **OK**.

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8. To edit a User or Group, double-click the record in the Users selection grid.

The User or Group's **Properties** edit form will open.

When you are done making changes to the User or Group, click **OK** at the bottom of the form.

9. Now, you need to decide whether you want to **nest** the **EventPro Administrators** Security Group within the **EventPro Users** Security Group.

If you want EventPro Administrators nested within EventPro Users, you need to make the EventPro Administrators Security Group a **member of** the EventPro **Users** Security Group. In the **EventPro Administrators Properties**, select the **Member Of** tab and **Add** the EventPro Users Group.

EventF	Pro Administrators Properties 2				
General Members M	lember Of Managed By				
Member of:					
Name	Active Directory Domain Services Folder				
EventPro Users	MyVMD.local/Users				
Add	Remove				
	roups from the current domain and groups maintained				
in the Global Catalog, such as universal groups.					
	OK Cancel Apply				

If you don't want EventPro Administrators nested within EventPro Users, leave the Security Groups separate.

10. Now, if you want further compartmentalize your Security Groups for the purposes of Active Directory Integration, you can create additional Security Groups and nest them within the EventPro Users Security Group.

You could, for example, create sub-groups based on your organization's departments, such as EventPro Event Managers, EventPro Sales, EventPro Accounting, and so on. You can then add these departmental sub-groups as Members to the EventPro Users Security Group.

EventPro Users Properties ? X					
General Members Member Of	Managed By				
Members:					
Name	Active Directory Domain Services Folder				
Sector 2 Event Pro Accounting	MyVMD.local/Users				
Sector 2 Content Pro Administrators	MyVMD.local/Users				
EventPro Event Managers					
Second Pro Sales	MyVMD.local/Users				
<					
Add Remove					
	OK Cancel Apply				

The reason for nesting all of those departmental sub-groups within the EventPro User Security Group is efficiency of assigning database permissions to the SQL Server. Instead of assigning permissions to each of the multiple department-based groups, you can simply assign database permissions to the all-encompassing EventPro Users Security Group.

11. Next, you can create **Active Directory Users**, if they do not already exist, and assign them to the correct Security Group(s).

The best way to create and configure Active Directory Users will vary depending on your organization's needs, so we will not attempt to describe the entire process.

There are three important factors to remember when creating or editing these Users:

a. Under the Member Of tab of each User's Properties, ensure that you Add the appropriate Security Group.
 Remember that when using Active Directory Integration, the User's Security Group will determine which EventPro Security Role will be assigned to the User.

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	Ξ.	Users	Domain Users MyVMD.Jocal/Users EventPro Users MyVMD.Jocal/Users Add Remove Primary group: Domain Users Set Primary Group There is no need to change Primary group unless you have Macintosh clients or POSIX-compliant applications. OK Cancel Apply Help	NS Administrators Group NS clients who are permitted to perform d esignated administrators of the domain I workstations and servers joined to the d I domain controllers in the domain I domain guests I domain users esignated administrators of the enterprise embers of this group are Read-Only Dom rentPro Users embers of this group can modify group p uilt-in account for guest access to the co embers of this group are afforded additio ervers in this group can access remote acc embers of this group are Read-Only Dom ervers in this group are Read-Only Dom esignated administrators of the schema
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b. The User's **EventPro User Name** will be created from a combination of the **domain** name and **User Logon Name** from Active Directory Users and Computer

Under the **User Properties > Account** tab, you can use either of the variations displayed there , *i.e.* userlogonname@yourdomain.local or yourdomain\userloginname.

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c. There are several fields in the Active Directory User Properties that will translate into EventPro: First Name, Last Name, Email Address, Address information, Telephone Number (from under the General tab), and Job Title (under certain circumstances).

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When a User later logs into EventPro, EventPro will look for a matching Windows User Name, Active Directory ID or Email Address.

Failing to find any of those, EventPro will assume this User is new, and will create a new EventPro Security User, pulling information from the Active Directory fields mentioned above.

The **Job Title** may be the one exception; it will only translate across if there is a Default Account set in EventPro's Event System Settings. That will be covered below, when the Administrator first logs into EventPro.

12. When you are done creating Users and Groups in Active Directory, you can proceed to Install SQL Server 175].

Install SQL Server

EventPro Software uses **SQL databases**, meaning you will need to install **SQL Server** to your **database server**, if it is not installed already.

You can buy an edition of SQL Server, or download the free edition, SQL Server Express, from the Microsoft website. Also, be sure to review the <u>minimum technical requirements</u> for EventPro Software.

- 1. Download the **SQL Server** installation file to your **database server** and run the installer.
- 2. Follow the installation documentation provided with your edition of SQL Server.
 - a. The instructions below will simply note the **critical settings** for SQL Server when used for EventPro Software.
 - b. The screenshots below demonstrate **SQL Server Express**, although regardless of which edition you use, the **important settings** will be the same.

- c. There are other settings and options in the installation process that these instructions will not describe, as they will vary, depending on the IT needs of your organization. Please consult with your IT Department for further guidance on installing and configuring SQL Server.
- 3. Feature Selection:
 - a. You should select the checkboxes for:
 - i. Database Engine Services
 - ii. Client Tools Connectivity
 - iii. Client Tools Backward Compatibility
 - b. Depending on the edition of SQL Server you are installing, there may be a checkbox for **Management Tools**; if so, **select** that checkbox, as well.

If there isn't a Management Tools option in the edition you are installing, you can download and install **SQL Server Management Studio (SSMS)** after installing SQL Server.

- c. Whether you select the other Feature checkboxes is up to your IT department.
- d. The **default directories** are typically fine as they are, unless your IT department says otherwise.

📸 SQL Server Installation Center			– 🗆 X
📸 SQL Server 2017 Setup			– 🗆 ×
Feature Selection Select the Express features to in	istall.		
License Terms Global Rules Microsoft Update Product Updates Install Setup Files Install Rules Feature Selection Feature Rules Instance Configuration Server Configuration Database Engine Configuration Feature Configuration Rules Installation Progress Complete	 Cooking for Reporting Service Features: Instance Features Database Engine Services SQL Server Replication Machine Learning Service R Python Full-Text and Semantic PolyBase Query Service Shared Features Client Tools Connectivity Client Tools Backwards Condition Client Connectivity SU LocalDB Redistributable Features 	rices (In-Database) c Extractions for Search e for External Data ompatibility	The web Feature description: The configuration and operation of each instance feature of a SQL Server instance is isolated from other SQL Server instances. SQL Server instances can operate side-by-side on the same computer. Prerequisites for selected features: Already installed: • Microsoft Visual C++ 2015 Redistributable • Windows PowerShell 3.0 or higher • Microsoft .NET Framework 4.6 Disk Space Requirements Drive C: 1195 MB required, 321866 MB available
	Select All Unselect All		
	Instance root directory:	C:\Program Files\Micro	osoft SQL Server\
	Shared feature directory:	C:\Program Files\Micro	osoft SQL Server\
	Shared feature directory (x86):	C:\Program Files (x86)	\Microsoft SQL Server\
			< Back Next > Cancel

4. Instance Configuration:
- a. Select the radio button next to "Named Instance".
- b. You can leave the **Named Instance** and **Instance ID** as **SQLEXPRESS**, unless there is another name you prefer to use.
- c. The **Installed Instances** grid at the bottom of this page would display any instances already installed. If there is already an installed instance, check with your IT Department whether you should use that instance.

SQL Server Installation Center				—		×	×
					_		^
Instance Configuration							
Specify the name and instance	D for the instance of S	QL Server. Instance ID bec	comes part of the in	stallation path.			
License Terms	O Default instance						
Global Rules Microsoft Update	Named instance:	SQLEXPRESS					
Product Updates							
Install Setup Files Install Rules	Instance ID:	SQLEXPRESS					
Feature Selection	SOL Server directory	C:\Program Files\Micros	oft SOL Server\MSS				
Feature Rules Instance Configuration	Installed instances:	C. (Flogram Files (Micros	OT 302 381781 (1933	QL14.3QLEAPRESS			
Server Configuration Database Engine Configuration	Instance Name	Instance ID	Features	Edition	Ve	rsion	
Feature Configuration Rules							
Installation Progress Complete							
compare							
				< Back Next	t>	Cance	el

5. Server Configuration:

- a. The Startup Type for both SQL Server Database Engine and SQL Server Browser must be set to Automatic.
- b. If not already set, switch the SQL Server Browser Start Type to Automatic.

SQL Server 2017 Setup				- 0	×
Server Configuration					
Specify the service accounts a	and collation configuration.				
icense Terms	Service Accounts Collation				
lobal Rules	Microsoft recommends that you u	use a separate account for each SQL Serve	er service.		
1icrosoft Update roduct Updates	Service	Account Name	Password	Startup Type	
istall Setup Files	SQL Server Database Engine	NT Service\MSSQL\$SQLEXPRESS	rassword	Automatic	~
istall Rules	SQL Server Browser	NT AUTHORITY\LOCAL SERVICE		Automatic	~
eature Selection				Automatic	
eature Rules	Grant Perform Volume Mainter	nance Task privilege to SQL Server Databa	ase Engine Service	Disabled	
1. C. C. K.				Manual	- 1
stance Configuration	This privilege enables instant f	ile initialization by avoiding zeroing of da	ta pages. This may lea	id to information	
istance Configuration	disclosure by allowing deleted	ile initialization by avoiding zeroing of da content to be accessed.	ta pages. This may lea	id to information	
erver Configuration	disclosure by allowing deleted		ta pages. This may lea	d to mornation	
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6. Database Engine Configuration:

- a. Under the **Account Provisioning** tab, indicate which **Authentication Mode** the administrator will use to access the Database Engine: **Windows Authentication** or **Mixed Mode** (SQL Server Authentication and Windows Authentication).
 - i. Windows Authentication: You intend to connect to SQL Server using Windows Authentication.
 - ii. **Mixed Mode (SQL Server Authentication and Windows Authentication)**: You intend to connect to SQL Server using Windows Authentication or SQL Server Authentication.

If you select Mixed Mode here, you need to enter a **Password** for the **SQL Server system administrator** (sa) account. If you later connect to SQL Server using SQL Server Authentication, you will need these sa credentials.

b. Also, under the Specify SQL Sever Administrators grid, click the Add Current User button.

Database Engine Co	nfiguration	
Specify Database Engine au	uthentication security mode, administrators, data directories and TempDB settings.	
icense Terms	Server Configuration Data Directories TempDB User Instances FILESTREAM	
lobal Rules licrosoft Update	Specify the authentication mode and administrators for the Database Engine.	
roduct Updates	Authentication Mode	
stall Setup Files	Windows authentication mode	
stall Rules	Mixed Mode (SQL Server authentication and Windows authentication)	
ature Selection	Specify the password for the SQL Server system administrator (sa) account.	
sture Rules		
erver Configuration	Enter password:	
atabase Engine Configuration	Confirm password:	
ature Configuration Rules	Specify SQL Server administrators	
stallation Progress	PSI\Sample (Sample) SQL	Server administrators have
omplete		estricted access to the abase Engine.
	Add Current User Add Remove	

- 7. Complete the rest of the installation process as recommended by your IT Department.
- As noted above, if there isn't a Management Tools option in the edition you are installing, you can download and install SQL Server Management Studio (SSMS) after installing SQL Server. There may be a prompt to Install SSMS at the end of the SQL Server Installer, or you can download SQL Server Management Studio (SSMS) from the Microsoft website.
- 9. It is recommended that you **restart** your computer once SQL Server is installed. If you install SQL Server Management Studio separately, you will be prompted to restart your computer at the end of the installation process.
- 10. You can then proceed to **<u>Configure SQL Server</u>** 179.

Configure SQL Server

- 1. After restarting the computer, open the Start menu, and go to SQL Server Configuration Manager.
- 2. The SQL Server Configuration Manager opens.
 - a. In the left-hand panel, go to **SQL Server Network Configuration > Protocols for SQLEXPRESS** (or whatever you named the SQL Server Instance <u>earlier</u> 176).
 - b. In the right-hand selection grid, you need to enable both TCP/IP and Named Pipes.
 - c. Right-click **TCP/IP** and select **Enable**.



d. The **Warning** dialog informs you that changes will not take effect until the service is restarted, which we will do next.

Sql Server Configuration Manager	_	\times			
File Action View Help					
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 SQL Server Configuration Manager SQL Server Services SQL Server Network Configurati SQL Native Client 11.0 Configurati Client Protocols Aliases SQL Server Network Configurati Protocols for SQLEXPRESS SQL Native Client 11.0 Configurati 	on (32bit) ation (32bit) on	Protocol Name Shared Memory Named Pipes	Status Enabled Enabled Disabled		
Aliases	Warning Any change	s made will be saved; ho the service is stopped an	owever, they will not take nd restarted. OK	×	

- e. Click OK. You should then see that TCP/IP is Enabled.
- f. Now, if necessary, repeat the process with **Named Pipes**. Right-click **Named Pipes** and select **Enable**. Click **OK** in the **Warning** dialog that follows.

g. Both TCP/IP and Named Pipes should now be Enabled.

If applicable, you may also want to check the Protocols under SQL Native Client Configuration and SQL Native Client Configuration (32bit) to ensure that **TCP/IP** and **Named Pipes** are **Enabled** there, as well.

Sql Server Configuration Manager File Action View Help Image: Sql Server Configuration Manager (Local) Sql Sql Server Services Sql Sql Network Configuration (32bit) Image: Sql Server Network Configuration Image: Protocols for SQLEXPRESS Image: Sql Server Network Configuration Image: Client Protocols Image: Aliases Image: Sql Server Network Configuration Image: Client Protocols Image: Aliases Image: Aliases	- - Protocol Name Status Shared Memory Enabled TCP//P Enabled TCP//P Enabled Sql Server Configuration Manager File Action View Help SQL Server Configuration Manager (Local) SQL Server Services SQL Server Service SQL Server Servic	Name Order Enabled STCP/IP 2 Enabled Named Pipes 3 Enabled		
	✓ SQL Server Network Configuration Protocols for SQLEXPRESS ✓ SQL Native Client 11.0 Configuration ✓ Client Protocols ✓ Aliases ✓ Aliases ✓ ✓	Sql Server Configuration Manager File Action View Help Image: Sql Server Configuration Manager (Local) SQL Server Configuration Manager (Local) SQL Server Network Configuration (32bit) Image: SQL Native Client 11.0 Configuration (32bit) Image: SQL Native Client 11.0 Configuration Image: Protocols for SQLEXPRESS Image: SQL Native Client 11.0 Configuration Image: SQL Native Client 11.0 Configuration Image: SQL Server Network Configuration Image: Protocols for SQLEXPRESS Image: SQL Native Client 11.0 Configuration Image: Client Protocols Image: Aliases Image: Aliases	Name C S Shared Memory 1 S TCP/IP 2 Named Pipes 3 Named Pipes 3	Enabled

3. In the left-hand panel, go to SQL Server Configuration Manager (local) > SQL Server Services.

In the selection grid to the right, select **SQL Server (SQLEXPRESS)** and click the **Restart** button **(e)** above. The service will stop and restart.

🚟 Sql Server Configuration Manager					-	
File Action View Help						
= 🔷 🖄 🗟 📓 🕑 🔍 💿 📀						
SQL Server Configuration Manager (Local) Restar	t service	State	Start Mode	Log On As	Process ID	Service Type
 SQL Server Services SQL Server Network Configuration (32bit) SQL Native Client 11.0 Configuration (32bit) Client Protocols Aliases SQL Server Network Configuration Protocols for SQLEXPRESS SQL Native Client 11.0 Configuration Client Protocols Aliases 	SQL Server (SQLEXPRESS) SQL Server Agent (SQLEXPRESS) SQL Server Browser	Running Stopped Running	Automatic Other (Boot, Sys Automatic	NT Service\MSSQLESSQLESSQLESS NT AUTHORITY\NETWORKSERVICE NT AUTHORITY\LOCALSERVICE	2652 0 4732	SQL Server SQL Agent
	٢					

4. Check to ensure that the SQL Server Browser is Running.

If it is not, you can try to start it by clicking the **Start** button above. This may not work, however, as there could be other reasons that the SQL Server Browser is not running. For example, you may need to go to the **Services** area to manually enable it there.

If you run into any issues here or any other part of **SQL Server Configuration**, please contact **Support** for assistance.

- 5. You can close the SQL Server Configuration Manager window.
- 6. Next, proceed to **Download EventPro Components** 1821.

Download EventPro Components

- 1. Log on to the Application Server as the Domain Administrator.
- 2. Proceed to the EventPro website and login to the Client Login area with your 6-digit license User ID.
- 3. Go to the **Downloads** area.

→ C' 🏠	i myaccount.eventpro.net/	Downloads/		••• 🗵 🗘 🔍 s	earch	<u>↓</u> III\ 🗉
						🔒 Logo
Established in 198		🜔 Ever	tPro (PMX pert [*]		00000
🏠 Home	🤱 My Account 🛛 🚢 Down	ıload 🛛 🌞 Wha	at's New	🚔 Upload File	🕐 Manual	X My Preferences
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this link to access	your cloud portal: Cloud Login					
	Vorkspace app: Click here					
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- 4. If you haven't already, download all of the EventPro components that you see in the Downloads grid.
 - a. The components you see in your **Downloads** grid represent the EventPro application and modules that you have purchased, so your screen may look different than the example screenshot.

 b. The installation instructions below will describe the main components required for the core EventPro program: EventPro (EventPro.Win.Setup.exe), EventPro License Updater/Database Tool (EventPro.EPDataUpdater.Setup.exe), and EventPro Licence (Licence.ini).

However, depending on your purchase, you may have additional components to download.

Download all components that you see, and if you have any questions about installing additional components or modules, contact your Support or Training Specialist.

c. Note that you will need to accept the License Agreement before you can download files.

If you want to review the content of the License Agreement, click the **Get License Agreement** button to retrieve the agreement in .RTF format. This is the same License Agreement that must be agreed to during EventPro installation.

5. While downloading the files, take note of the folder to which you save these files so that you can later retrieve them.

Do not open or run the files yet. The instructions below will inform you when you need each file.

6. You will use the Data Updater Install in the next step (Install Data Updater (183)), but you will need the EventPro License, EventPro Windows Install, and other components (if applicable) later.

Install Data Updater

- 1. Navigate to the downloaded EventPro.EPDataUpdater.Setup.exe and double-click to run it.
- 2. The installation wizard will begin. Click Next to continue.

n EventPro Data Updater Setu	nb X
29	Welcome to the EventPro Data Updater Setup Wizard
	The Setup Wizard will install EventPro Data Updater on your computer. Click "Next" to continue or "Cancel" to exit the Setup Wizard.
	< Back Next > Cancel

3. Select Installation Folder:

If you don't want to use the default path, you can enter a different folder path.

Click Next.

b EventPro Data Updater Setup —		×
Select Installation Folder	<	2
This is the folder where EventPro Data Updater will be installed.		- Con
To install in this folder, click "Next". To install to a different folder, enter it b "Browse".	below or click	
Folder:		
C:\PSI APPLICATIONS\EventPro Software\DataUpdater	Browse	
dvanced Installer		
< Back Next >	Cance	1
the next window, click Install.		
EventPro Data Updater Setup		\times
		×
EventPro Data Updater Setup Ready to Install The Setup Wizard is ready to begin the EventPro Data Updater installation		×
Ready to Install	×	×
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Ready to Install The Setup Wizard is ready to begin the EventPro Data Updater installation Click "Install" to begin the installation. If you want to review or change any		×
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Ready to Install The Setup Wizard is ready to begin the EventPro Data Updater installation Click "Install" to begin the installation. If you want to review or change any		×
The Setup Wizard is ready to begin the EventPro Data Updater installation Click "Install" to begin the installation. If you want to review or change any installation settings, click "Back". Click "Cancel" to exit the wizard.		×
Ready to Install The Setup Wizard is ready to begin the EventPro Data Updater installation Click "Install" to begin the installation. If you want to review or change any		5

You may encounter a security warning, for which you may need to click Yes or OK.

5. When the installation completes, click **Finish** in the final window.

4.



6. Next, go to <u>Create New Client Database</u> 1851.

Create New Client Database

In most cases, an existing database will be prepared for you, containing information that has been converted from a previous database or added under the guidance of your EventPro Training & Implementation Specialist. That database will be sent to you so that you can restore it.

Before restoring the database, however, this process requires that you first **create a new database** with the EventPro Database Utility. The new database you are creating here is essentially a **placeholder**. Later, you will restore your existing database over this new "placeholder" database.

- 1. Run the **EventPro Database Utility Wizard** by selecting **EventPro Data Updater** from your **Start** Menu, or doubleclicking the **EventPro Data Updater application file** in the folder to which you installed it.
- 2. On the first page of the wizard, select Create a New Client Database, and click Next.



3. Target Database:

Enter the target database information.

n	B	11111111
EventPro	Database	Utility

Target Database

Enter the target database information.

Database Type	MS-SQL	•
Server	MYDBSERVER\SQLEXPRESS	
Authentication		
User name		
Password		
Database	EventProData	•
Settings		
Client I.D.	000000	
Cloud Data		
Database Data Type	Standard	-
License File	C:\PSI APPLICATIONS\EventPro 19\EventPro\Licence.ini	

- a. Database Type: Choose MS-SQL.
- b. Server: Enter the SQL Server Named Instance, identifying the network name of the computer plus the instance name you specified earlier when <u>installing SQL Server [175]</u> (*i.e.* "SQLEXPRESS").

It will look something like this: MYDBSERVER\SQLEXPRESS

- c. **Authentication**: Because Users will be connecting to the SQL Server Instance using **Windows Authentication**, leave this checkbox unselected.
- d. **Database**: **Type** in (*don't select from the drop-down*) the name of the new database you are creating, *e.g.* **EventProData**.

The Data Updater will create 2 databases:

- i. This named database (*i.e.* **EventProData**), over which you will later restore the existing, prepared database from your Training or Support Specialist.
- ii. An EventProMaster database to control licensing.
- e. Client I.D.: Typically, you would use your six-digit License ID for the Client I.D.
- f. Cloud Data: Leave this unselected, as you are performing a Network Install of EventPro.
- g. Database Data Type: From the drop-down list, choose Blank or Standard.

×

i. **Standard** means the database will be populated with some basic default data, namely Statuses, Titles, Communication References, Booth Types, Budget Types, Payment Types, Location Features, and Location Setup Types.

Clients typically choose **Standard**, as they find it easier than starting from a completely blank database that has no frame of reference. The pre-entered status, titles, *etc*. can easily be edited to suit your organization's terminology.

ii. Blank means a completely blank database, with no pre-entered data.

If you are planning to restore an existing database over this new database, it doesn't really matter which data type you select.

- h. License File: Click the ellipsis (...) and browse to your license file (Licence.ini). This is the license file you downloaded earlier 182.
- i. When you have entered all of the target database information, click Next.
- 4. In the last page of the wizard, click **Finish**.
- 5. Now, if you have an existing database that needs to be restored, proceed to **Restore Existing Database over New**

If you are starting from a new database - *i.e.* you do not have an existing database that was sent from your EventPro Trainer, you can skip to <u>Give Database Rights to Users</u> 1951.

Restore Existing Database over New

In most cases, an EventPro Training or Support Specialist will provide you with a **database** that has been converted from a previous database and/or filled with information that you have provided.

You need to restore that database to the SQL Server before proceeding with EventPro installation.

With this process, you will be restoring the existing database **over** the new "**placeholder**" database you just created in the previous step.

Typically, the database is sent as a .BAK file, which you can restore in SQL Server Management Studio (SSMS).

Ensure that the existing database is stored on the same machine as SQL Server.

1. Run SQL Server Management Studio.

You may have a different version of SQL Server Management Studio than that depicted below, but the functions and settings should be essentially the same.

2. In the **Connect to Server** dialog, ensure that the correct **Server name** is selected (Network Computer Name\Named Instance, *e.g.* MYDBSERVER\SQLEXPRESS).

Select either **Windows Authentication** or **SQL Server Authentication**. If you choose SQL Server Authentication, enter the **User Name** and **Password**.

(Remember that when <u>installing SQL Server</u> [178] earlier, you chose between **Windows Authentication** and **Mixed Mode (SQL Server + Windows Authentication)**, and set the password for the **sa** account.)

Click Connect.

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	모 토 Connect to Server		×		
		SQL Server			
	Server type:	Database Engine	~		
	Server name:	MYDBSERVER\SQLEXPRESS	~		
	Authentication:	Windows Authentication	~		
	User name:	MyVMD\Administrator	~		
	Password:	Remember password			
	E	Connect Cancel Help (Options >>		

3. In the **Object Explorer** panel of **Microsoft SQL Server Management Studio**, expand the Databases so that you can see **EventProData**.

Right-click on EventProData, and select Tasks > Restore > Database.

	r Management Studio		Quick Launch (Ctrl+Q)	×
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 H Replication H PolyBase H Management E XEvent Profile 	Tasks Policies Facets Start PowerShell Azure Data Studio Reports Rename Delete Refresh	Vulnerability Assessment		
< ✓ Ready	Properties	Back Up Restore Generate Scripts Extract Data-tier Application Deploy Database to Microsoft Azure SQL Database Export Data-tier Application Upgrade Data-tier Application Import Flat File Import Data Export Data Export Data	Database Files and Filegroups Transaction Log	

- 4. The **Restore Database** window appears.
- 5. Under **Source**, select **Device**, and click the ellipsis next to the field.
 - a. The Select Backup Devices form appears.

R 1	🕵 R	estore Database - EventProDa	ta			_		×	□ ×
File	🐼 No	backupset selected to be restore	ed.						
6 G	Select Ge File		🗊 Script 👻 😯 Help						⊁≞ÿ
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			Database: Destination					~	
÷			Database: Restore to:	EventProData			Timeline	~	
±		🗯 Select backup devices				- 0	×		
± ±		Specify the backup media and	l its location for your restore opera	ation.				t LSN	
		Backup media type:	File		~				
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	<u>View</u>								
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					OK Cancel	Help		p	
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b. Click the Add button. The Locate Backup File window appears.

	Database - EventProData					- 0	×	□ ×
File 🔞 No backu	pset selected to be restored.							
G Select a pa	ge 🕻	🕽 Script 👻 😯 Help						¥≞ÿ
Object & Options		Source						
Conne		O Database:					\sim	
	backup devices	Devices		-		×		
Specify th	e backup media and its locatio	n for your restore operation.				-		
Backup m	edia type: Fil	📔 Locate Backup File - MYI	DBSERVER\SQLEXPF	RESS				×
Backup m	edia:	Backup File location:	C:\PSI APPLICA	TIONS\EventPro Software\Da	C			
₹ € • • • • • • • • • • • • •	ROIT DIODEITIES	Windows Photo Windows Pota Windows Pota Windows Sideb Windows Sideb Windows Pota Windows Pota Windows Pota Windows Pota Windows Pota Windows Pota Windows Sol Server2017Me System Volume Info System Volume Info Windows File name: 000	ble Devices par rShell S vare ter tant dia	000000_Sample.bak	Backup Files	s(*.bak;*tm;*.	log) Cancel	~

- c. In the **Locate Backup File** window, locate the existing database that your EventPro Trainer sent to you, which should have been saved on the same machine as SQL Server, as noted above.
- d. Click **OK** in the **Locate Backup File** window, and again in the **Select Backup Devices** window to return to the **Restore Database** form.
- 6. Back in the **Restore Database** form, under **Destination**, the **Database** should be set to **EventProData**.

. <mark></mark> N	💀 Restore Database - EventProDat	3	-		х		×
File	🐼 No backupset selected to be restore	ł.					_ !!
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Conne		O Database:			~		
		Device:]			
		Database:			~		
		Destination					
		Database: EventProData			~		
		Restore to:		Timeline			
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±		Restore Name Component Type Server Database Position First LSN Las	st LSN Ch	ieckpoint L	.SN		
+							
	Connection						
	HY MYDBSERVER\SQLEXPRESS [PSI\Sample]						
	View connection properties						
	Progress						
	One Done	<	Verify Ba	ckup Media	a		
		ОК	Cancel	Help			
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7. Ensure that you have selected the correct Source and Destination.

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ect & General Files Options	Source -	ahase.								~	
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		Database		00000				-		~	
	Destinatio	n —									
+	Database: EventProData									~	
+ +	Restor	Restore to: The last backup taken (Tuesday, April 16, 2019 5:05:15 PM) Timeline								meline	
•	Restore p	lan —									
+		sets to res									
+	Restore	Name	Component Database	Type Full	Server SRVR\SQL02	Database 000000	Position	First LSN	0000119800	Last 037 167	
			Database	- Cir	SATAGOLOL			1070000			
Connection											
Image: WYDBSERVER\SQLEXPRESS [PSI\Sample]											
View connection properties											
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							ОК	Car	ncel	Help	

8. In the left **Select a Page** panel, click on **Options**. Select the first checkbox, **Overwrite the Existing Database** (WITH REPLACE). (In this situation, we want the restored, prepared database from EventPro Training/Support to overwrite the blank "placeholder" database that we created in the previous step.)

- 🛃	Microsoft SQL Server Management	Studio		Quick Launch (Ctrl+Q)	ρ.	- 0	x	
File	💀 Restore Database - EventProDa	ta		-		×		
š G	Ready						÷	
0 1	Select a page	🗊 Script 👻 😯 Help						
Obje Cor	e General Files Options		tabase (WITH REPLACE) settings (WITH KEEP_REPLICATION) stored database (WITH RESTRICTED_USE	R)				
		Recovery state:	RESTORE WITH RECOVERY			~		
		Standby file:	C:\Program Files\Microsoft SQL Se	erver\MSSQL14.SQLEXPRESS\N	ISSQL\E			
	6	Leave the database ready to	use by rolling back uncommitted transaction	s. Additional transaction logs canr	not be restore	d.		
	C G G G	Tail-Log backup Tail-Log backup Take tail-log backup befor Leave source data (WITH NORECOV Backup file: Server connections	ore restore abase in the restoring state (FRY) C:\Program Files\Microsoft SQL Se	erver\MSSQL14.SQLEXPRESS\M	1SSQL\E			
	Connection	Close existing connection	ns to destination database					
Connection Image: Connection properties Image: Connection properties Prompt Image: Connection properties Prompt before restoring each backup Image: Connection properties Image: Connection properties								
	Progress							
	Done			OK Cancel	Hel	ρ		
	Ready							

- 9. Click **OK** at the bottom of the **Restore Database** dialog to begin the restore process.
- 10. When the restore is complete, you should receive a success dialog. Click OK.
- 11. You can now proceed to Give Database Rights to Users 1951.

Give Database Rights to Users

1. If you are not already in SQL Server Management Studio, run it now.

Ricrosoft SQL Server Management Studio			Quick Launch (Ctrl+Q)	₽ _ □	×
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	🖵 Connect to Server		×		
		SQL Server			
	Server type:	Database Engine	~		
	Server name:	MYDBSERVER\SQLEXPRESS	~		
	Authentication:	Windows Authentication	~		
	User name:	MyVMD\Administrator	~		
	Password:	Remember password			
	l I	Connect Cancel Help	Options >>		
	L				
Ready					

- a. In the **Connect to Server** dialog, ensure that the correct **Server name** is selected (Network Computer Name\Named Instance, *e.g.* MYDBSERVER\SQLEXPRESS).
- b. Select either **Windows Authentication** or **SQL Server Authentication**. If you choose SQL Server Authentication, enter the **User Name** and **Password**.

(Remember that when <u>installing SQL Server</u> 178) earlier, you chose between **Windows Authentication** and **Mixed Mode** (SQL Server + Windows Authentication), and set the password for the **sa** account.)

- c. Click Connect.
- 2. In the Object Explorer panel of SQL Server Management Studio, go to Security > Logins.
- 3. Right-click the Logins folder and select New Login.

🔀 Microsoft SQL Server Management Studio	Quick Launch (Ctrl+Q)
File Edit View Project Tools Window Help	
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Object Explorer	
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😑 😸 MYDBSERVER\SQLEXPRESS (SQL Server 14.0.1000 - PSI	
🕀 🔚 Databases	
E Security	
⊕ <mark>⊫ Logins</mark> ⊕ ≡ Server New Login	
terest Credet Filter ►	
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Management Arrow XEvent Profiler	
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□ Ready	

4. The Login - New form appears.

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Object Exp Connect		Login name: Windows authentication SQL Server authentication Password: Confirm password: Specify old password Old password: Enforce password policy Enforce password expira				Search		
+ + +	Connection	 User must change passw Mapped to certificate Mapped to asymmetric key 	vord at next login		~			
€	Server: MYDBSERVER\SQLEXPRESS Connection: MyVMD\Administrator Wew connection properties	Map to Credential Mapped Credentials	Credential	Provider	~	Add		
	Progress Ready	Default database: Default language:	master <default></default>		~	Remov	e	
<					ОК	Canc	el	

- 5. Select the radio button next to **Windows Authentication** to indicate that you want **Users** to connect to the SQL Server Instance using **Windows Authentication**.
- 6. You now need to find the EventPro Security Groups that you created back in <u>Create Active Directory Groups for</u> Integration 163.
 - a. Click the Search button next to the Login Name field. The Select User or Group window appears.
 - b. Click the **Object Type** button. In the **Object Types** window, select the **Groups** checkbox and click **OK**.

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Object Types	
Object Types	×
Select the types of objects you want to find. Object types: Other objects Select the types of objects you want to find. Object types: Other objects Select the types of objects you want to find. Object types: Other objects Select the types of objects you want to find. Object types: Select the types of objects you want to find.	
abase:	
OK OK	Cancel
abase:	

c. Back in the Select User or Group window, click the Locations button.

Select the correct **Domain** in the **Locations** window, and click **OK**. This is the Domain in which you created the EventPro User Security groups.

🔀 Mici	- Login in					_		×	□ ×
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8 ₩ \ ¥	 Server Role User Mappi Securables 	ing	Login name:				Search		, – ÷
Object Exp Connect •	- Status		 Windows authentication SQL Server authentication 						
			Password: Confirm password:						
E =	Select User	or Group		×					
÷	Select this o User, Group	bject type: o, or Built-in security	principal	Object Types					
+	Locations	5			<				
主 📫	C Select the	location you want t	o search.			~			
± =	Location:	MYDBSERVER				~	Add		
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	L.								
	Prc					~	Remove		
				OK Cancel]	~			
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d. Finally, enter a search term in the bottom field of the **Select User or Group** window, *e.g.* **EventPro**, and click the **Check Names** button.

🛃 Mici 📱 Login - New				_		□ ×
File Edit Select a page	🖵 Script 🔻 😯 Help					≠ ≞‡
Server Roles	Login name:				Search	
Object Exp Status	Windows authentication					
Connect •	SQL Server authentication					
🖃 🗟 PS	Password:					
	Confirm password:					
	Specify old password					
÷.	Old password:					
Ŧ	Enforce password policy					
±	 Enforce password expirat 	tion				
+ =	User must change passw					
Select User, Service Account	;, or Group	×		\sim		
• C Select this object type:				\sim		
User, Group, or Built-in security	y principal	Object Types		~	Add	
From this location:			rovider			
MyVMD.local		Locations				
Enter the object name to select	t (examples):					
EventPro		Check Names				
Pi					Remove	
Advanced		OK Cancel		~		
-48*	Default language:	<default></default>		~		
	an ingeogo.					
<				ОК	Cancel	
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e. If there are multiple matching results in the **Multiple Names Found** window, select the group(s) for which you want to assign database rights, and click **OK**. In this example, we will select the **EventPro Users** security group.

As you will recall from above, you may have created a broad EventPro Users Security Group with multiple department-based sub-groups nested within it. At this point, assuming you want all the departmental groups to have the same access rights to the database, you can just select the main **EventPro Users** group to encompass all of the departmental sub-groups within.

🔀 Mice 📱 Login - New		_		□ ×
File Edit Select a page				≠ ≞ ‡
Server Roles			Search	
Object Exp Securables Status Windows authentication				
Connect SQL Server authentication Ref Password:				
Confirm password:	_			
Select User, Service Account, or Group	<			
Image: Select this object type: Image: I				
H Multiple Names Found	×	1		
		~		
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PSI Matching names: Cor Name Logon Name (pre-Windows 2000) PSI	E-Mail Address			
PS EventPro Administrators EventPro Administrators VII EventPro Users EventPro Users				
Progress			Remove	
		~		
< <	>	~		
<	OK Cancel	ОК	Cancel	1

- f. Click **OK** in the **Select User or Group** form to return to **Login New**.
- 7. The Login Name will now be populated with the group you selected.

🛃 Mici	E cogin new				_	X	ı x
File Edit	Select a page	🖵 Script 🔻 😯 Help					a (
8 ¥ ¥	 Server Roles User Mapping 	Login name:	MyVMD\EventPro Users			Search	
Object Exp	 Securables Status 	Windows authentication					
Connect •		SQL Server authentication					
🖃 🐻 PS		Password:					
± 🗐		Confirm password:					
= =		Specify old password					
±		Old password:					
ŧ		Enforce password policy					
÷		 Enforce password expiration 	tion				
±		User must change passv	vord at next login				
± =		 Mapped to certificate 			\sim		
÷ 🗐	Connection	 Mapped to asymmetric key 			\sim		
+ F	Server: MYDBSERVER\SQLEXPRESS	Map to Credential			~	Add	
± ±	Connection:	Mapped Credentials	Credential	Provider			
	MyVMD\Administrator						
	Progress					Remove	
	Ready	Default database:	EventProMaster		~		
	New Y	Default language:	<default></default>		~		
		berault language.					
<				[ОК	Cancel	
🗇 Ready							

- 8. Ensure that the **Windows Authentication** radio button is selected, which you would have done earlier.
- 9. Near the bottom, you can set the **Default Database** to **EventProMaster**.
- 10. Next, in the Select a Page panel of the Login New form, select the User Mapping page.

Select the Map checkboxes for the EventProData and EventProMaster databases.

You then need to set the $\ensuremath{\textit{database}}$ role $\ensuremath{\textit{membership}}$ for each database.

a. Select **EventProMaster** in the top grid, and select the checkboxes next to **db_datareader** and **db_datawriter** below.

. <mark>.</mark>	📕 Login - New					_		×	×
File	Select a page General	Script	🔻 😯 Help						
8 ⋕	 Server Roles User Mapping 	Users map	pped to this login:						Ĺ
Object	 Securables Status 	Map	Database	User	Default Schema				
Conne	- Status	\checkmark	EventProData	MyVMD\EventPro Users					
			EventProMaster	MyVMD\EventPro Users					
= 🗟			master						
Ŧ			model						
			msdb						
			tempdb						
+	Connection								
÷	Server: MYDBSERVER\SQLEXPRESS		account enabled for: EventProMaster role membership for: EventProMaster						
	Connection: MyVMD\Administrator	db_ba	ccessadmin ackupoperator						
	View connection properties	db_da	atareader						
		db_da	atawriter Iladmin						
		db_de	enydatareader						
	Deserves		enydatawriter						
	Progress Ready	☐ db_ov ☐ db_se ☑ public	curityadmin						
<						OK	Can	cel	

b. Next, select **EventProData** in the top grid, and select the checkboxes next to **db_datareader** and **db_datawriter** at the bottom.

	Login - New					-		×	×
File	Select a page	Script	🔻 🕜 Help						 ∓
8 † 1	 Server Roles User Mapping 		oped to this login:						
Object	 Securables Status 	Map	Database	User	Default Schema				
Conne			EventProData	MyVMD\EventPro Users					
		\checkmark	EventProMaster	MyVMD\EventPro Users					
= 🗟			master						
÷			model						
			msdb						
			tempdb						
*	Connection Server: MYDBSERVER\SQLEXPRESS		account enabled for: EventPro						
	Connection: MyVMD\Administrator	db_ba	ccessadmin ickupoperator						
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		⊘ db_da	tawriter Iladmin						
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	Progress	db_ov	vner curityadmin						
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- c. You also need to give the db_owner right to at least one Login group, since the db_owner right to EventProData is required for updating EventPro Software with new releases. How you assign the db_owner right depends on who will be performing software updates.
 - i. Some organizations want only the Administrator to update EventPro Software. In this case, you would typically have an **EventPro Administrators Security Group** that is separate from an **EventPro Users Security Group**. You would give **db_owner** to the **EventPro Administrators Login** only.
 - ii. On the other hand, some organizations allow any User administrator or otherwise to update EventPro Software. In this case, you would typically create an EventPro Users Group with the EventPro Administrators nested as a sub-group within it. You would then assign db_owner to the EventPro Users Login, thereby giving the ability to update the software to all Users, regular or administrator.

To review how you set up Active Directory Groups, see <u>Create Active Directory Groups for Integration</u> 1631.

- 11. When you are done with the Login edit form, click OK. The Login will be added under Security > Logins.
- 12. If necessary, you can add another New Login.

Again, it depends on whether you have the EventPro Administrators Security Group set up as a separate group or nested within the **EventPro Users Security Group**.

If the EventPro Administrators Security Group is separate, you now need to create a **Login** for it, repeating the steps above and assigning the db-owner right to EventProData to the EventPro Administrators group.

13. When you are done creating Logins in the SQL Server Management Studio, you can exit it, and proceed to Install EventPro to Server 2001.

Install EventPro to Server

Because you are performing a **Network Installation**, this installation process must first be done from the **Application Server**.

1. Navigate to the EventPro.Win.Setup.exe you downloaded earlier [182], and double-click to run it.

Depending on the security settings on your network or computer, you may receive a warning about installing software, and you may need to click **Run** or **OK** to continue the installation.

2. The installation wizard will begin. Click Next to continue.

। EventPro Setup	×
-2 ⁴	Welcome to the EventPro Setup Wizard
	The Setup Wizard will install EventPro on your computer. Click "Next" to continue or "Cancel" to exit the Setup Wizard.
	< Back Next > Cancel

3. End-User License Agreement:

- a. Please read the EventPro Software Program License Agreement.
- b. Select **I ACCEPT** or **I DO NOT ACCEPT** below. If you do not accept the license agreement, you cannot continue with the installation process.
- c. Click **Next** to continue.

nd-User License Agreement		
Please read the following license	e agreement carefully	
EventBre Sef	huara Brogram	Liconco
	tware Program Agreement	License
	LLOWING TERMS AND	CONDITIONS
BEFORE INSTALLING TH INDICATES YOUR AC	IS SOFTWARE. INSTALL CEPTANCE OF THESE O NOT AGREE WITH TH	ATION OR USE TERMS AND
BEFORE INSTALLING TH INDICATES YOUR AC CONDITIONS. IF YOU D	IS SOFTWARE. INSTALL CEPTANCE OF THESE O NOT AGREE WITH THE	ATION OR USE TERMS AND

4. Installation Type: Choose Server Installation, and click Next.

(Review Installation Types above, if necessary.)

🐁 EventPro Setup			×
Installation Type Select the type of installation to perform.			5
O Stand Alone Installation			
 Server Installation 			
O Workstation Installation			
Advanced Installer			
	< Back	Next >	Cancel

5. Installation Options: Select the checkbox next to Use Active Directory to log into EventPro.

Click Next.

EventPro Setup Installation Options These are options for running EventPro.	×
☑ Use Active Directory to log into EventPro. (This requires a license that supports active direct	ory.)
Advanced Installer	lext > Cancel

6. Select Installation Folder:

- a. You can use the default **Program Files** path or enter a new path for the **Installation Folder**.
- b. If you do enter a different folder path, take note of it, as you will need it again for the workstation installs.
- c. Click Next.

👼 EventPro Setup	_		×
Select Installation Folder		5	Ve
This is the folder where EventPro will be installed.			
To install in this folder, click "Next". To install to a different folder, en "Browse".	ter it b	elow or clic	k
Folder:			
C:\Program Files (x86)\EventPro Software\EventPro\		Browse	
Advanced Installer	>	Can	cel

7. SQL Database:

- a. Enter the SQL Server Named Instance, identifying the network name of the computer plus the instance name you specified earlier when installing SQL Server (*i.e.* "SQLEXPRESS"). It will look something like this:
 MYDBSERVER\SQLEXPRESS.
- b. Select the radio button next to **Windows Authentication**. (As you will recall from <u>above</u> [198], you set up the **SQL Server Logins** to use **Windows Authentication**.)
- c. Click Next.

둸 EventPro Setup	×
SQL Database	
Configure SQL Co	nnection
Before updatin backup of the o	g an existing database you should first make sure you have a latabase.
Server:	MYDBSERVER \SQLEXPRESS
Authentication:	Windows Authentication
	○ SQL Authentication
Username:	Administrator
Password:	
Advanced Installer —	
	< Back Next > Cancel

- 8. The Installer will test the connection to the database before you can proceed with the installation.
- 9. When the connection test is completed, click **Install**.

EventPro Setup	<
Ready to Install The Setup Wizard is ready to begin the EventPro installation	5
Click "Install" to begin the installation. If you want to review or change any of your installation settings, dick "Back". Click "Cancel" to exit the wizard.	
Advanced Installer	

Depending on the security settings on your network or computer, you may encounter a warning, and you may need to click **Yes** or **OK** to continue the installation.

10. In the final window, click **Finish**.



11. Now the Server Installation process is complete. Before moving on to Workstation Installations, you first need to <u>Share</u> <u>the Installation Folder</u> [21].

Share Installation Folder

On the server to which you just installed EventPro, locate the folder in which EventPro was installed. By default, it would be **C: \ProgramFiles (x86)\EventPro Software\EventPro**, but you may have selected a different folder path in the <u>Select</u> Installation Folder [208] page of the installation wizard.

The exact process of sharing the folder will vary, depending on the network environment in which you are working. The instructions below provide an example, but you may have to consult the documentation for your network and operating system to determine how to share the Installation Folder from the Application Server to Workstations.

1. Right-click on the **EventPro** folder, and select **Share With > Advanced Sharing**.

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		iew V	
ecycle Bin		ke (C:) ► Program Files (x86) ► EventPro Software ► ✓ ♥ Search EventPro Software ►	
Recycle bill			
	Downloads	Name Date modified Type Size	
	🔛 Recent places	EventPro	
	💷 This PC	Open Open in new window	
	Desktop		
	Documents	Share with Advanced sharing	
	\rm Downloads	Restore previous versions	
	🚺 Music	Include in library Pin to Start	
	📔 Pictures		
	📔 Videos	Send to	
	📥 Local Disk (C:)	Cut	
	PerfLogs	Сору	
	Program Files	Create shortcut	
	Program Files (x86)	Delete	
	Common Files	Rename	
	EventPro	Properties	
	Internet Explorer		
	Microsoft.NET		
	Windows Mail		
	Windows NT		
	WindowsPowerShell		
	Users	×	
	1 item 1 item selected		
			 Ro Ra US 2015

The folder's Properties will appear. Initially, the Sharing tab will indicate that the folder is Not Shared.
 Click the Advanced Sharing button.



3. In the Advanced Sharing dialog, select the checkbox next to Share this Folder.

You can leave the Share Name as EventPro.
Recycle Bin Seneal Sharing Security Previous Versions Customize Network File and Folder Sharing EventPro Software VerterPro Network Path: Advanced Sharing Stare Stare Stare Advanced Sharing With Distare Advanced Sharing With Distare Advanced Sharing With Distare Advanced Sharing With Distare <tr< th=""><th>□ x ~ ? ~</th></tr<>	□ x ~ ? ~
Image: WBOXSVR Image	12:42 PM

4. Click the Permissions button to view the Share Permissions for the EventPro folder.
Users installing EventPro to their workstations require Read and Change permissions to this folder.
Click OK, and OK again to return to the EventPro folder Properties.

Recycle Bin	EventPro Properties General Sharing Security Previous Versions Cus Network File and Folder Sharing EvertPro Not Shared Network Path: Not Shared Share Advanced Sharing Set custom permissions, create multiple shares, and advanced sharing options. @ Advanced Sharing Close Cancel	Advanced Sharing	Share Permissions	Software P Size
		₩ VBOXSVR ₩ WINSRVR2012 1 item 1 item selected		ENG 1:15 PM
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5. Go to the **Security** tab in **EventPro Properties**, and click the **Edit** button to open the **Permissions for EventPro** window.

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ecycle Bin		Disk (C:) ▶ Program Files (x86) ▶ EventPro Software	× ¢	Search EventPro Sof		
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6. In **Permissions for EventPro**, click the **Add** button to open the **Select Users, Computers, Service Accounts, or Groups** window.

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	Downloads ^ Name	Date modified Type Size
	EventPro	EventPro Properties
	🖳 This PC	General Sharing Security Previous Versions Customize
	Desktop	Object name: C:\Program Files (x86)\EventPro Software\EventPr
	Downloads	Group or user names:
	₩ Music E Pictures	REFACE OWNER
	Videos	SYSTEM Security Security Object name: C\Program Files k86\\EventPro Software\EventPr
	📥 Local Disk (C:) DerfLogs	Collect name: C:\Program Hies (x86)\EventPro Software\EventPr To change permissions, click Edit. Group or user names:
	Program Files Program Files (x86)	Permissions for ALL
	Common Files	Full control
	EventPro Software	Modify & Administrators (MYVMD\Administrators) Read & execute & Users (MYVMD\Users) v
	Internet Explorer	List folder contents
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	1 item 1 item selected	Uist folder contents
		OK Cancel Apply
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7. In the **Select Users, Computers, Service Accounts, or Groups** window, ensure that **Users** and **Groups** are selected under **Object Types**, and that the **Location** is correct (*i.e.* the Domain in which you created the EventPro User Security groups).



- х | 🛃 🚺 = | EventPro Software Home Share View v ? **Recycle Bin** (⇐) ⇐ ↑ ↓ ≪ Local Disk (C:) ► Program Files (x86) ► EventPro Software ✓ ♂ Search EventPro Software Q x Size Name **EventPro Properties** 쑦 Favorites Desktop EventPro General Sharing Security Previous Versions Custor 退 Downloads х Recent places Ob Permissions for EventPro Security 💻 This PC 膧 Desktop Object n X Select Users, Computers, Service Accounts, or Groups Documents Group o 退 Downloads 🖶 ALL Select this object type Music То SR CR Users, Groups, or Built-in security principals Object Types... Pictures SYS SYS Per AP From this location Sec. Videos MyVMD.local Locatio & Eve Local Disk (C:) x Multiple Names Found Enter the object name: 🥸 CD Drive (D:) VirtualBox Guest SharedVM (\\vboxsrv) (E;) More than one object matched the name "eventpro". Select one or more names from this list, or, reenter the name. APPI ICA 📬 Network Full o Matching names Advanced... For clic Modify Logon Name (pre-Windo... E-Mail Address Description In Fol Read and and a 🔼 EventPro Admir EventPro Administrators MyVN List folder contents Read 1 item 1 item selected OK ОК Cancel ENG 3:00 PM , de $\mathbf{\Sigma}$ - 😼 🖬 🕼 US 2015-11-09

Type EventPro in the field below and click Check Names.

In the **Multiple Names Found** window, select the correct Security Group(s). As noted before, you may have nested the EventPro Administrators group within the EventPro Users group, or created the two groups separately. Whichever way you chose to create your security groups, just ensure that you select the correct groups when assigning rights and permissions.

Click OK.

Click OK in the Select Users, Computers, Service Accounts, or Groups window.

8. In **Permissions for EventPro**, select the relevant security group, and ensure that the **Allow** checkboxes for **Read & Execute**, **List Folder Contents**, and **Read** are selected.

Users will also require Write permissions for the installation process, in order to write to the directory.

For normal operation, Users do not require **Modify** and **Write** permissions. However, if Users do not have **Modify** and **Write** permissions, they will not be able to automatically update EventPro on their workstations; they would require assistance from an Admin User. If you want Users to be able to automatically update EventPro themselves, they require **Modify** and **Write** permissions.

Click OK, and OK again.

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		OK Cancel Apply
		▲ 😼 🕼 🕩 ENG 10:21 AM

9. Now that you have shared the folder with the EventPro Users, you can proceed to Install EventPro to Workstations 217.

Install EventPro to Workstations

- 1. Login to the **Workstation** computer as the Administrator.
- 2. Navigate to the **EventPro.Win.Setup.exe** you <u>downloaded earlier</u> [182], and double-click to run it.

Depending on the security settings on your network or computer, you may receive a warning about installing software, and you may need to click **Run** or **OK** to continue the installation.

3. The installation wizard will begin. Click **Next** to continue.



4. End-User License Agreement:

- a. Please read the EventPro Software Program License Agreement.
- b. Select **I ACCEPT** or **I DO NOT ACCEPT** below. If you do not accept the license agreement, you cannot continue with the installation process.
- c. Click Next to continue.

👼 EventPro Setup	×
End-User License Agreement	
Please read the following license agreement carefully	
	•
EventPro Software Program Lic	ense
Agreement	
READ THE FOLLOWING TERMS AND CO BEFORE INSTALLING THIS SOFTWARE. INSTALLATION	
INDICATES YOUR ACCEPTANCE OF THESE TE	
CONDITIONS. IF YOU DO NOT AGREE WITH THEM,	PROMPTLY
I accept the terms in the License Agreement	
\bigcirc I do not accept the terms in the License Agreement	
Advanced Installer	
< Back Next >	Cancel

5. Installation Type:

- a. This time, choose Workstation Installation.
- b. Click Next.

👼 EventPro Setup	×
Installation Type	
Select the type of installation to perform.	
O Stand Alone Installation	
○ Server Installation	
Workstation Installation	
Advanced Installer	
< Back Next >	Cancel

6. Installation Options:

- a. Select the checkbox next to Use Active Directory to log into EventPro.
- b. Click Next.



7. Select Installation Folder:

- a. You can use the default **Program Files** path for the Installation Folder, or enter a different folder path, if you prefer.
- b. Click Next.

ᡖ EventPro Setup	_		×
Select Installation Folder		<	V
This is the folder where EventPro will be installed.		X	
To install in this folder, click "Next". To install to a different folder, ent "Browse".	er it be	low or clic	k
Folder:			
C:\Program Files (x86)\EventPro Software\EventPro\		Browse	
Advanced Installer			
< Back Next >	,	Cano	cel

8. SQL Database:

- a. Enter the **SQL Server Named Instance**, identifying the network name of the computer plus the instance name you specified earlier when installing SQL Server (*i.e.* "SQLEXPRESS"). It will look something like this: **MYDBSERVER\SQLEXPRESS**.
- b. Select the radio button next to **Windows Authentication**. (As you will recall from <u>above</u>, you set up the **SQL Server Logins** to use **Windows Authentication**.)
- c. Click Next.

둸 EventPro Setup	×
SQL Database	- For
Configure SQL Co	nnection
Before updating backup of the d	g an existing database you should first make sure you have a atabase.
Server:	MYDBSERVER \SQLEXPRESS
Authentication:	Windows Authentication
	○ SQL Authentication
Username:	
Password:	
Advanced Installer —	
	< Back Next > Cancel

9. The Installer will test the connection to the database before you can proceed with the installation.

10. Select Server Path:

- a. Enter the path to the installation on the server. This is the <u>Installation Folder</u> you selected during the Server Installation, and **shared** with the EventPro User Group in the <u>previous step</u> [211].
- b. Click the **Browse** button, locate that folder on the Network, and click **Select Folder**.
- c. Click Next.

EventPro Setup		×
Select Server Path		
Enter the path to the installation on the ser	ver.	A CO
To install in this folder, click "Next". To insta "Browse".	ll to a different folder, e	nter it below or click
Server Folder:		
		Browse
Advanced Installer	< Back Next	> Cancel

11. Ready to Install: Click Install.

The EventPro Setup X
Ready to Install
The Setup Wizard is ready to begin the EventPro installation
Click "Install" to begin the installation. If you want to review or change any of your installation settings, dick "Back". Click "Cancel" to exit the wizard.
Advanced Installer
< Back Sack Cancel

Depending on the security settings on your network or computer, you may encounter a warning, and you may need to click **Yes** or **OK** to continue the installation.

12. In the final window, click Finish.



- 13. Now the workstation installation process is complete.
- 14. Repeat this process on the other workstations in your network.

- 15. You may want to create an **EventPro shortcut** on each User's desktop so that they can easily locate and run EventPro.
- 16. When you are done installing EventPro to the Server and Workstations, you can proceed to <u>Admin First Login to</u> <u>EventPro</u> 223.

Admin First Login to EventPro

The first User to login to EventPro will become an **Administrator**, as long as that User has sufficient **Rights** to the **SQL Server**.

1. Run EventPro.

NOTE: If you are running Windows in a domain environment, and use a domain user account to log on to a Windows Server 2012-based domain controller, you may receive Error 1301. This is not an EventPro error. It is a **Windows bug** wherein certain security identifiers (SIDs) cannot be mapped.

The hotfix for this bug can be found on the Microsoft Support website, KB2830145. Download and run the hotfix. Note that the hotfix will not run if Windows Update Services are set to disabled.

EventPro		×
An An	e following error occurred: n error (1301) occurred while enumerating the groups. The group's SID uld not be resolved.	* *
	OK	
	Copyright © 2015 Profit Systems Inc.	

After you run the hotfix and restart the computer, you can run EventPro again.

- 2. The **EventPro** program opens.
- 3. Click My Details under My Workplace in the left-hand navigation pane. Your Security User edit form opens.

Take note of some of the details that have been entered automatically, using the properties of the Active Directory User:

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My Workplace <	凝 Administrator@MyVMD 🛛 🗙								*
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- a. You will note that you are logged in as your **Active Directory User Logon Name**, which is also your **EventPro User Name**.
- b. In the **Account** field, a **Contact** has been created with the details from the Active Directory User.
- c. Under the **Security Roles** tab, you have been assigned the **Administrator** Security Role.
- 4. You can edit your Security User details and Contact information in EventPro. However, note that there are some limits to what you can edit in EventPro when using Active Directory Integration. Some changes need to be made back in Active Directory. See <u>Active Directory/EventPro Sync</u> ^[230] below.
- 5. As the Administrator, there are several actions you may want to complete before other Users log into EventPro:
 - a. <u>Create Internal Company</u> 224: Enter your internal **Company** in EventPro's CRM, and attach your Contact record to the Company (if applicable)
 - b. <u>Set Default Account</u> 225: Set your Company as the **Default Account** in Events System Settings (if applicable).
 - c. <u>Edit Administrator Security Role</u> Adjust the Administrator Security Role so that it only applies to Administrators.
 - d. <u>Create Security Roles</u> 227: Create additional Security Roles for other Users.
- 6. When you have finished the steps described above, you can allow other Users to log into EventPro. See <u>User First</u> <u>Login to EventPro</u>

Create Internal Company

With Active Directory Integration, when a User first logs into EventPro, the program will automatically create a linked **Contact** for the User with information from the Active Directory User properties.

If you are the first person to log into EventPro, a Contact will be created from your **Active Directory User properties**, but that Contact will **not** be attached to a **Company**.

You don't need to create a company for your organization or attach contacts to a company, but you may find it useful for internal processes. If you want your internal Users/Contacts to be attached to a Company in EventPro's CRM, you need to add your organization as a Company.

- 1. Follow the instructions under Company/Contact Management (CRM) > Add New Company (Company Edit Form) in the <u>EventPro User Manual</u> to add your organization as a Company in EventPro's CRM.
- 2. You can then link your Contact to the Company, referring to Add New Company > Company Contacts > Link Existing Contact in the EventPro User Manual.
- When other Users/Contacts are added to EventPro, they can also be linked to the internal Company. This will be done automatically if you set your Company as the Default Account under EventPro Setup > Events > System Settings. See the next step: <u>Set Default Account</u> ²²⁵.

Set Default Account

This is an optional step, and may not be applicable to your organization.

If you entered your organization as a **Company** in EventPro's CRM (<u>see above</u> 224), you have the option to set your Company as the **Default Account** in **Event System Settings**. Doing so will make your Company the default Event Client each time you start an event booking.

Also, setting your Company as the **Default Account** will cause the Contacts of newly logged-in Users to be automatically be attached to your Company, pulling in their company Positions from the User Job Title in Active Directory.

If you do not want to set your Company as the Default Account, you can manually link the Contacts to a Company after Users log in for the first time.

1. To set your **Company** as the **Default Account**, go to **EventPro Setup > Events > System Settings > People**.

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Home Vie	ew Tools	^
Effective Date 1/1/2018: 2018	Rates Modify Refresh Rest View Close	
Setup <	♣ Administrator@MyVMD	-
EventPro Setup EventProConnect Setup Virtual Assistant Setup User Field Definition	Image: Second	4 >>
Model Management	Dates/Times People Wizard Options Miscellaneous Function Options	
# Sequence Numbers	Automatically assign events to user creating the booking Default Event Manager: RJV	- 🖶
Security		- E
	Default Account: *EP Event Venue	- 📑
 [♠] My Workplace [●] Events [●] Lodging [●] CRM/Sales [●] CRM/Sales [●] Communications [●] Tasks [●] Finance [●] Reports [●] ···· [●] ···· [●] ···· [●] ···· [●] ···· 		

- 2. Search for and select your internal **Company** from the **Default Account** drop-down.
- 3. Click the **Save** icon at the top of the **System Settings** tab.

- 4. You can now exit this area of Setup.
- 5. Proceed to Edit Administrator Security Role 226.

Edit Administrator Security Role

This is an **important step** that is required for most organizations.

As you may have noticed, when you first logged into EventPro, you were automatically assigned the Administrator Security Role.

The Administrator Security Role will be automatically assigned to any User who logs into EventPro, until you edit it.

If you don't want everyone in EventPro to have Administrator rights - which is likely the case - you need to specify who should be assigned this role.

- 1. In EventPro, go to Setup > Security > Roles.
- 2. Double-click the Administrator role record to open the Administrator Security Role edit form.

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Setup <	Security ×		
 EventPro Setup EventProConnect Setup Virtual Assistant Setup User Field Definition Model Management Sequence Numbers Security 	Jusers Roles Ware Role Type Administrator Administrator		×
	Active Directory Groups: Everyone Role Type: Administrator		*
🏠 My Workplace	Login User Name 🔺 User Code Account Inactive		
📌 Events	Administrator@MyVMD Administrator@MyVMD Kirk, Allison		
🔳 Lodging			
CRM/Sales			
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- 3. Looking at the **Active Directory Groups** field at the top of the edit form, you will see that the **Administrator Security Role** is assigned to "**Everyone**".
- 4. Use the arrow to open the drop-down.
 - a. Unselect the "Everyone" checkbox.
 - b. Select the checkbox next to the EventPro Administrators Active Directory Group.
- 5. Save and Close the Security Role edit form.
- 6. Now the Administrator Security Role will only be assigned to Users who are part of the **EventPro Administrators Active Directory Group**.

 Now you need to create other Security Roles and assign them to the relevant Active Directory Groups, so that when other Users log into EventPro, they are assigned to the correct EventPro Security Roles. Go to <u>Assign Security</u> <u>Roles to AD Groups</u> 227.

Assign Security Roles to AD Groups

Now you need to assign Security Roles to the other Active Directory Groups besides Administrators. That way, when other Users log into EventPro, they will be assigned to the correct EventPro Security Roles based on their Active Directory Group membership.

1. In EventPro, go to Setup > Security > Roles.

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🐉 Virtual Assistant Setup	Name 🔺 Role Type		
🍰 User Field Definition	Administrator Administrator		
🧬 Model Management	Catering Other		
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2. There are several different Role Types: Administrator, Default, Other, and Online.

(Review Security Setup > Roles (Security Permissions) > Create Security Roles > Role in the <u>EventPro User</u> <u>Manual</u>.)

- 3. The **Administrator Security Role** should be assigned to the EventPro Administrators Active Directory Group only, as noted <u>above</u> 226. Typically, very few Users should get this Security Role, as it allows full access to the program.
- 4. How you set up the other Security Roles will depend on whether all the other Users, besides Administrators have the same or different security permissions.
 - a. If all other Users besides Administrators will have the same security rights in EventPro, you could use the **Default Security Role** for your general EventPro Users Active Directory Group.
 - b. However, if you want to further **compartmentalize** User security permissions in EventPro for example, differentiating rights based on department you need to create **additional EventPro Security Roles**.
- 5. If you want to use the **Default** Security Role for your entire EventPro Users Active Directory Group, you can adjust the Default Security Role so that it provides the correct permissions for the Users.
 - a. Double-click the Default Security Role record to open its edit form.
 - b. Set the Active Directory Groups field to the relevant Active Directory security group, *e.g.* EventPro Users.
 - c. Adjust the specific security permissions for this role, as required.

(Review Security Setup > Roles (Security Permissions) > Create Security Roles > Permissions in the EventPro User Manual.)

d. When you are done editing the Default Security Role, click Save and Close.

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6. If you require multiple different **Security Roles** to apply to various **Security Groups**, you can create **"Other**"-type **Security Roles** with different sets of Permissions.

(Review Security Setup > Roles (Security Permissions) > Create Security Roles in the EventPro User Manual.)

a. As you create each **Security Role**, ensure that you select the relevant **Active Directory Group(s)** from the dropdown.

The **Active Directory Groups** field in the **Security Role edit form** is only visible if you are working with Active Directory Integration, *i.e.* you own the EventPro Active Directory Integration module.

The Active Directory Groups field allows you to map the EventPro Security Role to selected Active Directory Groups, which ensures that Users are automatically assigned the correct permissions in EventPro, based on their Active Directory Group membership.

b. Adjust the specific permissions for the role, as required.

(Review Security Setup > Roles > Create Security Roles > Permissions in the EventPro User Manual.)

c. When you are done creating the Security Role, click **Save and Close** in the edit form.

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- d. The role will be added to the **Setup > Security > Roles** selection grid.
- 7. After you have completed all the administrative work required, you can allow the other Users to log into EventPro. See <u>First User Login to EventPro</u> 229.

User First Login to EventPro

After you have configured Active Directory and EventPro as described above, your organization's Users should simply need to log into their workstations with their Windows accounts, and run EventPro.

EventPro will create a new "Named"-type User for each Active Directory User that runs EventPro for the first time, up to the maximum number of Named users allowed by your software license.

When "Named" user accounts are used up, EventPro will then create "Concurrent"-type users, if allowed by your software license.

If the maximum number of Concurrent users are already logged in when a new individual attempts to run EventPro for the first time, EventPro will create the new User, but not allow him/her to log in while all Concurrent spaces are being used.

1. When EventPro opens, the User can click **My Details** under **My Workplace** in the left navigation pane to view his/her EventPro **Security User** record.

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🏠 My Workplace	User Code:* PDelany@MyVMD.local Change Password On First Logon		Open In Existing Tab (faster): I Default Print Destination: Close Report Preview When Printed	Unspecified
📌 Events	Inactive Definition Font Color:		Exit Email Recipient Selection On Double Click	0 \$
Lodging CRM/Sales	Back Color: Azure Azure			Default ~
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↓ [↑] Import/Export				
Oashboards				
ž i 🖄 ••••				
User: PDelany@MyVMD.local				

- 2. The EventPro User Name will be the same as the User's Active Directory User Logon Name.
- 3. Under **Security Roles**, the User will already be assigned the role determined by the Active Directory Security Group to which the User belongs.
- 4. In the **Account** field, an EventPro **Contact** has been created for the User, pulling the details from the User's Active Directory properties.

If you set the Default Account to your internal Company (<u>see above</u> 25)), the Contact will be linked to the **Company**, and the User's Active Directory **Job Title** will appear as the Contact's company **Position**.

5. The User's Security User details and Contact information can be edited in EventPro, as required.

However, note that there are some limits to what you can edit in EventPro when using Active Directory Integration. Some changes need to be made back in Active Directory. See <u>Active Directory/EventPro Sync</u> 230 below.

6. Installation is complete and EventPro is now ready to use.

Active Directory/EventPro Sync

When using EventPro Active Directory Integration, the **EventPro Users** will sync to Active Directory. In other words, each time a User logs into EventPro, EventPro will check specified fields in the User's Active Directory properties, as noted in <u>Create Active Directory Groups for Integration</u> [163], above:

- First Name
- Last Name
- Email Address
- Address Information
- Telephone Number
- Job Title

• Security Roles (based on the User's Active Directory Security Group membership)

If you edit those fields in EventPro, they will be overwritten by Active Directory the next time the User logs into EventPro. Changes you make in EventPro are not pushed to Active Directory.

To edit any of that information for an EventPro User, you need to edit the User back in Active Directory.

- The first six fields described (First Name, Last Name, Email Address, Address Information, Telephone Number, and Job Title) are simply edited in the User's **Properties** in Active Directory.
- To change the User's EventPro **Security Role**, you need to change the Active Directory Security Groups to which the User belongs. The User will need to log off and log back onto the workstation before any Active Directory changes will take effect in EventPro.

If you edit a User in Active Directory, EventPro should still recognize and match up the Active Directory User with the correct EventPro User, since it checks three values:

- Windows User Name
- Active Directory ID
- Email Address (in EventPro, the Contact's email address)

However, if you change all three of those values for a User in Active Directory, EventPro will not recognize the User when he/she logs in, and will create a new User.

Network Install: SQL Authentication

- This type of EventPro network installation requires knowledge of SQL Server. Your organization's EventPro installation should be done by an IT Specialist who has sufficient technical knowledge and is familiar with your organization's computer network. If you do not have in-house IT to assist you with EventPro installation, the instructions below will guide you through the general process, but if you have any doubts about how to proceed, please contact EventPro Support.
- These instructions only cover one standard set of options that typically work under normal circumstances. For more options, you will require assistance from an IT specialist who is familiar with your organization's network.
- Note that these instructions describe the installation of the base EventPro application. You may have purchased
 additional modules that also require installation. Unless otherwise advised, you should download all of the software
 components available to you, and consult with your Support or Training Specialist for assistance with installation.
- Installation Instructions:
 - 1. Download EventPro Components 232
 - 2. Install SQL Server 234
 - 3. Configure SQL Server 238
 - 4. Create SQL User 241
 - 5. Install Data Updater 245
 - 6. <u>Create New Client Database</u> 248
 - 7. <u>Restore Existing Database over New</u> 250
 - 8. Change SQL User 257
 - 9. Install EventPro to Server 260
 - 10. Share Installation Folder 265
 - 11. Install EventPro to Workstations 265
 - 12. Admin First Login to EventPro 271

13. User First Login to EventPro 278

- In this sample installation process, we follow a particular sequence of steps to prepare your EventPro database. We run
 the EventPro Database Utility Wizard to create two databases: EventProMaster, a required database that controls
 program licensing, and a named database, typically called EventProData, which is initially blank. This new, blank
 EventProData database is essentially just a "placeholder" database. You have most likely received and saved a backup
 of an existing, prepared database from your EventPro Training or Support Specialist. We will restore that existing,
 prepared EventPro database backup over the blank "placeholder" database, so that EventProData will then contain your
 existing information. Installing EventPro Software will occur later in the process.
- Note that there is another slightly different sequence of steps that you can follow after installing the Data Updater. You can consult with your IT department and/or EventPro Support or Training Specialist to determine which sequence to follow. In this alternate process, after installing the Data Updater, you first restore the backup of the existing, prepared EventPro database, typically naming it EventProData. You then install EventPro Software to add the EventProMaster database, although you do not yet run the EventPro program. You then run the Database Utility Wizard to link the client database to the EventProMaster database ("Create Master Database Client ID"). There will then be several other steps to complete before running EventPro. For more details about this process, see <u>Alternate Database Restore</u> <u>Process</u> [280].

Download EventPro Components

- 1. Log on to the **Application Server**.
- 2. Proceed to the **EventPro website** and login to the **Client Login area** with your 6-digit license **User ID**.
- 3. Go to the **Downloads** area.

Home My Account Download	Event Pro '		00
🏠 Home 🥻 My Account 👗 Download 🔹			
	🌞 What's New	🍰 Upload File	👔 Manual 🛛 🔀 My Prefere
Downloads			
- this link to access your cloud portal: Cloud Login			
ou need the Citrix Workspace app: Click here			
view/Accept the EventPro Software Program License Ag	greement and	download your licen	sed applications.
ou must accept the binding License Agreement before downloading.			
am authorized to accept Software License Agreements on behalf of Corporate Inc.	with Client ID 00000	and I accept the EventPro Softw	are Program License Agreement
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	Size	Date (B 10-May-2019 01:53 PM	Description *Required*
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Click File Name Download file EventPro.Win.Setup.19.1.2.0.exe Download file EventPro.Connect.Setup.19.1.2.0.exe Download file EventPro.VirtualAssistant.Setup.19.1.2.0.exe	Size 146,187/ 143,575/ 115,107/	 B 10-May-2019 01:53 PM CB 10-May-2019 01:54 PM CB 10-May-2019 01:55 PM CB 10-May-2019 01:58 PM 	*Required* EventPro Connect Setup EventPro VirtualAssistant Setup
Click File Name Download file EventPro.Win.Setup.19.1.2.0.exe Download file EventPro.Connect.Setup.19.1.2.0.exe Download file EventPro.VirtualAssistant.Setup.19.1.2.0.exe Download file EventPro.Api.Setup.19.1.2.0.exe	Size 146,1871 143,5751 115,1071 126,7741 113,9771	 B 10-May-2019 01:53 PM CB 10-May-2019 01:54 PM CB 10-May-2019 01:55 PM CB 10-May-2019 01:58 PM 	*Required* EventPro Connect Setup EventPro VirtualAssistant Setup EventPro Api
Click File Name Download file EventPro.Win.Setup.19.1.2.0.exe Download file EventPro.VirtualAssistant.Setup.19.1.2.0.exe Download file EventPro.VirtualAssistant.Setup.19.1.2.0.exe Download file EventPro.Api.Setup.19.1.2.0.exe Download file EventPro.Api.Setup.19.1.2.0.exe	Size 146,1871 143,5751 115,1071 126,7741 113,9771	 B 10-May-2019 01:53 PM CB 10-May-2019 01:54 PM CB 10-May-2019 01:55 PM CB 10-May-2019 01:58 PM CB 10-May-2019 01:57 PM 	*Required* EventPro Connect Setup EventPro VirtualAssistant Setup EventPro Api License Updater/Database Tool

- 4. If you haven't already, **download all of the EventPro components** that you see in the **Downloads** grid.
 - a. The components you see in your **Downloads** grid represent the EventPro application and modules that you have purchased, so your screen may look different than the example screenshot.
 - b. The installation instructions below will describe the main components required for the core EventPro program: EventPro (EventPro.Win.Setup.exe), EventPro License Updater/Database Tool (EventPro.EPDataUpdater.Setup.exe), and EventPro Licence (Licence.ini).

However, depending on your purchase, you may have additional components to download.

Download all components that you see, and if you have any questions about installing additional components or modules, contact your Support or Training Specialist.

c. Note that you will need to accept the License Agreement before you can download files.

If you want to review the content of the License Agreement, click the **Get License Agreement** button to retrieve the agreement in .RTF format. This is the same License Agreement that must be agreed to during EventPro installation.

5. While downloading the files, take note of the folder to which you save these files so that you can later retrieve them.

Do not open or run the files yet. The instructions below will inform you when you need each file.

6. First, proceed to Install SQL Server 234.

Install SQL Server

EventPro Software uses **SQL databases**, meaning you will need to install **SQL Server** to your database server, if it is not installed already.

You can buy an edition of SQL Server, or download the free edition, SQL Server Express, from the Microsoft website.

- 1. Download the SQL Server installation file to your database server, and run the installer.
- 2. Follow the installation documentation provided with your edition of SQL Server.
 - a. The instructions below will simply note the critical settings for SQL Server when used for EventPro Software.
 - b. The screenshots below demonstrate **SQL Server Express**, although regardless of which edition you use, the **important settings** will be the same.
 - c. There are other settings and options in the installation process that these instructions will not describe, as they will vary, depending on the IT needs of your organization. Please consult with your IT Department for further guidance on installing and configuring SQL Server.

3. Feature Selection:

- a. You should select the checkboxes for:
 - i. Database Engine Services
 - ii. Client Tools Connectivity
 - iii. Client Tools Backward Compatibility
- b. Depending on the edition of SQL Server you are installing, there may be a checkbox for **Management Tools**; if so, select that checkbox, as well.

If there isn't a Management Tools option in the edition you are installing, you can download and install **SQL Server Management Studio (SSMS)** after installing SQL Server.

- c. Whether you select the other Feature checkboxes is up to your IT department.
- d. The **default directories** are typically fine as they are, unless your IT department says otherwise.

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🃸 SQL Server 2017 Setup			- 0	\times
Feature Selection Select the Express features to in	nstall.			
License Terms Global Rules	Looking for Reporting Service	es? <u>Download it from</u>	the web	
Microsoft Update	Features:		Feature description:	
Product Updates Install Setup Files Install Rules Feature Selection Feature Rules Instance Configuration Server Configuration Database Engine Configuration Feature Configuration Rules Installation Progress Complete	Instance Features Database Engine Services SQL Server Replication R Python Full-Text and Semanti PolyBase Query Service Shared Features Client Tools Connectivity Client Tools SDK SQL Client Connectivity S LocalDB Redistributable Features	vices (In-Database) c Extractions for Search e for External Data ompatibility	The configuration and operation of each instan feature of a SQL Server instance is isolated from other SQL Server instances. SQL Server instance can operate side-by-side on the same compute Prerequisites for selected features: Already installed: Microsoft Visual C++ 2015 Redistributable Windows PowerShell 3.0 or higher Microsoft .NET Framework 4.6 Disk Space Requirements Drive C: 1195 MB required, 321866 MB available	1 5 if. v
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	Shared feature directory:	C:\Program Files\Micr	osoft SQL Server\	
	Shared feature directory (x86):	C:\Program Files (x86)	\Microsoft SQL Server\	
			< Back Next > Canc	el .

4. Instance Configuration:

- a. Select the radio button next to "Named Instance".
- b. You can leave the **Named Instance** and **Instance ID** as **SQLEXPRESS**, unless there is another name you prefer to use.
- c. The **Installed Instances** grid at the bottom of this page would display any instances already installed. If there is already an installed instance, check with your IT Department whether you should use that instance.

🃸 SQL Server Installation Center				_		
髋 SQL Server 2017 Setup					— C	X
Instance Configuration Specify the name and instance		QL Server, Instance ID bea	comes part of the inst	allation path.		
License Terms Global Rules Microsoft Update	 Default instance Named instance: 	SQLEXPRESS				
Product Updates Install Setup Files Install Rules Feature Selection	Instance ID:	SQLEXPRESS				
Feature Rules Instance Configuration Server Configuration	SQL Server directory:	C:\Program Files\Micro	soft SQL Server\MSSQ	L14.SQLEXPRESS		
Database Engine Configuration Feature Configuration Rules Installation Progress Complete	Instance Name	Instance ID	Features	Edition	Version	1
			<	Back Next	> C	ancel

5. Server Configuration:

- a. The Startup Type for both SQL Server Database Engine and SQL Server Browser must be set to Automatic.
- b. If not done already, switch the SQL Server Browser Start Type to Automatic.

Install Setup Files Install Rules SQL Server Database Engine NT Service\MSSQL\$SQLEXPRESS Ac SQL Server Browser NT AUTHORITY\LOCAL SERVICE Ar Feature Selection Comparison Professor Comparison Profess		
Silobal Rules Microsoft Update Microsoft Update Microsoft recommends that you use a separate account for each SQL Server service. Service Account Name Password Service SQL Server Database Engine NT Service\MSSQLSSQLEXPRESS Account Name SQL Server Database Engine NT AUTHORITY\LOCAL SERVICE Account Name Service GC Server Browser NT AUTHORITY\LOCAL SERVICE Account Name Service Grant Perform Volume Maintenance Task privilege to SQL Server Database Engine Service Didit disclosure by allowing deleted content to be accessed. Didit disclosure by allowing deleted content to be accessed. Seture Configuration reactor Configuration Reless Click here for details Click here for details Service for details		
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6. Database Engine Configuration:

- a. Under the **Account Provisioning** tab, indicate which **Authentication Mode** the administrator will use to access the Database Engine: **Windows Authentication** or **Mixed Mode** (SQL Server Authentication and Windows Authentication).
 - i. Windows Authentication: You will connect to SQL Server using Windows Authentication.
 - ii. **Mixed Mode** (SQL Server Authentication and Windows Authentication): You will connect to SQL Server using Windows Authentication or SQL Server Authentication.

If you select **Mixed Mode** here, you need to enter a **Password** for the **SQL Server system administrator** (**sa**) account. If you later connect to SQL Server using SQL Server Authentication, you will need these **sa** credentials.

b. Also, under the Specify SQL Sever Administrators grid, click the Add Current User button.

SQL Server 2017 Setup	C	ı ×
Database Engine Con	figuration	
Specify Database Engine auth	nentication security mode, administrators, data directories and TempDB settings.	
icense Terms	Server Configuration Data Directories TempDB User Instances FILESTREAM	
ilobal Rules Aicrosoft Update	Specify the authentication mode and administrators for the Database Engine.	
roduct Updates	Authentication Mode	
stall Setup Files	Windows authentication mode	
nstall Rules	O Mixed Mode (SQL Server authentication and Windows authentication)	
eature Selection	Specify the password for the SQL Server system administrator (sa) account.	
eature Rules Istance Configuration		
erver Configuration	Enter password:	
atabase Engine Configuration	Confirm password:	
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	Add Current User Add Remove	
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- 7. Complete the rest of the installation process as recommended by your IT Department.
- As noted above, if there isn't a Management Tools option in the edition you are installing, you can download and install SQL Server Management Studio (SSMS) after installing SQL Server. There may be a prompt to Install SSMS at the end of the SQL Server Installer, or you can download SQL Server Management Studio (SSMS) from the Microsoft website.
- 9. It is recommended that you **restart** your computer once SQL Server is installed. If you install SQL Server Management Studio separately, you will be prompted to restart your computer at the end of the installation process.
- 10. You can then proceed to **<u>Configure SQL Server</u>** 238.

Configure SQL Server

- 1. After restarting the computer, open the Start menu, and go to SQL Server Configuration Manager.
- 2. The SQL Server Configuration Manager opens.
 - a. In the left-hand panel, go to **SQL Server Network Configuration > Protocols for SQLEXPRESS** (or whatever you named the SQL Server Instance <u>earlier</u> [235]).
 - b. In the right-hand selection grid, you need to enable TCP/IP and Named Pipes.
 - c. Right-click **TCP/IP** and select **Enable**.



d. The **Warning** dialog informs you that changes will not take effect until the service is restarted, which we will do next.

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 SQL Server Configuration Manager SQL Server Services SQL Server Network Configurati SQL Native Client 11.0 Configur Client Protocols Aliases SQL Server Network Configurati 	on (32bit) ation (32bit)	Protocol Name Shared Memory Named Pipes	Status Enabled Enabled Disabled		
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 ✓ .豊. SQL Native Client 11.0 Configur. ■, Client Protocols ■, Aliases 	Warning Any change	:s made will be saved; ho the service is stopped ar	wever, they will not take nd restarted.	×	
			ОК		

- e. Click **OK**, and you will see that **TCP/IP** is now **Enabled**.
- f. Now, if necessary, repeat the process with **Named Pipes**. Right-click **Named Pipes** and select **Enable**. Click **OK** in the **Warning** dialog that follows.

g. Both TCP/IP and Named Pipes should now be Enabled.

If applicable, you may also want to check the Protocols under SQL Native Client Configuration and SQL Native Client Configuration (32bit) to ensure that **TCP/IP** and **Named Pipes** are **Enabled** there, as well.

Sql Server Configuration Manager File Action View Help Image: Sql Server Configuration Manager (Local) SQL Server Services SQL Server Service Configuration (32bit) SQL Server Network Configuration (32bit) Image: Client Protocols Aliases SQL Server Network Configuration Image: Client Protocols SQL Server Network Configuration Image: Client Protocols SQL Server Network Configuration Image: Client Protocols Image: Client Protocols Aliases	- □ Protocol Name Status Shared Memory Enabled Named Pipes Enabled TCP//P Enabled Sql Server Configuration Manager File Action View Help ← ⇒ 201 @ 201 SQL Server Configuration Manager (Local) ঊ SQL Server Services ঊ SQL Server Services	- □ Name Order Enabled 3 Shared Memory 1 Enabled	1 X		
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3. In the left-hand panel, go to SQL Server Configuration Manager (local) > SQL Server Services.

In the selection grid to the right, select **SQL Server (SQLEXPRESS)** and click the **Restart** button **(e)** above. The service will stop and restart.

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SQL Server Configuration Manager (Local) Restar	t service	State	Start Mode	Log On As	Process ID	Service Type
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	<					

4. Check to ensure that the SQL Server Browser is Running.

If it is not, you can try to start it by clicking the **Start** button above. This may not work, however, as there could be other reasons that the SQL Server Browser is not running. For example, you may need to go to the **Services** area to manually enable it there.

If you run into any issues here or any other part of SQL Server Configuration, please contact **Support** for assistance.

- 5. You can close the SQL Server Configuration Manager window.
- 6. Next, proceed to Create SQL User 241.

Create SQL User

As a security best practice in an SQL environment, we recommend that the User who performs EventPro installation should have the minimum security rights possible.

It is highly recommended that you **do not** install the EventPro as the **SQL Server system administrator** (**sa**), since sa security rights are excessive for that purpose.

Therefore, we recommend creating a new SQL User for the purposes of creating EventPro databases and installing EventPro to the server and workstations.

- 1. Run SQL Server Management Studio.
- 2. Connect to Server:
 - a. Server Type: Leave as Database Engine.
 - b. **Server Name**: Ensure that the correct **Server name** is selected (Network Computer Name\Named Instance, *e.g.* MYDBSERVER\SQLEXPRESS).
 - c. Authentication: Choose whether you are connecting to SQL Server using Windows Authentication or SQL Server Authentication. If you are connecting with SQL Server Authentication, enter the User Name and Password (*i.e.* the sa credentials).

(Remember that earlier, when <u>installing SQL Server</u>²³⁷), you chose between **Windows Authentication** and **Mixed Mode (Windows Authentication and SQL Server Authentication)**, and set the password for the **sa** account.)

d. Click Connect.



- 3. In the **Object Explorer** panel of **SQL Server Management Studio**, go to **Security > Logins**.
- 4. Right-click the **Logins** folder and select **New Login**.

	ject Tools Window Help 😋 🔛 🗳 🗊 New Query 💡	9 ● & & @ @ ? ? ? . ? . ? . ? . ? . ? . ? . ? . ?	P = □ × √ □ ≠ ÷;
Object Explorer Connect → # ×# ■ P • MYDBSERVER\SQLE • Databases • Cogins • Cogins • Cogins • Server • Server • Server Ob • Server Ob • PolyBase • Management • XEvent Profiler	► I S EXPRESS (SQL Server 14.0.1000 - P New Login Filter • Start PowerShell Reports • Refresh	×	

- 5. The Login New form appears.
- 6. Select the radio button next to **SQL Server Authentication**, since you want **Users** to connect to the SQL Server Instance using **SQL Server Authentication**
- 7. Enter a Login name. In the example, we have used the name "User1".
- 8. Enter a **Password** and **Confirm** the password for User1.
- 9. Unselect the checkbox next to User Must Change Password at Next Login.

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÷	Connection Server:	Mapped to asymmetric key Map to Credential			~			
	MYDBSERVER\SQLEXPRESS Connection: MyVMD\administrator Y View connection properties	Mapped Credentials	Credential	Provider	~	Add		
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<					ОК	Cancel		
🗇 Read	y							

- 10. In the left-hand Select a Page panel, click Server Roles.
- 11. In the **Server Roles** page, select the checkbox next to **dbcreator**. This gives User1 the security privileges to create the EventPro databases.

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G -	Select a page	🖵 Script 🔻 😮 Help]	• -	
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- 12. Click **OK** to save the User1 login.
- 13. Close SQL Server Management Studio.
- 14. You can now proceed to Install Data Updater 245.

Install Data Updater

- 1. Navigate to the downloaded EventPro.EPDataUpdater.Setup.exe and double-click to run it.
- 2. The installation wizard will begin. Click Next to continue.



3. Select Installation Folder:

- a. If you don't want to use the default path, you can enter a different folder path.
- b. Click Next.



4. In the next window, click **Install**.

🕾 EventPro Data Updater Setup 🛛 🗙	
Ready to Install The Setup Wizard is ready to begin the EventPro Data Updater installation	
Click "Install" to begin the installation. If you want to review or change any of your installation settings, dick "Back". Click "Cancel" to exit the wizard.	
Advanced Installer	

You may encounter a security warning, for which you may need to click Yes or OK.

5. When the installation completes, click **Finish** in the final window.



6. Next, go to <u>Create New Client Database</u> 248.

Create New Client Database

In most cases, an existing database will be prepared for you, containing information that has been converted from a previous database or added under the guidance of your EventPro Training & Implementation Specialist. That database will be sent to you so that you can restore it.

Before restoring the database, however, this process requires that you first **create a new database** with the EventPro Database Utility. The new database you are creating here is essentially a **placeholder**. Later, you will restore your existing database over this new "placeholder" database.

- 1. Run the **EventPro Database Utility Wizard** by selecting **EventPro Data Updater** from your **Start** Menu, or doubleclicking the **EventPro Data Updater application file** in the folder to which you installed it.
- 2. On the first page of the wizard, select Create a New Client Database, and click Next.



3. **Target Database**: Enter the target database information.
EventPro Database Utility

Target Database

Enter the target database information.

Database Type	MS-SQL	•
Server	MYDBSERVER\SQLEXPRESS	۲
Authentication		
User name	User 1	
Password	•••••	
Database	EventProData	•
Settings		
Client I.D.	000000	
Cloud Data		
Database Data Type	Blank	•
License File	C:\EventPro\Licence.ini	

- a. Database Type: Choose MS-SQL.
- b. Server: Enter the SQL Server Named Instance, identifying the network name of the computer plus the instance name you specified earlier when <u>installing SQL Server [235]</u> (*i.e.* "SQLEXPRESS").

It will look something like this: MYDBSERVER\SQLEXPRESS

- c. Authentication: Select the Authentication checkbox, which indicates that User will use SQL Authentication to connect to the SQL Server instance.
- d. Enter the User Name and Password of User1 (which you created <u>above</u> 241).
- e. **Database**: Type in (*don't select from the drop-down*) the name of the new database you are creating, *e.g.* **EventProData**.

The Data Updater will create 2 databases:

- i. This named database (*i.e.* EventProData), over which you will later restore the existing, prepared database from your Training or Support Specialist.
- ii. An EventProMaster database to control licensing.
- f. Client I.D.: Typically, you would use your six-digit License ID for the Client I.D.
- g. Cloud Data: Leave this unselected, as you are performing a Network Install of EventPro.
- h. Database Data Type: From the drop-down list, choose Blank or Standard.

×

i. **Standard** means the database will be populated with some basic default data, namely Statuses, Titles, Communication References, Booth Types, Budget Types, Payment Types, Location Features, and Location Setup Types.

Clients typically choose **Standard**, as they find it easier than starting from a completely blank database that has no frame of reference. The pre-entered status, titles, *etc*. can easily be edited to suit your organization's terminology.

ii. **Blank** means a completely blank database, with no pre-entered data.

If you are planning to restore an existing database over this new database, it doesn't really matter which data type you select.

- i. **License File**: Click the ellipsis (...) and browse to your license file (Licence.ini). This is the license file you downloaded earlier 233.
- j. When you have entered all of the target database information, click Next.
- 4. In the last page of the wizard, click **Finish**.
- 5. You can now proceed to **<u>Restore Existing Database over New</u>** 2501.

Restore Existing Database over New

In most cases, an EventPro Training or Support Specialist will provide you with a **database** that has been converted from a previous database and/or filled with information that you have provided.

You need to restore that database to the SQL Server before proceeding with EventPro installation.

With this process, you will be restoring the existing database **over** the new "**placeholder**" database you just created in the previous step.

Typically, the database is sent as a .BAK file, which you can restore in SQL Server Management Studio (SSMS).

Ensure that the existing database is stored on the same machine as SQL Server.

1. Run SQL Server Management Studio.

You may have a different version of SQL Server Management Studio than that depicted below, but the functions and settings should be essentially the same.

2. Connect to Server:

Although you created the database as User1, you can restore the database as the Windows Administrator User or the sa user.

- a. Ensure that the correct **Server name** is selected (Network Computer Name\Named Instance, *e.g.* MYDBSERVER\SQLEXPRESS).
- b. Choose the Authentication Mode: Windows Authentication or SQL Server Authentication. If applicable, enter the SQL Server Authentication Login and Password.

(Remember that you specified the Authentication Mode when <u>Installing SQL Server</u> 237) earlier.)

c. Click Connect.



3. In the **Object Explorer** panel of **Microsoft SQL Server Management Studio**, expand the Databases so that you can see **EventProData**.

Right-click on EventProData, and select Tasks > Restore > Database.

	r Management Studio		Quick Launch (Ctrl+Q)	×
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Object Explorer Connect ▼ ¥ ¥ ■ ■ ■ MYDBSERVER\SQLE ■ Databases # ■ Databases # ■ Database St # ■ Database St # ■ EventProD # ■ EventProV # ■ Security # ■ Security # ■ Security	XPRESS (SQL Server 14.0 abases napshots New Database New Query			
	Tasks Policies Facets Start PowerShell Azure Data Studio Reports Rename Delete Refresh	Vulnerability Assessment		
< ✓ Ready	Properties	Back Up Restore Generate Scripts Extract Data-tier Application Deploy Database to Microsoft Azure SQL Database Export Data-tier Application Upgrade Data-tier Application Import Flat File Import Data Export Data Export Data	Database Files and Filegroups Transaction Log	

- 4. The **Restore Database** window appears.
- 5. Under **Source**, select **Device**, and click the ellipsis next to the field.
 - a. The Select Backup Devices form appears.

R 1	🕵 R	estore Database - EventProDa	ta			_		×	□ ×
File	🐼 No	backupset selected to be restore	ed.						
6 G	Select Ge File		🗊 Script 👻 😯 Help						₽≞₽
Object Conne	P Op		Source O Database:] [~	
			Database: Destination					~	
÷			Database: Restore to:	EventProData			Timeline	~	
±		🗯 Select backup devices				- 0	×		
± ±		Specify the backup media and	l its location for your restore opera	ation.				t LSN	
		Backup media type:	File		~				
		Backup media:					_		
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	¥₩ F [i					Contents			
	<u>View</u>								
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					OK Cancel	Help		p	
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b. Click the Add button. The Locate Backup File window appears.

R 1	Ŗ Restore Database - EventProData			- 🗆	×	×
File I	🔞 No backupset selected to be restored					
G ÷	Select a page & General # Files	🗊 Script 🕞 🛛 🖌 🕼			, e	i i i
Object Conne	✗ Options	Source Database:			~	
-	 Select backup devices Specify the backup media and its local 		_	×	~	
	Backup media type:	Fi 🛢 Locate Backup File - MYDBSERVER\SQLEXPRESS		—		×
÷	Backup media:	Backup File location: C:\PSI APPLICATIONS\EventPro Software\Da	Ċ		5	ρ
*	view connection properties Progress Done Done	Image: Second	Backup File	s(*bak;*tm;*log)	
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🗖 Read	ду					

- c. In the **Locate Backup File** window, locate the existing database that your EventPro Trainer sent to you, which should have been saved on the same machine as SQL Server, as noted above.
- d. Click **OK** in the **Locate Backup File** window, and again in the **Specify Backup** window.
- 6. Back in the **Restore Database** form, under **Destination**, the **Database** should be set to **EventProData**.

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File	🐼 No backupset selected to be restore	ł.					_ !!
8 G •	Select a page	I Script → 3 Help				ع	<u> </u>
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Conne		O Database:			~		
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		Database: EventProData			~		
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	Progress						
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		ОК	Cancel	Help			
🗇 Rea	dy					-	

7. Ensure that you have selected the correct Source and Destination.

B B <th>Microsoft SQL S</th> <th>erver Management Stu</th> <th>udio</th> <th></th> <th></th> <th></th> <th></th> <th>Qu</th> <th>iick Launch (</th> <th>Ctrl+Q)</th> <th>ρ-</th> <th></th>	Microsoft SQL S	erver Management Stu	udio					Qu	iick Launch (Ctrl+Q)	ρ-	
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Seriel Script < () Help ✓ General Files ✓ Options O Database: ✓ Device: C:\PSI APPLICATIONS\EventPro Software\Data\000000_Sample.bak ✓ Database: 000000 Destination Database: Database: EventProData Restore to: The last backup taken (Tuesday, April 16, 2019 5:05:15 PM) Restore plan Backup sets to restore: Restore plan Backup sets to restore: Petore Name Connection V* V* MYDBSERVER\SQLEXPRESS [PSI\Sample] Mew connection properties Fragress	Ready											
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		n properties										
Verify Backup Med	ODDee Done		<							Ve	erify Backup N	> Nedia

8. In the left **Select a Page** panel, click on **Options**.

Select the first checkbox, **Overwrite the Existing Database (WITH REPLACE)**. (In this situation, we want the restored, prepared database from EventPro Training/Support to overwrite the blank "placeholder" database that we created in the previous step.)

- 🛃	Microsoft SQL Server Management	Studio		Quick Launch (Ctrl+Q)	ρ.	. 🗆	х
File	💀 Restore Database - EventProDa	ta		_	· 🗆	×	
ě C	Ready						÷
8 †	Select a page	🗊 Script 👻 😯 Help					
Obje Con	 General Files Options 	Restore options					
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			estored database (WITH RESTRICTED_USE	к)			
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	c.	Standby file:	C:\Program Files\Microsoft SQL Se o use by rolling back uncommitted transactions				
	E	Leave the database ready to	o dae by rolling back directimitted transaction.	a. Additional transaction loga cani	for be reatored		
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	G	Take tail-log backup be					
	E	(WITH NORECO)	abase in the restoring state VERY)				
		Backup file:	C:\Program Files\Microsoft SQL Se	rver\MSSQL14.SQLEXPRESS\N	MSSQL\E		
		Server connections					
	Connection	Close existing connectio	ns to destination database				
	₩ WYDBSERVER\SQLEXPRESS [PSI\Sample]	Prompt Prompt before restoring	each backup e server property controls whether full-text inde	eves are imported, rebuilt, or reset	for the restore		
	View connection properties	database.		and any imported, repaire, or resor			
	Progress						
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				OK Cancel	Help		
	eady						

- 9. Click **OK** at the bottom of the **Restore Database** dialog to begin the restore process.
- 10. When the restore is complete, you should receive a success dialog. Click OK.
- 11. You can now proceed to Change SQL User 257.

Change SQL User

1. Return to SQL Server Management Studio, once again ensuring that the Server Name is correct, and selecting Windows Authentication or SQL Server Authentication as appropriate.

Click Connect.

Image: Wicrosoft SQL Server Management Studio File Edit View Project Tools Window Image: Imag		米 ⊡ 台 ク・ペ・ 図 ♬ 22 23 副 副 品 国 注 34 王 王		ר ב זים בי≮ ק	∎ ×
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	모 ^를 Connect to Server		×		
		SQL Server			
	Server type:	Database Engine	~		
	Server name:	MYDBSERVER\SQLEXPRESS	~		
	Authentication:	Windows Authentication	~		
	User name:	PSI\Sample	~		
	Password:				
		Remember password			
		Connect Cancel Help	Options >>		
🗇 Ready					

- 2. In the **Object Explorer** panel, expand the **Logins** folder.
- 3. Double-click **User1** to open its **Login Properties**.
- 4. Under **Server Roles**, unselect the **dbcreator** checkbox.

Kicrosoft SQL Server Management Studio				×	х
File Edit View Project Tools Window Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a page Select a p	Script - 2 Help	es to a user			
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5. Under User Mapping, you can check to ensure that User1 has db_owner rights for both EventProData and EventProMaster.

This would have been set automatically during database creation.

Nicrosoft SQL Server Management Studio						×		x
File Edit View Project Tools Window Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page: Select a page Image: Select a page Image: Select a page Image: Select a page Image: Select a page: Select a p	Script	🕶 😯 Help						
🥬 User Mapping	Users ma	apped to this login:						
Object Explorer	Мар	Database	User	Default S	chema			
Connect 🕶 🍟 🎽 🝸 🖒 🥠		EventProData	User1	dbo				
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🕀 🛑 Databases		master						
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MyVMD\administrator Server: MyDBSERVER\SQLEXPRESS		Laccount enabled for. EV	rentrioData					
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User1 Connection: MyVMD\administrator		iccessadmin						
🕀 💼 Server Roles		ackupoperator						
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Replication Progress	db_0	wner ecurityadmin						
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XEvent Profiler								
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- 6. Click OK.
- 7. You can now proceed to Install EventPro to Server 2001.

Install EventPro to Server

Because you are performing a **Network Installation**, this installation process must first be done from the **Application Server**.

1. Navigate to the **EventPro.Win.Setup.exe** you <u>downloaded earlier</u> [232], and double-click to run it.

Depending on the security settings on your network or computer, you may receive a warning about installing software, and you may need to click **Run** or **OK** to continue the installation.

2. The installation wizard will begin. Click **Next** to continue.



3. End-User License Agreement:

- a. Please read the EventPro Software Program License Agreement.
- b. Select **I ACCEPT** or **I DO NOT ACCEPT** below. If you do not accept the license agreement, you cannot continue with the installation process.
- c. Click Next to continue.

🗟 EventPro Setup 🛛 🗙
End-User License Agreement
Please read the following license agreement carefully
^
EventPro Software Program License
Agreement
READ THE FOLLOWING TERMS AND CONDITIONS BEFORE INSTALLING THIS SOFTWARE. INSTALLATION OR USE INDICATES YOUR ACCEPTANCE OF THESE TERMS AND CONDITIONS. IF YOU DO NOT AGREE WITH THEM, PROMPTLY
• I accept the terms in the License Agreement
○ I <u>d</u> o not accept the terms in the License Agreement
Advanced Installer
< Back Next > Cancel

4. Installation Type: Choose Server Installation, and click Next.

(You can review Installation Types above, if necessary.)

EventPro Setup Installation Type Select the type of installation to perform.			×
 Stand Alone Installation Server Installation Workstation Installation 			
Advanced Installer ———————————————————————————————————	< Back	Next >	Cancel

5. Installation Options: Do not select the checkbox next to Use Active Directory to log into EventPro. (That option requires the EventPro Active Directory Module, and is covered under <u>Network Install: Active Directory Integration</u> 1621.)

Click Next.

EventPro Setup Installation Options These are options for running EventPro.	×
Use Active Directory to log into EventPro. (This requires a license that supports active directory.)	
Advanced Installer	Cancel

6. Select Installation Folder:

- a. You can use the default **Program Files** path or enter a different path for the **Installation Folder**.
- b. If you do enter a different folder path, **take note** of it, as you will need it again for the workstation installs.
- c. Click Next.

튨 EventPro Setup	—		×
Select Installation Folder		<	
This is the folder where EventPro will be installed.			
To install in this folder, click "Next". To install to a different folder, ent "Browse".	er it be	low or click	¢
Folder:			
C:\Program Files (x86)\EventPro Software\EventPro\		Browse	
Advanced Installer			
< Back Next >		Cano	el

- 7. SQL Database:
 - a. Server: Enter the SQL Server Named Instance, identifying the network name of the computer plus the instance name you specified earlier when installing SQL Server (*i.e.* "SQLEXPRESS"). It will look something like this: MYDBSERVER\SQLEXPRESS.
 - b. Authentication: Select the radio button next to SQL Authentication. Enter the Username and Password of the SQL User login you created earlier 24.
 - c. Click Next.

둸 EventPro Setup	×
SQL Database	- Sector
Configure SQL Co	nnection
Before updating backup of the c	g an existing database you should first make sure you have a latabase.
Server:	MYDBSERVER \SQLEXPRESS
Authentication:	O Windows Authentication
	SQL Authentication
Username:	User 1
Password:	••••••
Advanced Installer	
	< Back Next > Cancel

- 8. The Installer will test the connection to the database before you can proceed with the installation.
- 9. When the connection test is completed, click **Install**.

😓 EventPro Setup	\times
Ready to Install The Setup Wizard is ready to begin the EventPro installation	res)
Click "Install" to begin the installation. If you want to review or change any of your installation settings, click "Back". Click "Cancel" to exit the wizard.	
Advanced Installer	

Depending on the security settings on your network or computer, you may encounter a warning, and you may need to click **Yes** or **OK** to continue the installation.

10. In the final window, click Finish.



11. Now the Server installation process is complete. Before moving on to Workstation Installations, you first need to <u>Share</u> the Installation Folder 265.

Share Installation Folder

- On the server to which you just installed EventPro, **locate the folder** in which EventPro was installed. By default, it would be **C:\ProgramFiles (x86)\EventPro Software\EventPro**, but you may have selected a different folder path in the <u>Select Installation Folder</u> 2021 page of the installation wizard.
- You need to share this Installation Folder so that network users installing EventPro to their workstations can access it.
 - For Sharing, Users will require Read and Change permissions.
 - For **Security**, Users will require **Read & Execute**, **List Folder Contents**, and **Read** permissions. Users will also require **Write** permissions for the installation process, in order to write to the directory.
 - For normal operation, Users do not require Modify and Write permissions. However, if Users do not have Modify and Write permissions, they will not be able to automatically update EventPro on their workstations; they would require assistance from an Admin User. If you want Users to be able to automatically update EventPro themselves, they require Modify and Write permissions.
- The exact process of sharing the folder will vary, depending on the network environment in which you are working. You may have to consult the documentation for your network and operating system to determine how to share the Installation Folder from the Application Server to Workstations.
- Once the folder is shared, you can proceed to **Install EventPro to Workstations** 2851.

Install EventPro to Workstations

- 1. Login to the **Workstation** computer as an Administrator User.
- 2. Navigate to the EventPro.Win.Setup.exe you downloaded earlier [232], and double-click to run it.

Depending on the security settings on your network or computer, you may receive a warning about installing software, and you may need to click **Run** or **OK** to continue the installation.

3. The installation wizard will begin. Click Next to continue.

n EventPro Setup	×
	Welcome to the EventPro Setup Wizard
	The Setup Wizard will install EventPro on your computer. Click "Next" to continue or "Cancel" to exit the Setup Wizard.
	< Back Next > Cancel

- 4. End-User License Agreement:
 - a. Please read the EventPro Software Program License Agreement.
 - b. Select **I ACCEPT** or **I DO NOT ACCEPT** below. If you do not accept the license agreement, you cannot continue with the installation process.
 - c. Click Next to continue.



5. Installation Type:

- a. This time, choose **Workstation Installation**.
- b. Click Next.

둸 EventPro Setup		×
Installation Type		
Select the type of installation to perform.		
O Stand Alone Installation		
○ Server Installation		
Workstation Installation		
Advanced Installer		
	< Back Next >	Cancel

6. Installation Options: Do not select the checkbox for Use Active Directory to log into EventPro. (That option requires the EventPro Active Directory Module, and is covered under <u>Network Install: Active Directory Integration</u> [162] .)

Click Next.

EventPro Setup Installation Options These are options for running EventPro.		×
Use Active Directory to log into E (This requires a license that su		
Advanced Installer	< Back Next >	Cancel

7. Select Installation Folder: You can use the default **Program Files** path for the Installation Folder, or enter a different folder path, if you prefer.

Click Next.

통 EventPro Setup	_		×
Select Installation Folder This is the folder where EventPro will be installed.		X	-25
To install in this folder, click "Next". To install to a different folder, ent "Browse".	er it be	low or click	c
Folder: C:\Program Files (x86)\EventPro Software\EventPro\		Browse	
		browsern	
Advanced Installer			
< Back Next >		Cano	el

- 8. SQL Database:
 - a. **Server**: Enter the **SQL Server Named Instance**, identifying the network name of the computer plus the instance name you specified earlier when installing SQL Server (*i.e.* "SQLEXPRESS"). It will look something like this: **MYDBSERVER**(**SQLEXPRESS**).

- b. Authentication: Select the radio button next to SQL Authentication.
- c. Enter the Username and Password of the SQL User Login you created earlier 241.
- d. Click Next.

둸 EventPro Setup	×
SQL Database	
Configure SQL Co	nnection
Before updating backup of the d	g an existing database you should first make sure you have a latabase.
Server:	MYDBSERVER \SQLEXPRESS
Authentication:	O Windows Authentication
	SQL Authentication
Username:	User1
Password:	••••••
Advanced Installer	
	< Back Next > Cancel

9. The Installer will test the connection to the database before you can proceed with the installation.

10. Select Server Path:

- a. Enter the path to the installation on the server. This is the <u>Installation Folder</u> and you selected during the Server Installation, and **shared** with the network users in the <u>previous step</u> and .
- b. Click the **Browse** button, locate that folder on the Network, and click **Select Folder**.
- c. Click Next.

EventPro Setup		×
Select Server Path		
Enter the path to the installation on the server.		
To install in this folder, click "Next". To install to a "Browse".	a different folder, enter	it below or click
Server Folder:		
		Browse
Advanced Installer		
	Back Next >	Cancel

11. Ready to Install: Click Install.

😓 EventPro Setup	×
Ready to Install	
The Setup Wizard is ready to begin the EventPro installation	9
Click "Install" to begin the installation. If you want to review or change any of your	
installation settings, click "Back". Click "Cancel" to exit the wizard.	
A duran and Ta shellow	
Advanced Installer	

Depending on the security settings on your network or computer, you may encounter a warning, and you may need to click **Yes** or **OK** to continue the installation.

12. In the final window, click Finish.



- 13. Now the workstation installation process is complete.
- 14. Repeat this process on the other workstations in your network.
- 15. You may want to create an EventPro shortcut on each User's desktop so that they can easily locate and run EventPro.
- 16. When you are done installing EventPro to the Server and Workstations, you can proceed to <u>Admin First Login to</u> <u>EventPro</u> 271.

Admin First Login to EventPro

You can log in to EventPro for the first time using the default Administrator account that has been pre-set in EventPro.

- 1. Run EventPro.
- 2. In the Log On dialog, enter these default Administrator credentials:
 - a. User Name: Admin
 - b. Password: EventPro1234

Passwords are case-sensitive.

3. The **EventPro** program opens.

Click My Details under My Workplace in the left-hand navigation pane. Your Security User edit form opens.

You will note that this Admin user has been assigned the Administrator Security Role by default.

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- 4. One of the first things you will want to do is change the **Password** for the Admin User, since it is the EventPro default that many people will know.
 - a. In the navigation ribbon above your Security User details, click the **Change My Password** button.



b. The Change Password dialog appears. Enter the Old Password (EventPro1234). Enter and confirm your New Password.

REMEMBER THIS PASSWORD!

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- c. Click OK.
- 5. You can make other changes to your Admin account as required.

(Review Security Setup > Users > Create New User in the <u>EventPro User Manual</u>.)

- 6. As the Administrator, there are several actions you will probably need to complete before other Users log into EventPro:
 - a. <u>Create Security Roles</u> 273
 - b. Create Users 276
 - c. Create Internal Company & Contacts 278
- 7. When you have finished the steps described above, you can allow other Users to log into EventPro. See <u>User First</u> Login to EventPro 278.

Create Security Roles

A **Security Role** allows you to define a standard set of permissions for each category of Users according to their ability to access data in EventPro.

You may find it convenient to have your Security Roles set up and defined before you create Users. That way, when you add new Users, you can simply select the applicable Security Role.

- 1. In EventPro, go to Setup > Security > Roles.
- 2. There are several different Role Types: Administrator, Default, Other, and Online.

(Review Security Setup > Roles (Security Permissions) > Create Security Roles > Role in the <u>EventPro User</u> <u>Manual</u>.)

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- 3. The **Administrator Security Role** is assigned to the default EventPro Admin User. Typically, very few Users should get this Security Role, as it allows full access to the program.
- 4. If you do not create any other Security Roles, any other Users you create in EventPro will be assigned the **Default** Security Role. If all of your EventPro Users - besides Administrators - will have the same security rights in EventPro, then having just the **Default Security Role** may be sufficient.

If you haven't already, you can **adjust the Default Security Role** so that it provides the correct permissions for the EventPro Users you plan to assign to this role.

(Review Security Setup > Roles > Create Security Roles > Permissions in the EventPro User Manual.)

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5. If one Default Security Role for all Users is not sufficient, and you want to further compartmentalize User security permissions in EventPro - for example, differentiating rights based on department or management hierarchy - you need to create **additional EventPro Security Roles** of the "**Other**" type.

You could, for example, have Security Roles called **Event Managers**, **Finance**, and **Catering**. Those Security Roles would all be of the Role Type "**Other**", but would have different assigned permissions, depending on the information that staff members in those roles need to access.

Additionally, there is the Role Type **"Online"**, which you use to set permissions related to online activities in **EPConnect**. If you want a User to be able to log into EPConnect, they must be assigned an Online-type security role. If a User needs to log into both the EventPro application and EPConnect, the User must be assigned an Online-type role **and** another type of security role (*i.e.* Default, Other, or Administrator).

(Review Security Setup > Roles (Security Permissions) > Create Security Roles in the EventPro User Manual.)

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6. When you are done editing and/or creating Security Roles, you can proceed to Create Users 2761.

Create Users

- 1. You can now create the **Security Users** to match the staff members that will be using EventPro. Review the instructions under **Security Setup > Users > Create New User** in the <u>EventPro User Manual</u>.
- 2. Make sure that you assign each User the correct **Security Role**, particularly if you created Security Roles in addition to the built-in Default Security Role.
- 3. Ensure that you adjust the User's **Password** so that the User can log in for the first time. In the User's edit form, you can choose one of two options: **Change Password on First Logon** or **Reset Password**.
 - a. Select the **Change Password on First Logon** checkbox. The User will be able to log in the first time with just the User Name, leaving the Password blank, and EventPro will ask the User to set a new password.

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b. Click the **Reset Password** button, and assign a default **Password**. The User will be able to log in the first time with this temporary password, and EventPro will ask the User to set a new password.

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4. One other thing you may want to do with your EventPro Users is attach them to Contacts in CRM. It is an optional step, but if you want to do so, see <u>Create Internal Company & Contacts</u>^[278].

Create Internal Company & Contacts

1. You do not need to attach Security Users to CRM Accounts in EventPro, but you may find it useful for internal processes.

NOTE: In EventPro, a CRM Account can be either a Contact or a Company. A Contact does not need to be attached to a single Company; a Contact can be an independent Account, or be linked to multiple companies.

- 2. You can create your internal Contacts and Company, if applicable, by following these instructions:
 - a. Company/Contact Management (CRM) > Add New Company (Company Edit Form) in the <u>EventPro User</u> <u>Manual</u>.
 - b. Company/Contact Management (CRM) > Add New Contact (Contact Edit Form) in the EventPro User Manual.
- 3. Once you have Accounts set up in CRM, you can then **edit** each User's profile under **Security Setup**.
- 4. In the **Security User edit form**, use the **Account** drop-down to find and select the correct Contact or Company for the User. **Save and Close** each User's edit form when you are done.

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5. When you are done linking Accounts to Users, you can proceed to User First Login to EventPro 2781.

User First Login to EventPro

- 1. When you are done creating Users, you can distribute **User Names** (and default **Passwords**, if applicable) to the relevant members of your organization, and ask them to run EventPro on their **workstations**.
- 2. The Log On dialog appears. The User will enter his/her User Name.

The **Password** depends on how you set up the User's profile, *i.e.* whether you selected **Change Password to First Logon** or **Reset Password**:

a. If you selected the **Change Password on First Logon** checkbox in the User's profile, the User can leave the Password blank and click **OK**.

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b. If you **Reset** the Password on the User's profile, the User can enter the temporary password that you set on the profile, and click **OK**.

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3. Either way, the **Change Password on First Logon** dialog appears.

The User must enter and confirm a New Password, and click OK.

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4. Once in EventPro, the User can view his/her profile by clicking **My Details** in the left navigation panel.

Installation is complete and EventPro is now ready to use.

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Alternate Database Restore Process

- In the various sample installation procedures described above, we followed a certain sequence of steps to prepare your EventPro database: create a new placeholder database, and then restore the existing EventPro database over the placeholder.
- We also noted that there is an **alternate sequence of steps** that you could follow after installing the Data Updater. These instructions will briefly describe this alternate process.
 - 1. After installing the Data Updater, you can **restore the backup** of the existing, prepared EventPro database. (In this sequence of steps, you are not restoring it over another database, as described in the other method of preparing the database.)
 - a. Run **SQL Server Management Studio**. (Remember that the version of SQL Server Management Studio you are running may be different, but you should be able to find the same or similar functions.)
 - b. In SQL Server Management Studio, right-click the Databases folder and select Restore Database.

Microsoft SQL Server Management Studio Quick Launch (Ctrl+Q) </th
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c. In the **Restore Database** window, under **Source**, select the radio button next to **Device**, and click the ellipsis.

The Select Backup Device window appears.

d. In the Select Backup Device window, click Add.

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e. The Locate Backup File dialog appears. Find and select the backup file of the EventPro database that your Training or Support Specialist sent you, and click OK. Click OK in the Select Backup Devices window to return to the Restore Database window.

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- f. Back in the **Restore Database** window, check that the **Destination Database** is correct. If you prefer, you can change the name of the database to the commonly used **EventProData**.
- g. Click **OK**. The database restore will begin.

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h. When the database restoration is complete, you will see that your EventPro database has been added under **Databases** in the **Object Explorer** panel of **SQL Server Management Studio**.

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- 2. The next step is to **install EventPro Software**. Follow the process as described for the particular installation type, but do not run the EventPro program yet. This step will add the **EventProMaster** database.
- 3. Next, you will link the client database to the EventProMaster database.
 - a. Run the Database Utility Wizard and select "Create a Master Database Client ID".


b. In the **Target Database** page of the wizard, enter the required information. Most of these fields are described in the installation instructions above, except for **Tenant I.D.**, which is a field required specifically for linking the client and Master databases.

Enter the target	database information.	
Database Informat	tion	
Database Type	MS-SQL	,
Server	MYDBSERVER \SQLEXPRESS	
Authentication		
User name		
Password		
Database	EventProData	
Settings		
Client I.D.	0000000	
Tenant I.D.	1234ABCD5678EFGH	
Cloud Data		
License File	C:\PSI APPLICATIONS\EventPro Software\EventPro\Licence.ini	

- c. To find the **Tenant I.D.**, return to **SQL Server Management Studio**. (Remember that your version of SQL Server Management Studio may be slightly different, but you should be able to find the same or similar functions.)
- d. In the **Object Explorer** panel, expand **Databases > EventProData** (or whatever your client database is called) **> Tables**, and locate the **SecurityUser** database.
- e. Right-click the SecurityUser database, and click Select Top 1000 Rows.

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f. In the **Results** tab to the bottom right, locate the **Tenant I.D.** column, and copy any one of the values.

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- g. Return to the **EventPro Database Utility wizard**, and paste that Tenant I.D. value into the **Tenant I.D.** field of the **Target Database** page.
- h. Finish working through the EventPro Database Utility wizard.
- 4. You can now continue with the installation process as described for the particular installation type you are completing. This may mean you now have to give database rights to users, change the SQL user's rights, or login to EventPro for the first time.

EventPro Desktop Shortcuts

When you install EventPro Software, the installer will automatically create an **desktop icon** that points to the **32-bit** version of EventPro.

- Typically, **32-bit** version of EventPro is suitable for most users.
- There is usually no reason to use the 64-bit version of EventPro, unless you are integrating EventPro with Outlook 64bit.
- If your installation will be integrated with Outlook 64-bit, or there are other reasons you require EventPro 64-bit, please ask your EventPro Trainer or contact EventPro Support to change the target of the desktop shortcut.

Update Software License

- 1. Proceed to the **EventPro website** and login to the **Client Login area** with your 6-digit license **User ID** and 4-digit **Password**.
- 2. Locate your License file, and click **Download File** to download the license.
- 3. Save your license file to your EventPro folder.
- 4. In your EventPro folder, run the EventPro.EPDataUpdater application file to start the EventPro Database Utility Wizard.

5. The EventPro Database Utility Wizard begins.



- 6. Choose the **Update License in Master Database** option. Click **Next**.
- 7. **Target Database**: Enter the relevant information for the target database.

tPro Database Util	ty	
r get Database Enter the target	database information.	
Database Informa	ion	
Database Type	MS-SQL	•
Server	MYDBSERVER \SQLEXPRESS	
Authentication		
User name		
Password		
Settings		
Client I.D.	000000	
Cloud Data		
License File	C:\EventPro\Licence.ini	
		Back Update Canc

a. Database Information:

- i. Enter in your Database Type and Server name.
- ii. If you are using **SQL Authentication**, check the Authentication checkbox and enter the SQL server username and password.
- iii. If you are using **Windows Authentication**, leave the Authentication checkbox unchecked.

b. Settings:

- i. Enter your Client ID, which is your 6 digit user ID number or the same value used to create the database
- ii. Leave Cloud Data unchecked.
- iii. In the **License File** field, click the ellipsis button to browse to the license file that you just downloaded. Once you've located the license file, click **Open** to select.
- 8. Click Update.
- 9. "Completed" will be displayed in the Results section of the Database Conversion Complete window. Click Finish.
- 10. Your license has now been updated.
- 11. The person with Administrator rights to perform this update should log into EventPro first, before other users, to complete the update process. After the Administrator has logged into EventPro, the other users can log in as usual.

Update Your Software

- These instructions will explain how to install Software Updates on your Network Installation of EventPro. If you are using the EventPro Cloud application, you do not need to download or install updates. See Get Your Software Cloud
 <u>Update Cloud Software</u> [55].
- **NOTE**: Updating EventPro Software should only be performed by authorized users with sufficient IT knowledge and understanding of your organization's network. If you are uncertain how to proceed with a software update, please contact **EventPro Support** for assistance.
- Preliminary Step: Backups
 - 1. Before updating, it is **important to backup your EventPro data**. You should make backups of the following databases:
 - a. The EventProMaster database, which has the same name for every user.
 - b. The database that stores your event data, often called **EventProData**. Typically, this database would have been created and named by your Trainer when you first installed EventPro.
 - 2. The process for making backups will vary, depending on the software you are using to manage your databases.

Please consult the documentation of the database management software you use.

- a. For example, in Microsoft SQL Server Management Studio, you right-click the database, go into the **Tasks** submenu and select **Backup**.
- b. You can add or remove file destinations to where a backup can be saved.
- c. Give your backup a unique name, and click OK.
- 3. Regardless of which database management software you use, you should do a "Full" backup of both databases.

• Retrieve the Software Update

- 1. Login to the **Client** area of the **EventPro website**, and go to the **Download** page.
- 2. If you are authorized to accept Software License Agreements on behalf of EventPro XAF with your organization's Client ID, and you accept the EventPro Software Program License Agreement, you can select the checkbox.
- 3. Click the **Download File** link beside the file named **EventPro.Win.Setup.##.#.##.######.exe**. The version number will vary, but the format will be similar.
- 4. Save the file to an appropriate destination on your machine.

• Server Update Process

- 1. Run the EventPro.Win.Setup.##.##.###.###.exe executable you downloaded earlier.
- 2. The Installation Wizard appears. Click Next.
- 3. End-User License Agreement: If you accept the terms in the License Agreement, select the "I accept..." radio button, and click Next.
- 4. Installation Type: Select Server Installation, and click Next.
- 5. Installation Options: If your license contains the EventPro Active Directory Module, you will select the checkbox. Otherwise, leave the checkbox unchecked. Click Next.
- 6. Select Installation Folder: Browse and enter the existing path for the current installation of EventPro using a UNC. Click Next.
 - a. **IMPORTANT**: If the UNC seems to change back to a **local path** when you click **Next** (something starting with a C: or another drive letter), use the local path for now, and note that there will be an <u>extra step</u> [292] at the end of the installation.
 - b. About UNC: A UNC is a network path that includes the computer's name.

For example, if your computer's name is MyPC and EventPro is installed on C:\EventPro, your UNC could be \\MyPC\EventPro\. If you do not know your computer name, you can check in the computer's settings or type "computer name" in the taskbar or Start menu search box.

However, identifying the UNC is not always that straightforward, depending on your network. If you aren't certain about your network's UNC, you may want to contact your IT Department or EventPro Support for assistance, and record the UNC for future updates.

- 7. **SQL Database**: Enter the path to the server your EventPro database is located on. The path is in the format "ComputerName\ServerName".
 - a. If you are not sure what the path to the server is, you can find this information in your database management software, although it will vary, depending on the software you use.
 - i. For example, in Microsoft SQL Server Management Studio, this information is available by right-clicking the EventProMaster database and selecting **Properties**. In the pop-up window that appears, the **Server** is listed in the left pane.
 - b. The **credentials** you enter are based on your original setup.
 - i. If you select **Windows Authentication**, it will try to connect to the database with the **current Windows User's credentials**.
 - ii. If you select **SQL Authentication**, the **SQL account credentials** have to be entered manually.
 - c. Select the applicable authentication option, enter credentials if necessary, and click Next.
- 8. The installer will attempt to connect to your database, and will only continue if the connection is successful.

If it does not continue, there is an issue with your credentials and/or SQL server path.

- 9. Once your installation is configured, click **Install**.
- 10. **EXTRA STEP FOR CHANGING UNC**: If the UNC did not stick in <u>step 6</u> arlier (*i.e.* it kept reverting to a local path), you must do the following set of steps. If you do not, Workstation installations will look in the wrong place when attempting to update automatically.

If you are not certain how to find or edit the files described below, you may want to contact your IT Department or EventPro Support to walk you through the process for the first time.

- a. Open your computer's File Explorer, and navigate to the folder to which you installed EventPro.
- b. Locate the EventPro.Win.exe and EventPro.Win32.exe config files.

Depending on how you have File Explorer configured, you should be able to see that these files are marked as **CONFIG File**.

- c. **Right-click** the **EventPro.Win.exe** file, select **Open With**, and choose whichever text editor you prefer (*e.g.* Notepad).
- d. Look at the eighth line, which will be similar to this:

<add key="NewVersionServer" value="C:\EventPro\" />

This is the path that Workstations will look to when attempting to update, so this path needs to be a UNC.

e. Delete the path currently between the quotation marks, and replace it with the UNC path you tried to enter in step 6 [29].

So, for example, if the UNC is \\MyPC\EventPro\, that path would be put between the quotation marks. As noted above, remember that your UNC will be different, as it is specific to your network.

<add key="NewVersionServer" value="\\MyPC\EventPro\" />

- f. **Save** the file and close.
- g. Now repeat the process, c. to f., with the **EventPro.Win32.exe** file.

• Workstation Update Process

1. After you update the server, the workstations should automatically update when the users run and log into EventPro.

Get Help

- EventPro has offices in North America, Australia, and the United Kingdom, allowing us to provide sales, training, and support services to our clients in all time zones.
- Support:
 - EventPro Software is backed by our team of dedicated, in-house Support experts.
 - If you require assistance with your EventPro application, please contact Support in the region nearest you: <u>https://www.eventpro.net/contact-us.html</u>
 - For most efficient service, please provide this information when contacting Support:
 - Your Name and Company Name.
 - Your 6-digit User I.D. number.
 - If this is an existing case, your HQ Number, which can be found in the Support email you have received.
 - **Details** about your issue or question.
 - Please note that in order to access Support, you must have a current Upgrade Protection Plan (UPP).
- Sales:
 - Any of our **Solutions Consultants** will be happy to answer your questions and discuss how the EventPro Software application and various Modules will meet the needs of your organization.
 - Feel free to contact a Solutions Consultant in the region nearest you: <u>https://www.eventpro.net/contact-us.html</u>

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Please report errors or submit suggestions regarding the Installation Guide content to Manual@EventPro.net

For questions related to program functionality or technical issues, please contact the EventPro Support Department

For questions about purchasing, contact an EventPro Solutions Consultant

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