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:
  - **Get Your Software: Cloud** 2
  - **Get Your Software: Installed** 66
- 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 **EventPro Software Manual**.

Get Your Software: Cloud

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

- Send Data for Conversion 2 **(if required)**
- Review Cloud Requirements 8
- Citrix Options 8
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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:

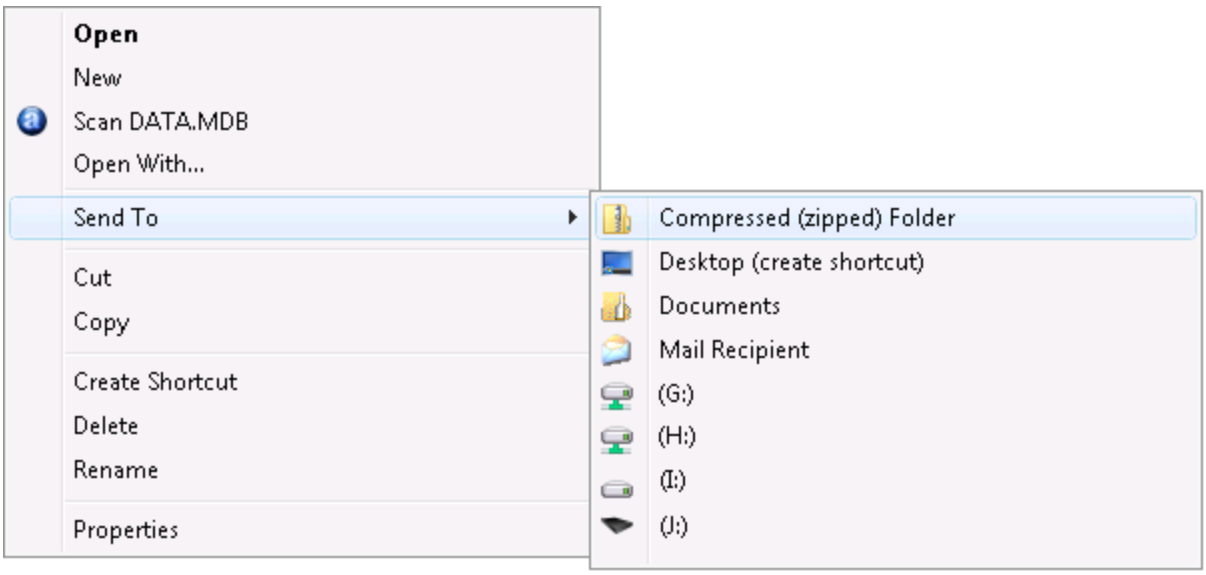
- From EventPro Standard Edition 2
- From EventPro Enterprise Edition 3

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**.



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 **Support** to let them know that your data has been sent.
7. If this process does not work for you, please contact **Support** for further assistance.

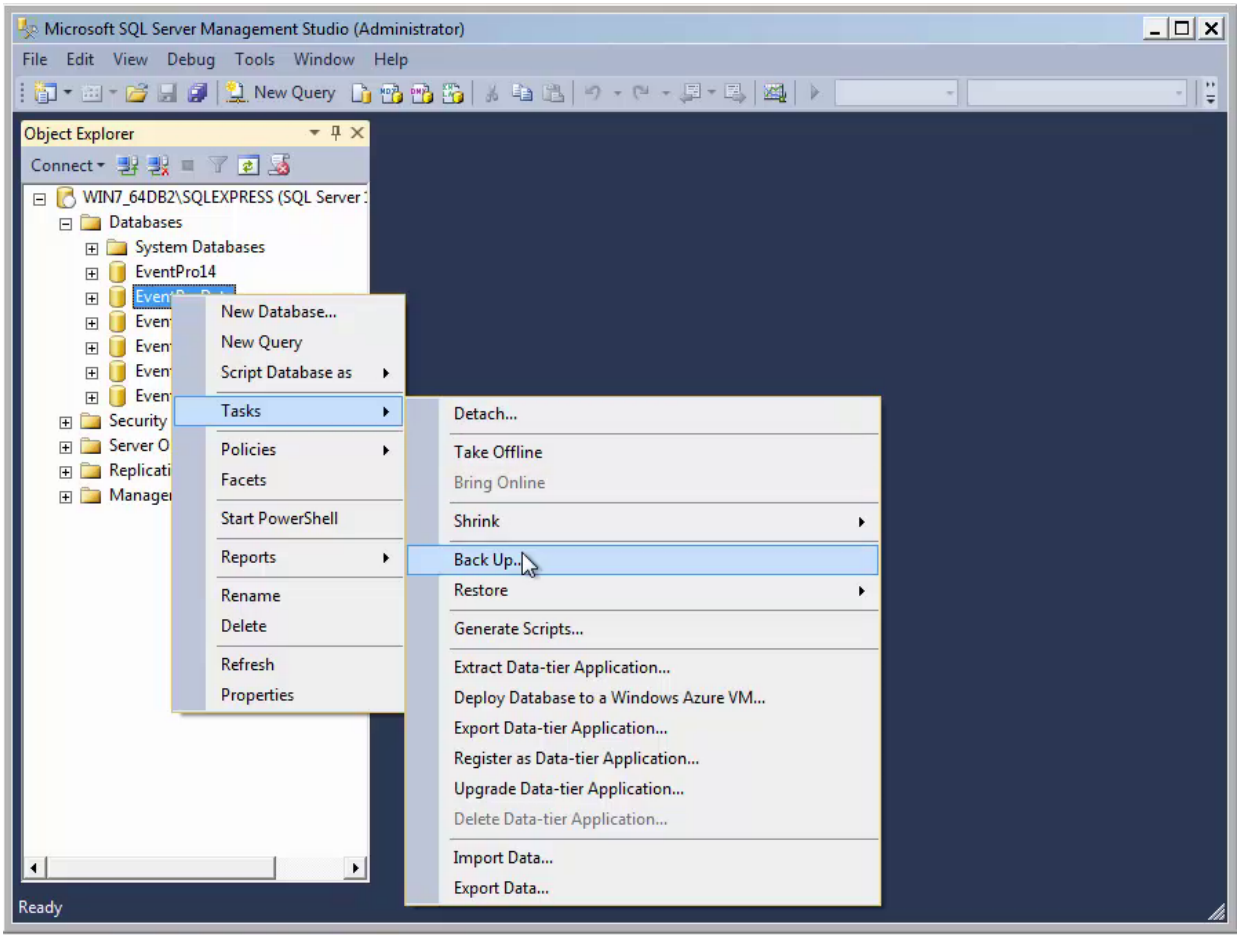
From EventPro Enterprise Edition

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**.

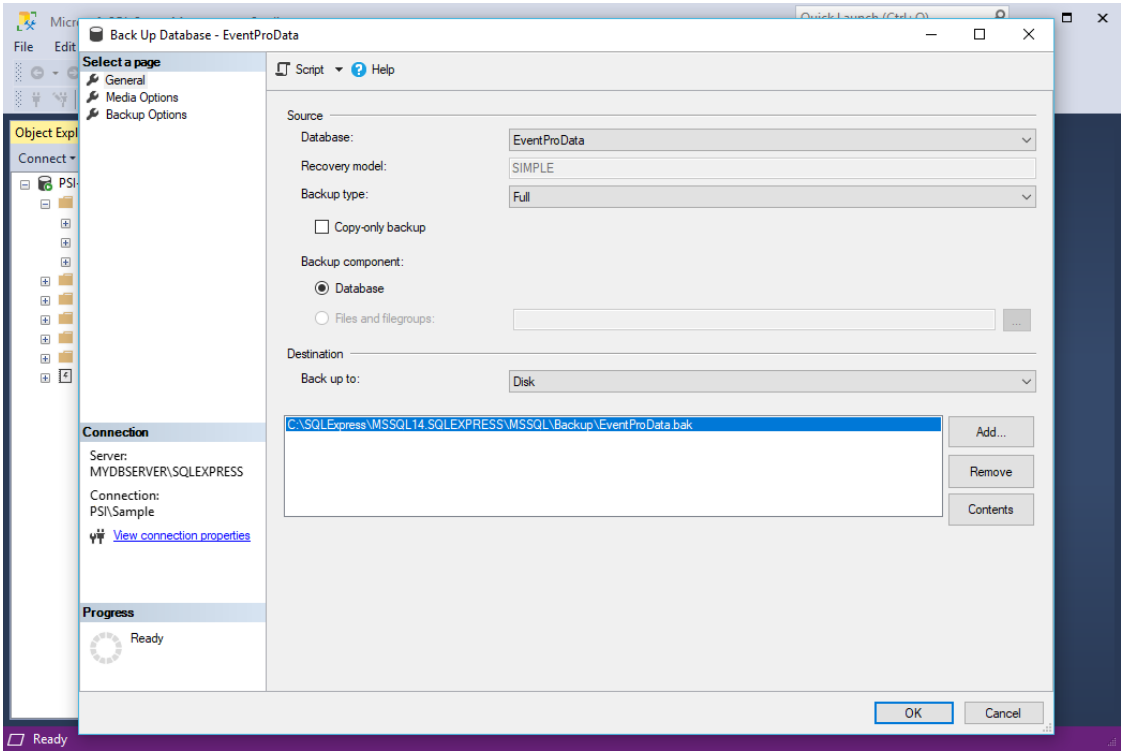


4. In the **Back Up Database** window, ensure that these settings have been selected:

   a. Under the **General** page:

      i. **Backup type**: Full

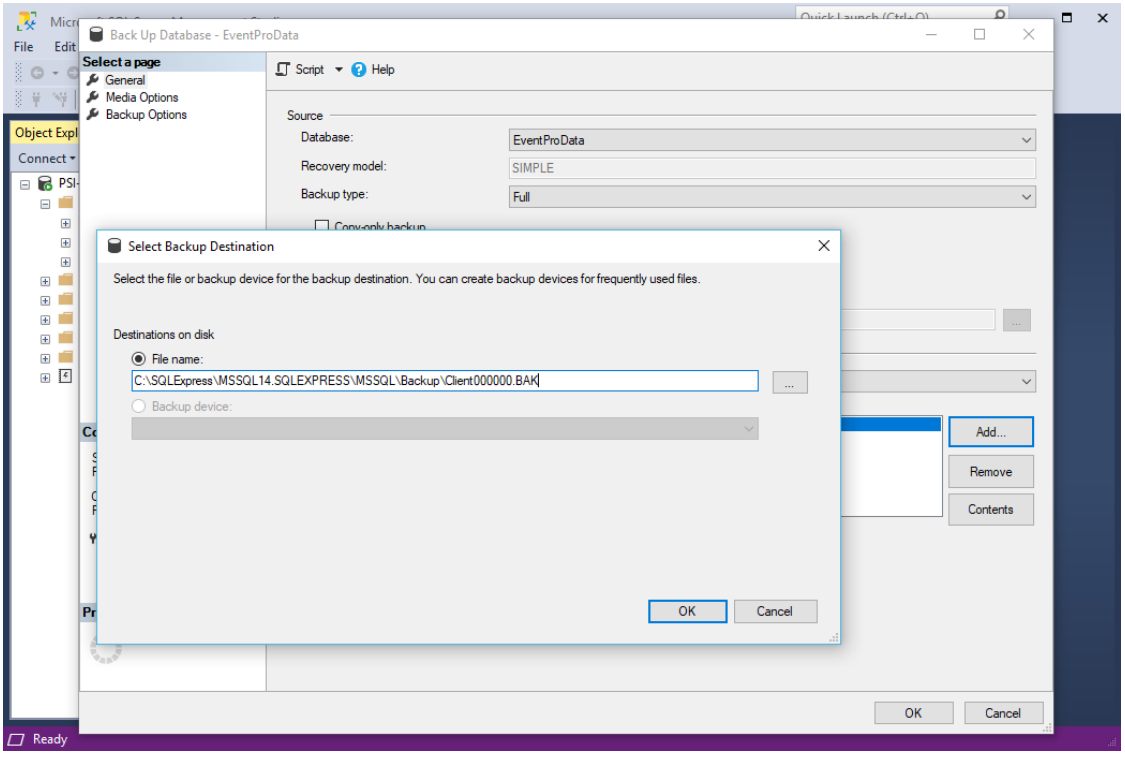
      ii. **Back up to**: Disk



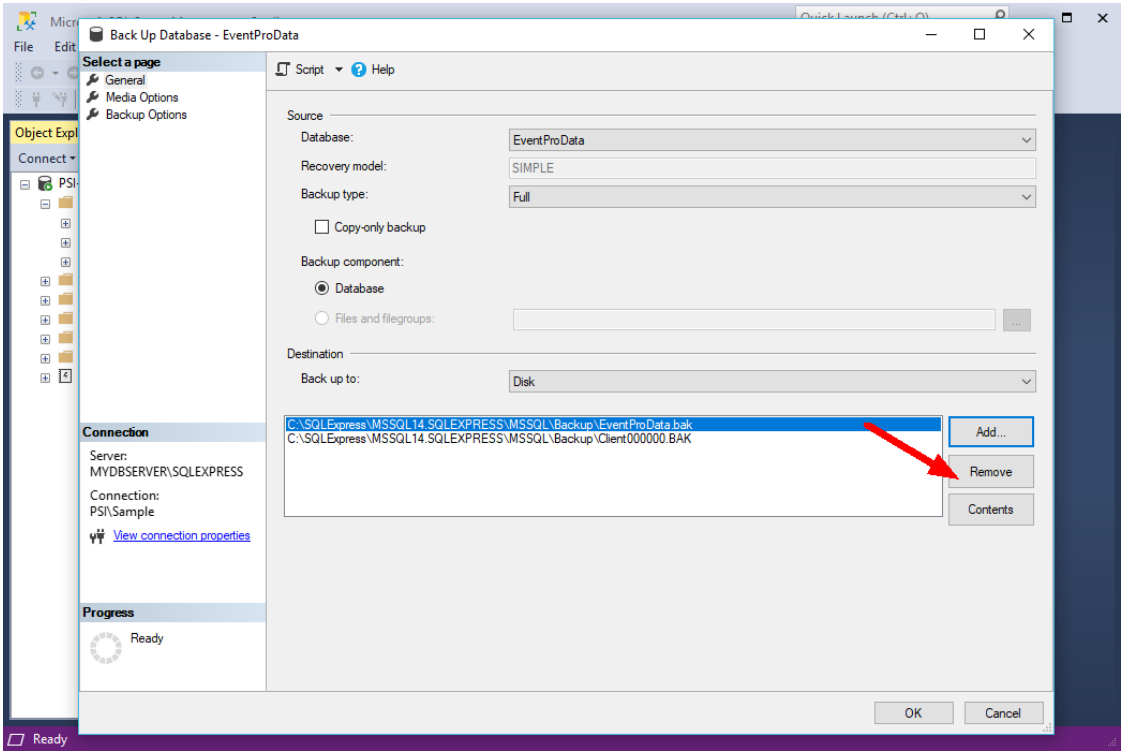
iii. Since EventProData is the default name for all databases, you should ideally rename your backup database so that it is more easily identifiable for EventPro Support.

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.



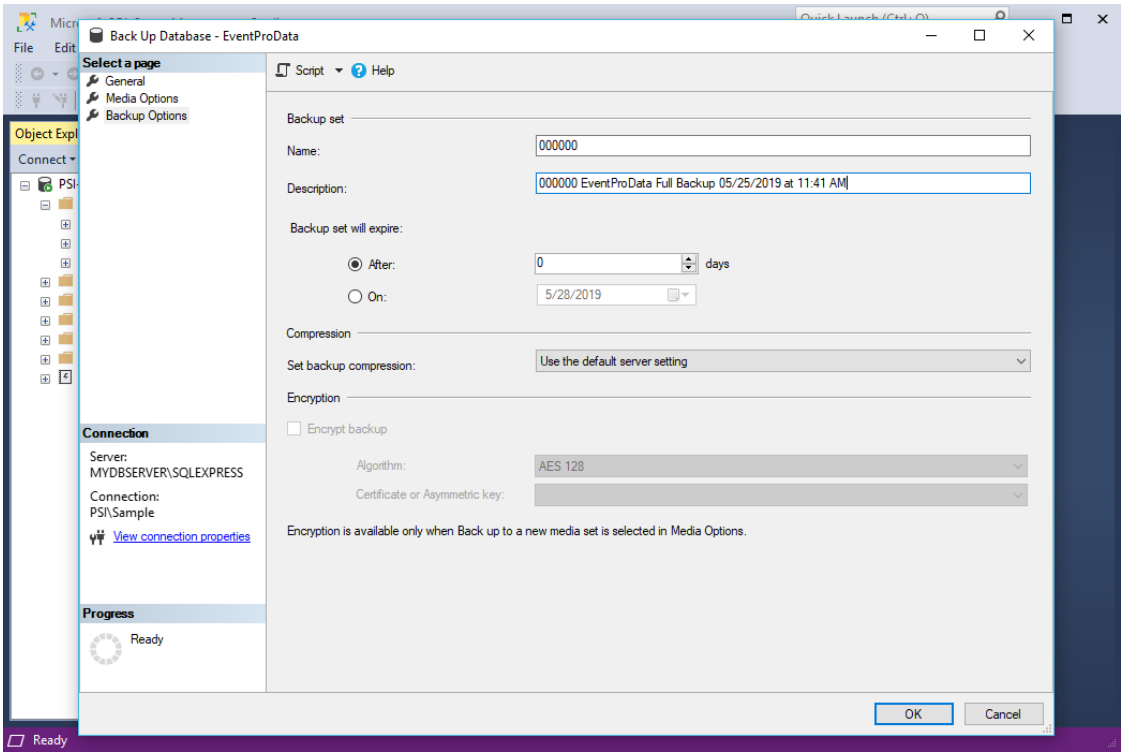
iv. You can then **Remove** the original name.



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**.



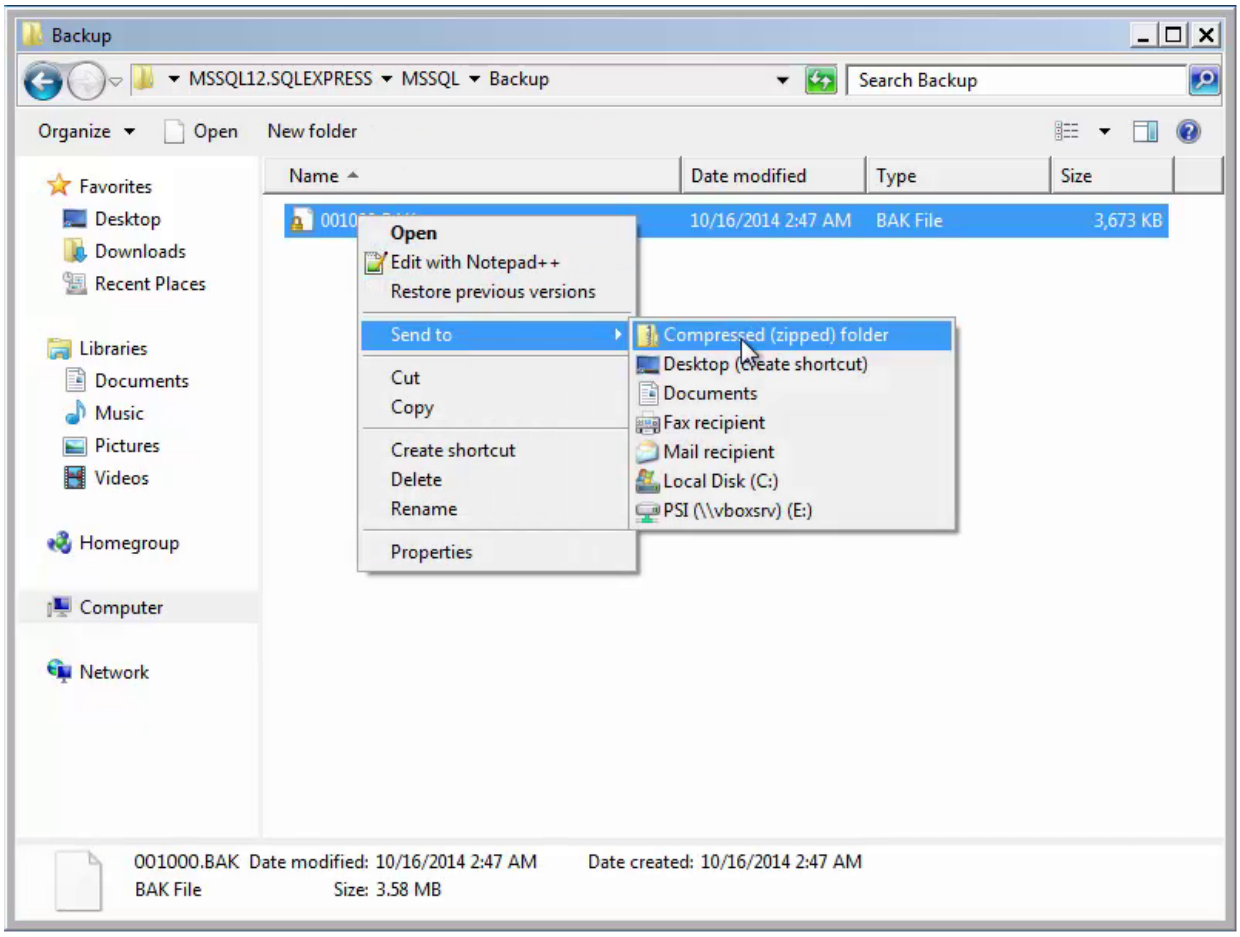
c. Click **OK**. It may take a few minutes to backup, depending on the size of your database.

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 **Support** to let them know that your data has been sent.
4. If this process does not work for you, please contact **Support** for further assistance.

If something in this process does not work for you, please contact **Support** 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 **Upgrade Receiver to Workspace** 9.

- 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 **Citrix Options** 8.

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 Version** 31 **Citrix**.
- There is also a mobile Citrix Workspace app that allows you to access EventPro Cloud on your mobile device. See **EventPro Cloud on Mobile Device** 56.

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 **Desktop** 9 or/and **Mobile** 11. (If you are installing Citrix for the first time, you can begin at **Install Citrix** 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.

1. 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:

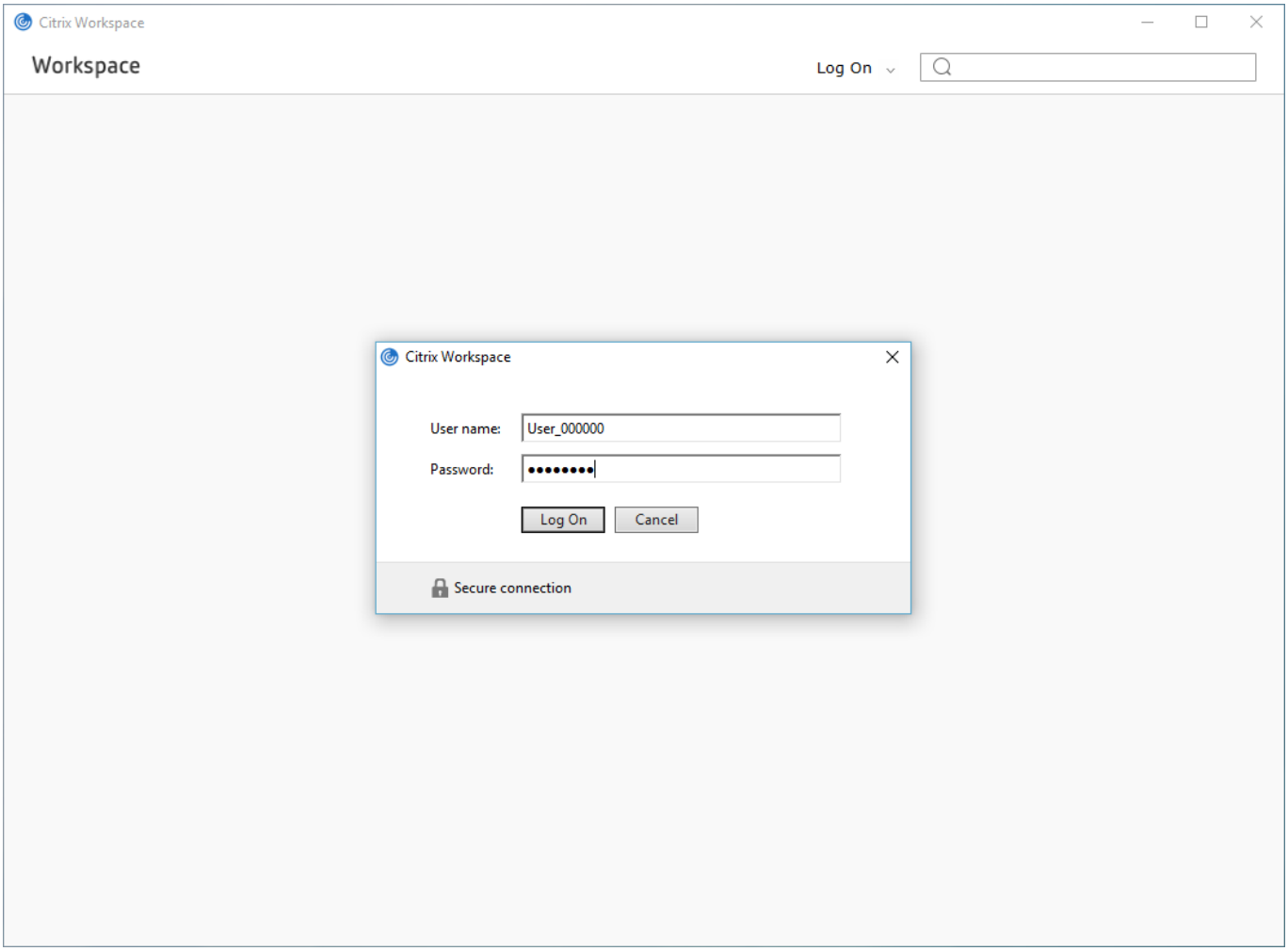
a. The **Learn More** button will direct you to a website with more information about Citrix Workspace.

b. Click **Got It** to go to the Citrix Workspace app.

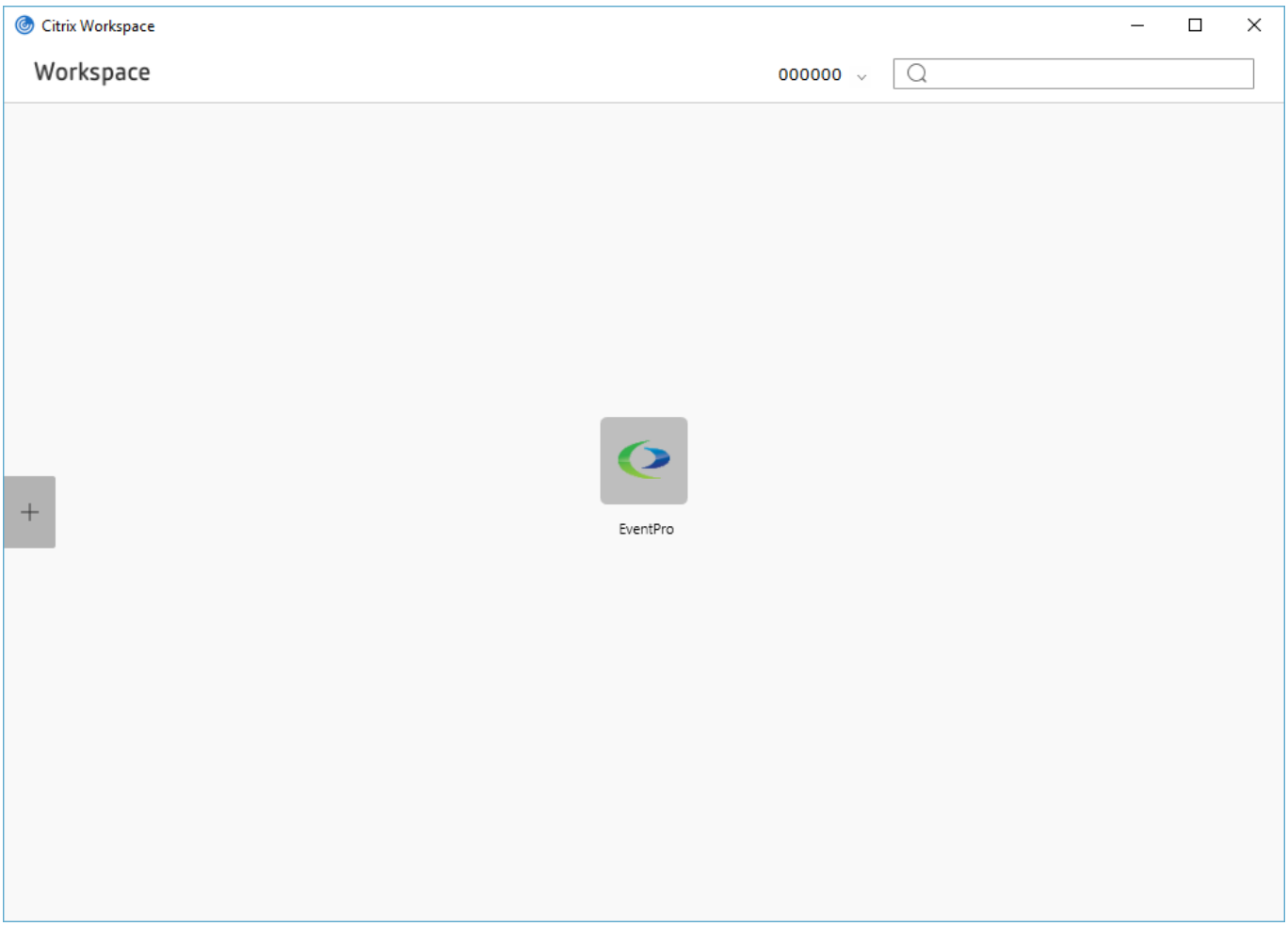
4. Citrix Workplace should remember your Account and go directly to the login dialog.

   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.



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



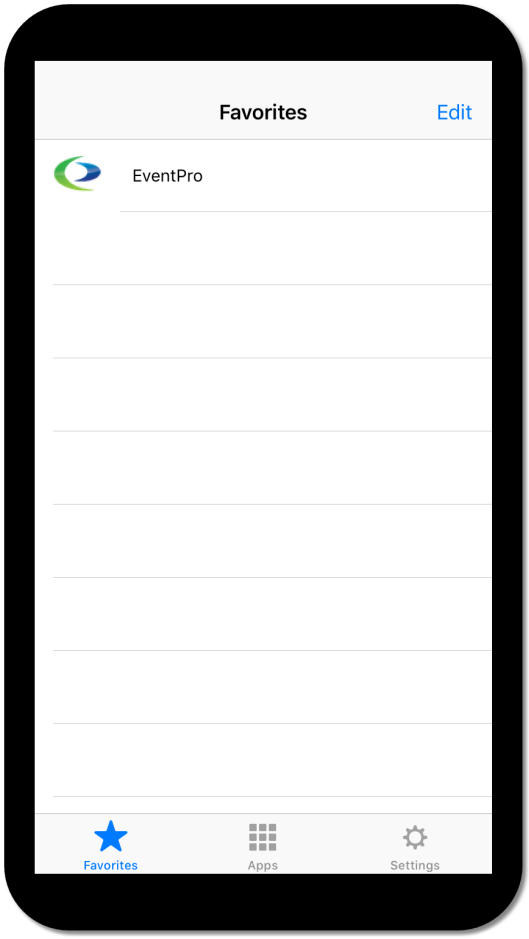
7. The process of upgrading to Citrix Workspace on your smartphone or tablet will vary, depending on your device, its operating system, and its settings.

   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.

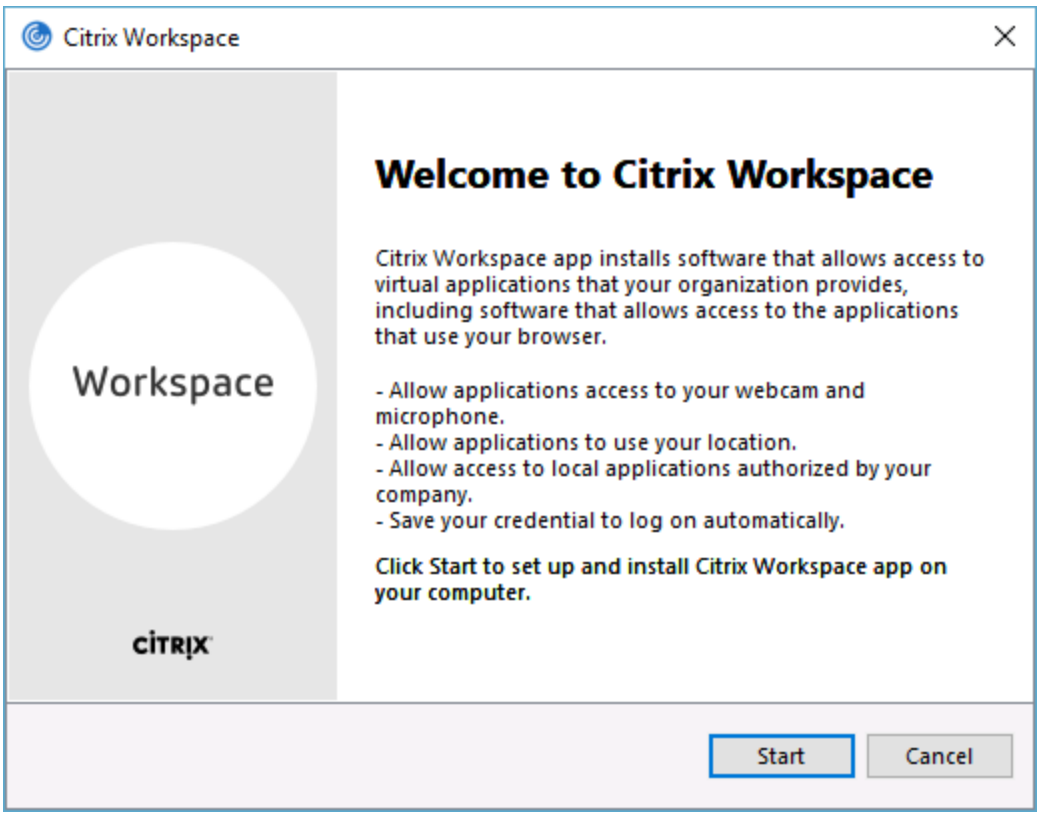
d. If your account and favorite apps have not been preserved during the upgrade, you can review how to **Add an Account** 57, **Log In/Sign In** 57, **Add Apps to Favorites** 59, **Adjust Settings** 60, and more under **EventPro Cloud on Mobile Device** 56.



Install Citrix

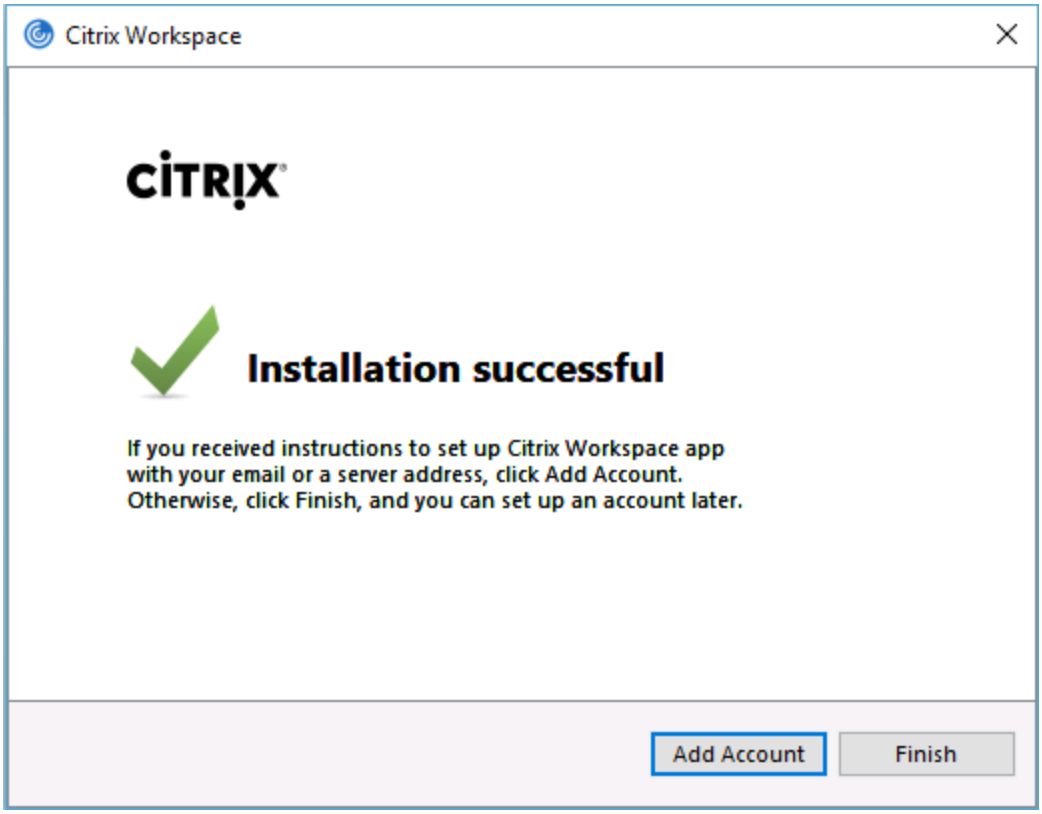
- The following instructions describe how to install Citrix Workspace on a **computer**.
- To learn how to install and use the Citrix Workspace mobile app on a smartphone or tablet, see **EventPro Cloud on Mobile Device** 56.

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 Run Citrix Workspace & Add Account 15 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**.

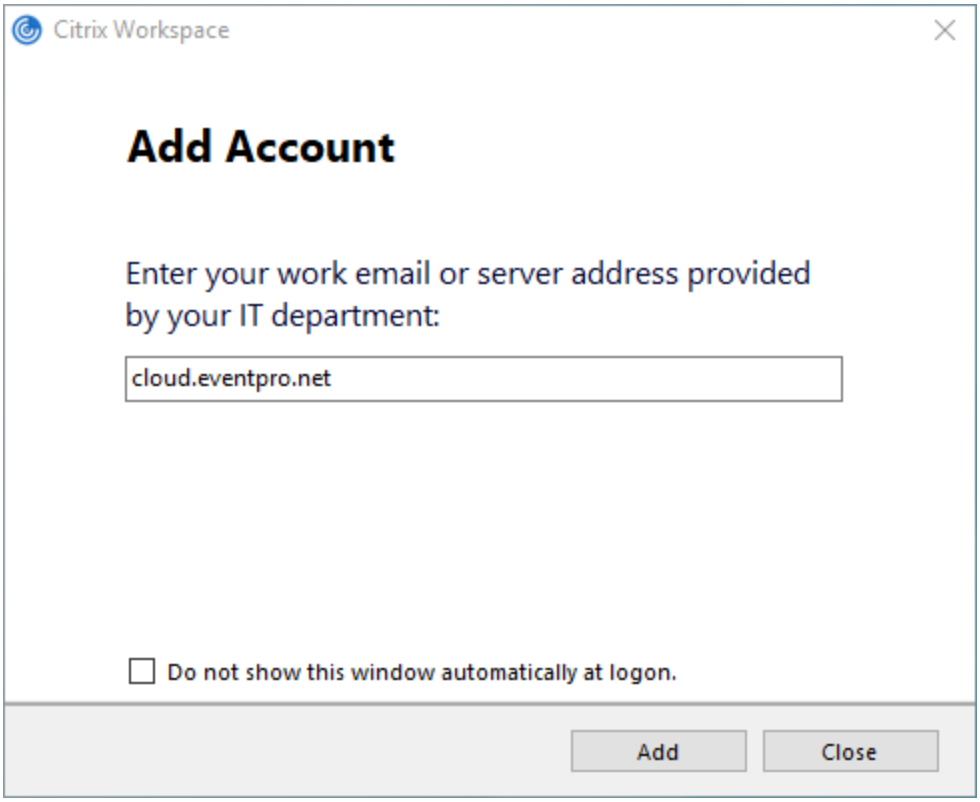
The first time you run Citrix Workspace after installing it, you need to take a few steps in order to set up access to EventPro. Subsequent logging in to EventPro will be much more simple.

- Run Citrix Workspace & Add Account 15
- Add Apps to Citrix Workspace 17
- Run EventPro 19
- Subsequent EventPro Login 22

Run Citrix Workspace & Add Account

1. Assuming it is already installed 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 below 37.)
3. Enter **cloud.eventpro.net** in the field and click **Add**.



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:

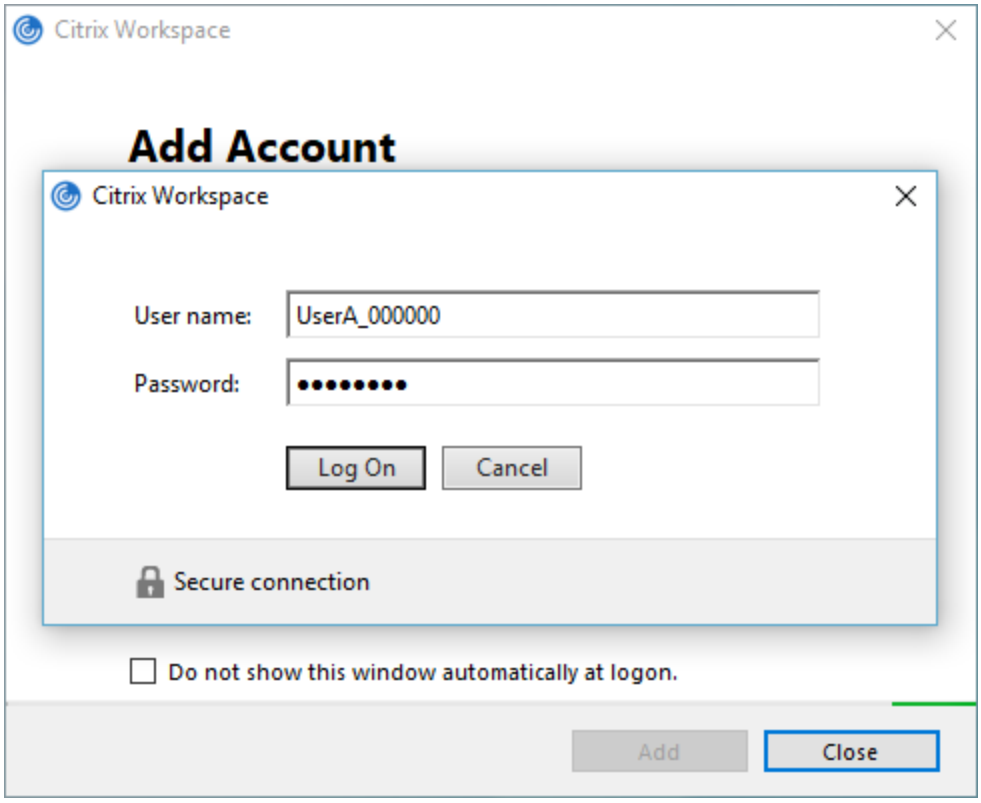
User Name: admin_X (where the X represents your company's 6-digit User ID number. So, for example, if your User ID is 123456, you would log in with the user name admin_123456).

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

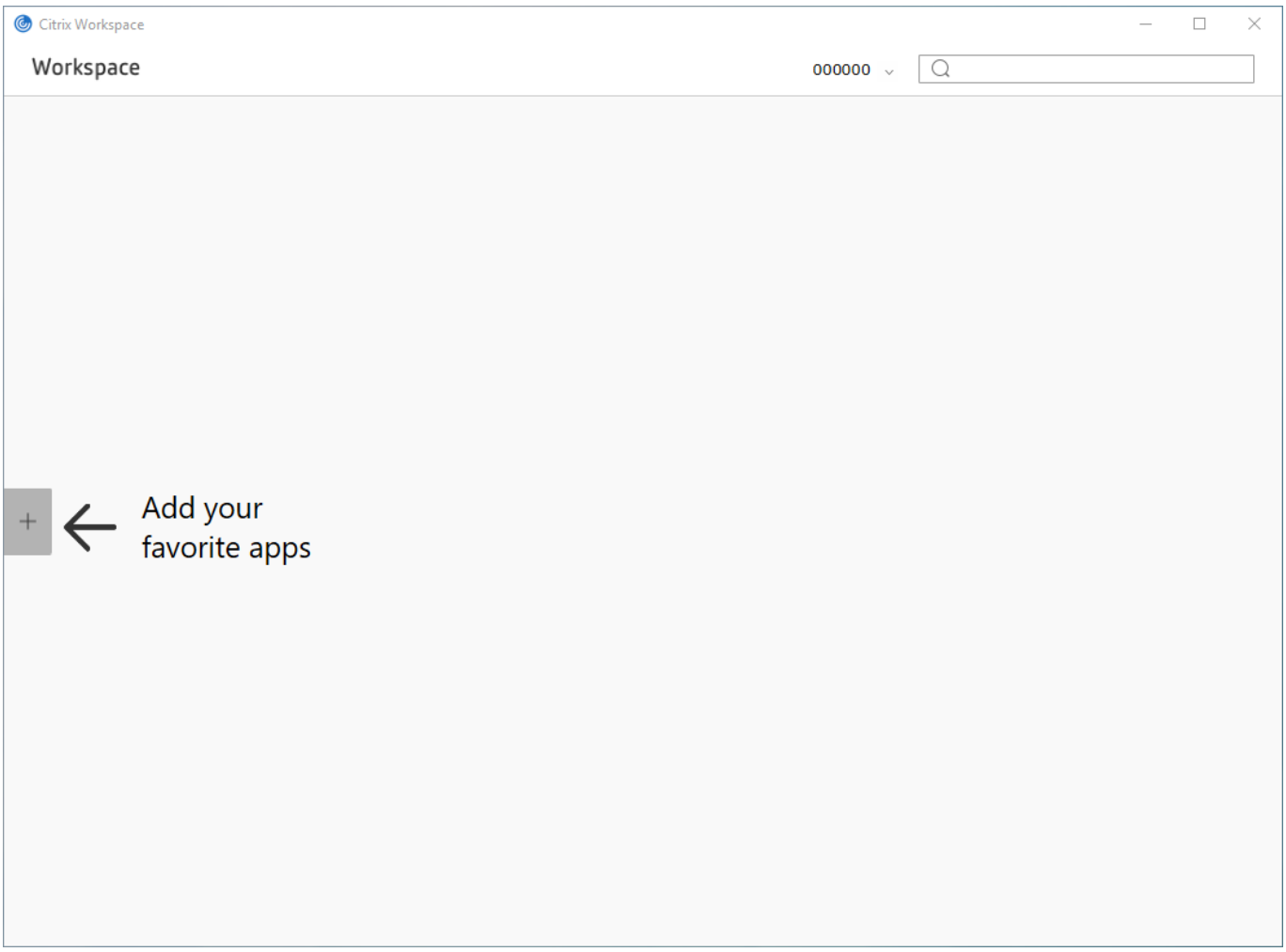
b. If you are a **regular, non-Admin User**, your Admin User should have provided you with your **User Name** (in the format namel_000000, where "name" is your first name, "l" is your last name initial, and 000000 represents your organization's 6-digit User ID) and your **Password**.

Enter those credentials now.

c. Click **Log On**.



5. The **Citrix Receiver** window opens.

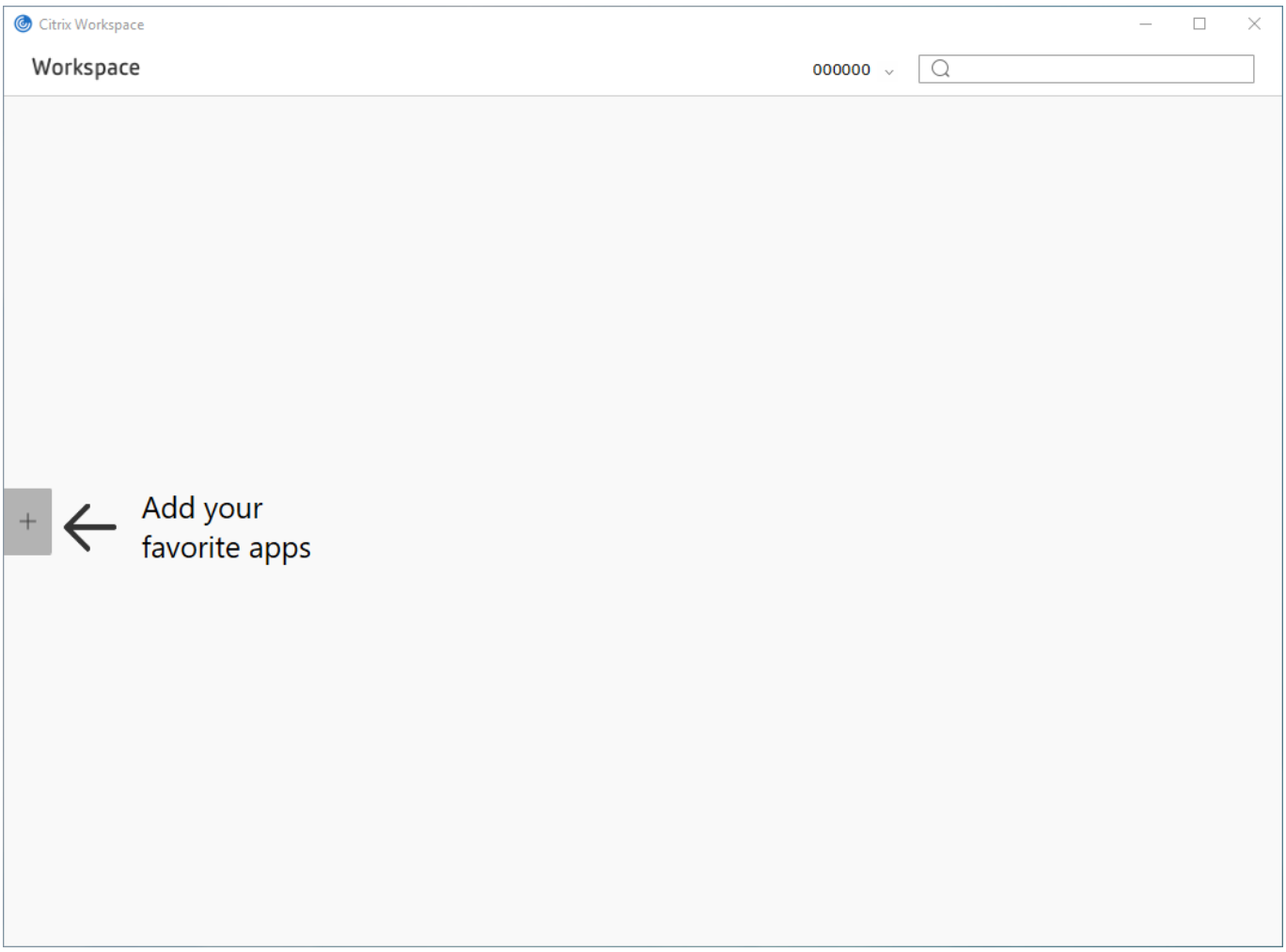


6. Next, go to **Add Apps to Citrix Workspace** 17.

Add Apps to Citrix Workspace

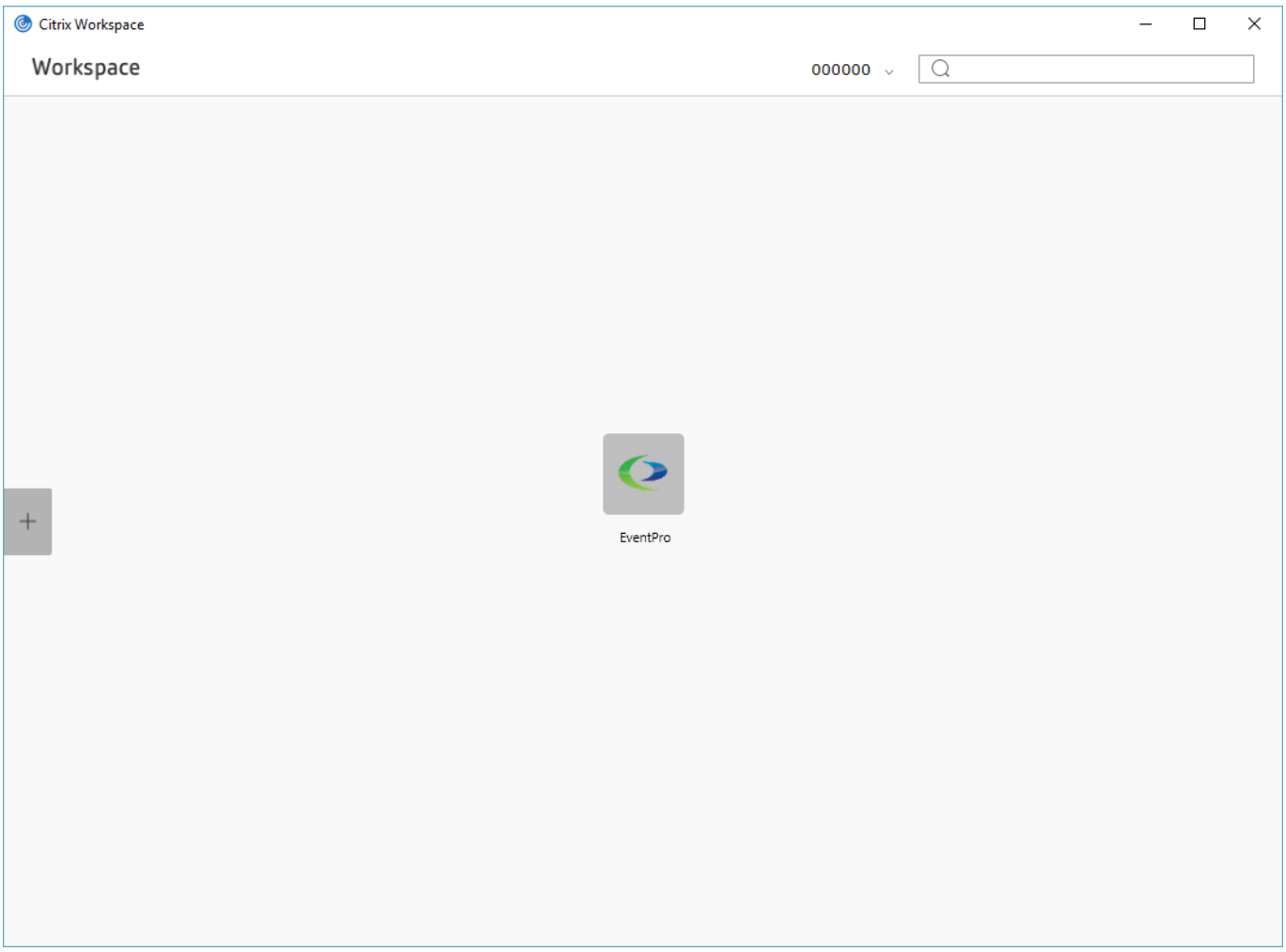
1. When you open and log into Citrix Workspace for the first time, there won't be any apps on the screen.

   You can add your EventPro app now.



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.



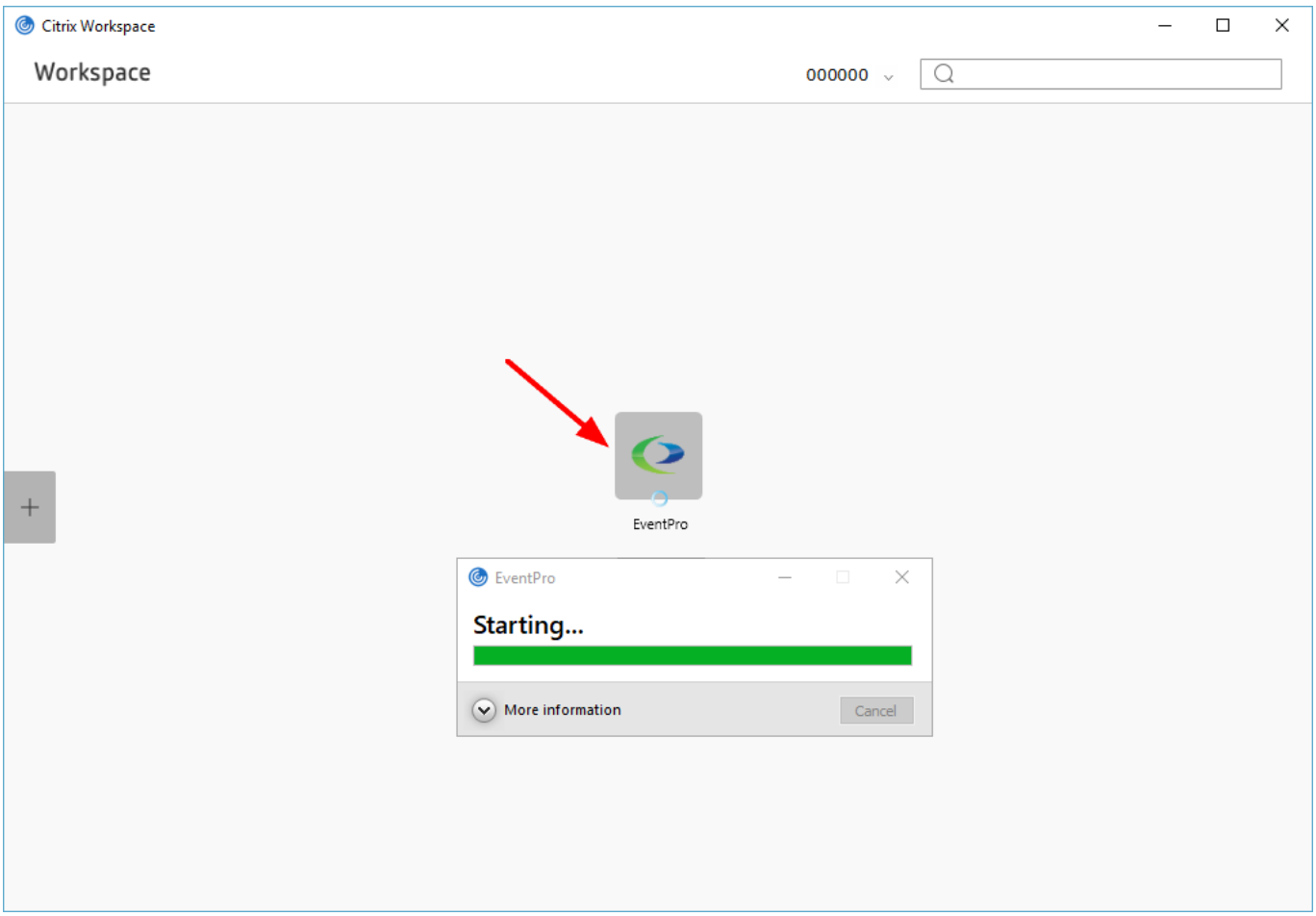
5. Next, go to **Run EventPro** 19.

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.



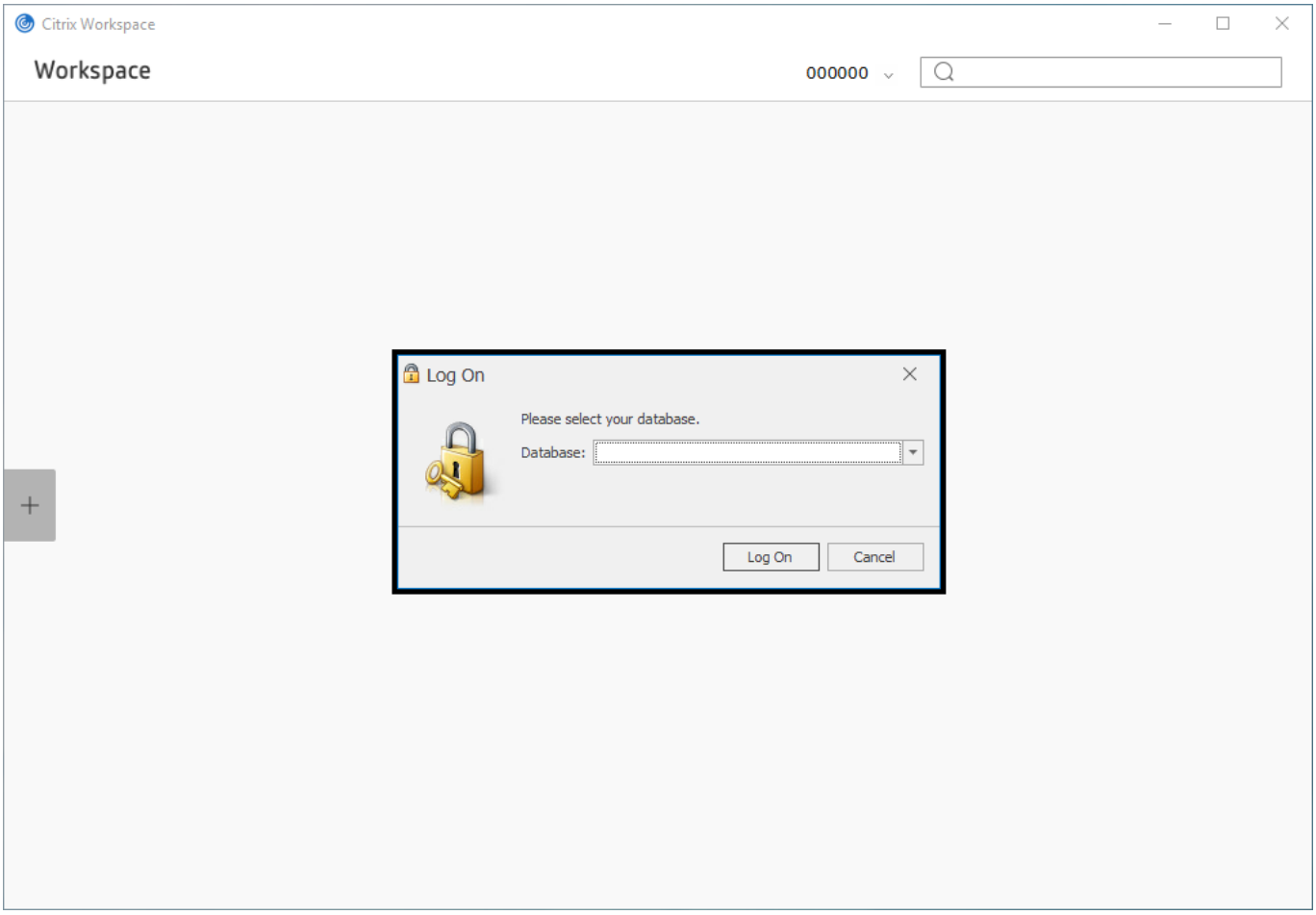
3. The **EventPro Starting** dialog will disappear, and the **EventPro splash screen** will appear, indicating that EventPro is starting up.

   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.

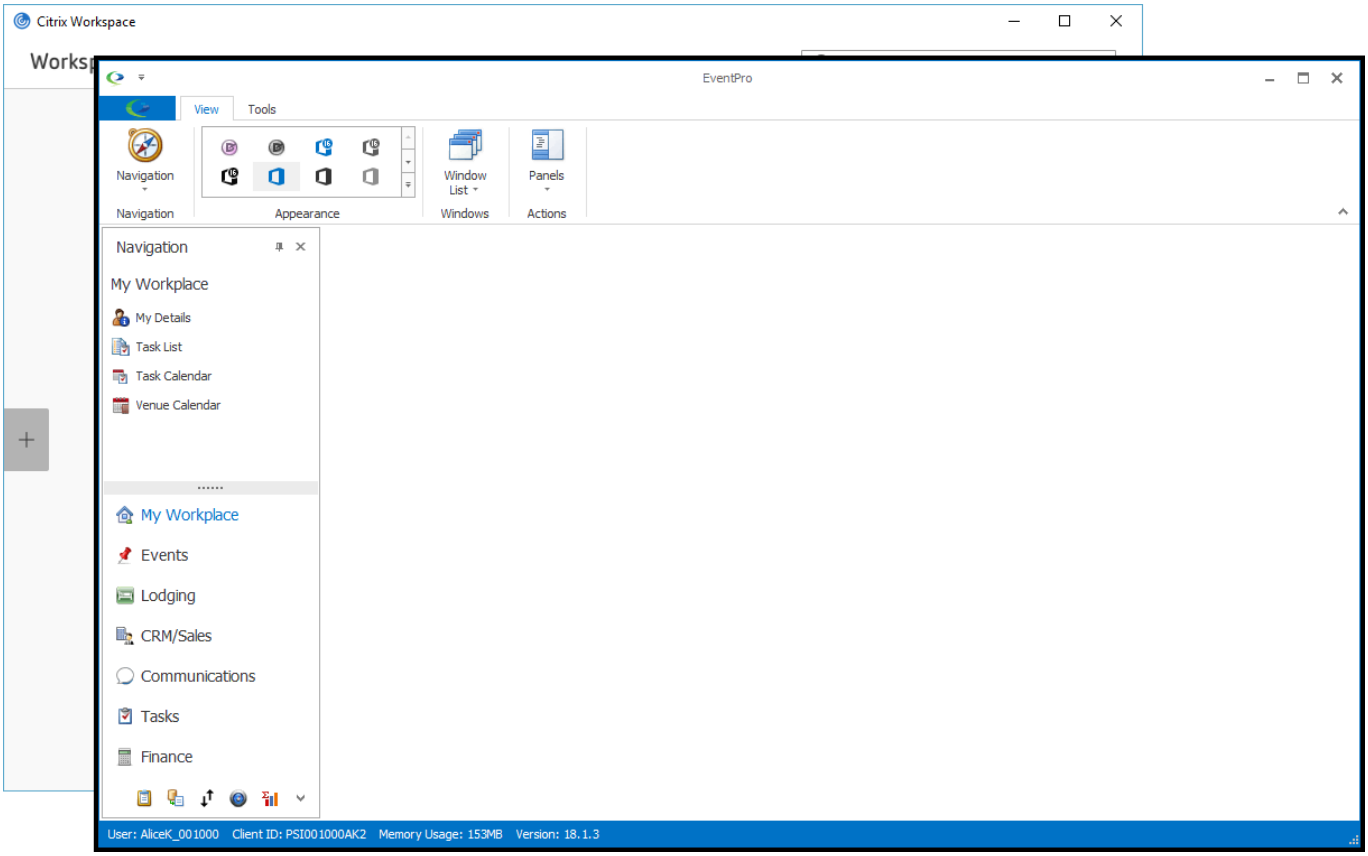
   Do not click the program icon a second time once EventPro is already loading up; give the loading screen a few moments to appear.

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.



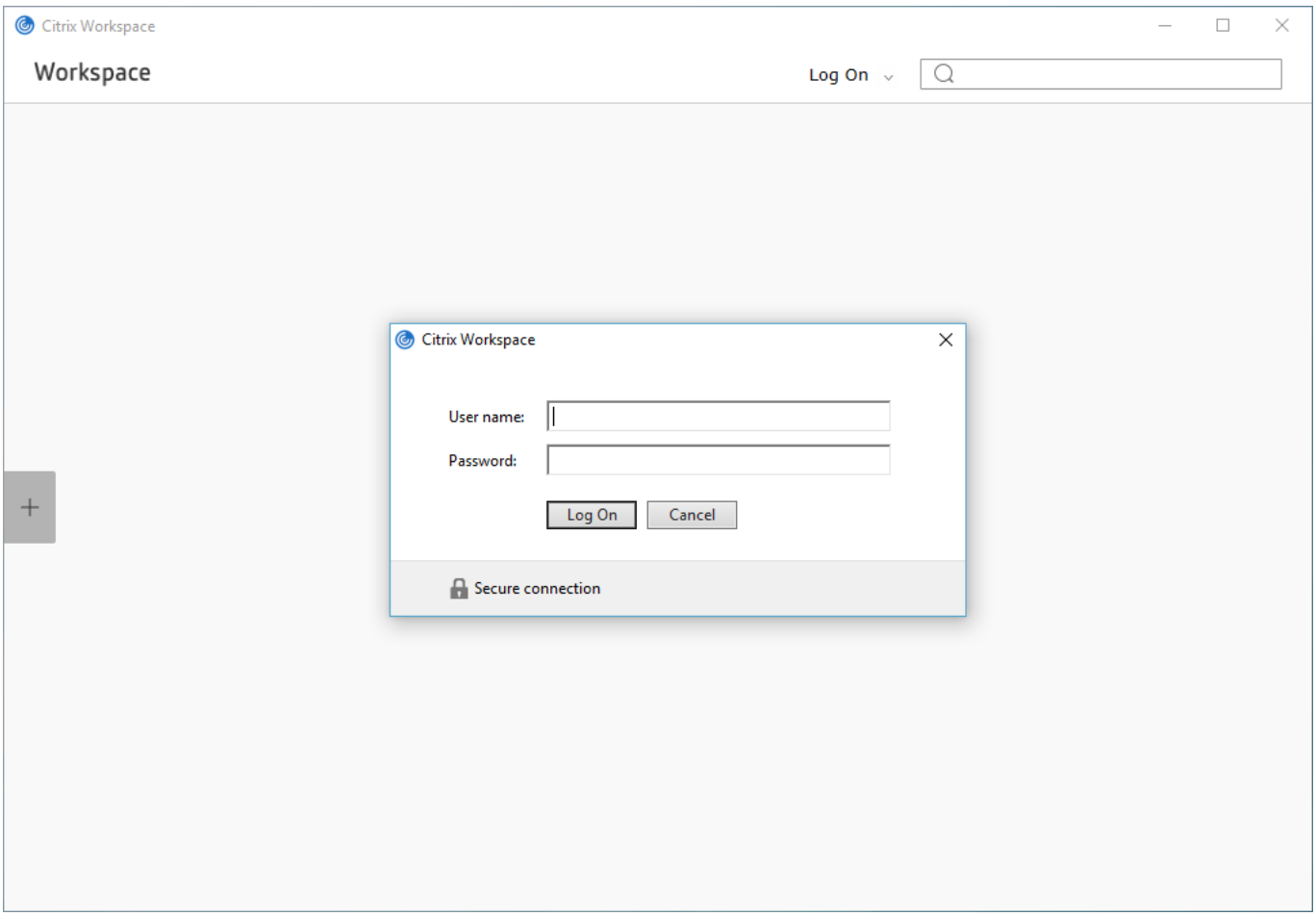
5. The EventPro application will load for a few more seconds, and then appear in its own window separate from the Citrix Workspace window.



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.

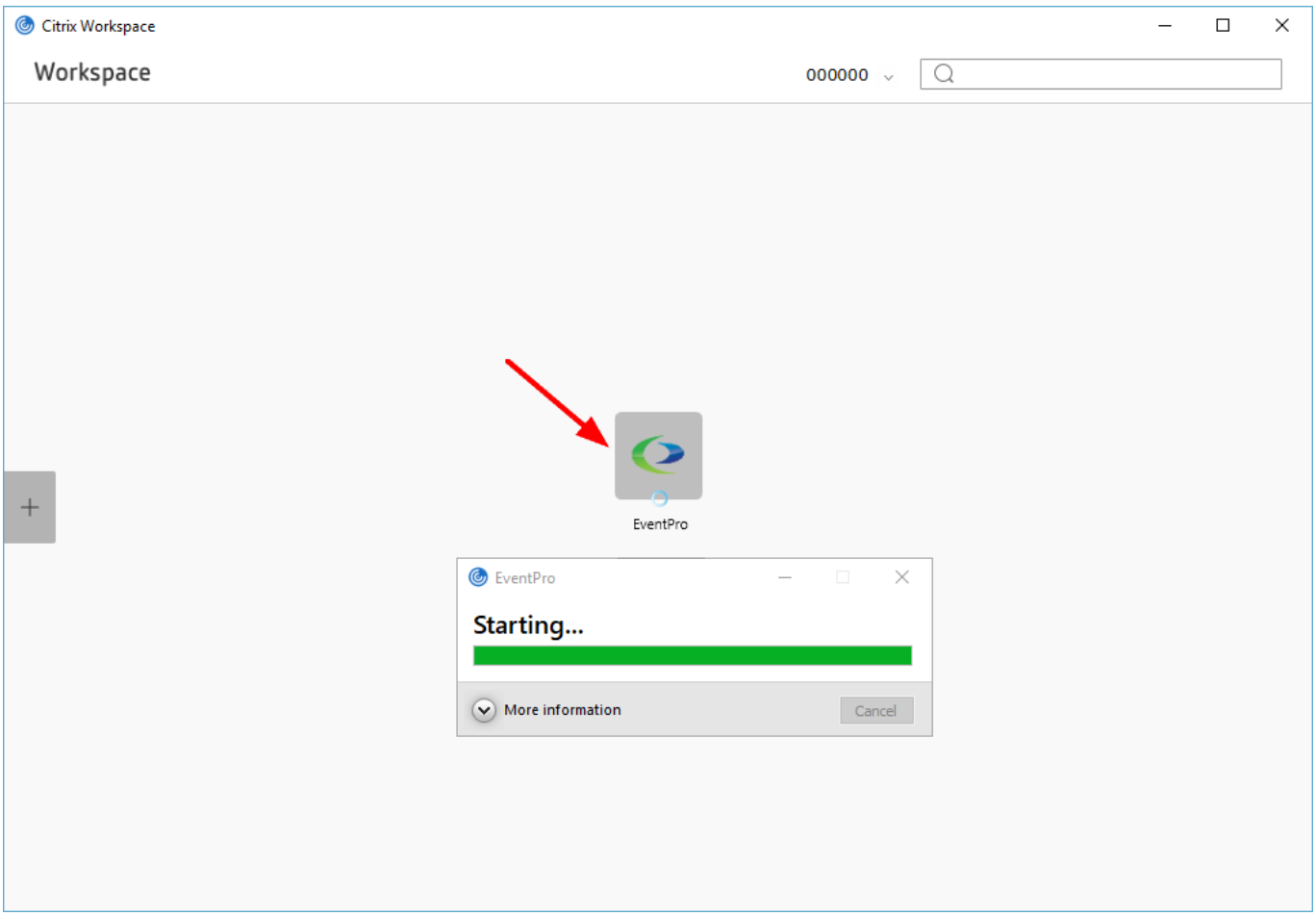
1. Run **Citrix Workspace** from your Start menu or desktop shortcut.
2. If the login dialog doesn't pop up right away, click the **Log On** link.
3. Enter your **User Name** and **Password**, and click **Log On**.



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.



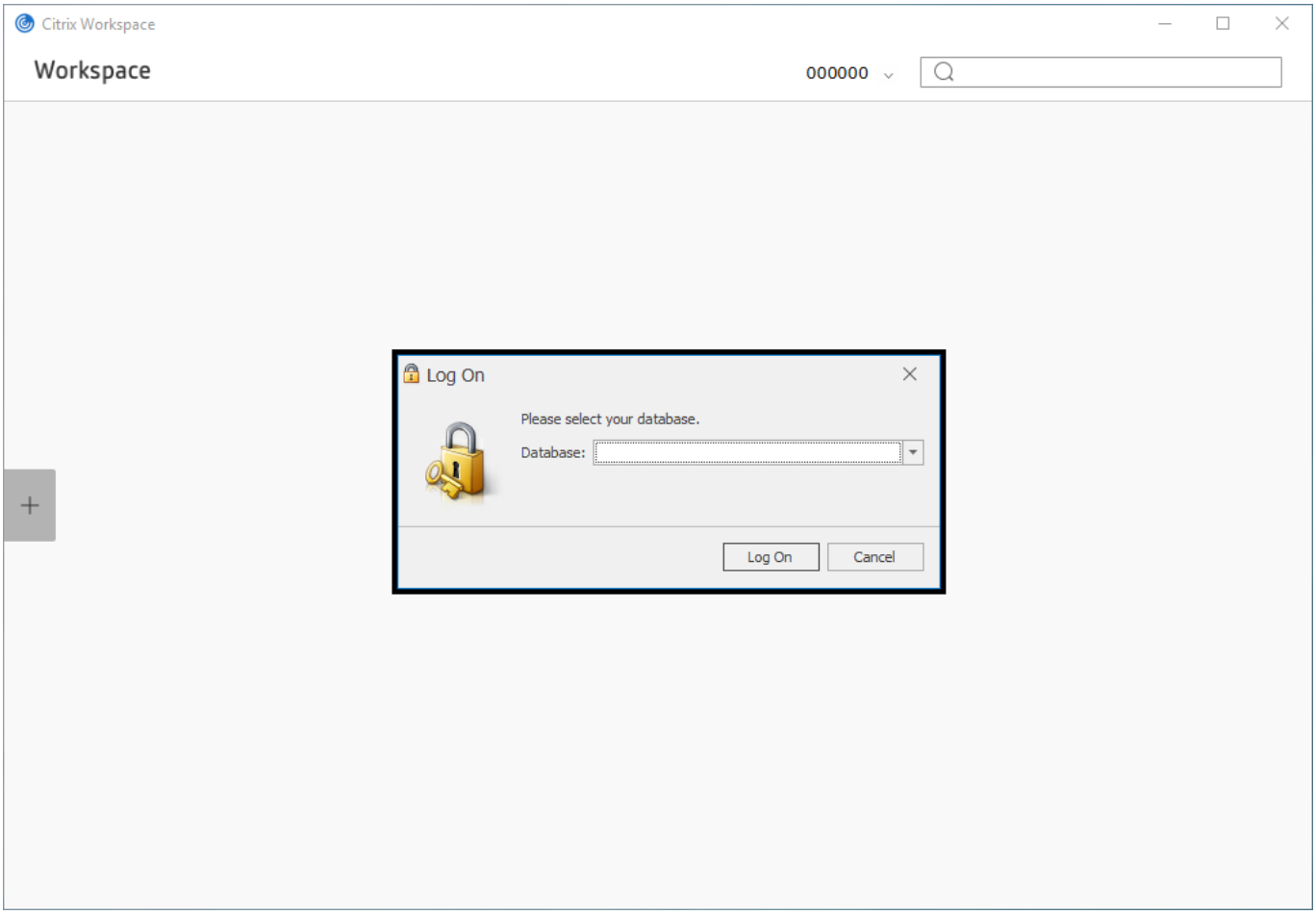
6. The **EventPro Starting** dialog will disappear, and the **EventPro splash screen** will appear, indicating that EventPro is starting up.

   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.

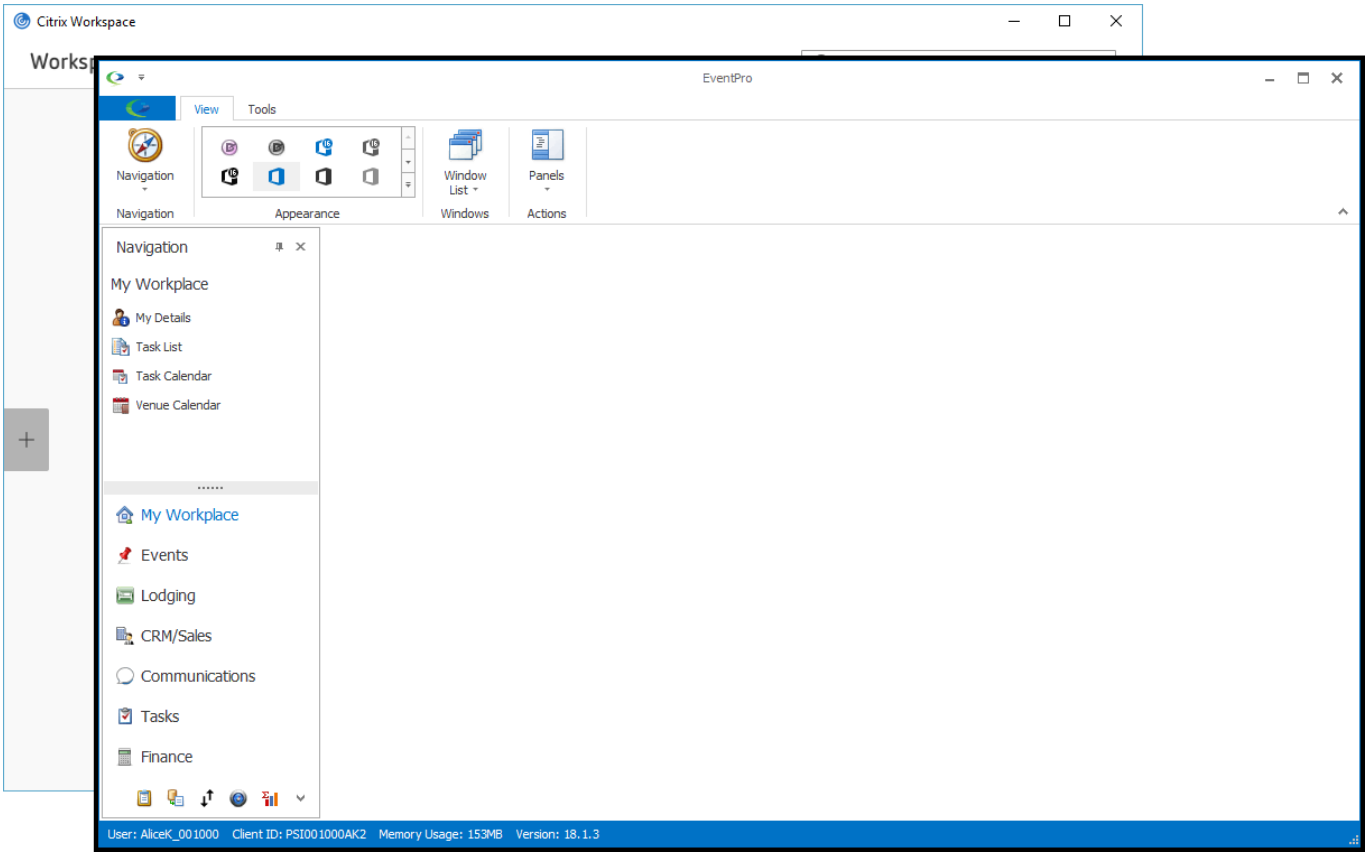
   Do not click the program icon a second time once EventPro is already loading up; give the loading screen a few moments to appear.

7. 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.



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



Access from Cloud Gateway Browser

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

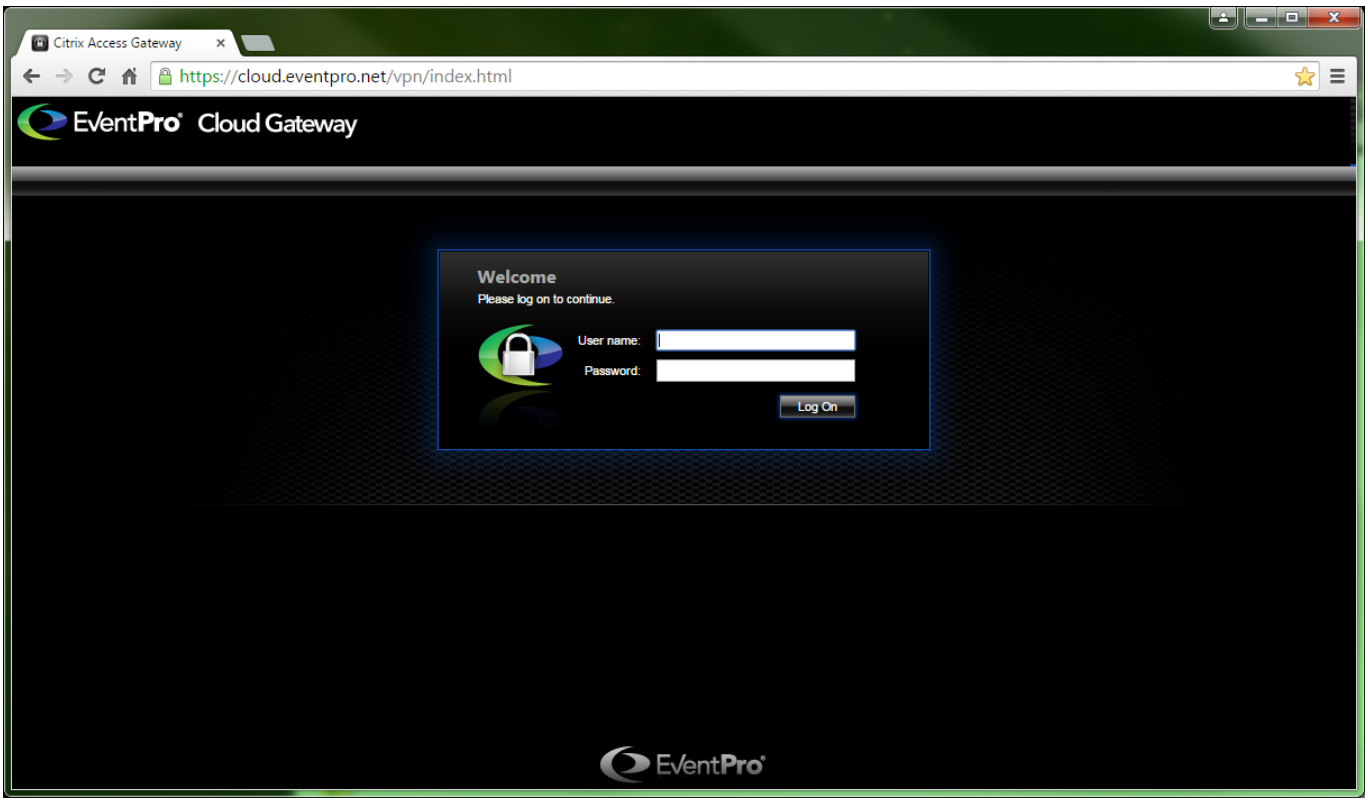
The first time you access Citrix through the Cloud Gateway, you need to take a few steps in order to set up access to EventPro. Subsequent logging into EventPro will be much more simple.

- Login to Cloud Gateway 26
- Run Citrix 29
- Add Apps to Citrix StoreFront 35
- Activate Desktop Citrix 37
- Run EventPro 40
- Subsequent EventPro Login 44

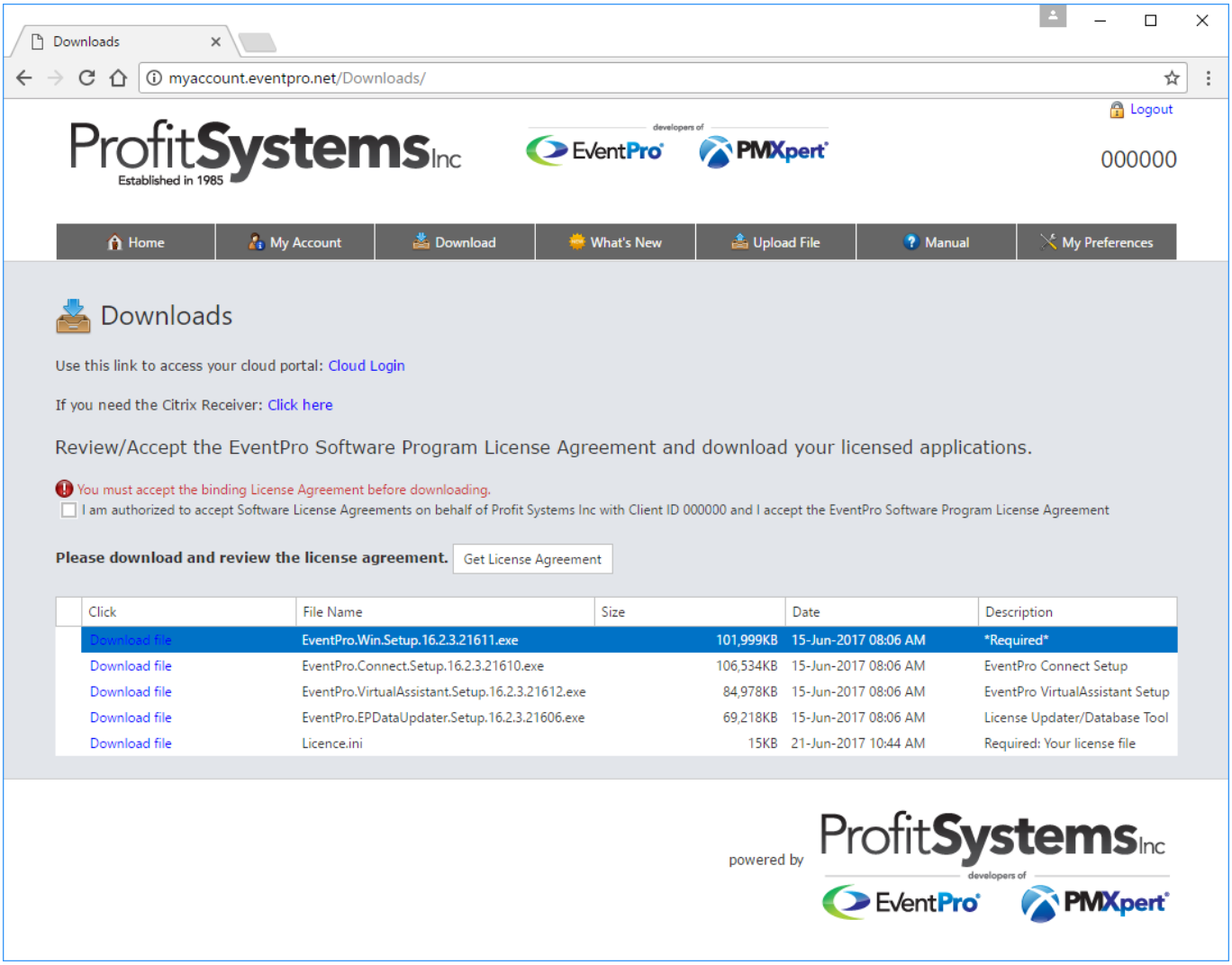
Login to Cloud Gateway

1. In your internet browser, go to:

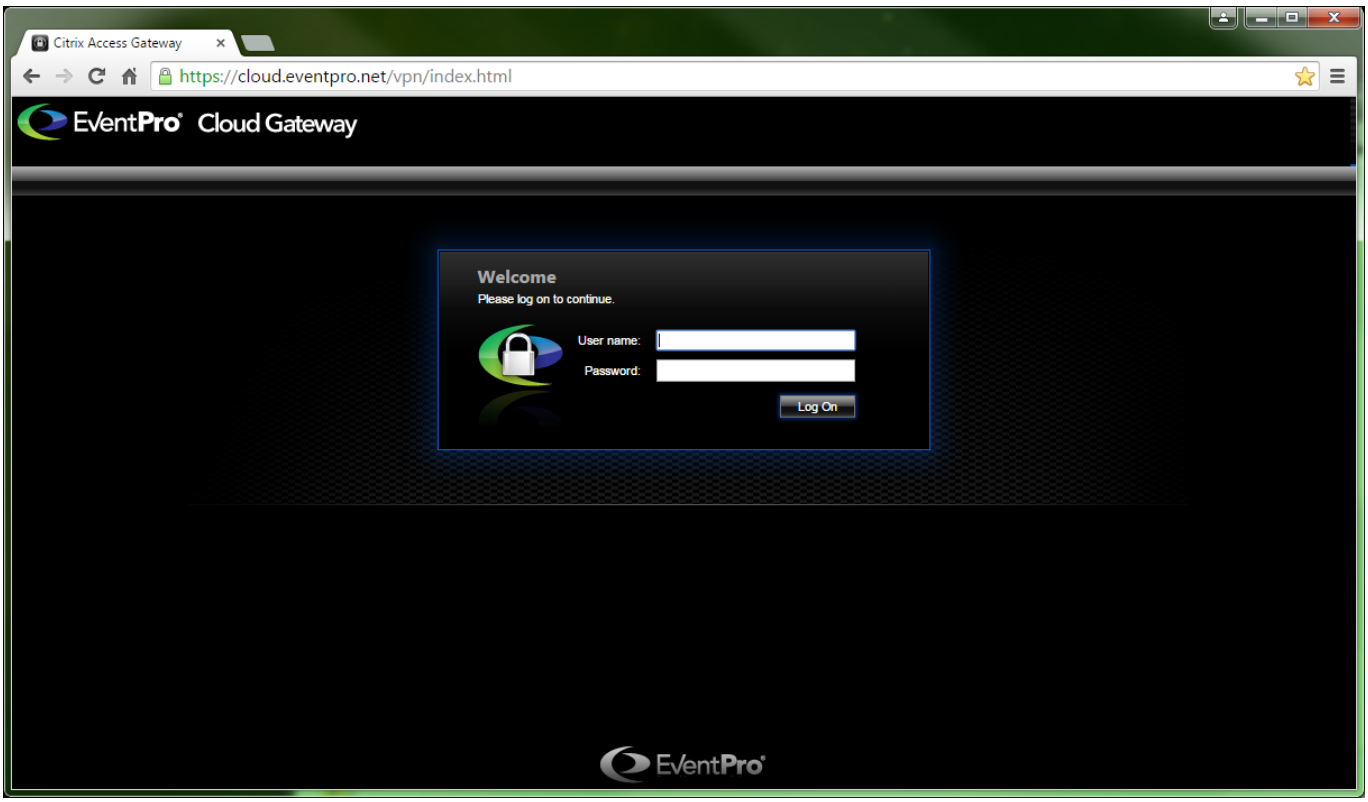
   https://cloud.eventpro.net



You can also access the **Cloud Login** link from the EventPro **My Account** page.



2. The **EventPro Cloud Gateway** 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:

   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 **Change Your Password** 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, "l" 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** 29, 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 **above** 13.

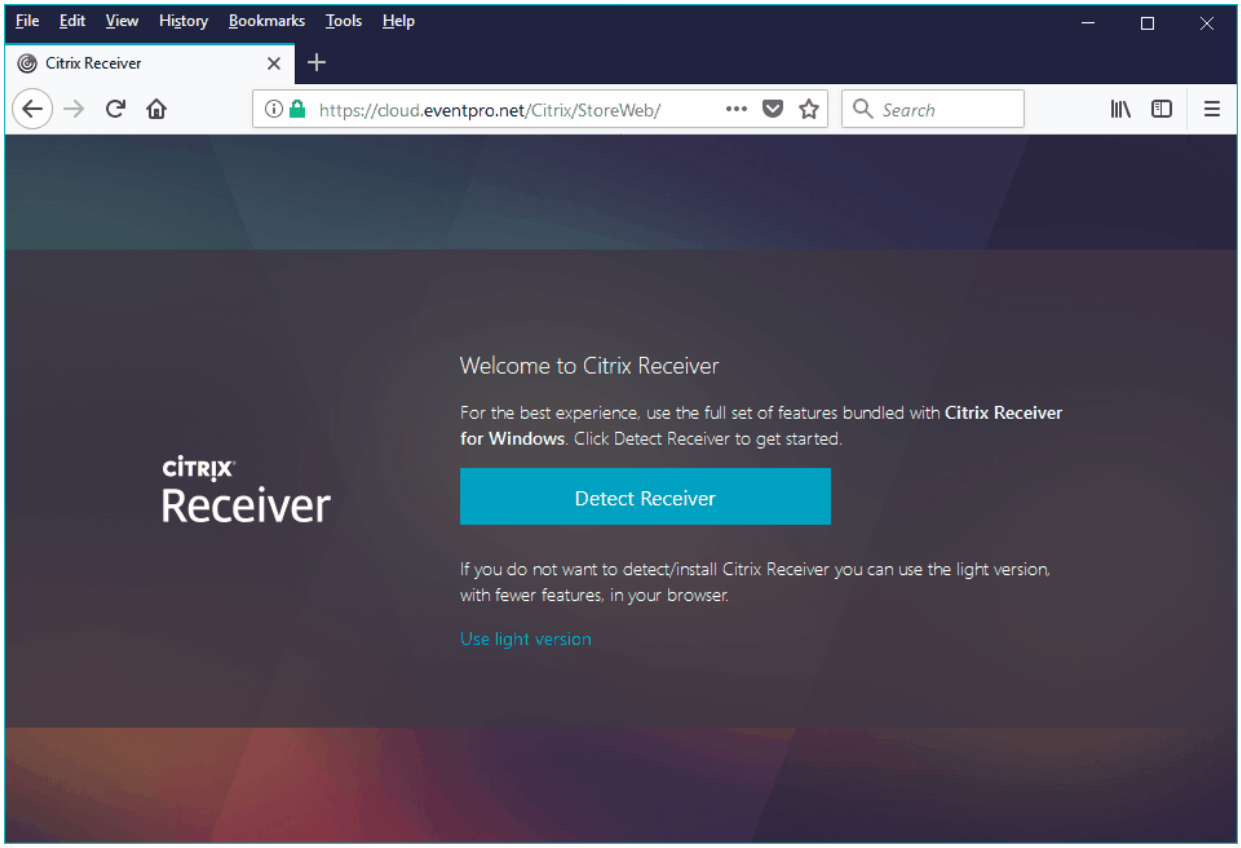
▼ Use Installed Citrix

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

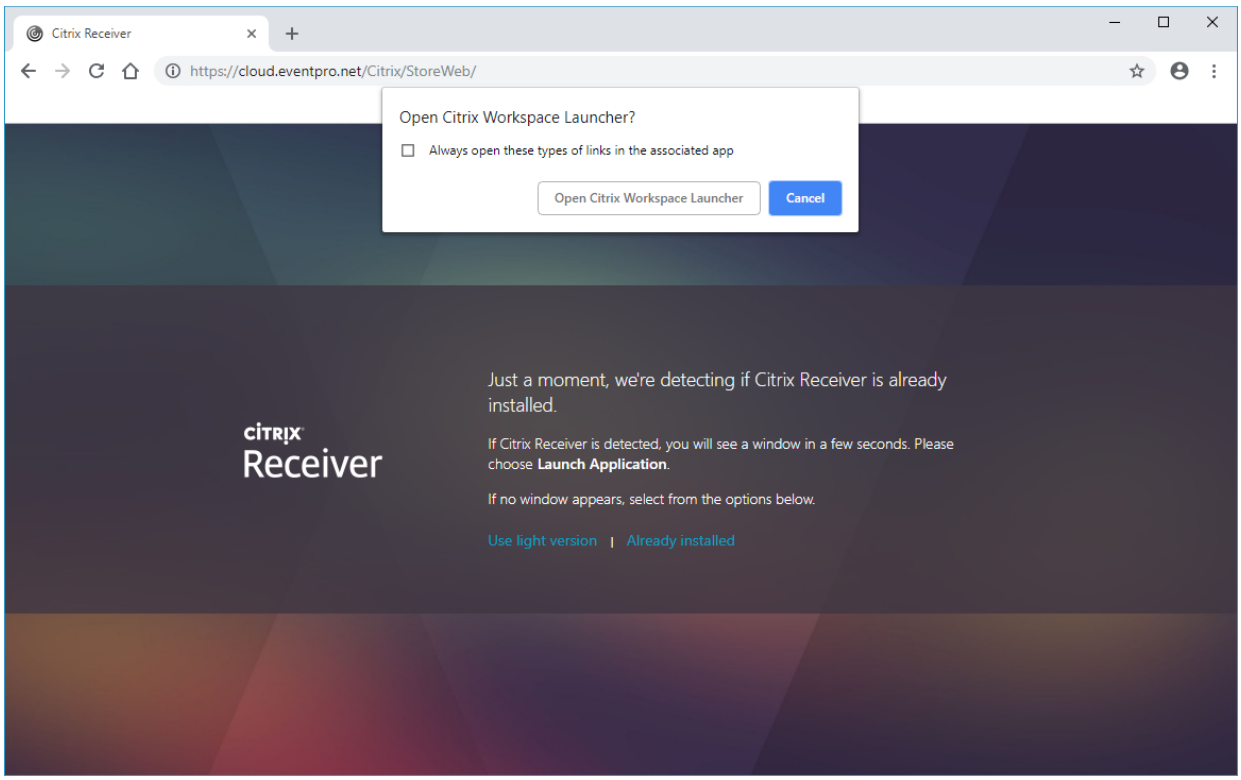
   However, if your **browser history has been cleared** since the last time you logged into Citrix, you may need to **detect/allow/activate** it again. The process of detecting Citrix will differ slightly, depending on the browser you are using. We will look at the examples of **Firefox** and **Chrome**.

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".)

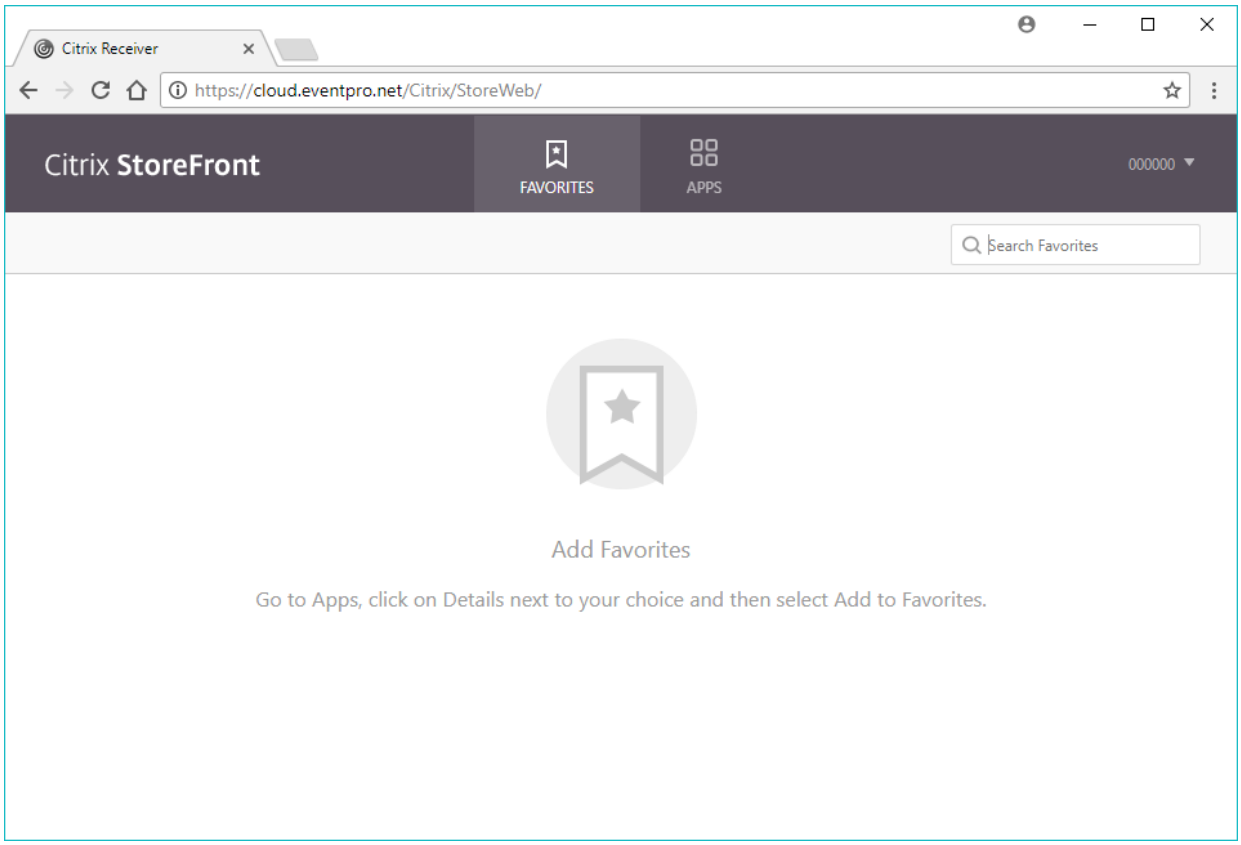
   Click **Detect Receiver**.



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



5. You will arrive at the **Citrix StoreFront**.

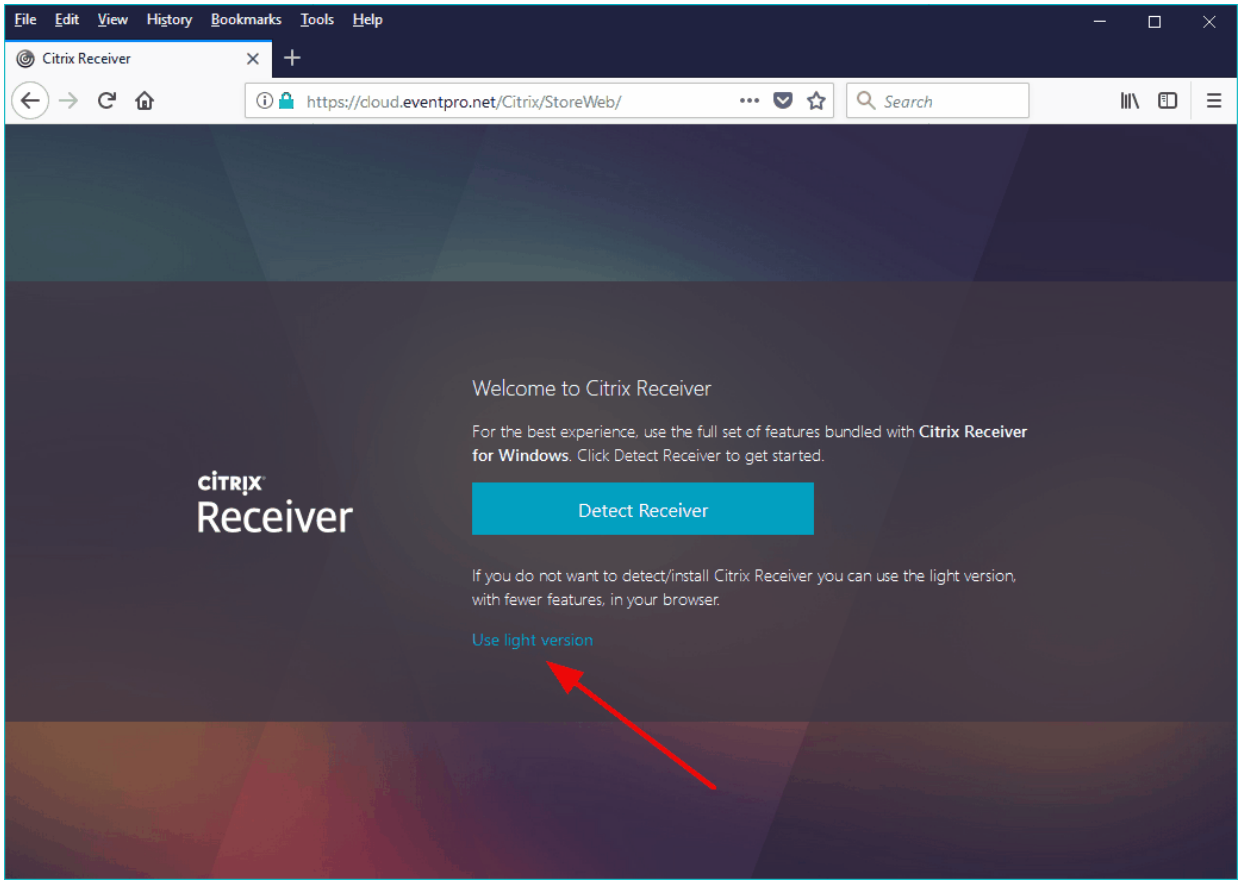


6. If you do not want to detect or install Citrix Workspace, you can use the **Light Version** within an internet browser. Also, if Citrix Workspace is installed, but fails for some reason, the EventPro Cloud application will use the Light Version.

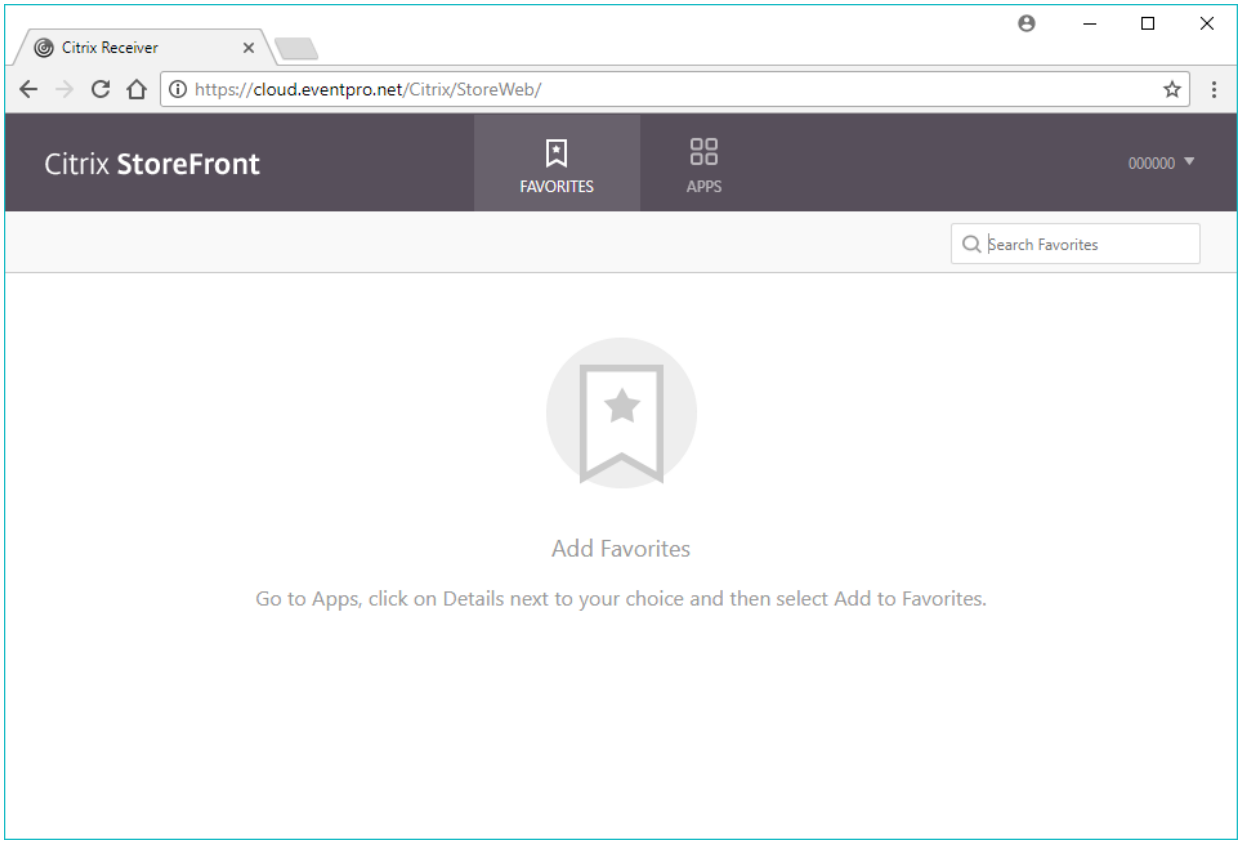
Use Light Version (No Install)

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.

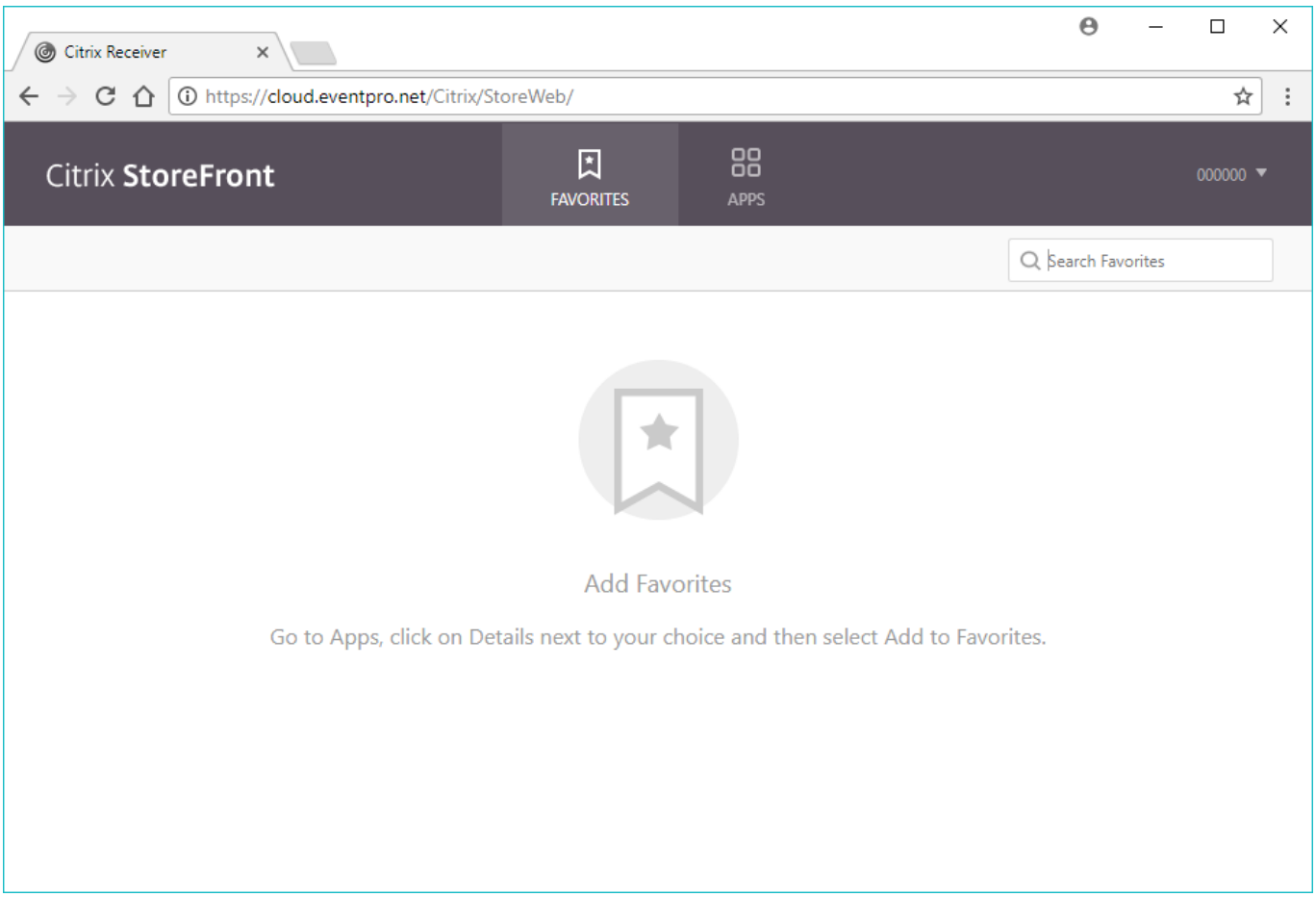


3. You will go to the **Citrix Receiver StoreFront**.

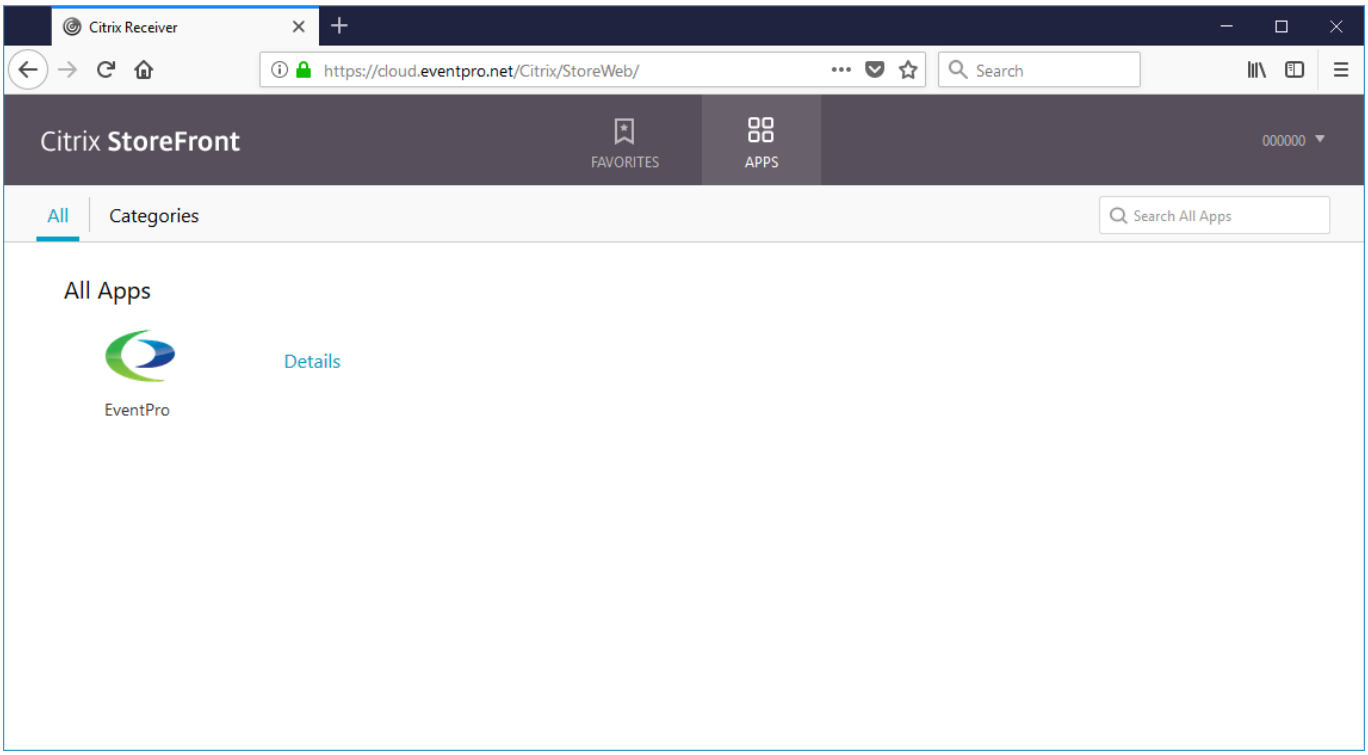


7. The **Citrix StoreFront** opens to the **Favorites** page.

   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.



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

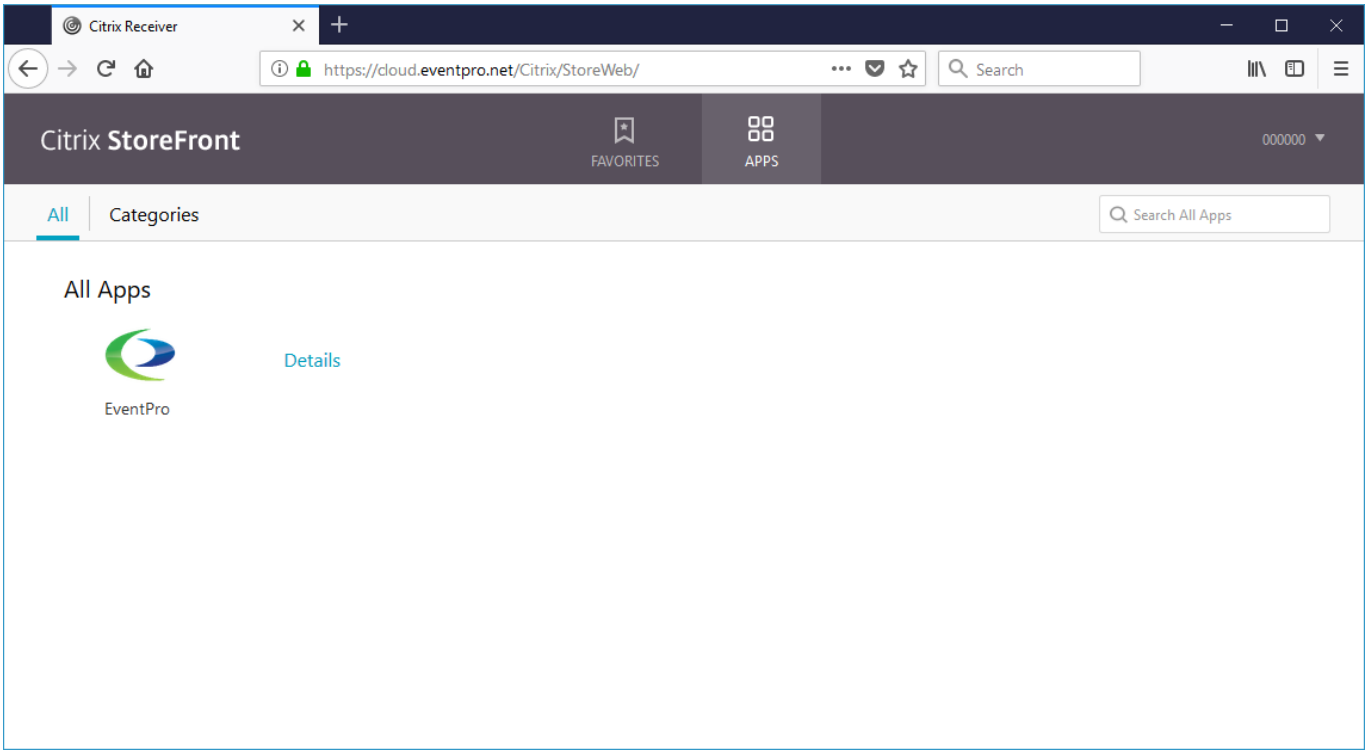
See Add Apps to Citrix StoreFront 35.

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.

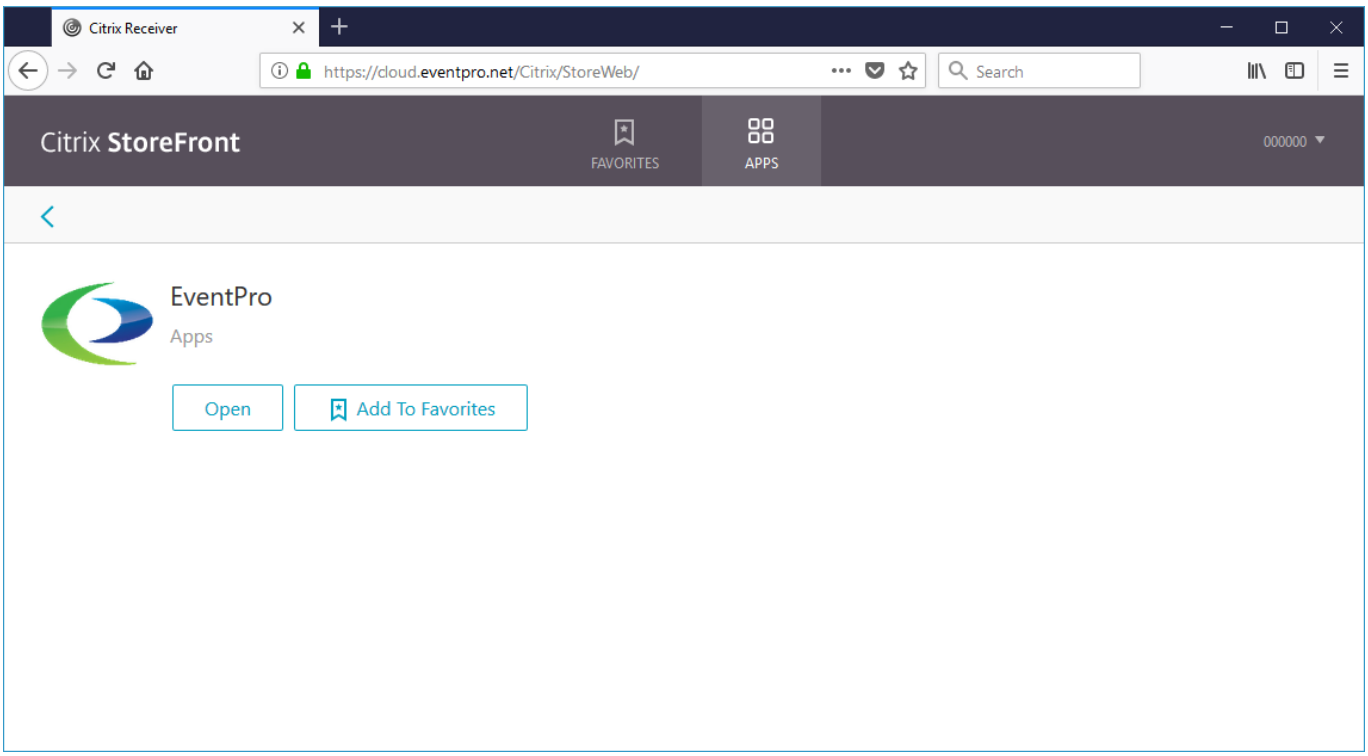
2. In the top navigation ribbon, click **Apps** to open the **All Apps** page.



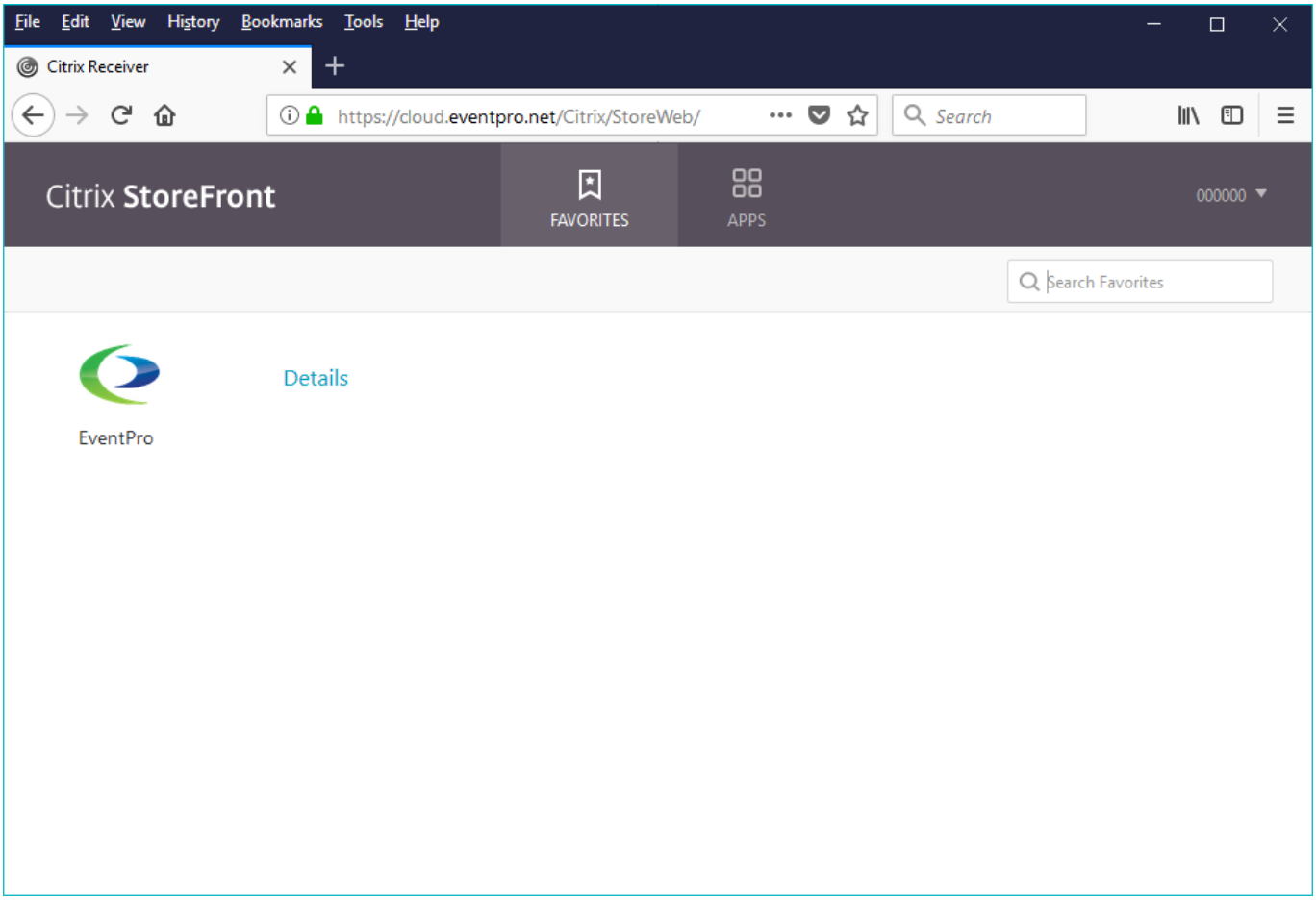
3. Find the **EventPro** application icon and click the **Details** link to the right of the icon.

   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**.



5. View your **Favorites** page.



6. If you need to, you can now **Activate Desktop Citrix** 37.

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

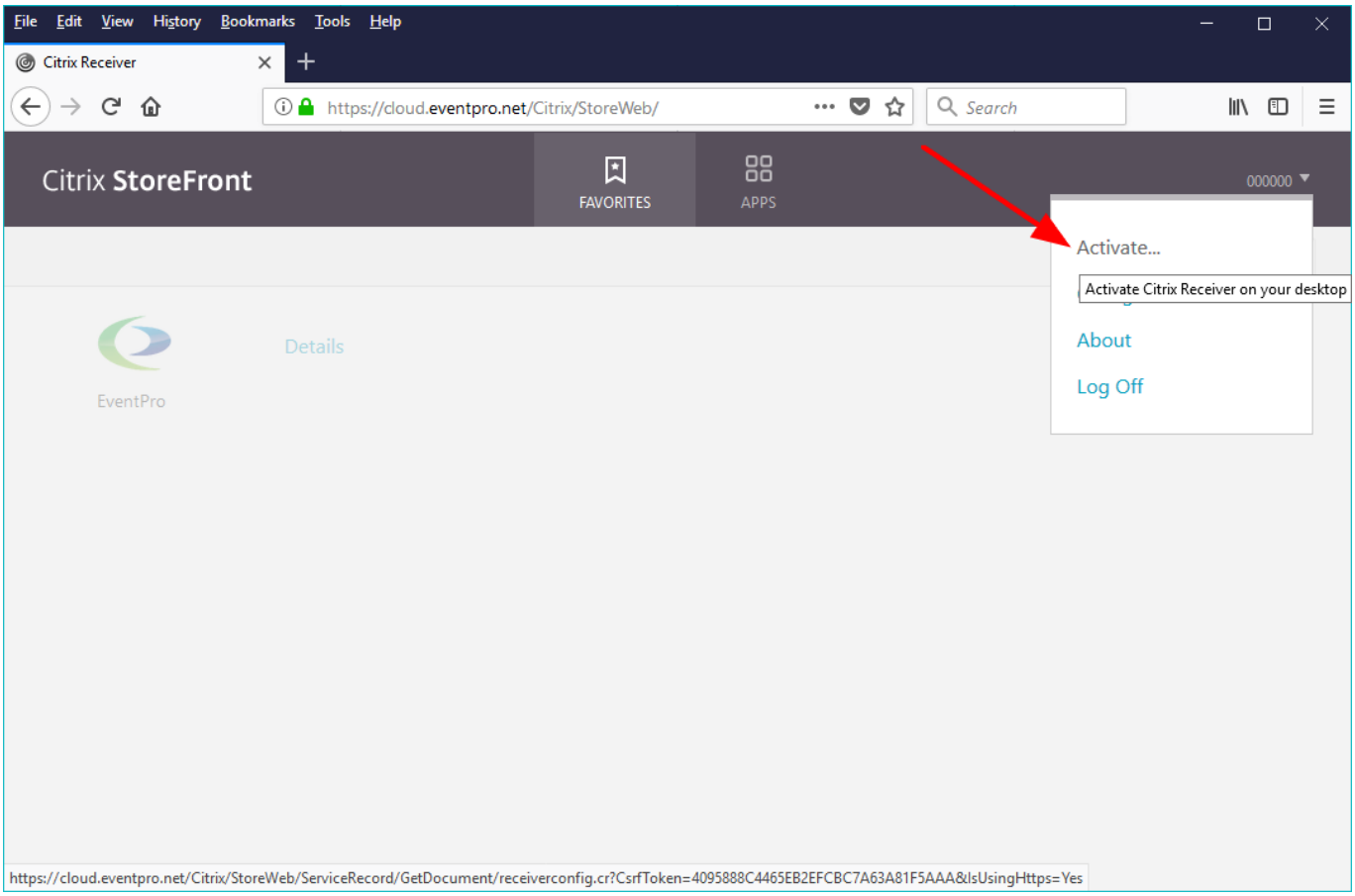
Activate Desktop Citrix

You may have already activated the Desktop Citrix Workspace and added an account; review **Access from Desktop Citrix Workspace >** **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**.

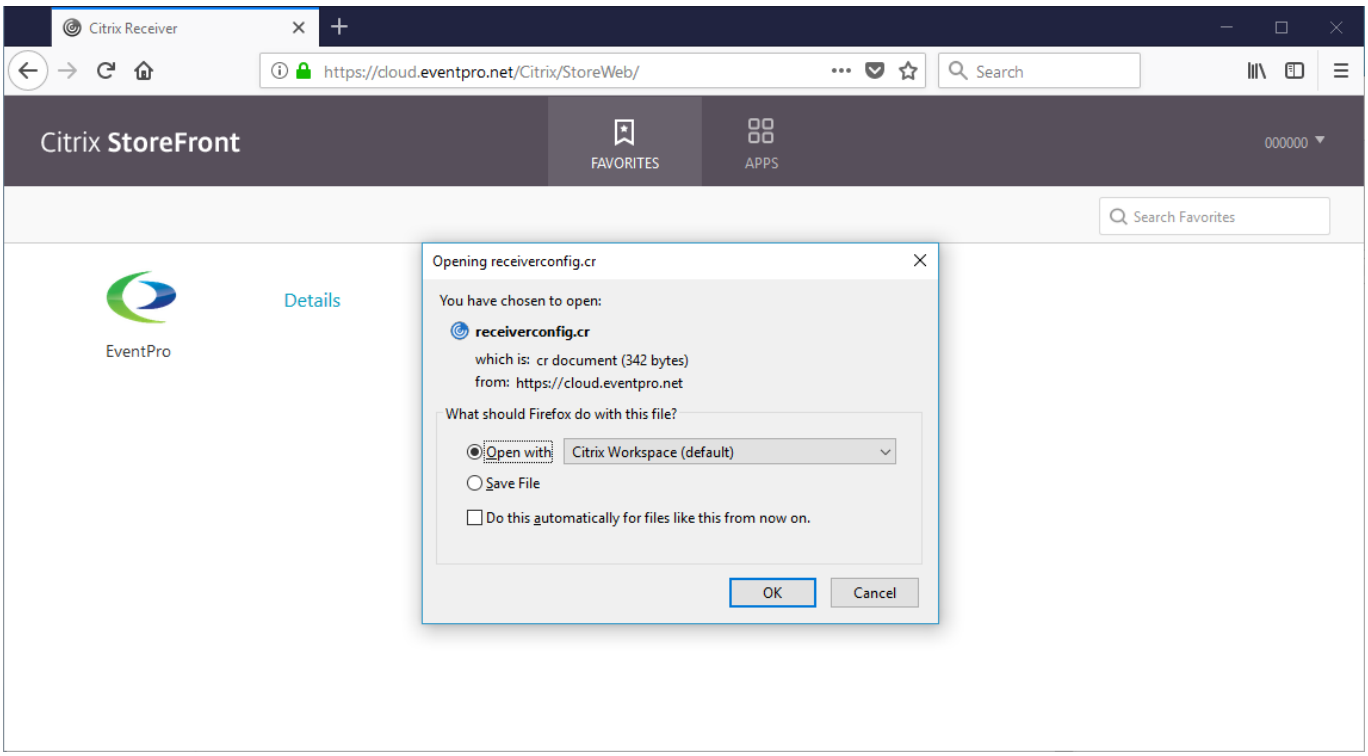
   You may notice that the hover hint text for this command says, "**Activate Citrix Receiver on your desktop**".



2. You will be prompted to **Open** or **Save** the **receiverconfig.cr** file, and click **OK**.

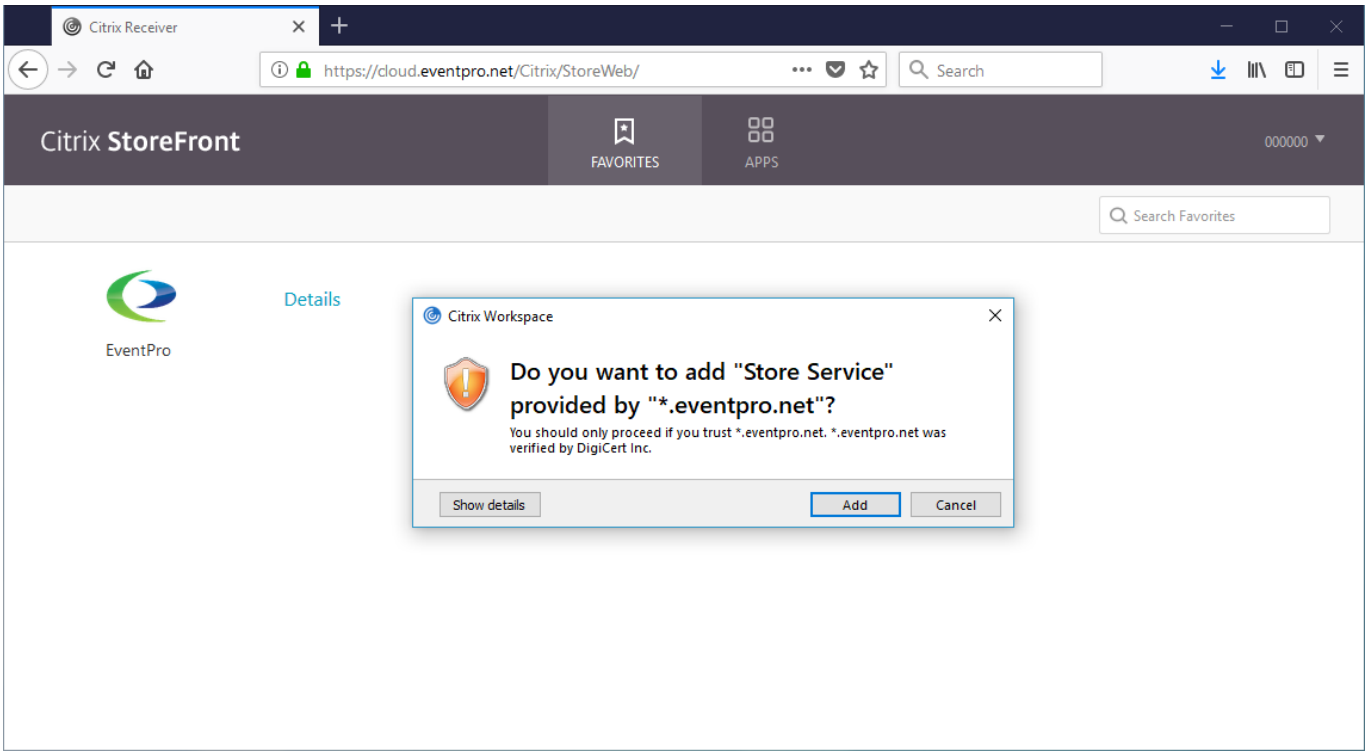
   (Note that although the dialog still refers to "receiver", it will use the new **Citrix Workspace** application.)

   If you **Save** the file, go to the folder where you saved it and double-click to run it.

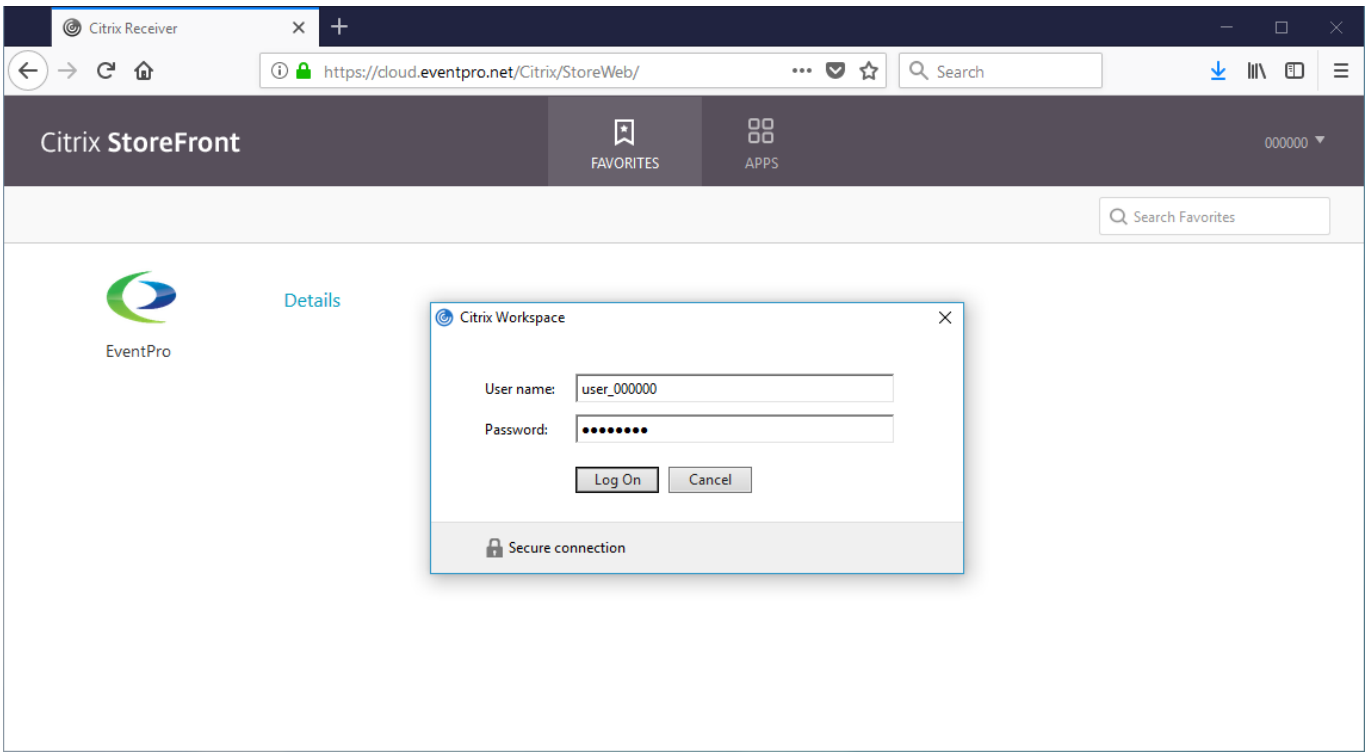


3. The prompt from Citrix asks if you want to add "**Store Service**" provided by "***.eventpro.net**".

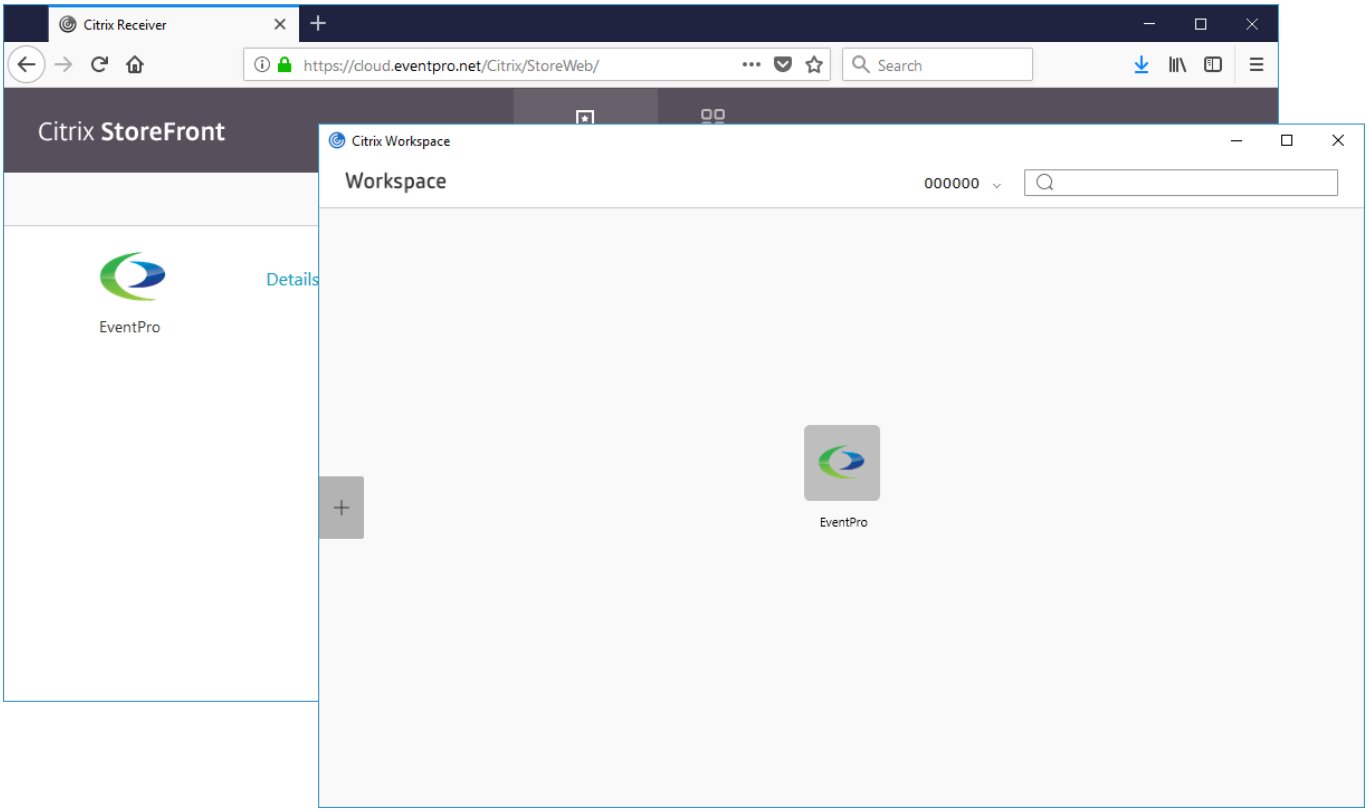
   If you want to proceed, click **Add**.



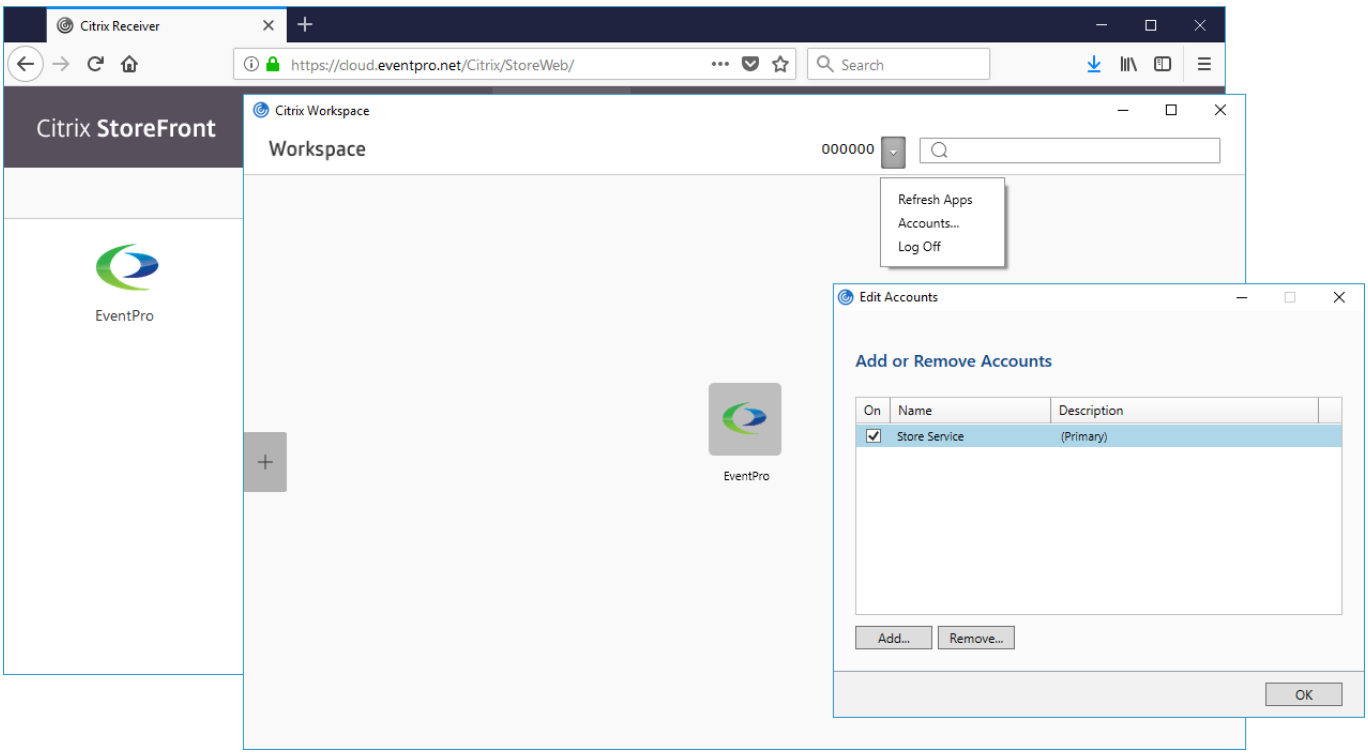
4. In the next dialog, enter your **User Name** and **Password**, and click **Log On**.



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



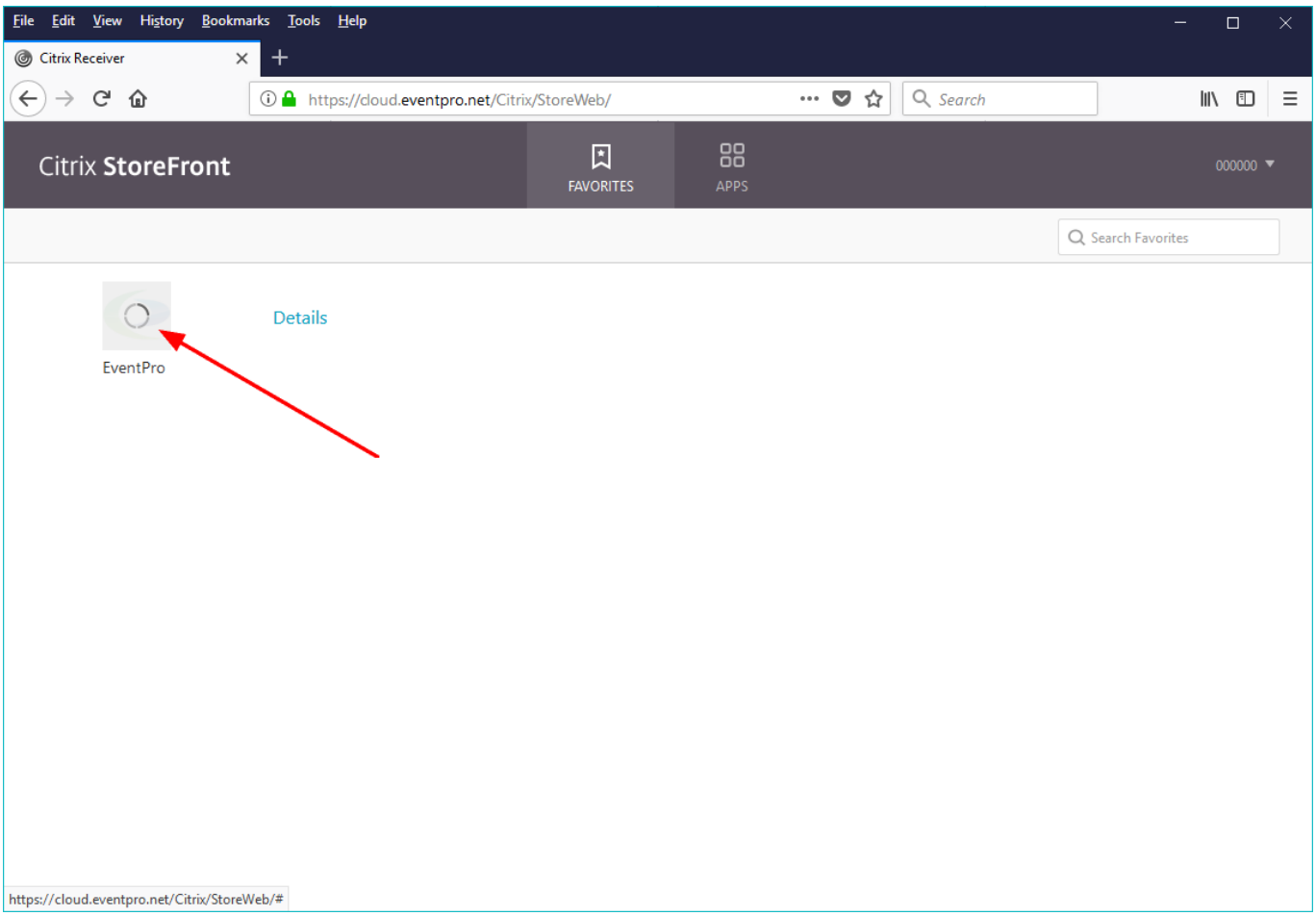
6. If you select **Accounts** under the Username menu, you will see that the Store Service account has been added to the desktop Citrix Workspace, so you won't be prompted to add an account when you subsequently run it.



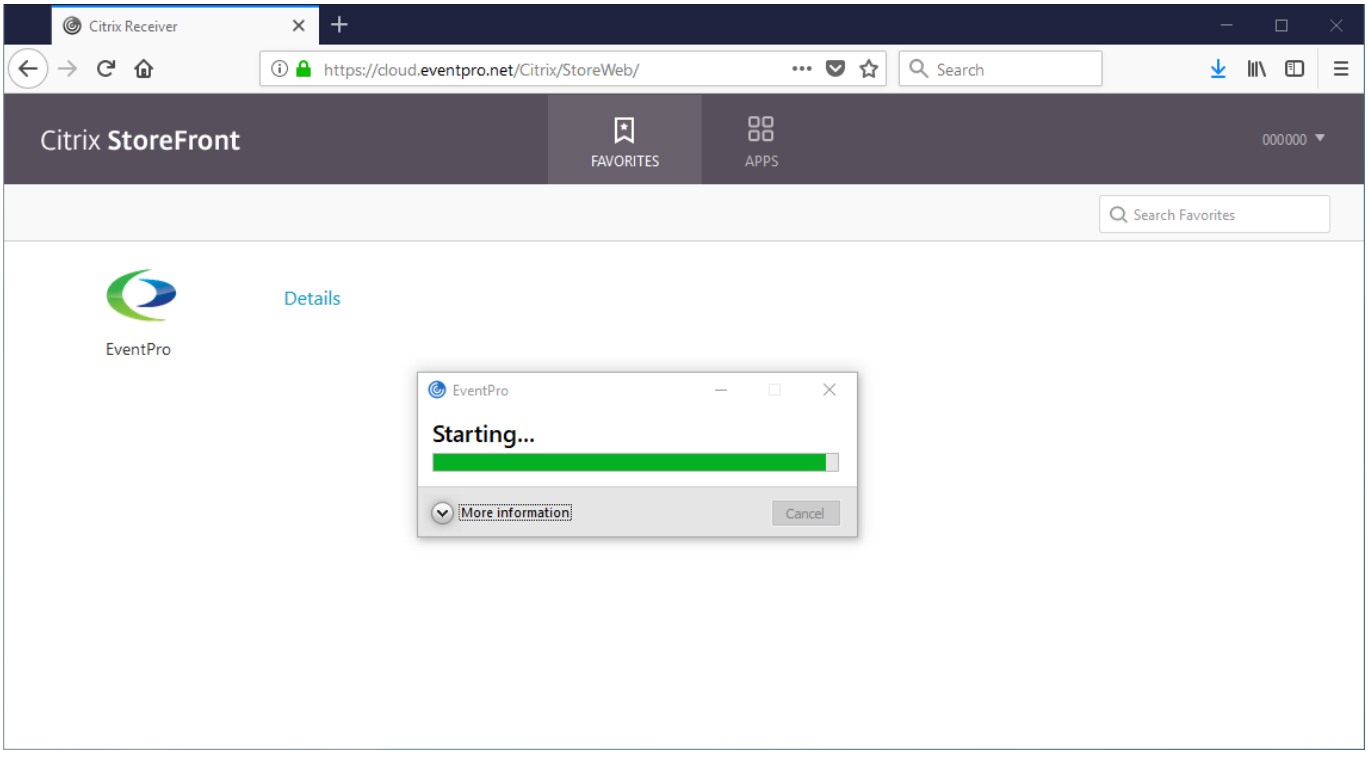
Run EventPro

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.

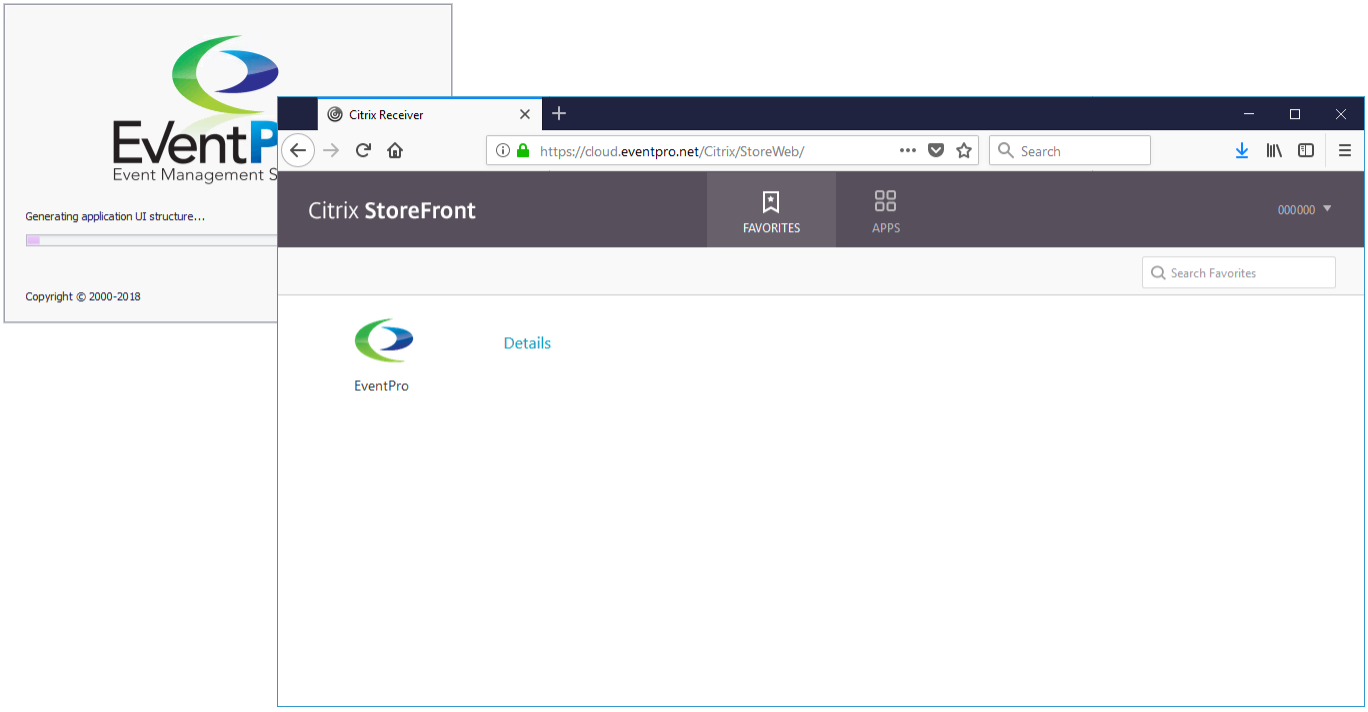


2. The **EventPro Starting** dialog should appear. Continue to wait, and do not click the EventPro icon again.



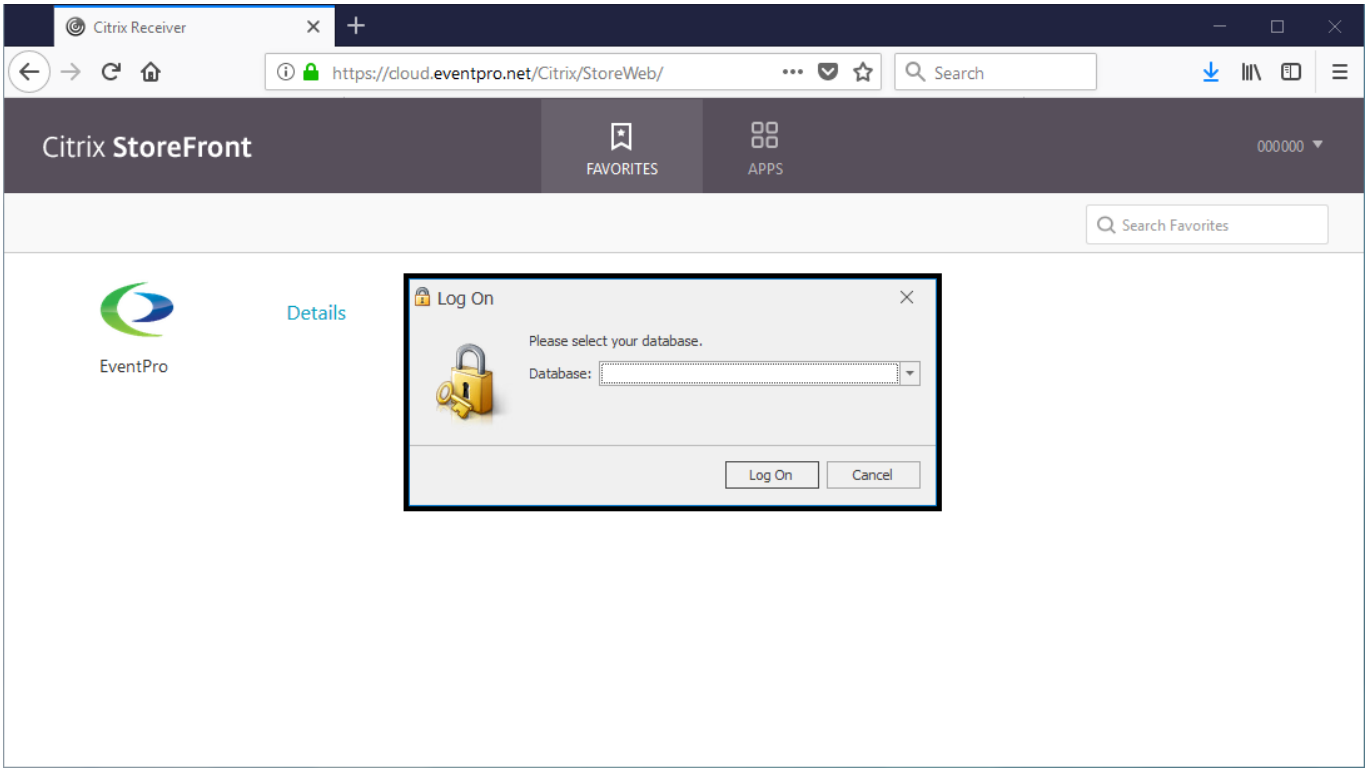
3. The **EventPro Starting** dialog will disappear, and the **EventPro splash screen** will appear, indicating that EventPro is starting up.

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.



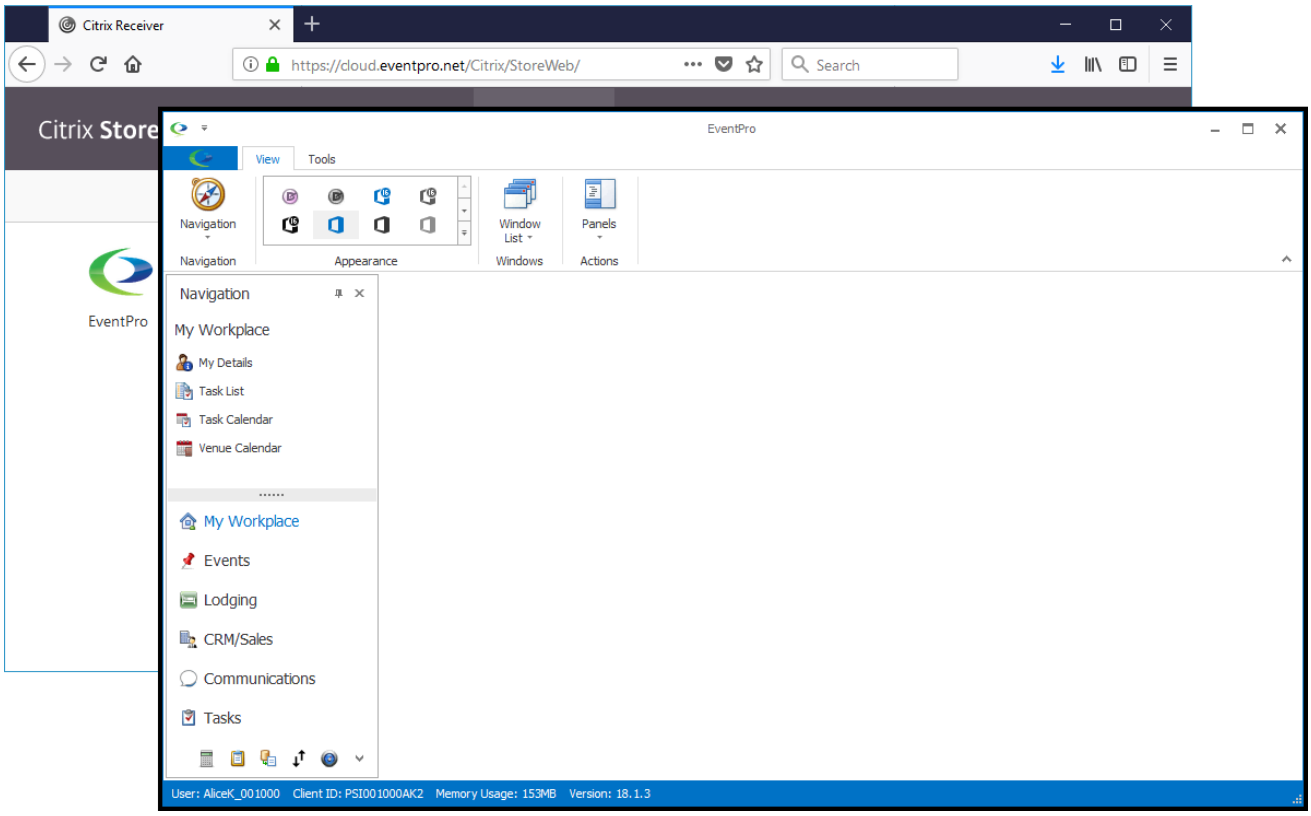
4. If there is more than one database to choose from, select the relevant database from the drop-down list and click **Log On**.

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



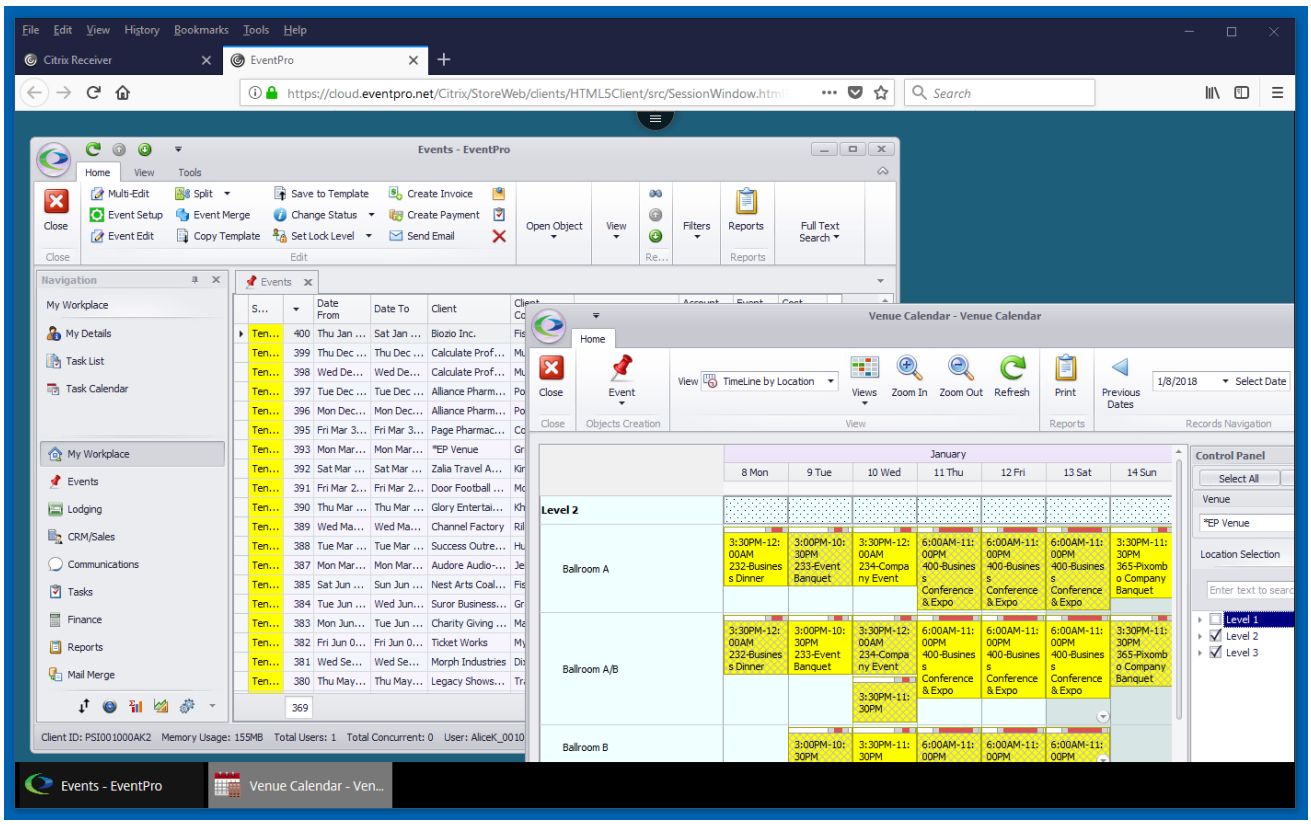
5. The EventPro application will load for a few more moments, and then appear.

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.

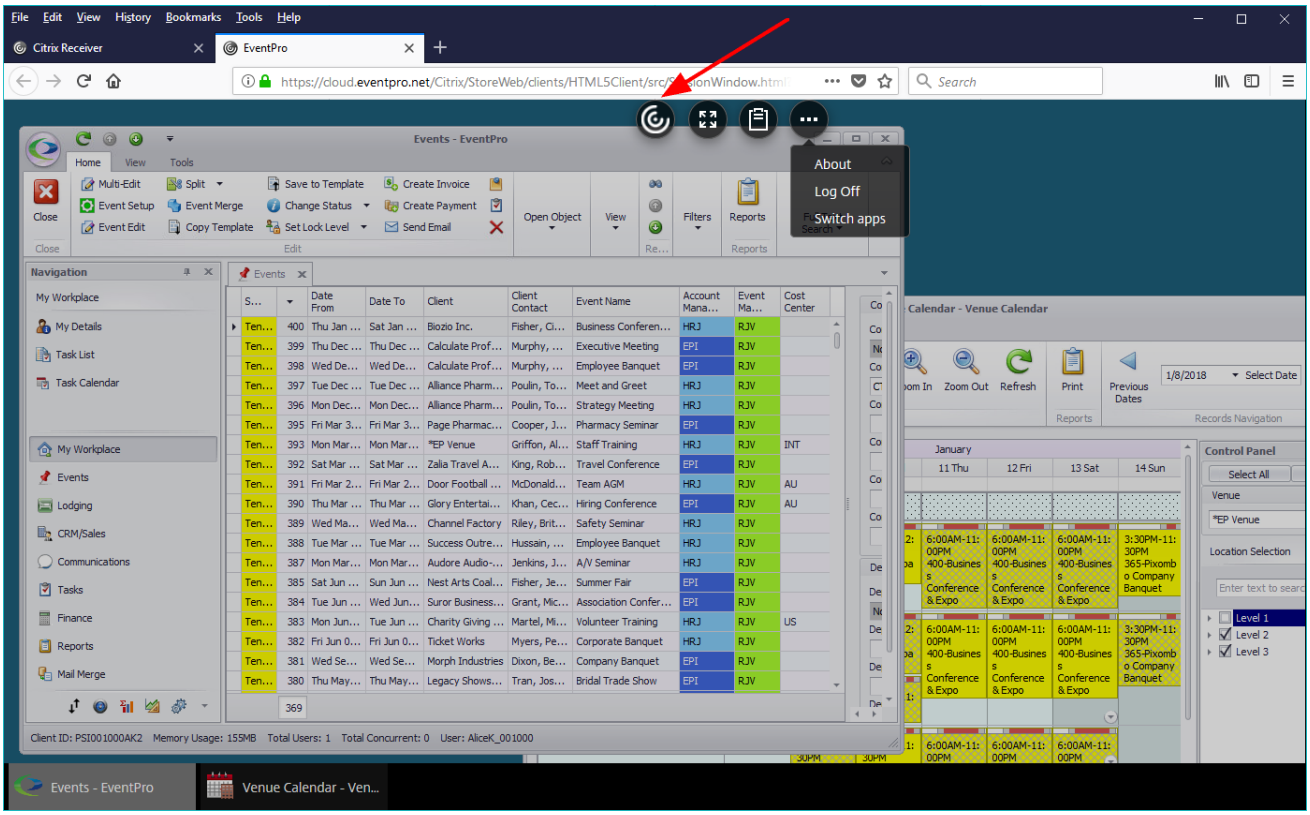


b. If you are using the "Light Version" of **Citrix Receiver** (*i.e.* bypassing Citrix installation), the EventPro application will open in a new tab **within the same browser**.

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



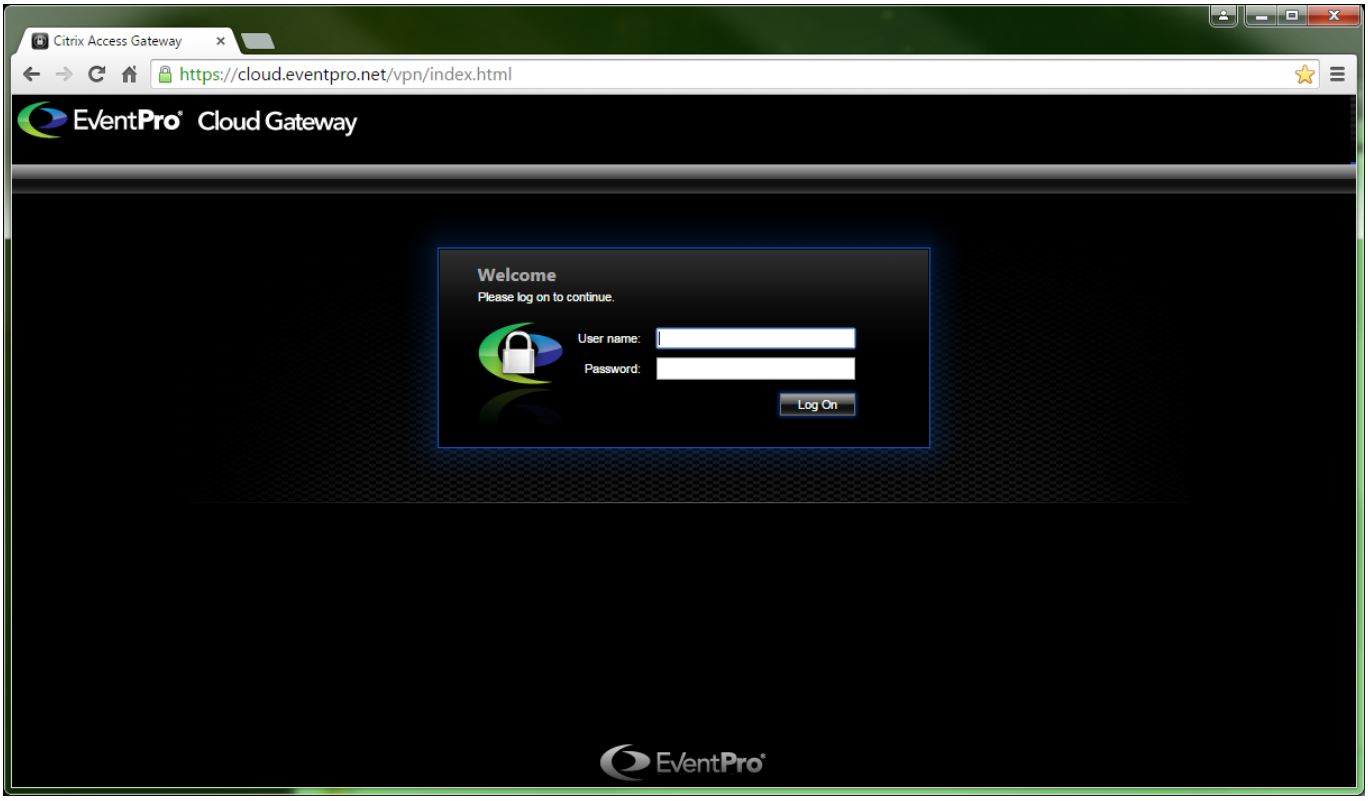
Click the menu icon at the top center of the browser window to access options for **Full Screen**, **Clipboard**, and more.



Subsequent EventPro Login

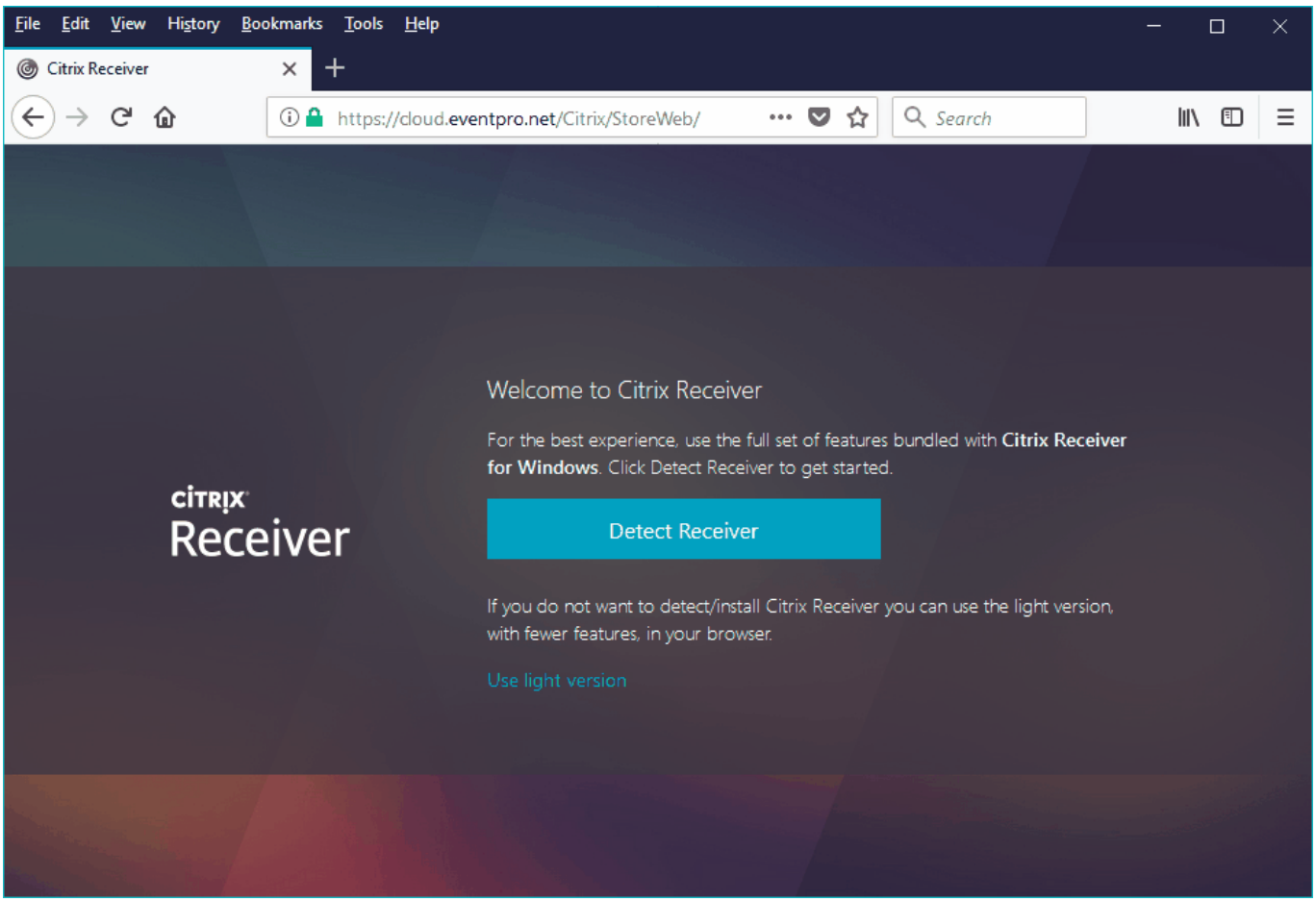
After you have completed the setup described above, there will be fewer steps to logging in to EventPro Cloud.

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**.

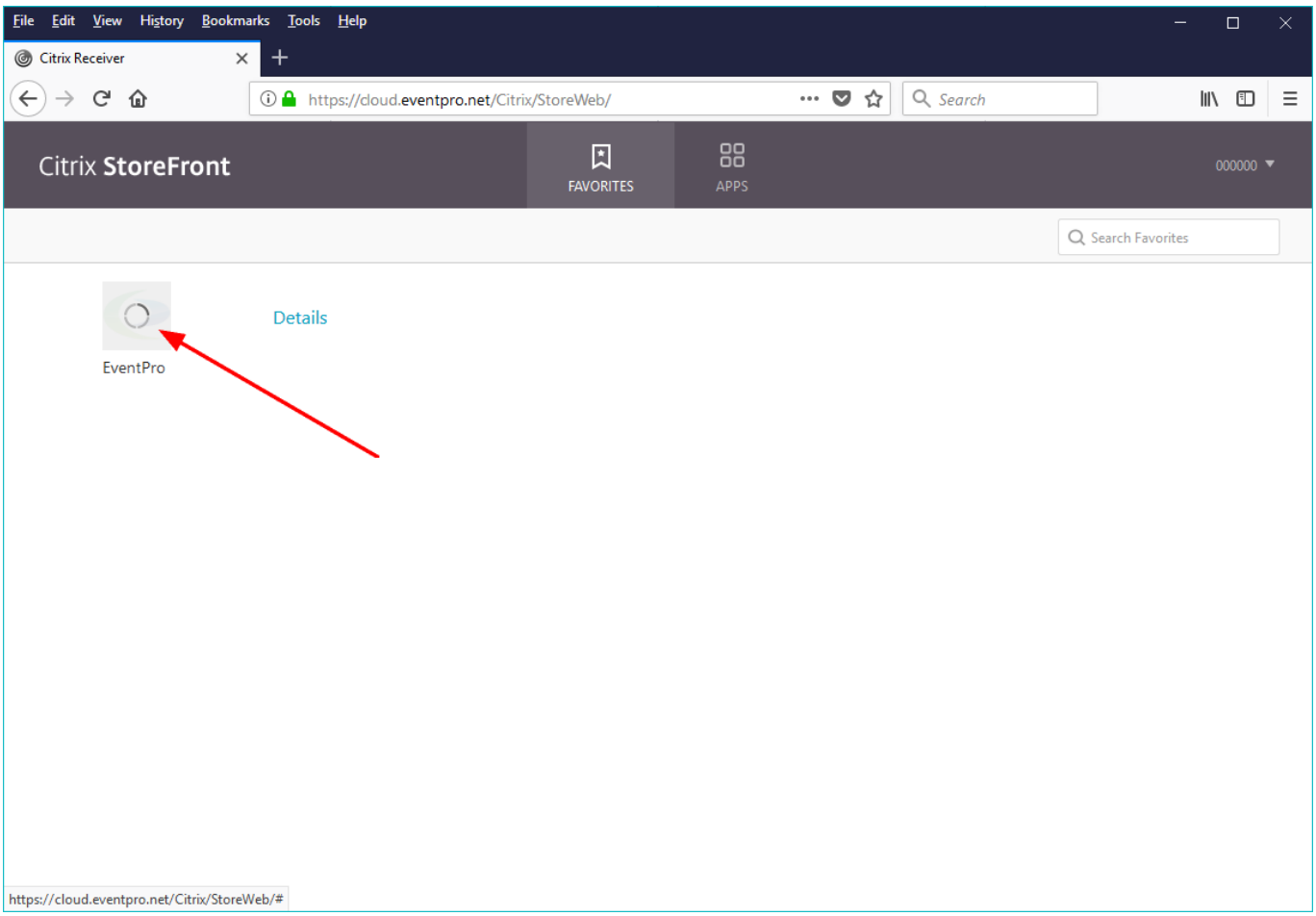


3. If you have **Citrix Workspace installed**, the browser should remember it, but if your browser history has since been cleared, you may need to click **Detect Receiver** again.

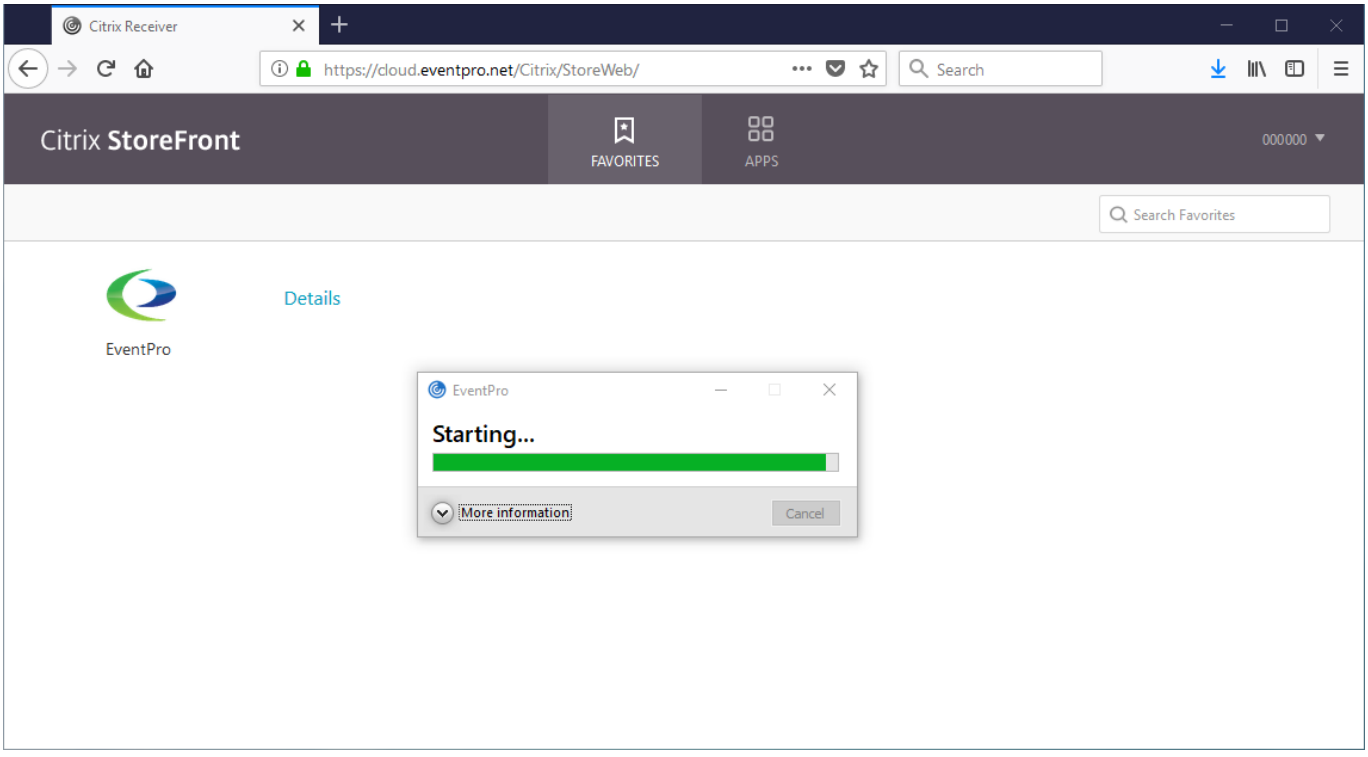
   If you do not want to install Citrix Workspace, remember that you click the **Use Light Version** link instead.



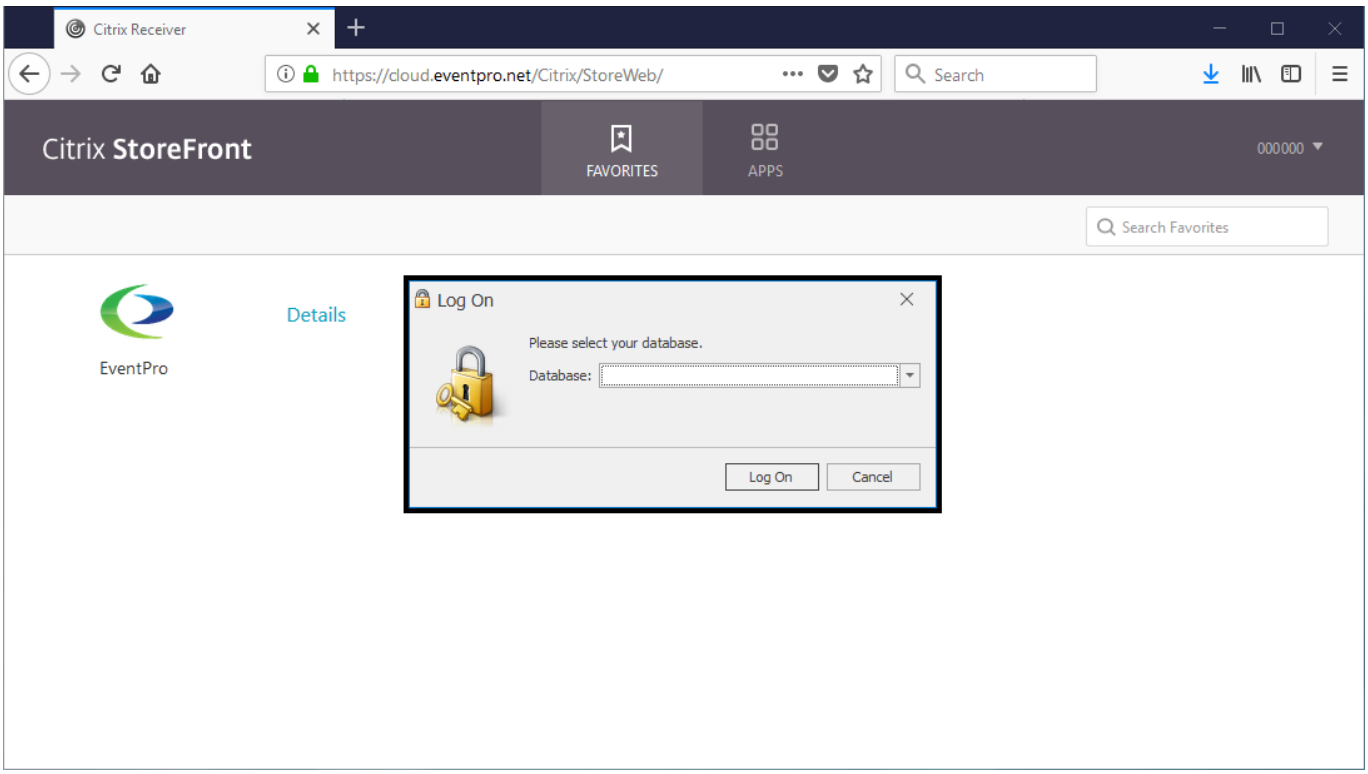
4. Once you are in the **Citrix StoreFront**, click your **EventPro** app icon. The loading spinner icon indicates that it is working, and you **do not** need to click the icon again.



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

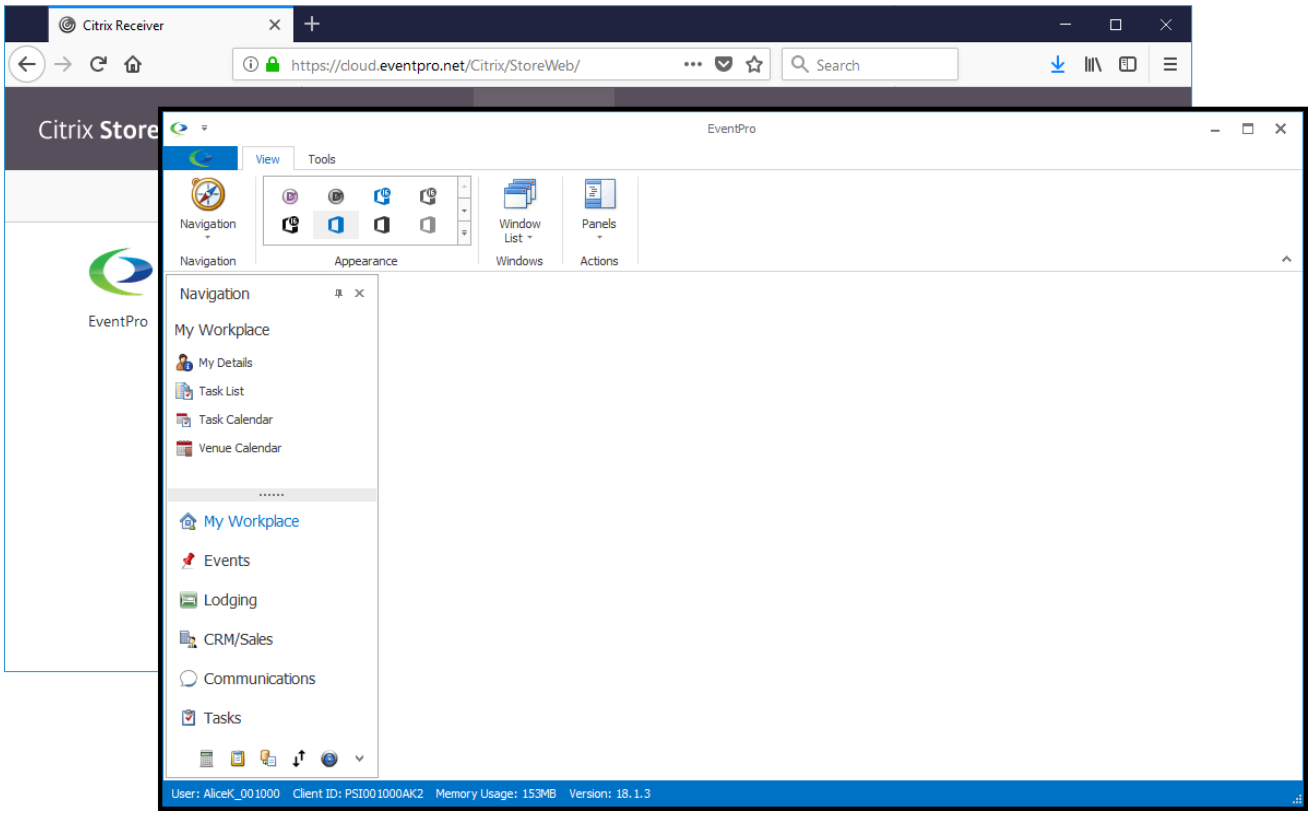


6. If there is more than one database, select the correct database from the drop-down list, and click **Log On**. If you only have one database, you won't need to select one.

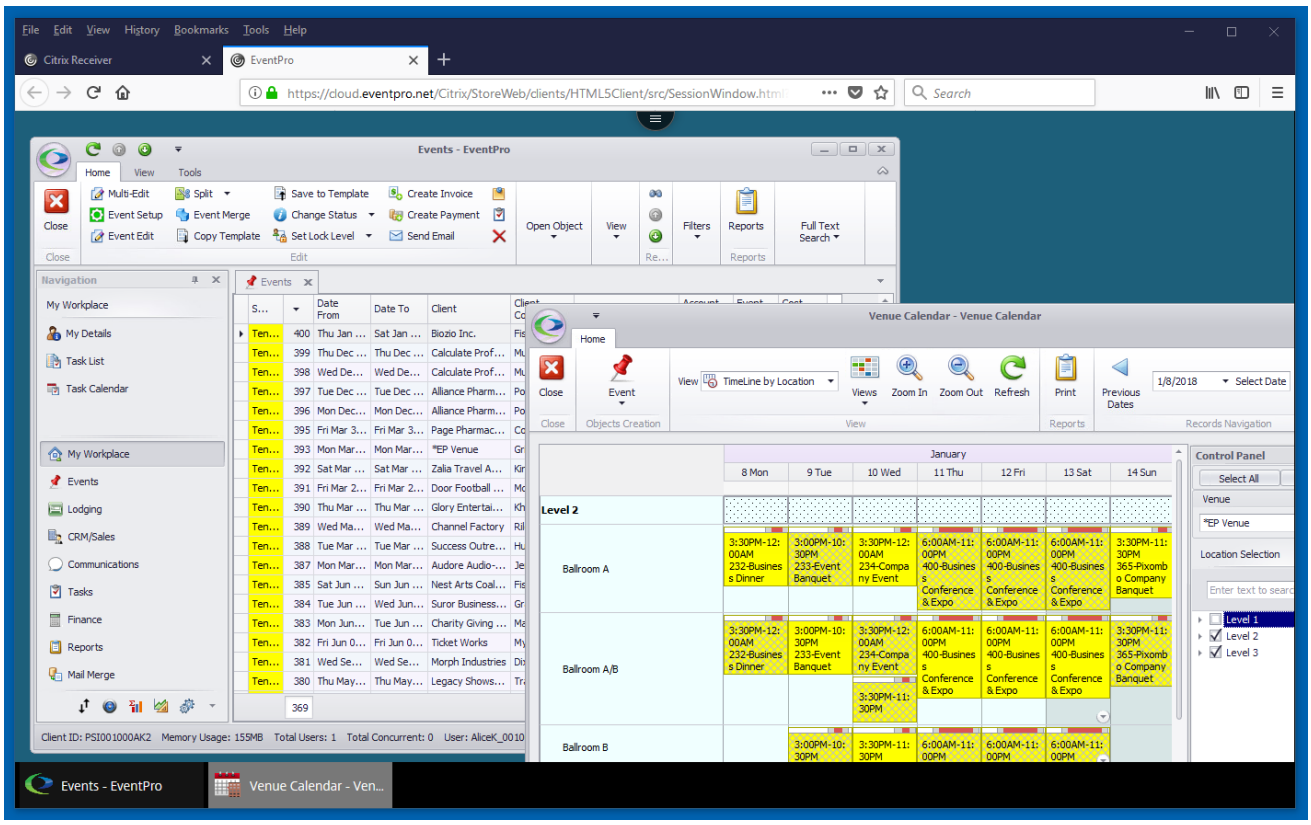


7. The EventPro application opens.

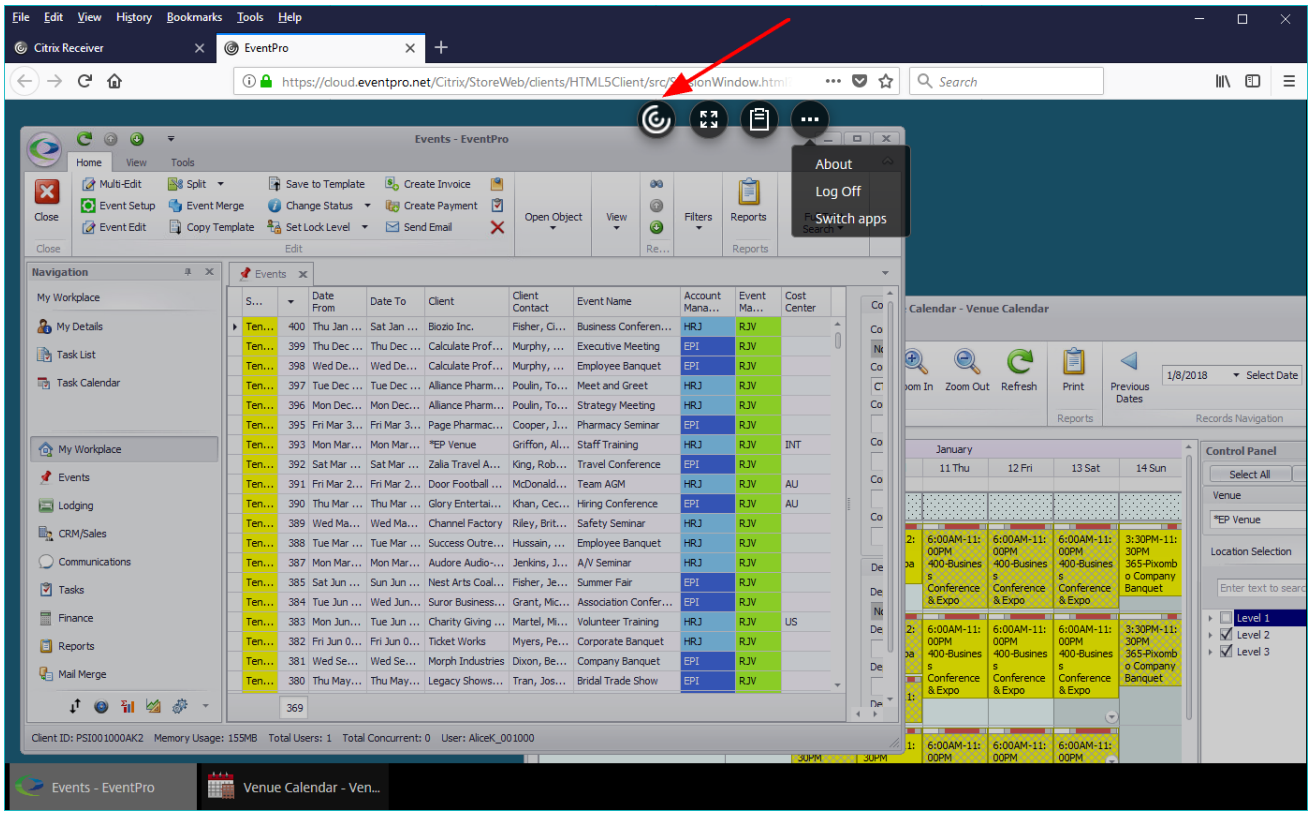
   a. If using the **installed Citrix Workspace**, the EventPro application will appear in its own window that is **separate from the browser** in which Citrix StoreFront was launched.



   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.



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



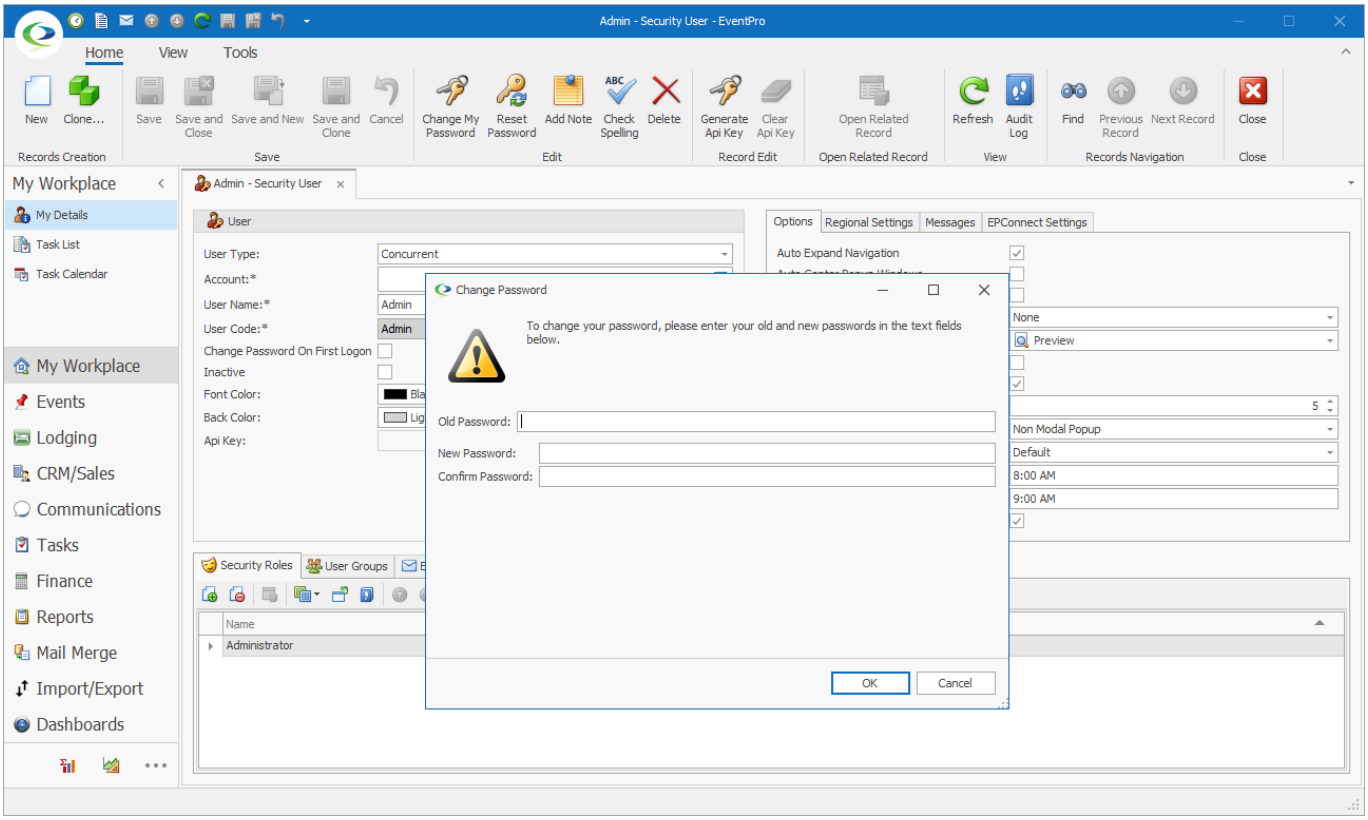
Change Your Password

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**.

   Review the requirements for a cloud password under **Cloud Password Policy** 50.



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**:
  - Uppercase characters
  - Lowercase characters

- Digits 0 through 9 (Base 10 digits)
- Non-alphanumeric characters ~ ! @ # $ % ^ & * _ - + = ` | \ ( ) { } [ ] : ; " ' < > , . ? /
- Unicode character that is categorized as alphabetic but is not uppercase or lowercase, including Unicode characters from Asian languages

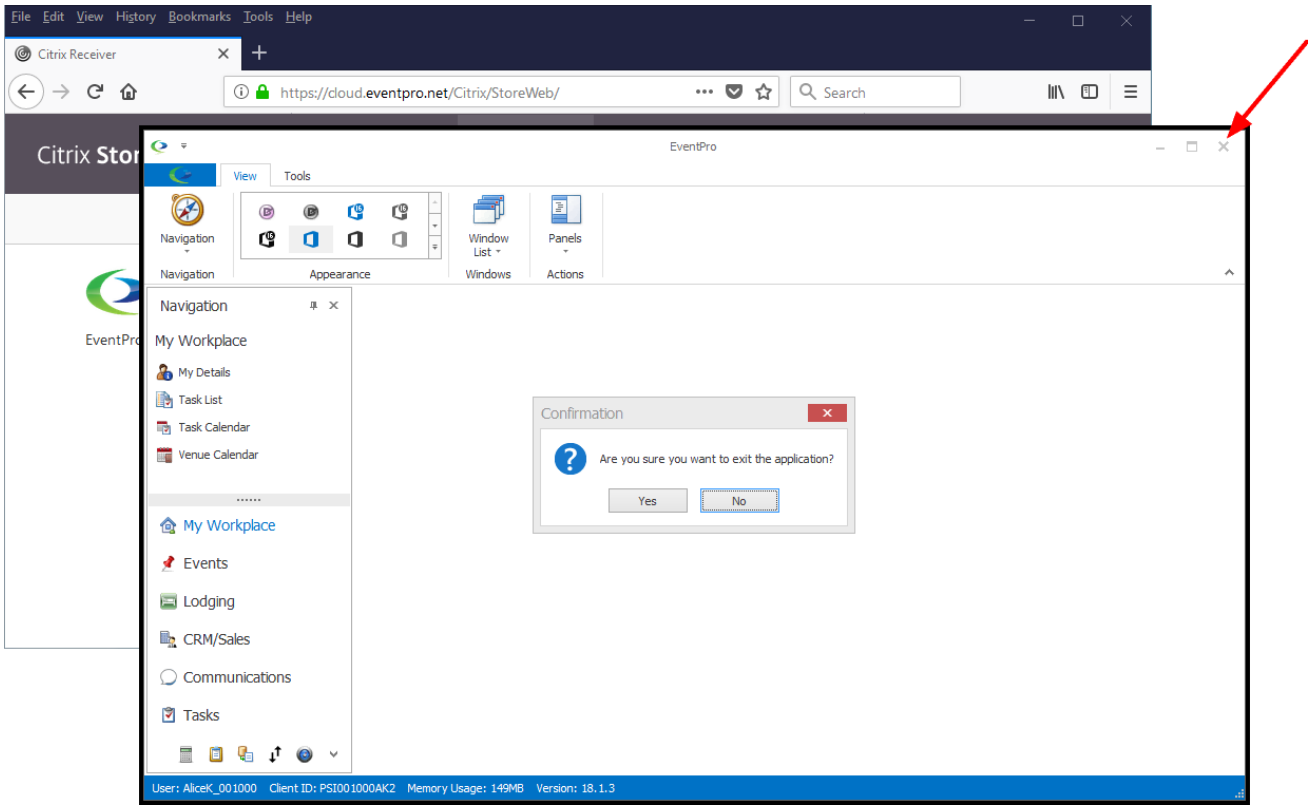
- **Minimum Password Length**: 7 characters
- **Password History Remembered**: 24 passwords, meaning that you cannot reuse a password that you used in the last 24 times you changed your password.
- **Minimum Password Age**: 1 day, meaning you cannot change your password more than once a day, which prevents users from repeatedly changing passwords in a short period of time to get back to an old password.

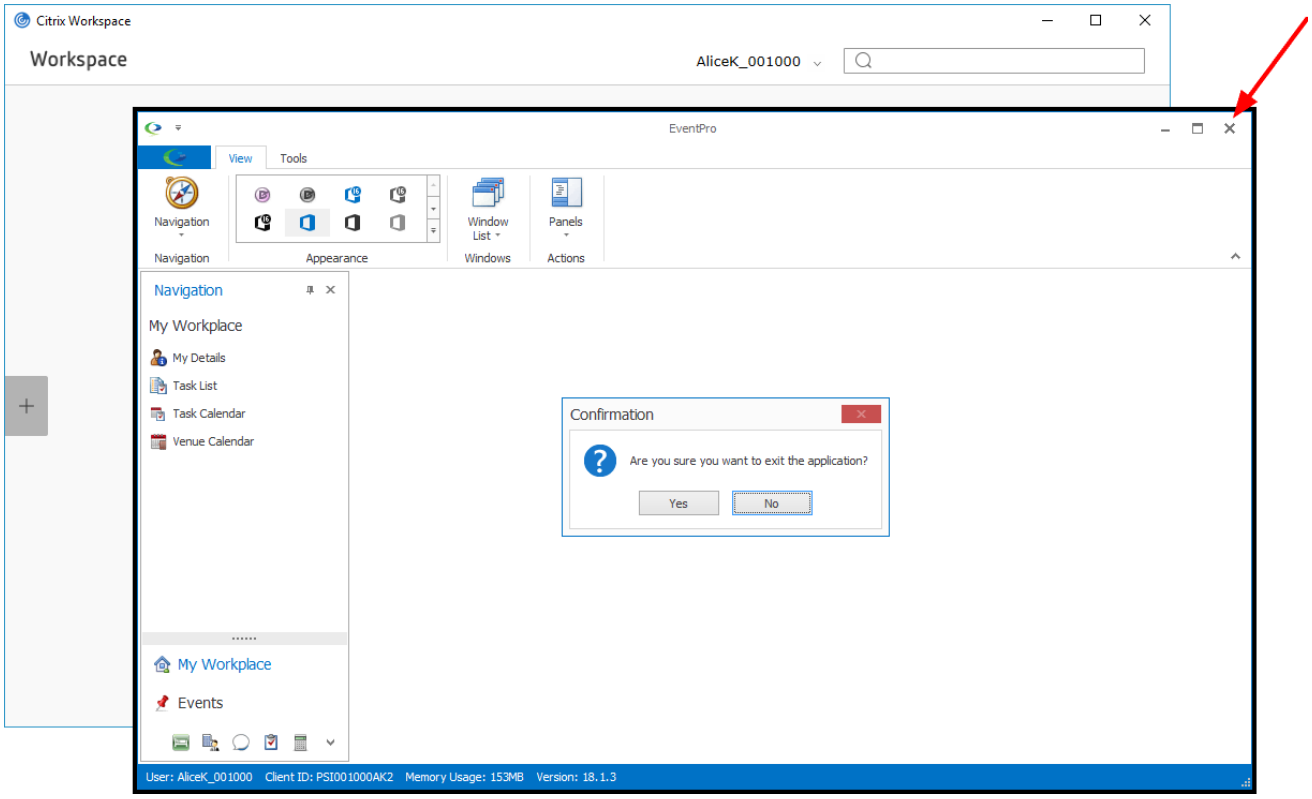
Exit EventPro Cloud

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

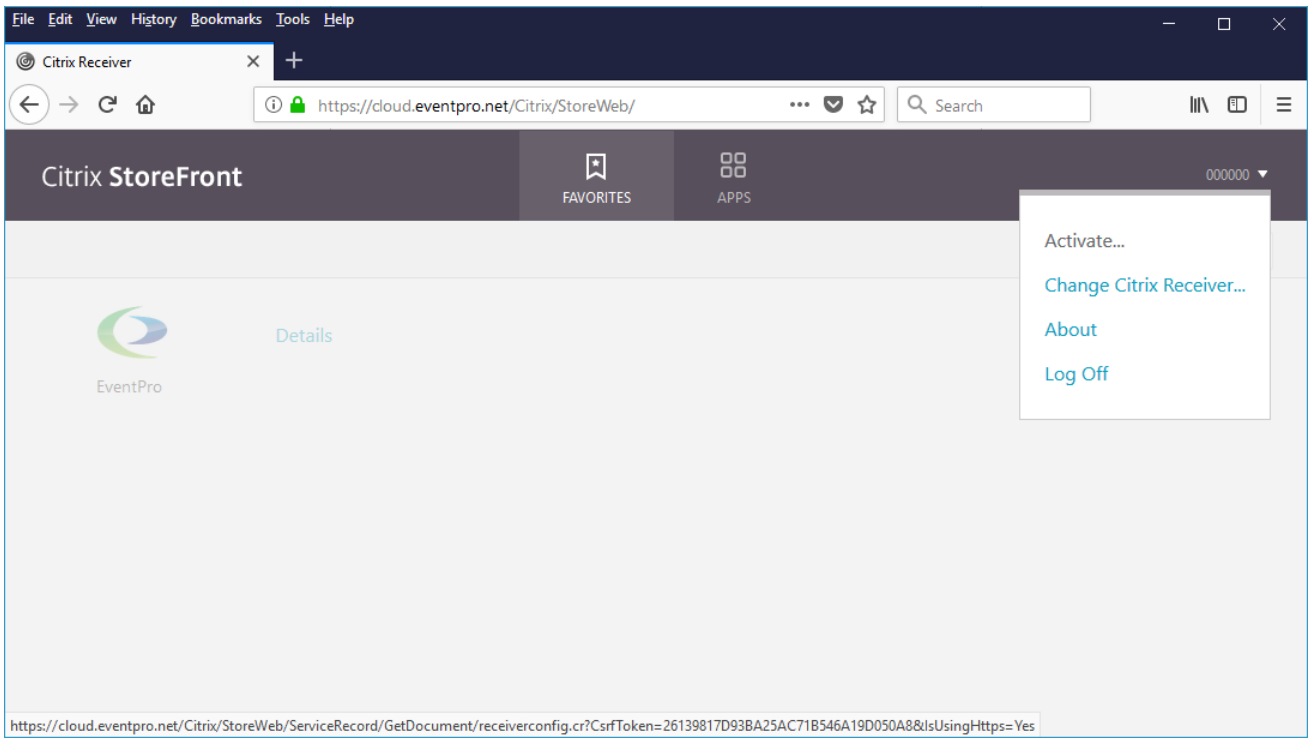
- **Installed Citrix Workspace**:
  - When using the installed Citrix Workspace, whether accessing EventPro from the desktop Citrix Workspace or the Cloud Gateway in a browser, the EventPro application opens in its own window.
  - To close EventPro, click the **X** in the upper right corner of the main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

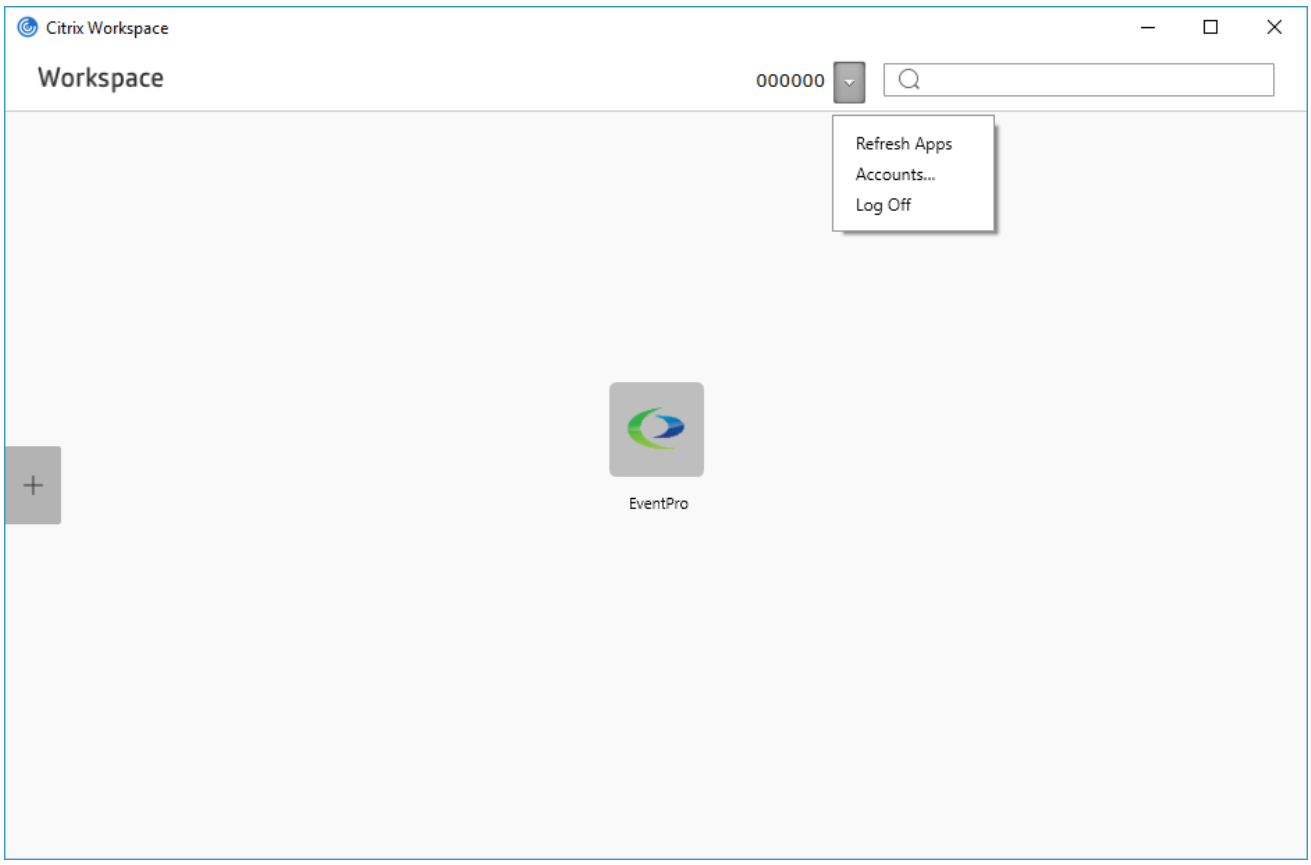
    The dialog will confirm that you want to exit the application. Click **Yes** to close EventPro.



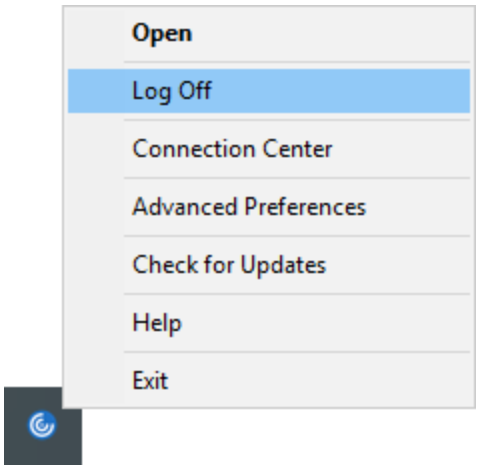


- If you want, you can then **log out of Citrix Workspace**, and exit the Citrix Workspace application window or the internet browser, depending on how you accessed EventPro.

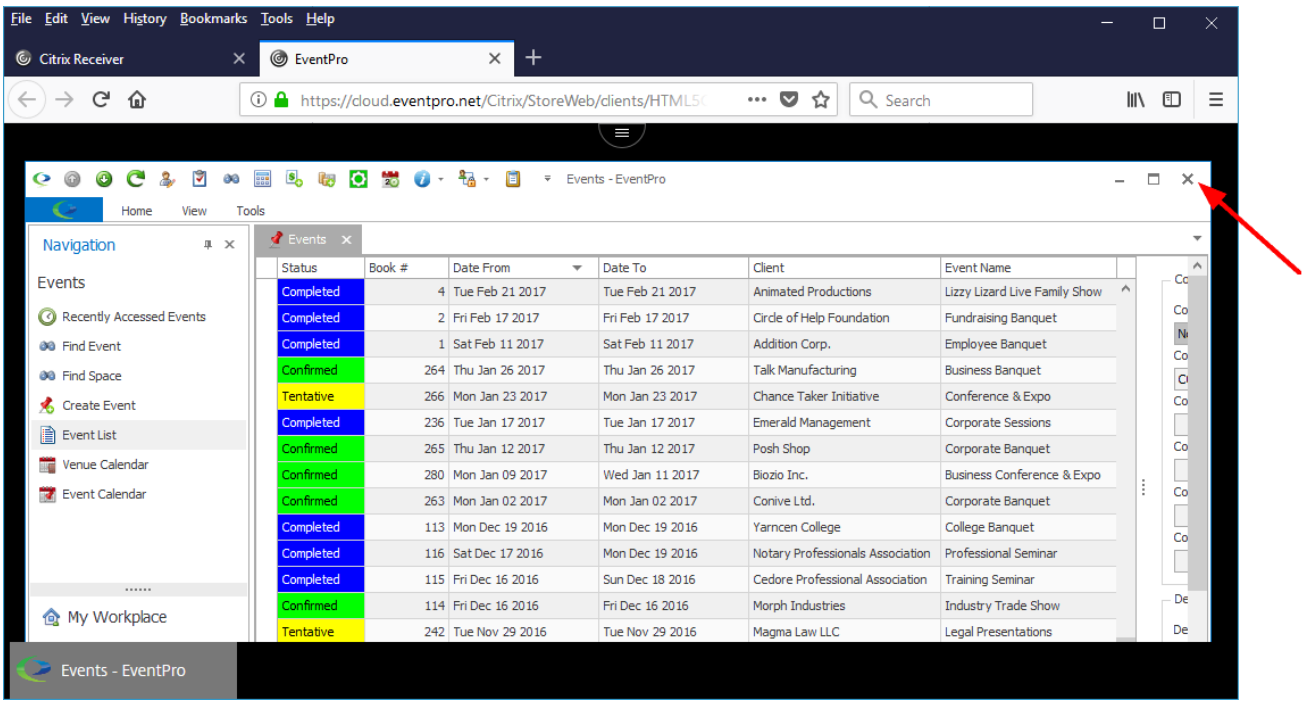




- Citrix Workspace may still be running in the background. If you need to completely exit Citrix Workspace, you can do so by right-clicking the icon in your Task Bar, and selecting **Exit**.

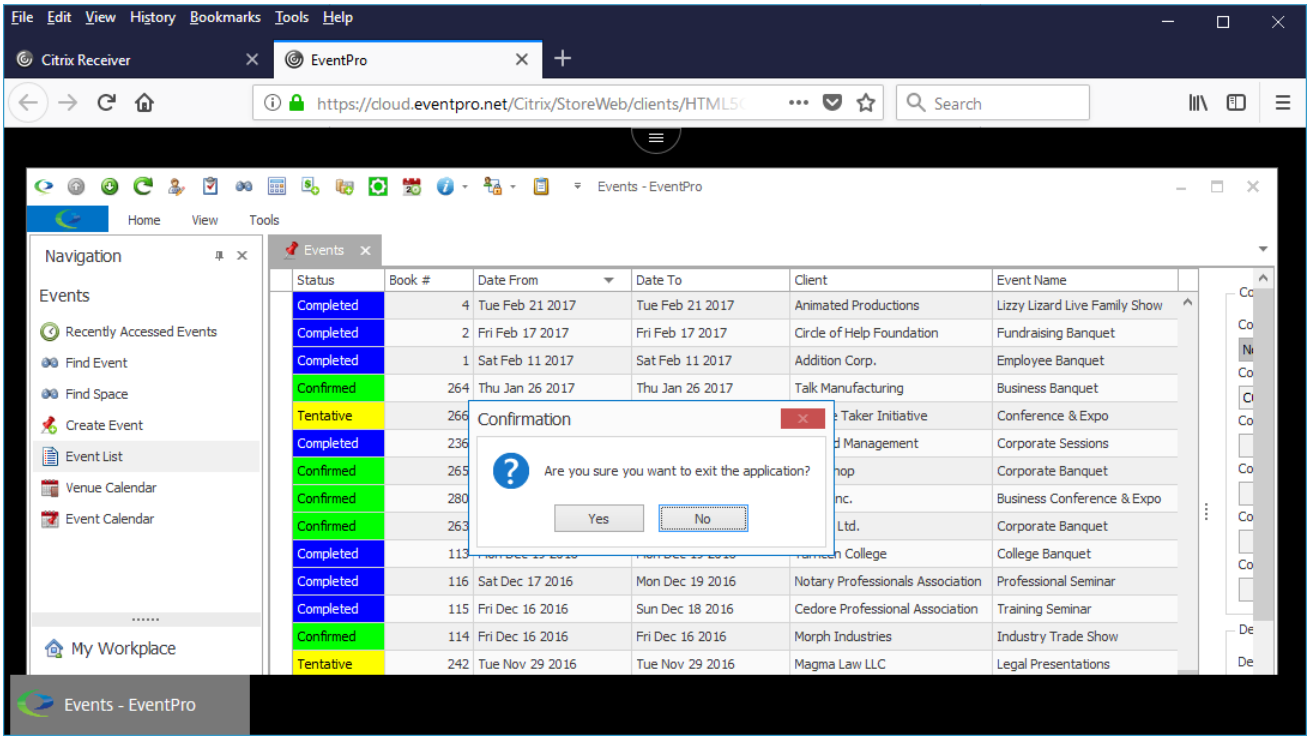


- **Light Version of Citrix (Not Installed)**:
  - With the Light Version HTML5 Receiver, the EventPro application window stays confined within the browser window.
  - To close EventPro in the HTML5 Receiver, you need to click the X in the upper right corner of the main EventPro **application** window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



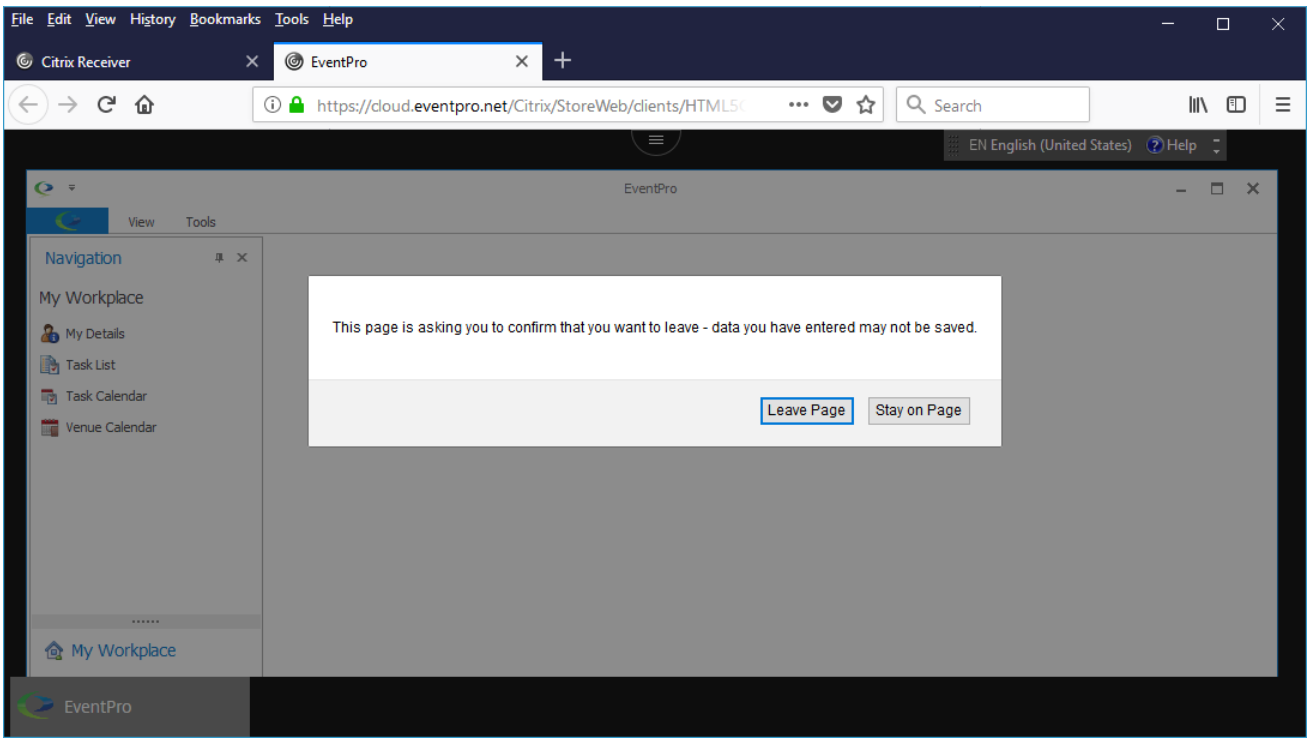
- You should see the EventPro dialog asking "**Are you sure you want to exit the application?**". Click **Yes**.

  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.



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

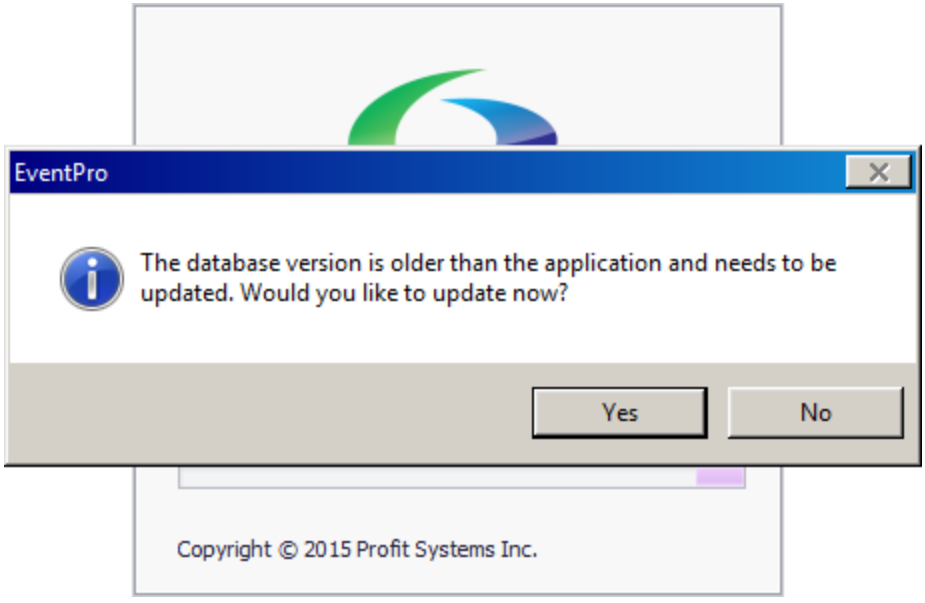
  Opt to stay on the page. Then, to ensure that you have logged out properly, click the X in the upper right corner of the **EventPro application window**, as noted above.



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**.

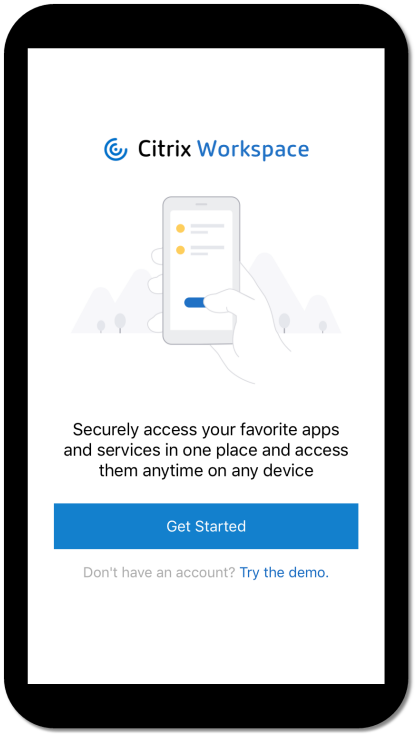
   Typically, you can find the **Citrix Workspace app** on the iTunes App Store (Apple iOS devices) or Google Play (Android devices), but if neither of those options are applicable to you, there are other versions available for download on the Citrix website.

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.

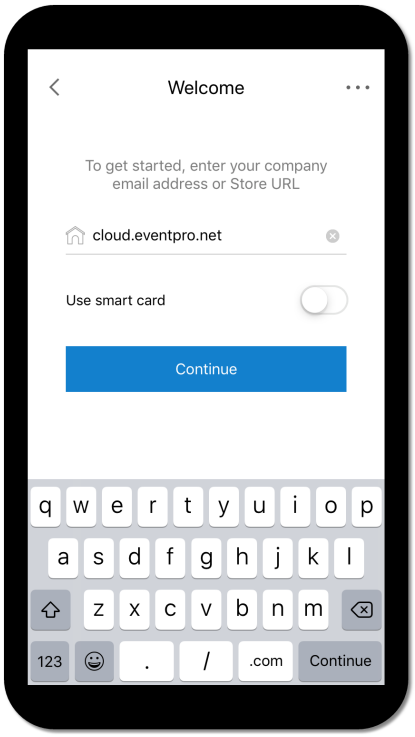
   b. Tap **Got It** to continue to the Citrix Workspace app.

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

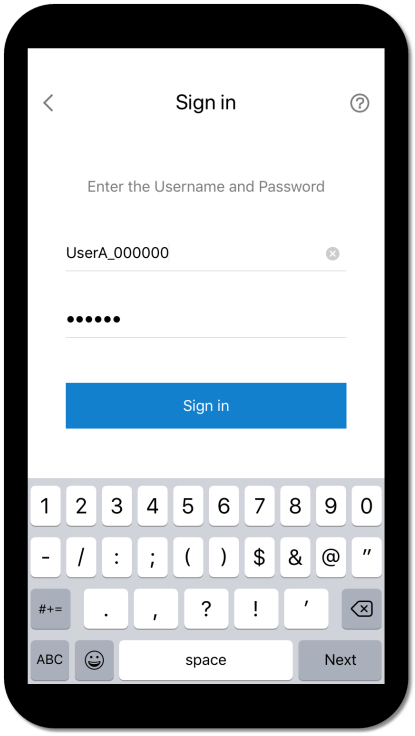


5. The **Welcome** or **Add Account** screen asks you to enter your company email address or Store URL.

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



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.

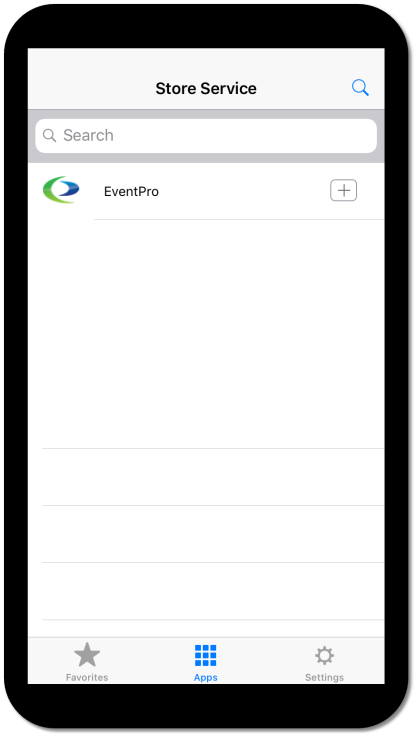
   You can review the default credentials under **Run Citrix Workspace & Add Account** 16 above.

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.

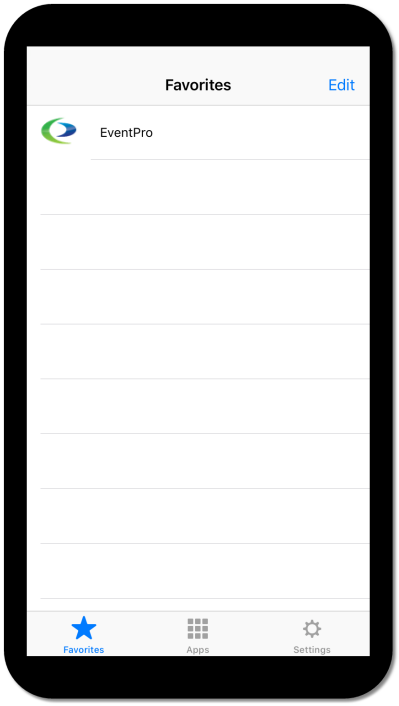
   In our example, Workspace opens to the **Apps** page, which displays all of the apps available to you on Citrix Workspace.



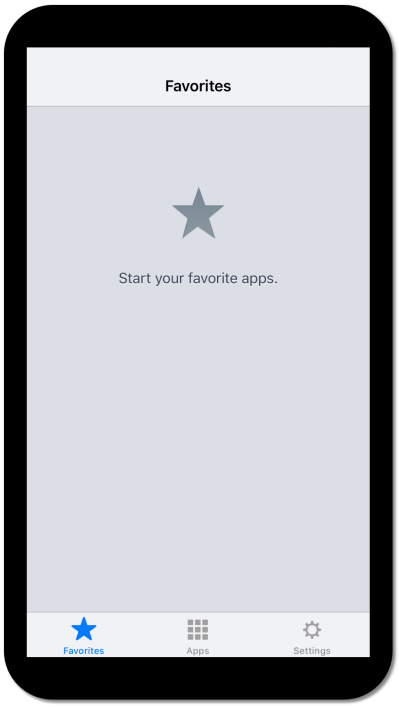
8. You can add your EventPro app to your **Favorites** page so that it is easily accessible.

   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.



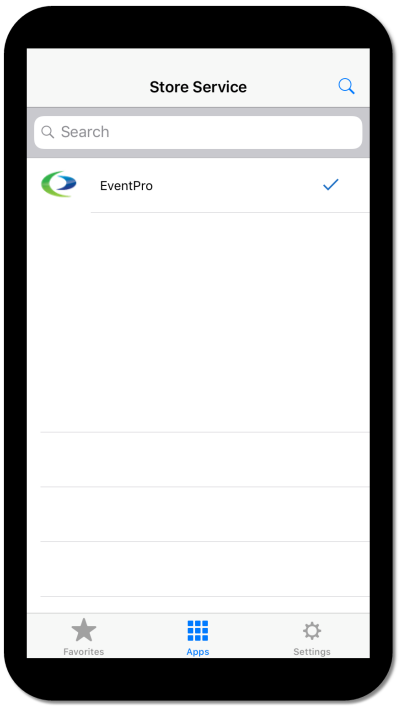
   b. If the **Favorites** screen is empty, you can add the EventPro app now.



   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**.

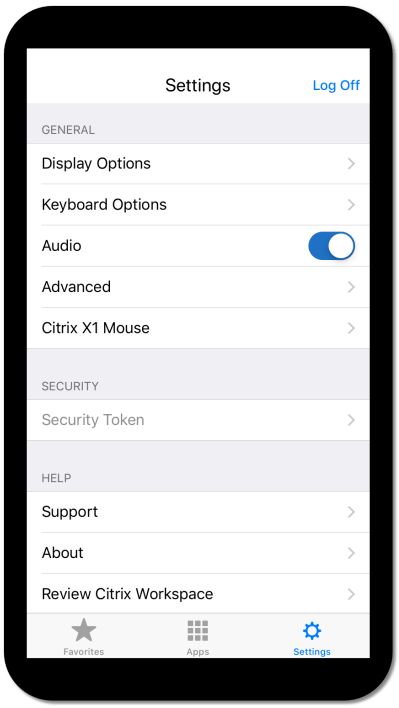
A checkmark will appear next to the EventPro app icon, indicating that it has been added to Favorites, and if you go to the **Favorites** page, you will see the EventPro app there.



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.

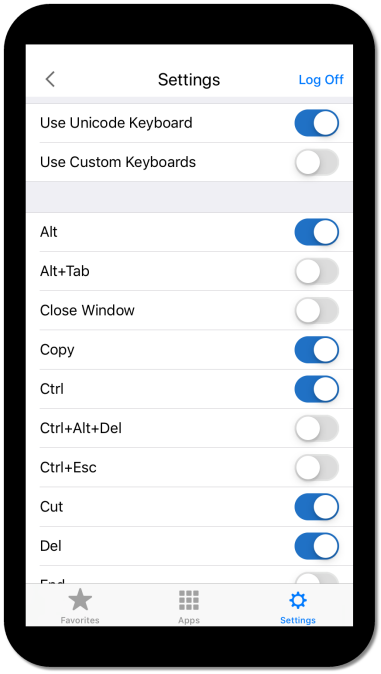
   a. Go to the **Settings** area in the Citrix Workspace app.



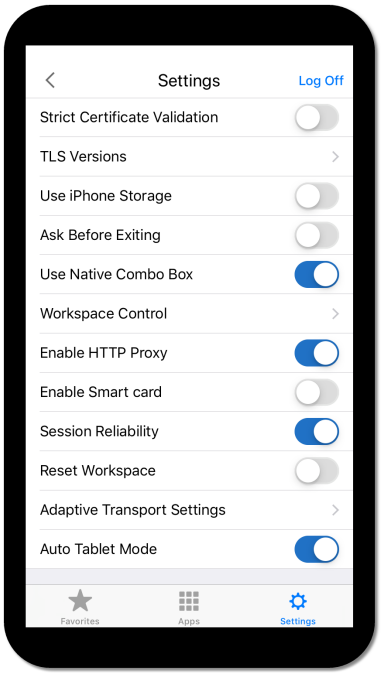
   b. Three areas under which you will likely need to adjust settings are **Keyboard**, **Advanced**, and **Display**.

      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.

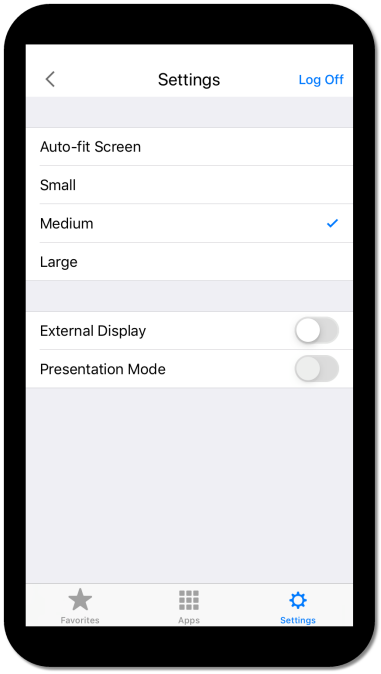
You may also want to enable the clipboard, which may involve turning on an "**Enable clipboard**" setting, or enabling various clipboard functions individually (**Cut**, **Copy**, **Paste**, *etc*.).



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



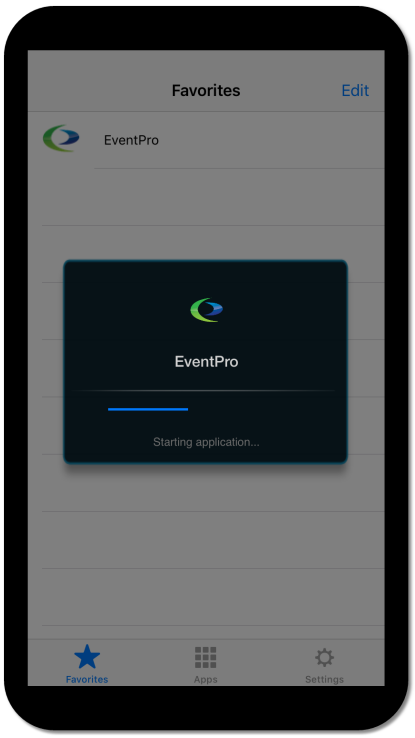
iii. Choosing a **Display** option is up to your personal preference. If you want the EventPro window to adjust to your device screen automatically, look for some sort of "**Auto-Fit**" setting.



10. You can now start EventPro Cloud.

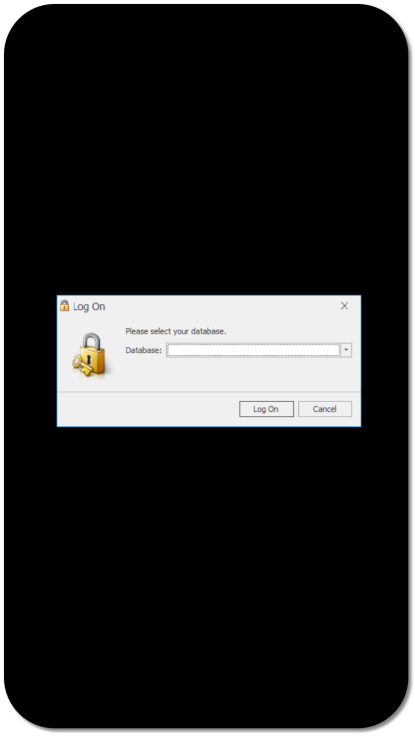
    Go to your **Favorites** page, and **tap** your EventPro Cloud app icon to begin.

    The EventPro application will start.



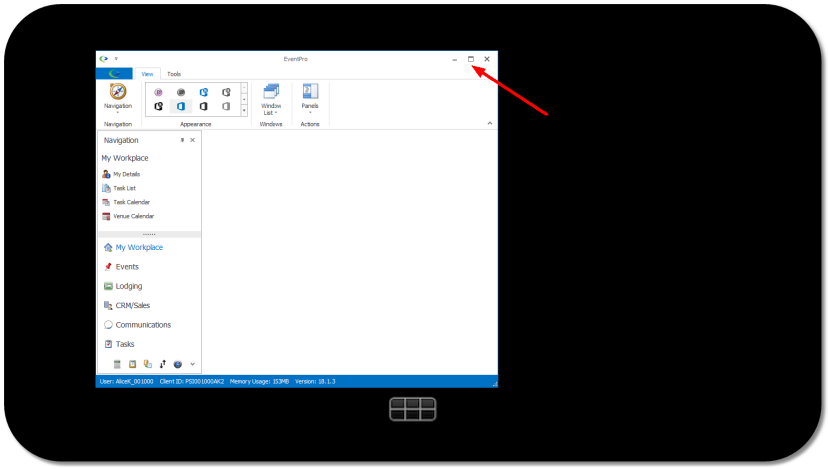
11. You may need to wait a few moments as EventPro loads.

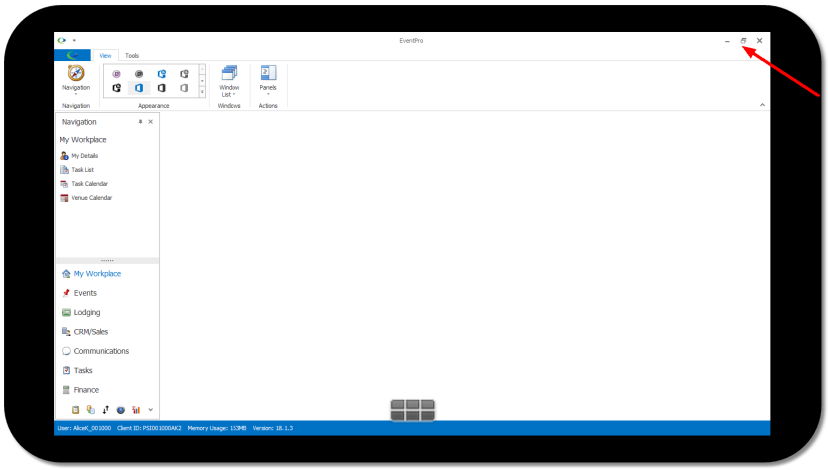
12. If you have more than one database to choose from, select the relevant database from the drop-down list and tap **Log On**. If you only have one database, you will not have to perform this step.



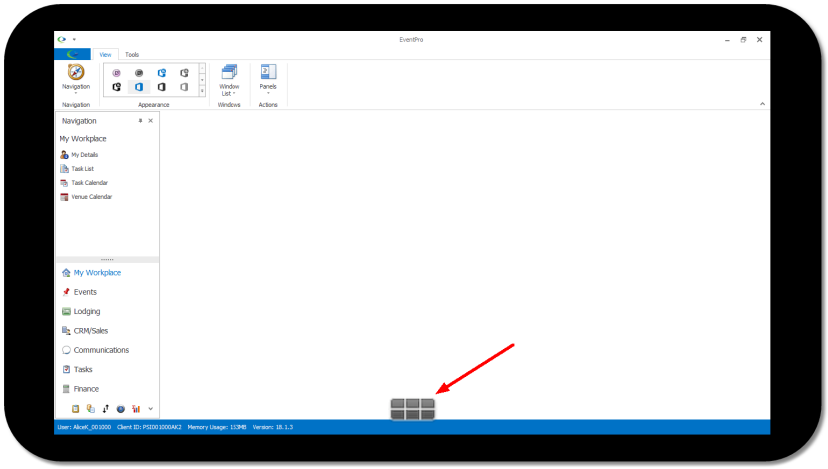
13. When EventPro opens, the size of the application window will vary, depending on your **Display** settings.

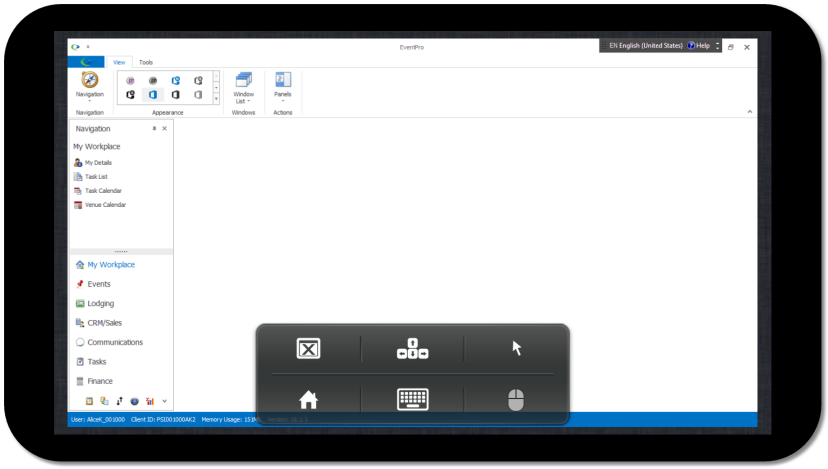
    You can tap the **Maximize** and **Restore Down** commands in the upper right corner of the application window.





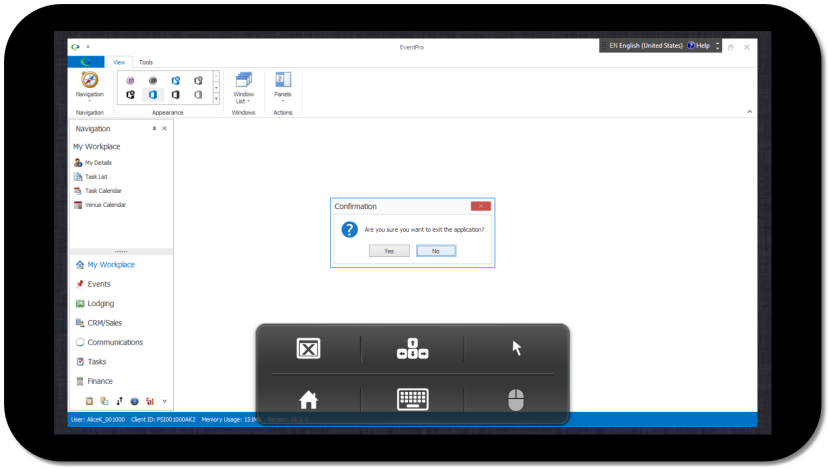
14. Tap the **grid icon** at the bottom middle of the screen to open the Citrix Workspace toolbar.





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 **Options and Requirements** 66:
  - **Options and Requirements** 66
    - **Minimum System Requirements** 67
    - **Installation Types** 67
    - **Authentication Modes** 67
    - **Active Directory Integration** 67
- Then, after determining the type of installation you will be performing, proceed to the chapter relevant to your installation:
  - **Standalone Install** 68
  - **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**.
  - **Network Install: Windows Authentication** 96
  - **Network Install: Active Directory Integration** 162 *(requires EventPro Active Directory Module)*
  - **Network Install: SQL Authentication** 231
- Once you have installed EventPro Software, there are some other topics you may want to review:
  - **EventPro Desktop Shortcuts** 288
  - **Update Software License** 288
  - **Update Your Software** 291

Options and Requirements

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

- **Minimum System Requirements** 67
- **Installation Types** 67
- **Authentication Modes** 67
- **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.
  - **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.

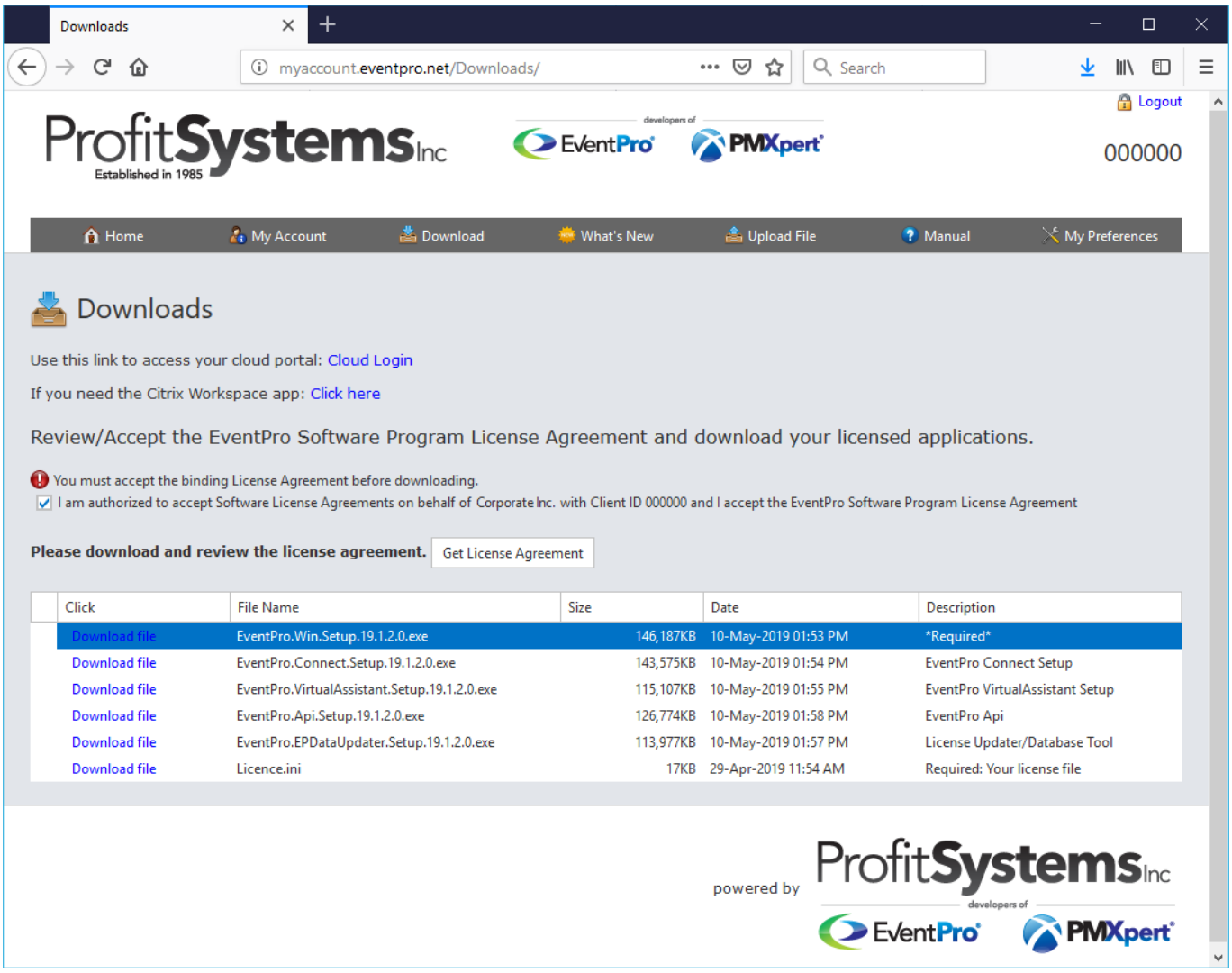
Please note that Active Directory Integration requires the separately purchased **EventPro Active Directory module**.

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** 69
  2. **Install SQL Server** 70
  3. **Configure SQL Server** 73
  4. **Install Data Updater** 77
  5. **Create New Client Database** 79
  6. **Restore Existing Database over New** 82
  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 **Alternate Database Restore Process** 280.

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.



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.

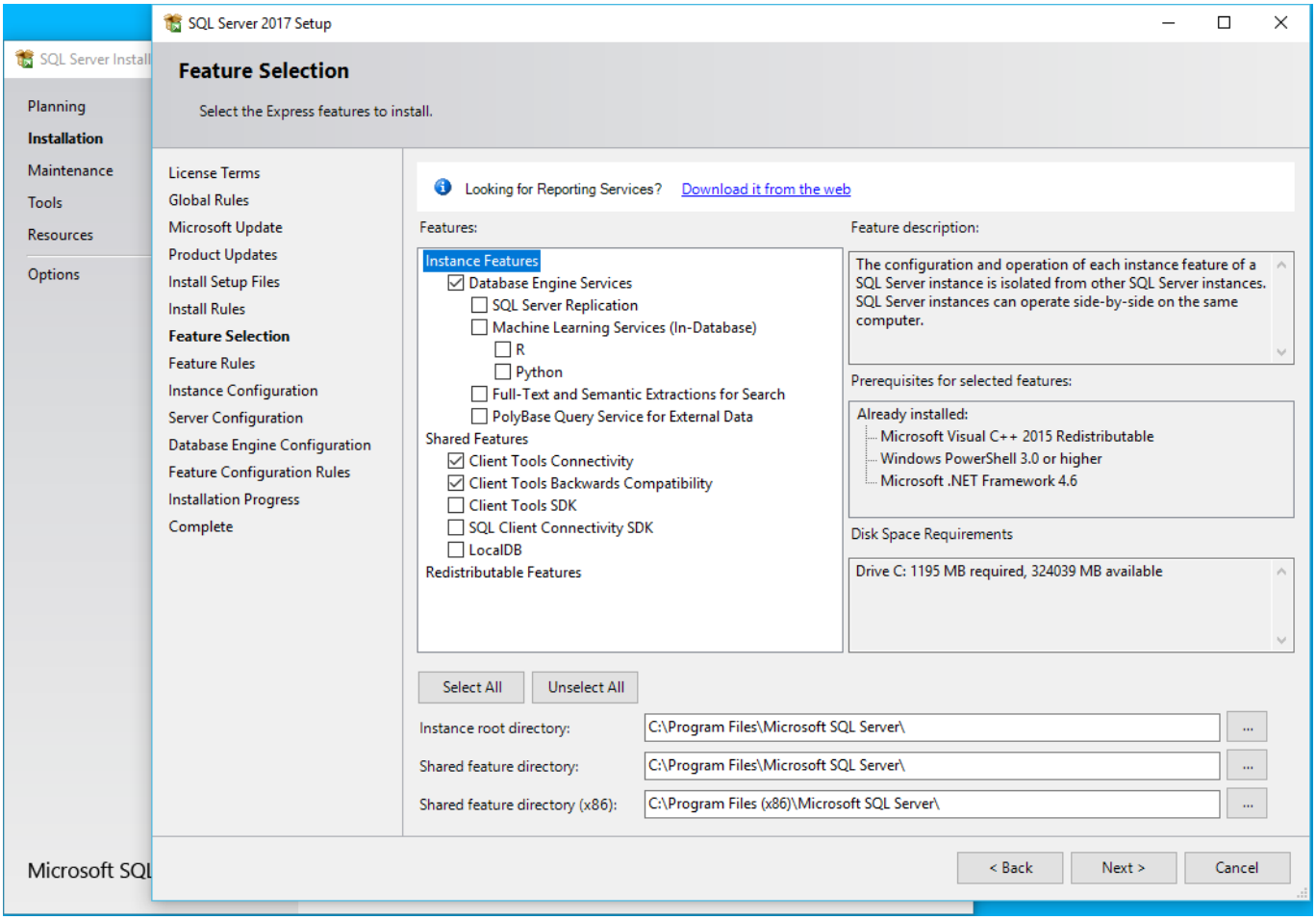
6. Proceed to **Install SQL Server** 70.

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 **minimum technical requirements** 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**:



   a. You should **select** the checkboxes for:

i. **Database Engine Services**

ii. **Client Tools Connectivity**

iii. **Client Tools Backward Compatibility**

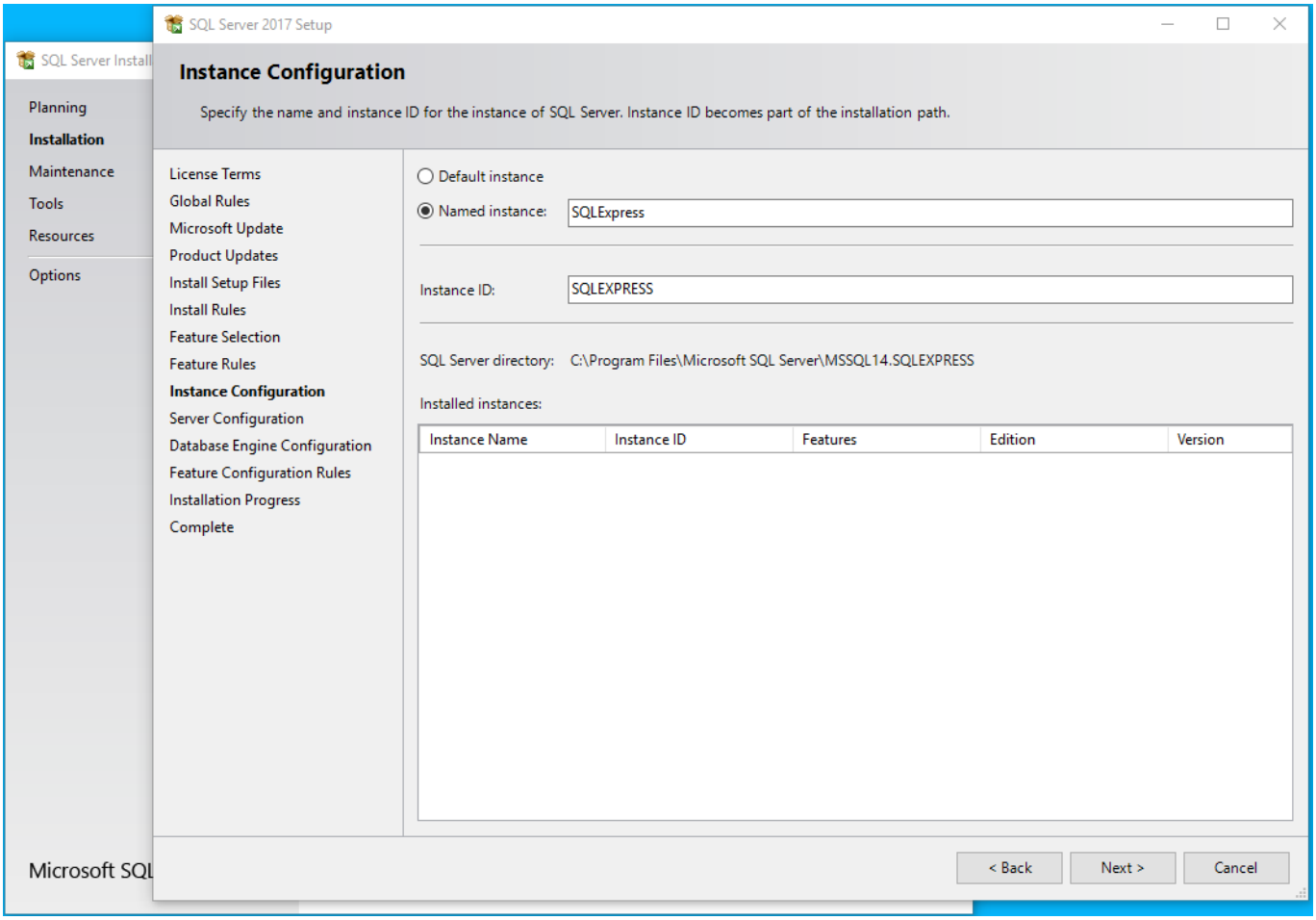
b. Depending on the edition of SQL Server you are installing, there may be a checkbox for **Management Tools**; if so, **select** that checkbox, as well.

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**:

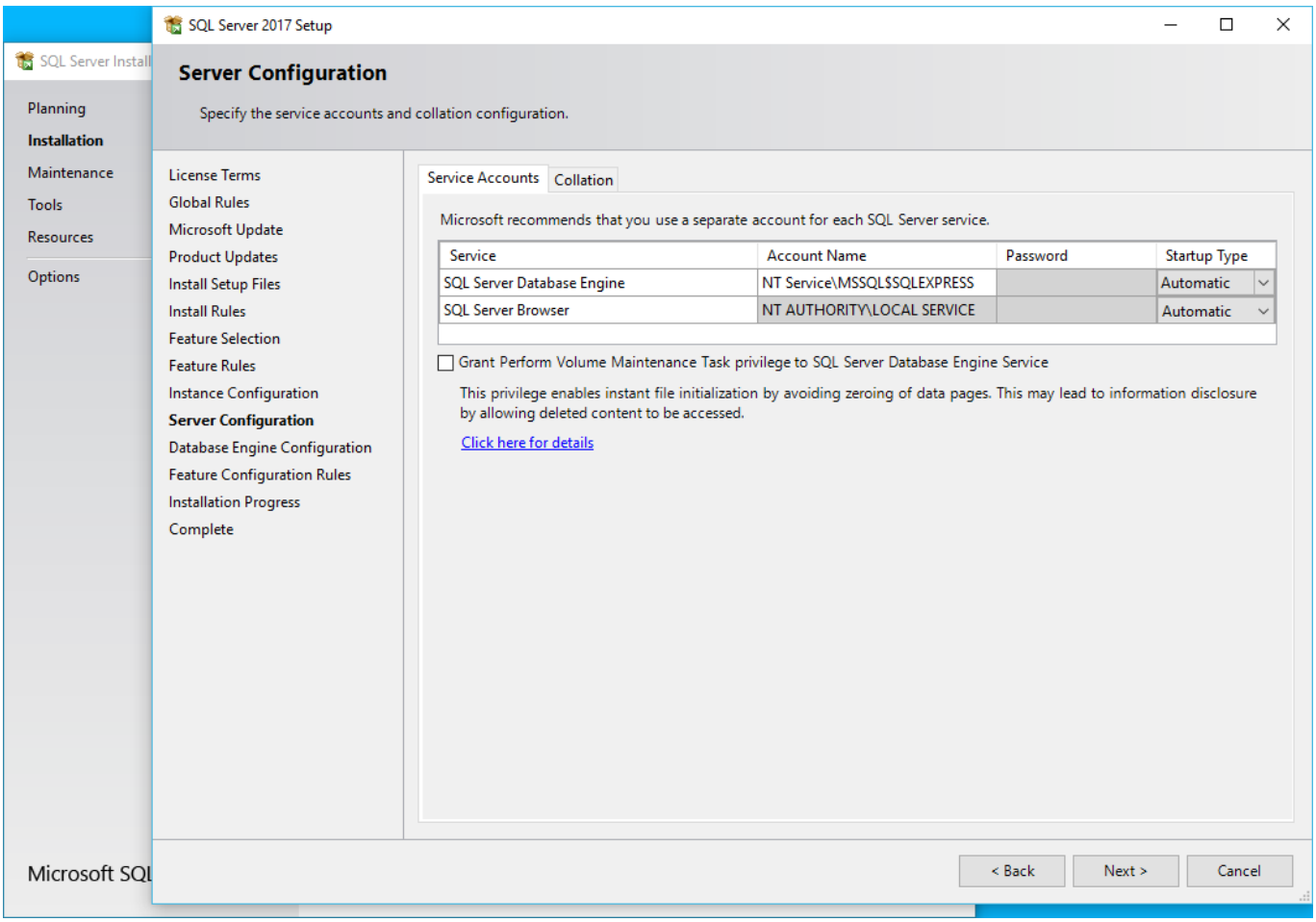


a. Select the radio button next to "**Named Instance**".

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.

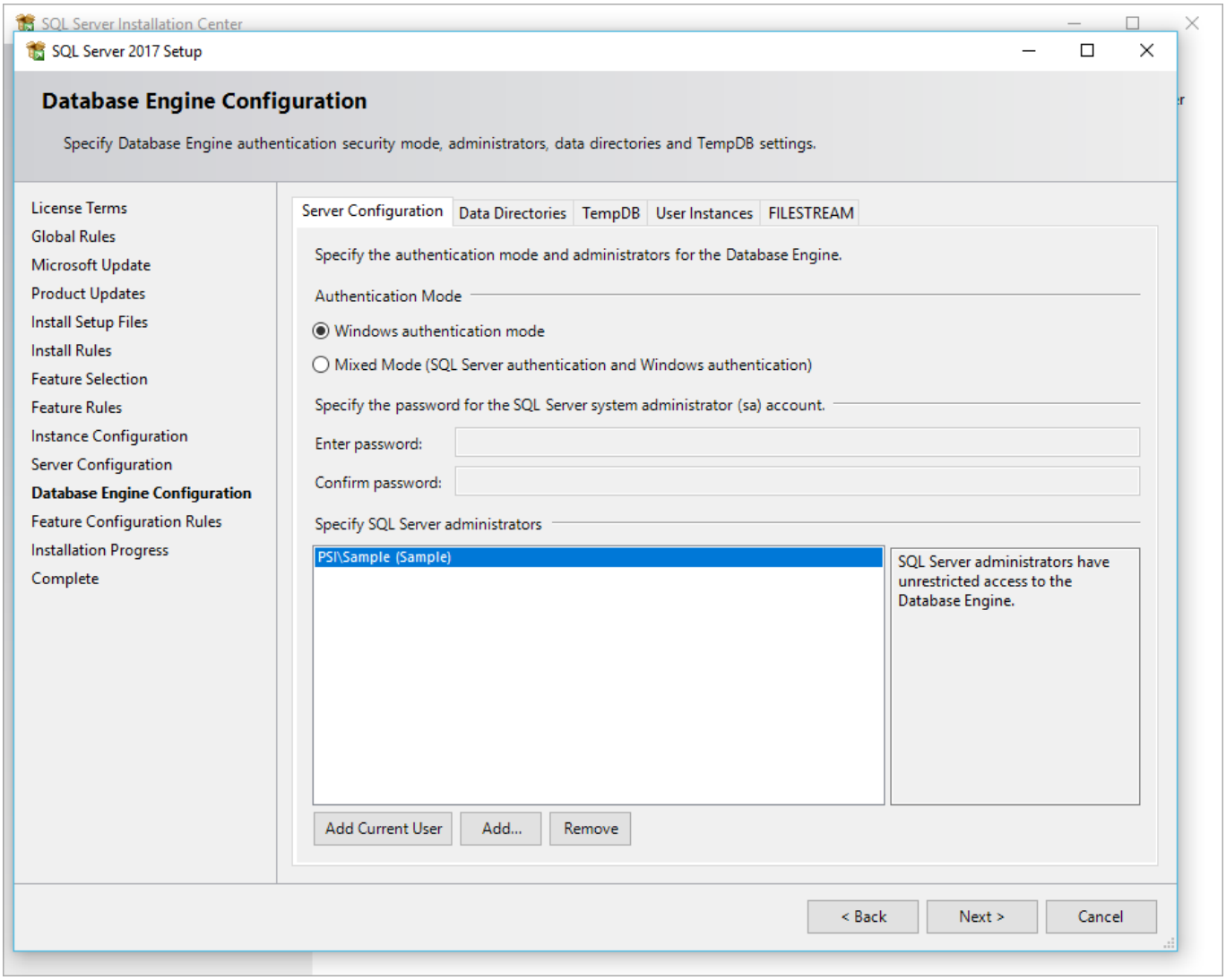
5. **Server Configuration**:



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**:



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 **above** 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 **Configure SQL Server** 73.

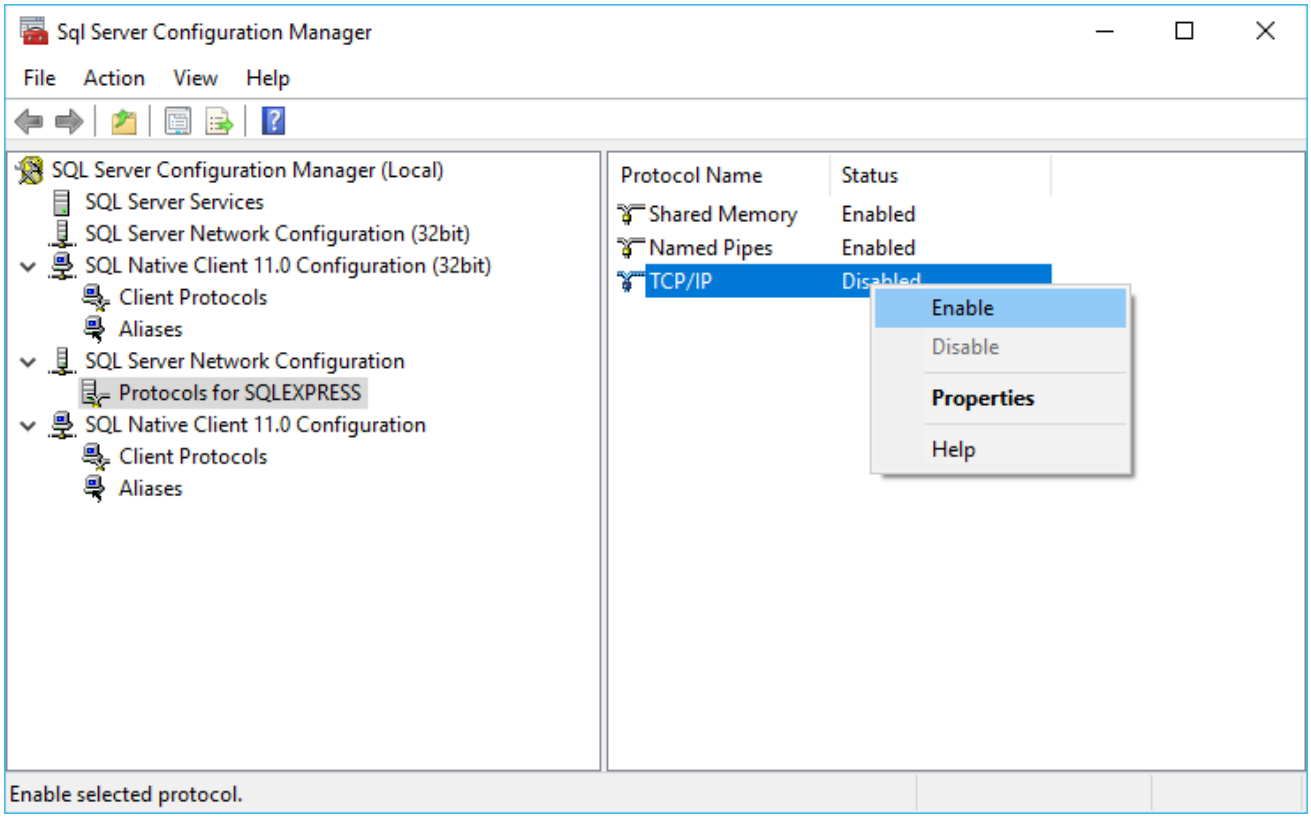
Configure SQL Server

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

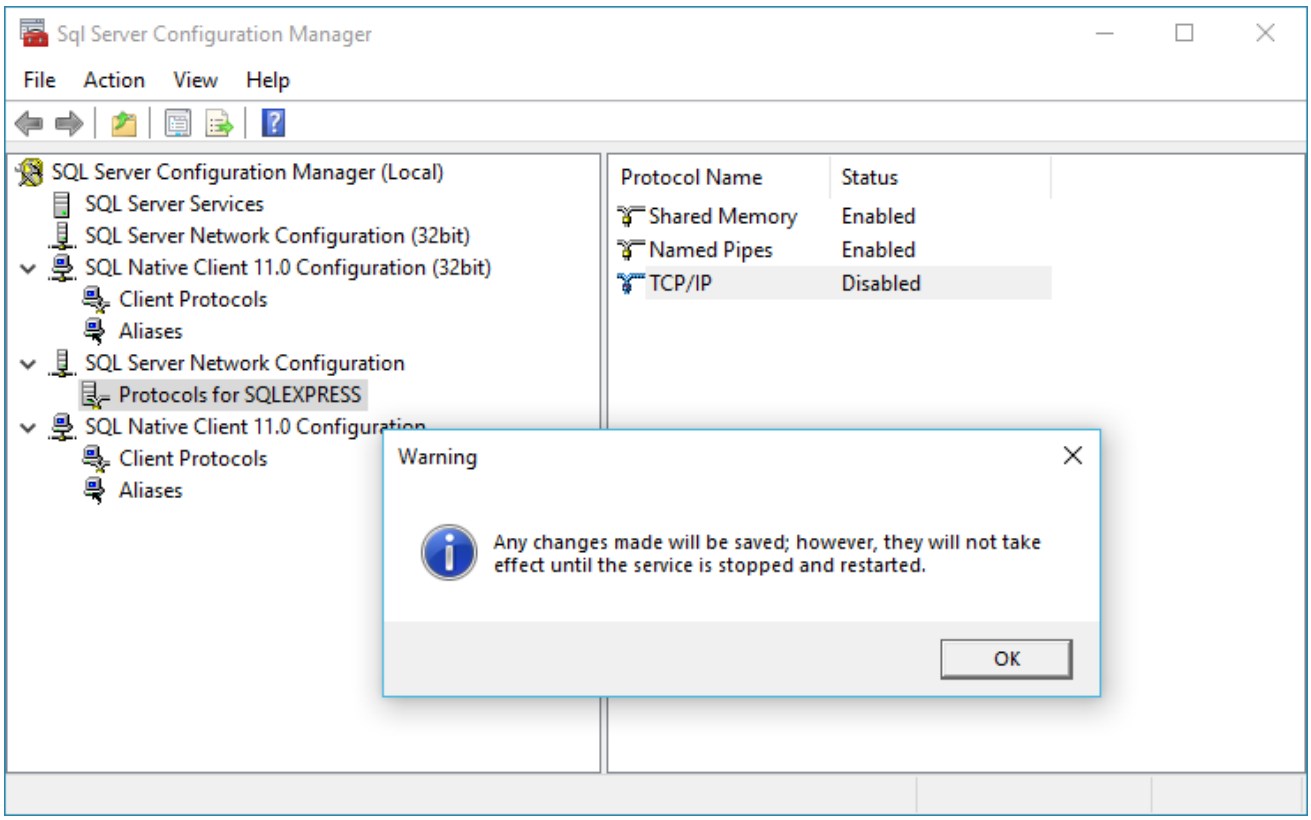
a. In the left-hand panel, go to **SQL Server Network Configuration > Protocols for SQLEXPRESS** (or whatever you named the SQL Server Instance **earlier** 71).

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**.



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

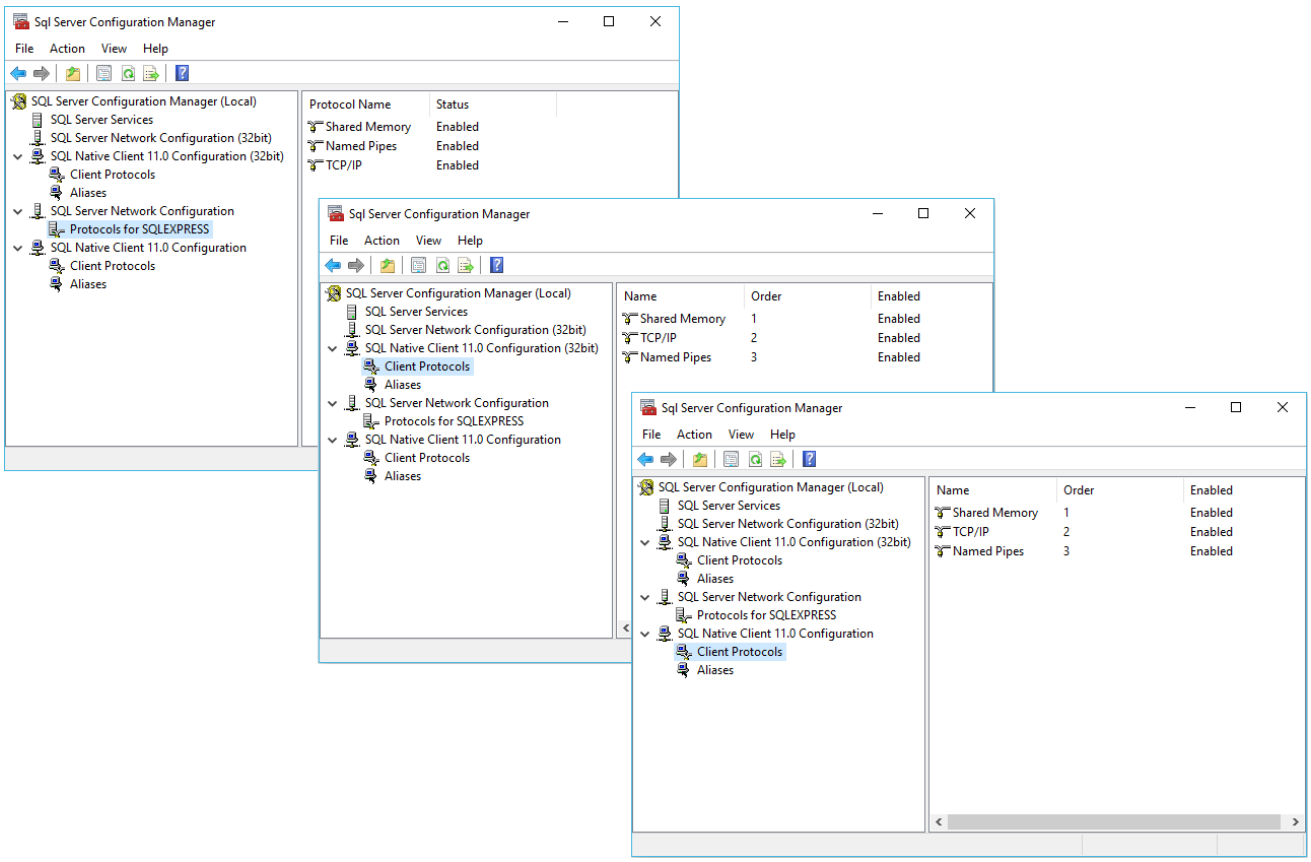


e. Click **OK**, and you will see that **TCP/IP** is now **Enabled**.

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.

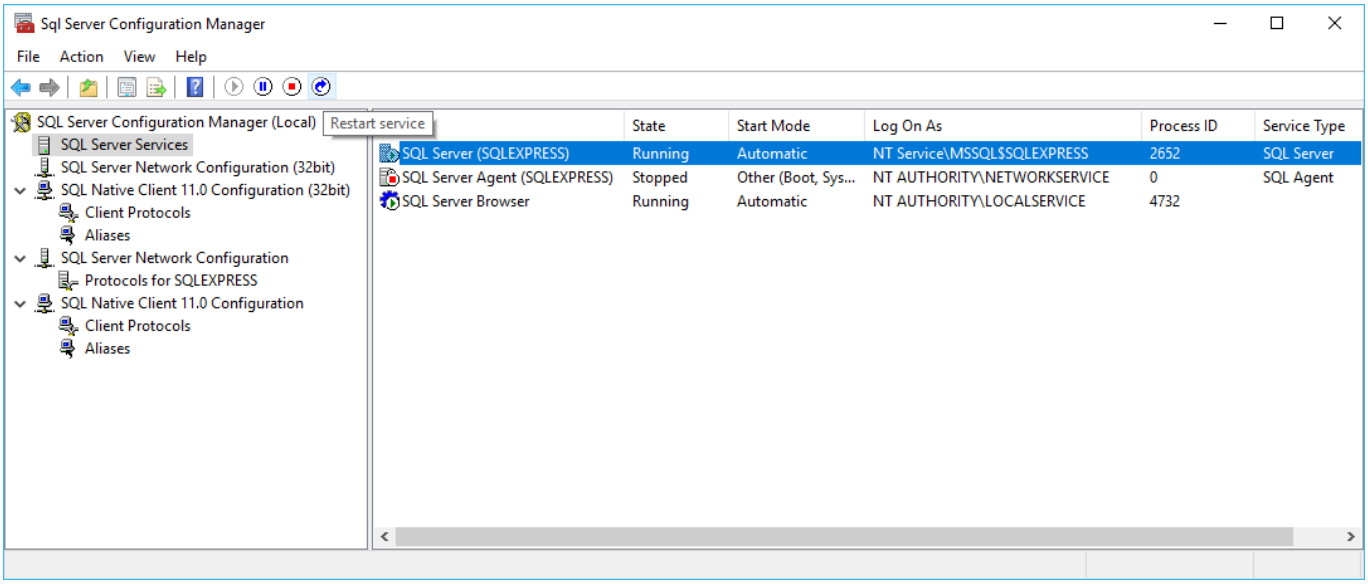
g. Both **TCP/IP** and **Named Pipes** should now be **Enabled**.

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 above. The service will stop and restart.



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.

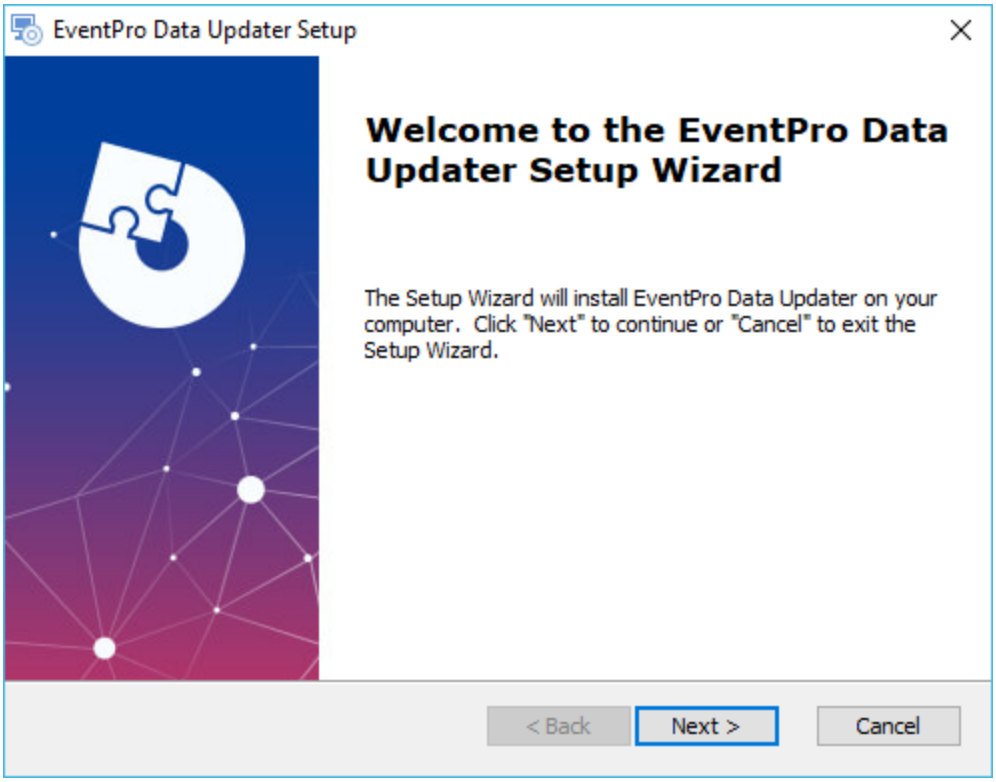
   If you run into any issues here or any other part of SQL Server Configuration, please **contact Support** for assistance.

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

6. Next, proceed to **Install Data Updater** 77.

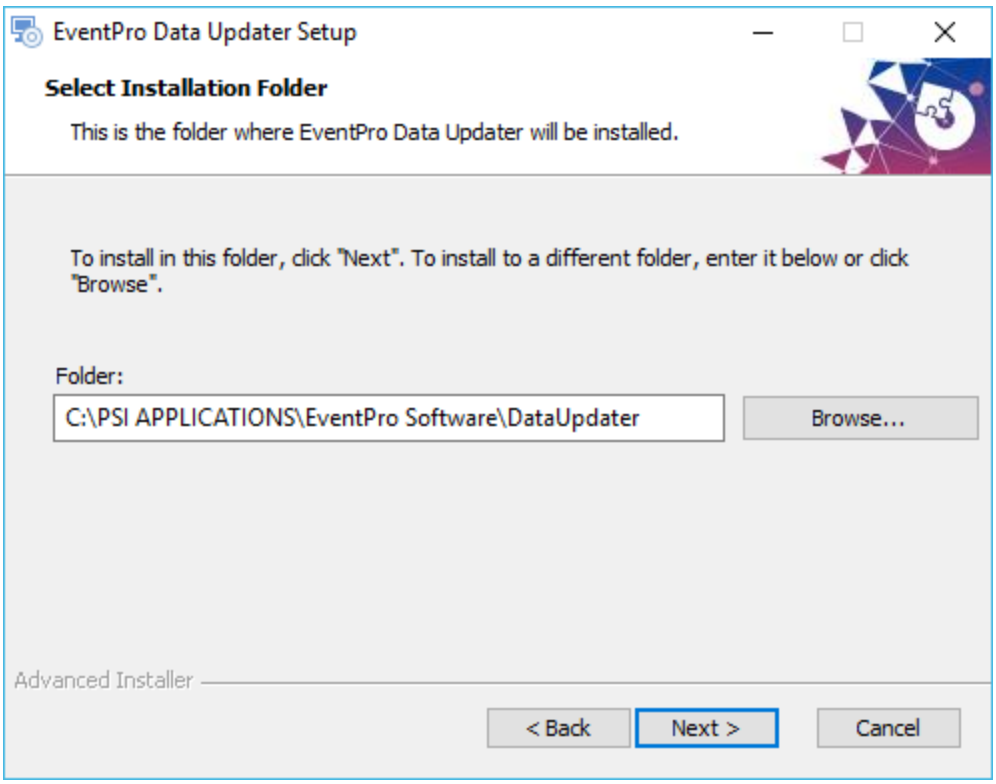
Install Data Updater

1. Navigate to the **EventPro.EPDataUpdater.Setup.exe** that you downloaded **earlier** 69, and double-click to run it.
2. The installation wizard will begin. Click **Next** to continue.

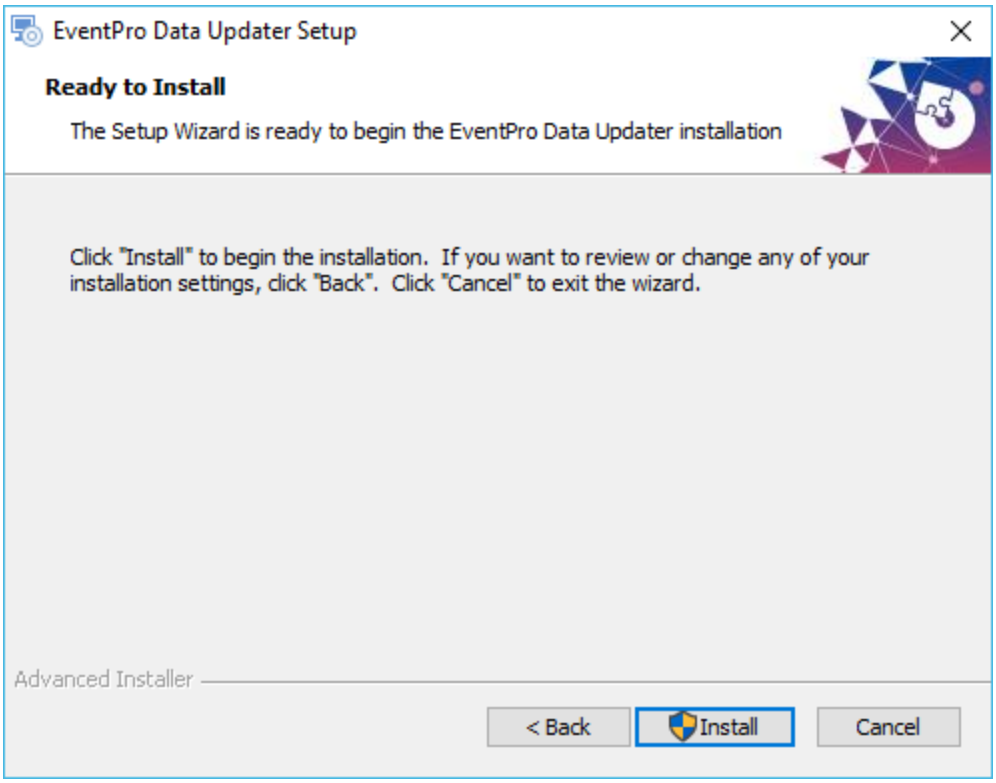


3. **Select Installation Folder**: If you don't want to use the default path, you can enter a different folder path.

   Click **Next**.

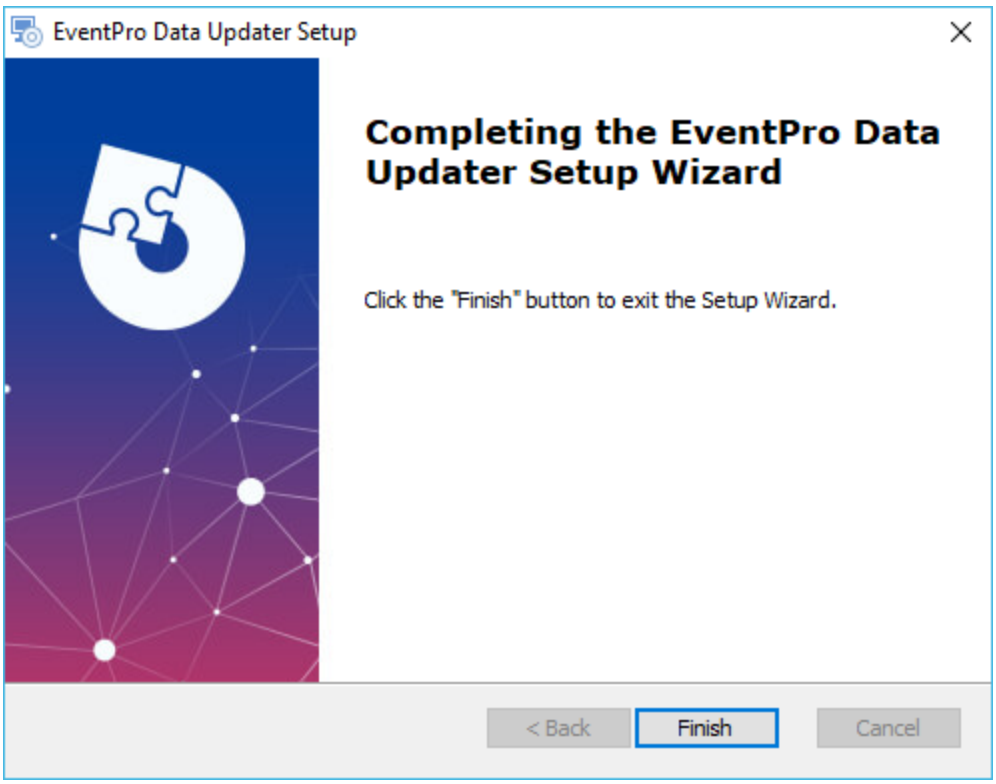


4. In the next window, click **Install**.



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.



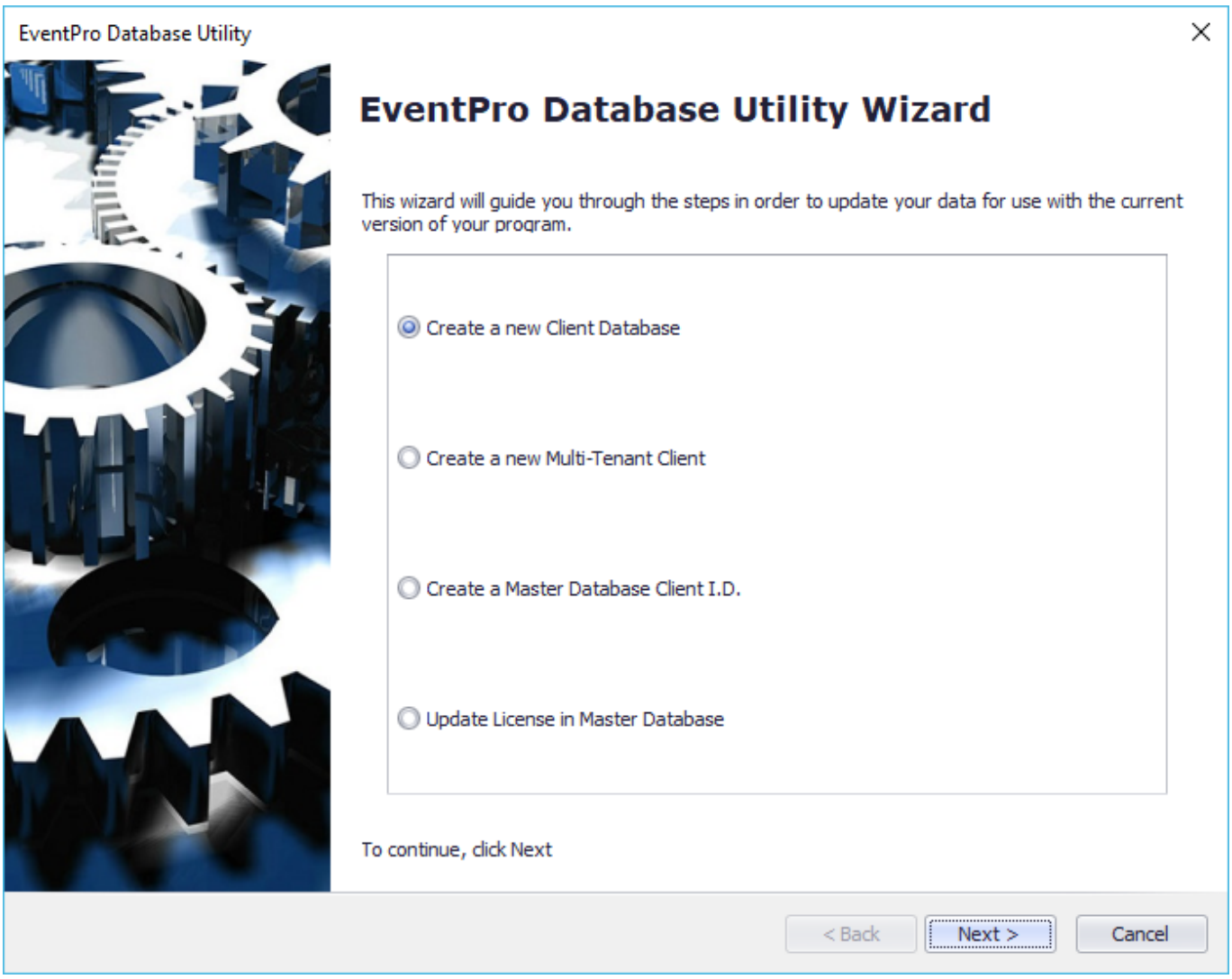
6. Next, proceed to Create New Client Database 79.

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.

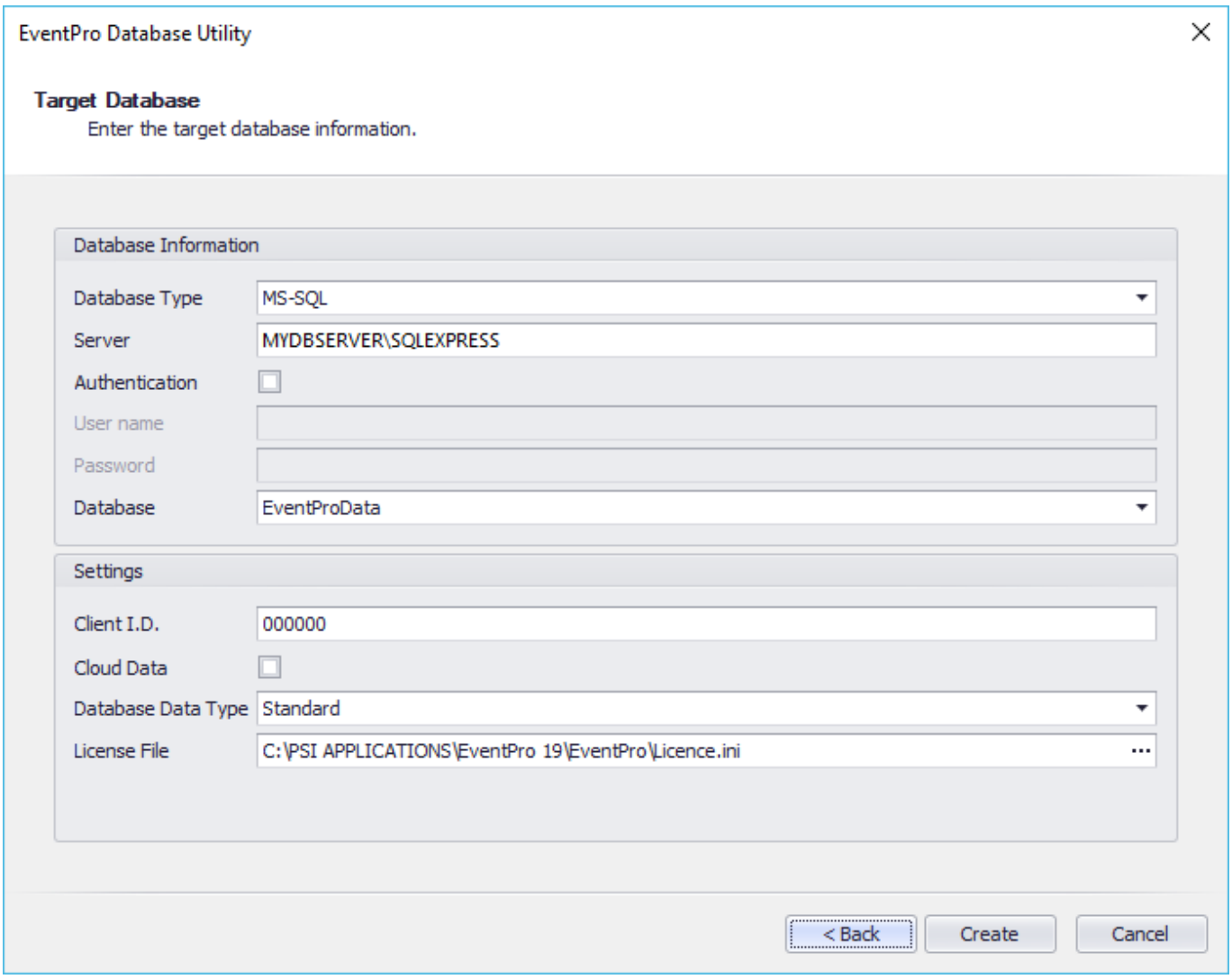
Before restoring the database, however, this process requires that you first **create a new database** with the EventPro Database Utility. The new database you are creating here is essentially a **placeholder**. Later, you will restore your existing database over this new "placeholder" database.

1. Run the **EventPro Database Utility Wizard** by selecting **EventPro Data Updater** from your **Start** Menu, or double-clicking 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.



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 **installing SQL Server** [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** 69.

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 **Restore Existing Database over New** 82.

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**.

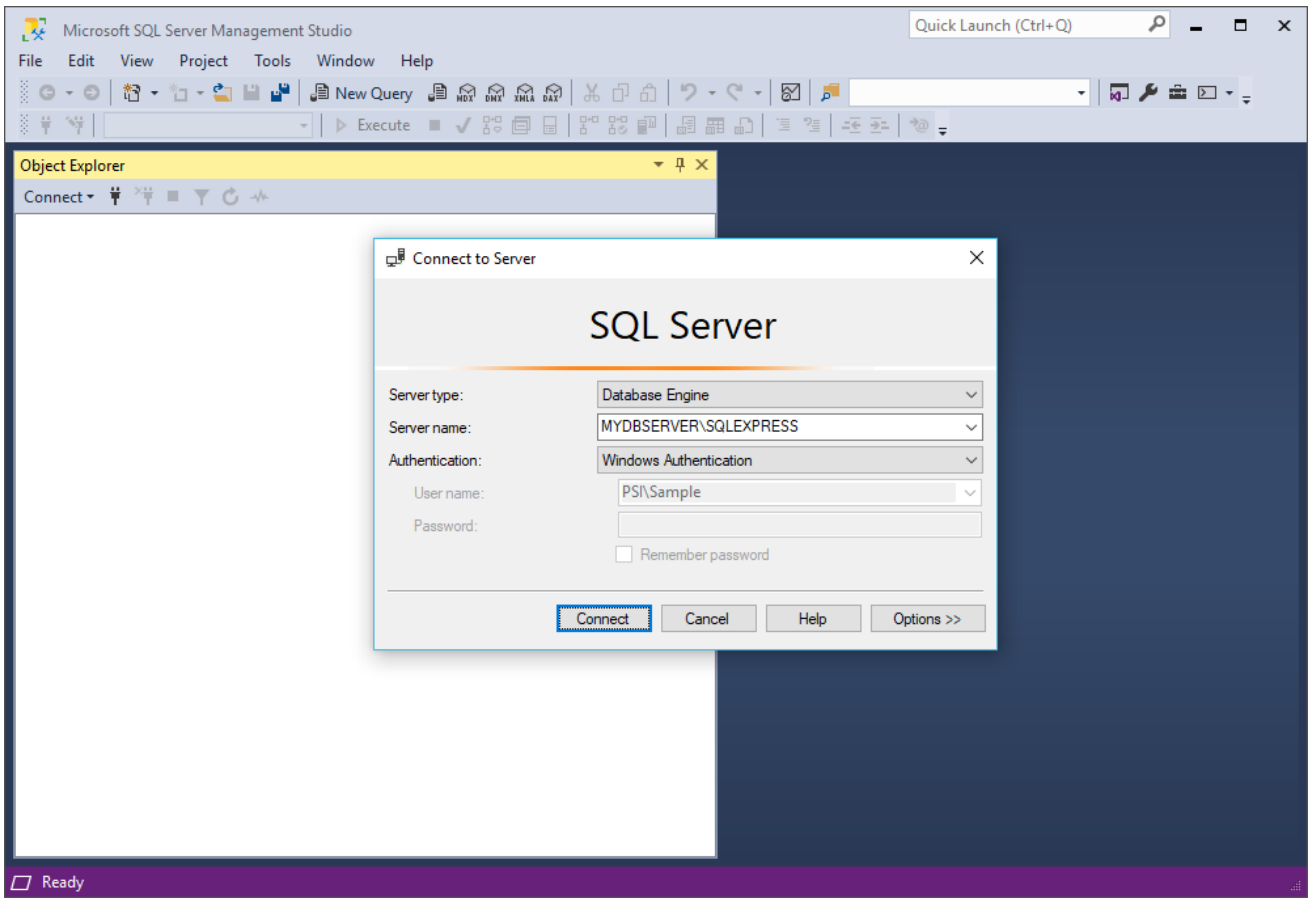
   You may have a different version of SQL Server Management Studio than that depicted below, but the functions and settings should be essentially the same.

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 **earlier** 71.

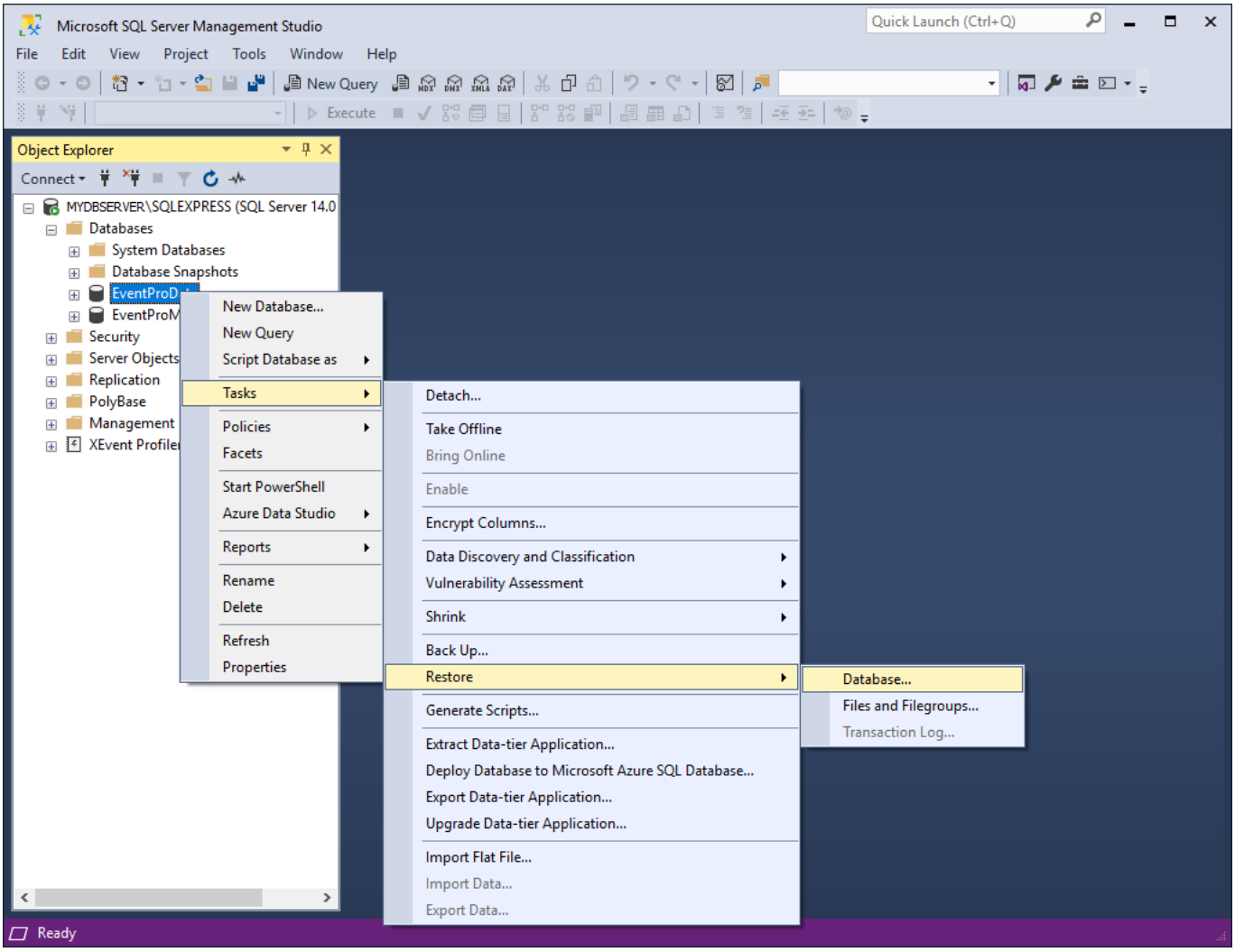
   b. Select **Windows Authentication**, assuming that you selected Windows Authentication as the Authentication Mode.

   c. Click **Connect**.

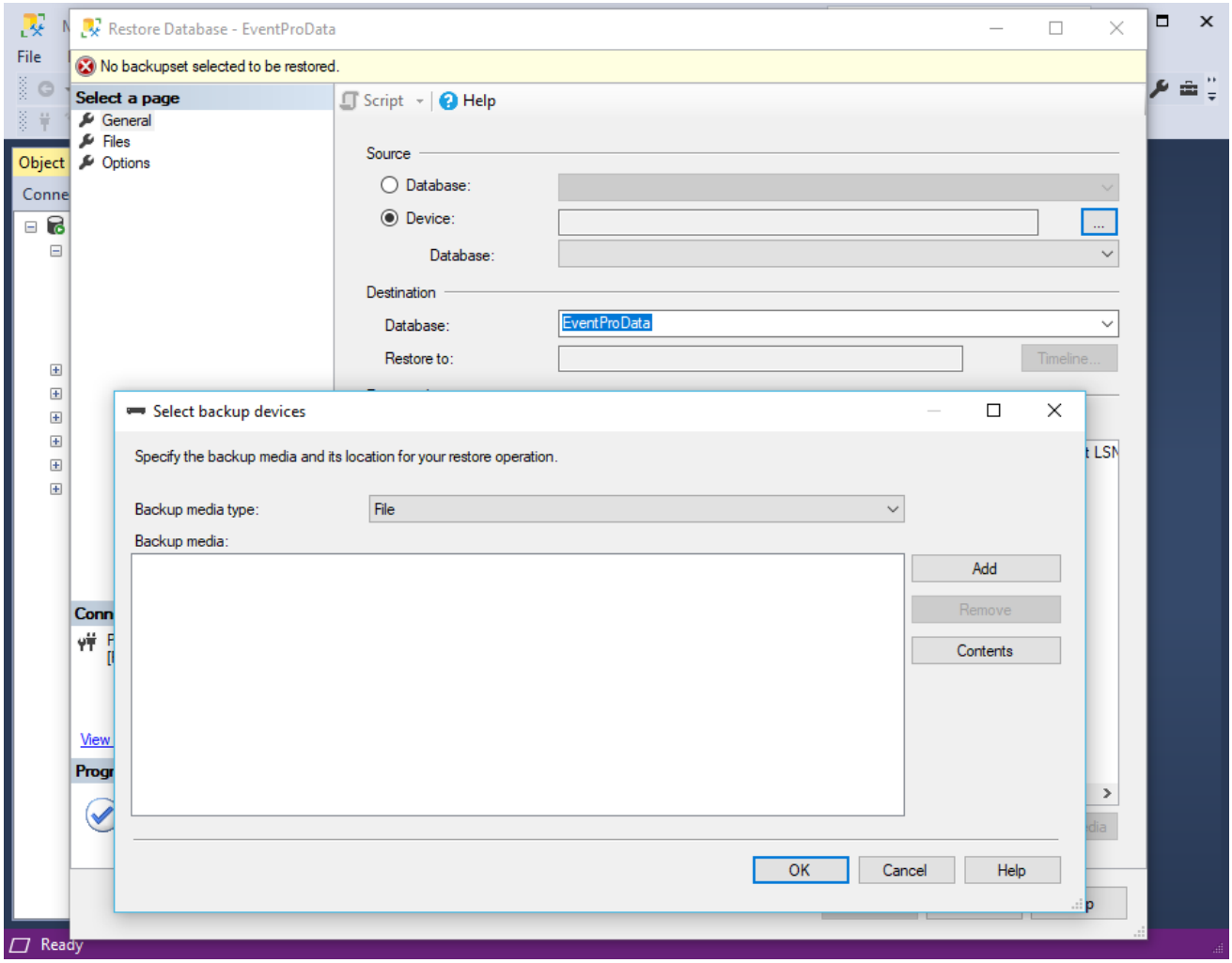


3. In the **Object Explorer** panel of **Microsoft SQL Server Management Studio**, expand the **Databases**. You should be able to see the **EventProData** and **EventProMaster** databases, which you would have created in the previous step (**Create New Client Database** 79).

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

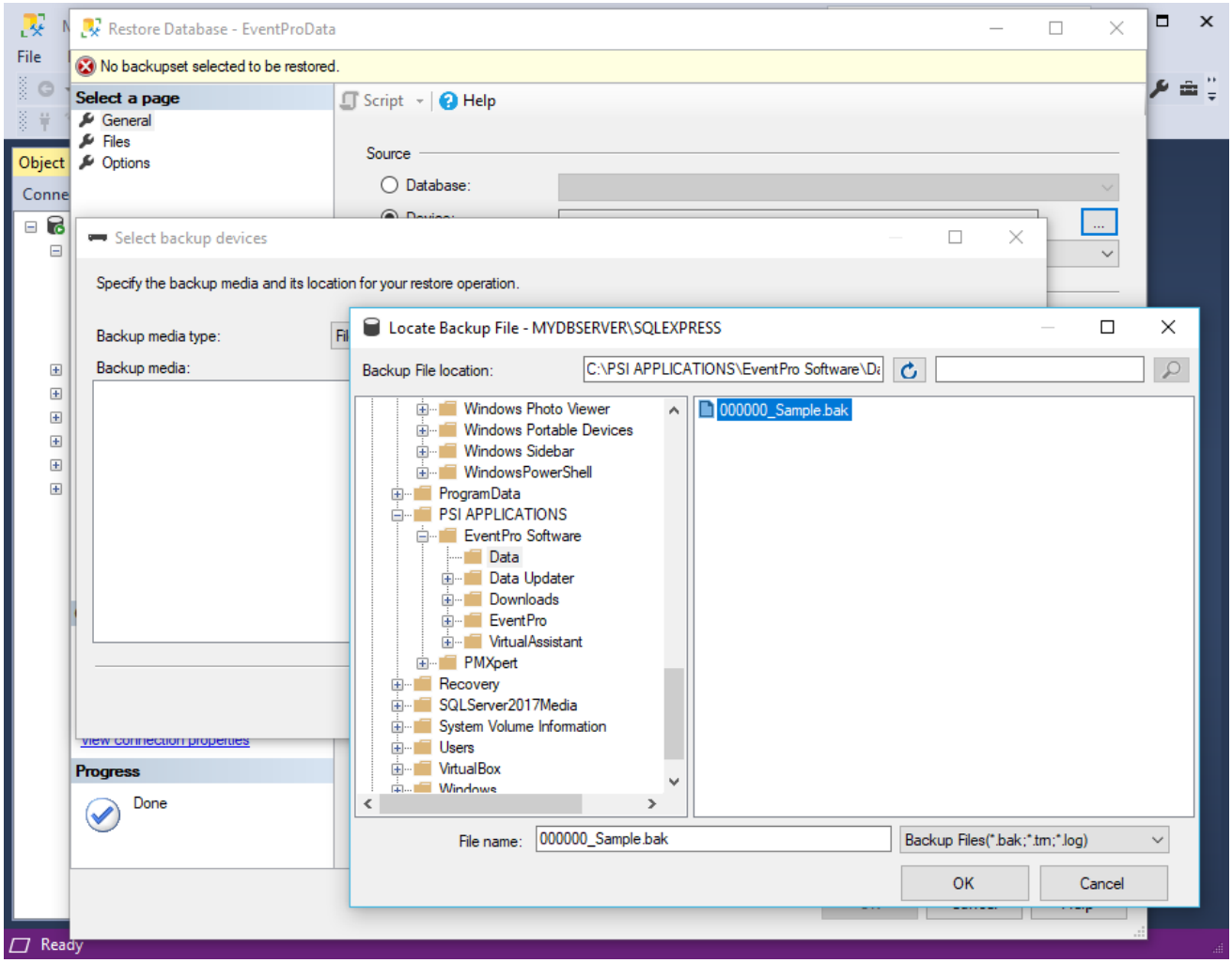


5. The **Restore Database** window appears.
6. Under **Source**, select **Device**, and click the ellipsis next to the field.
   a. The **Select Backup Devices** dialog appears.



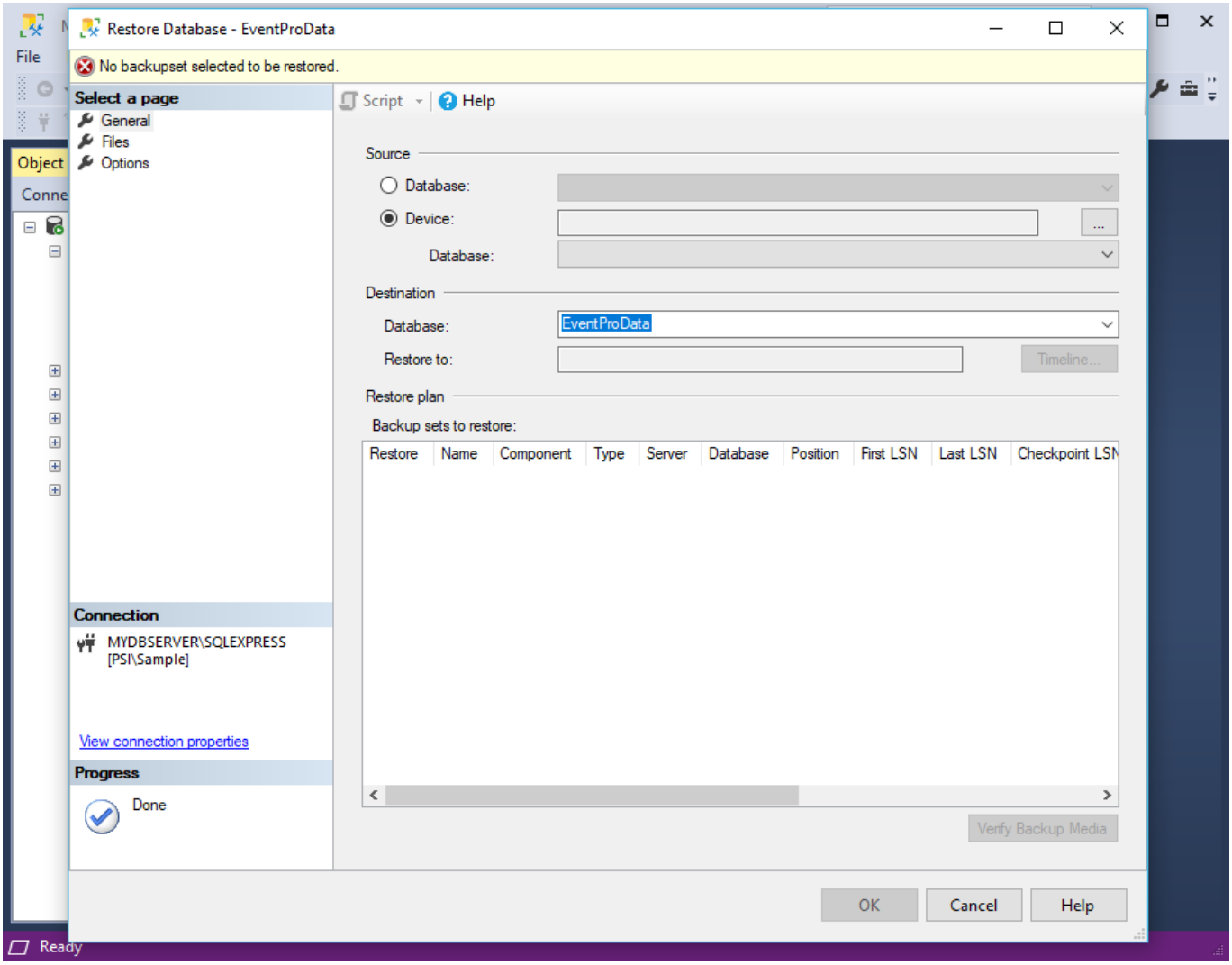
b. Click the **Add** button. The **Locate Backup File** window appears.

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.

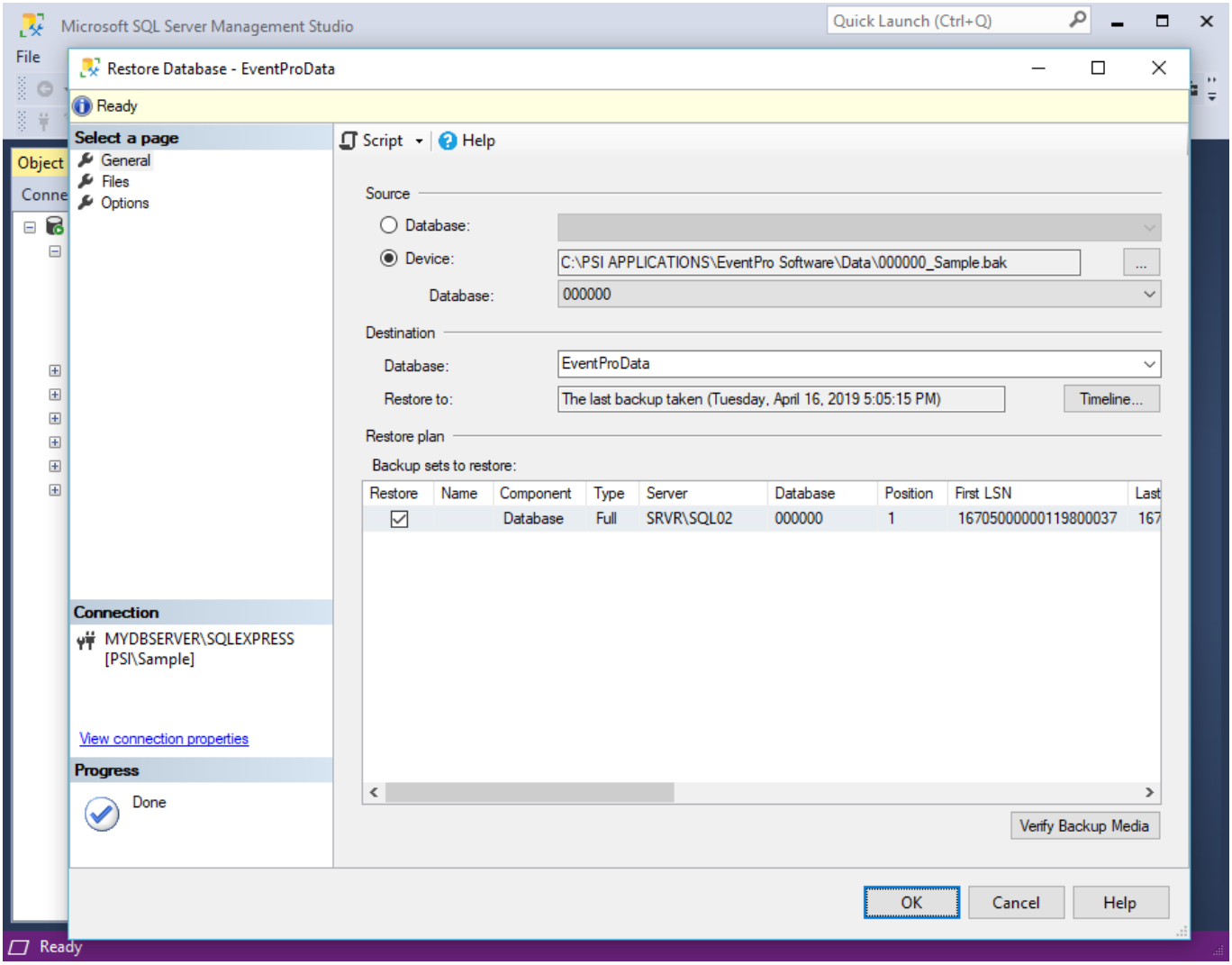


d. Click **OK** in the **Locate Backup File** window, and again in the **Select Backup Devices** window to return to the **Restore Database** dialog.

7. Back in the **Restore Database** dialog, under **Destination**, the **Database** should be set to **EventProData**.

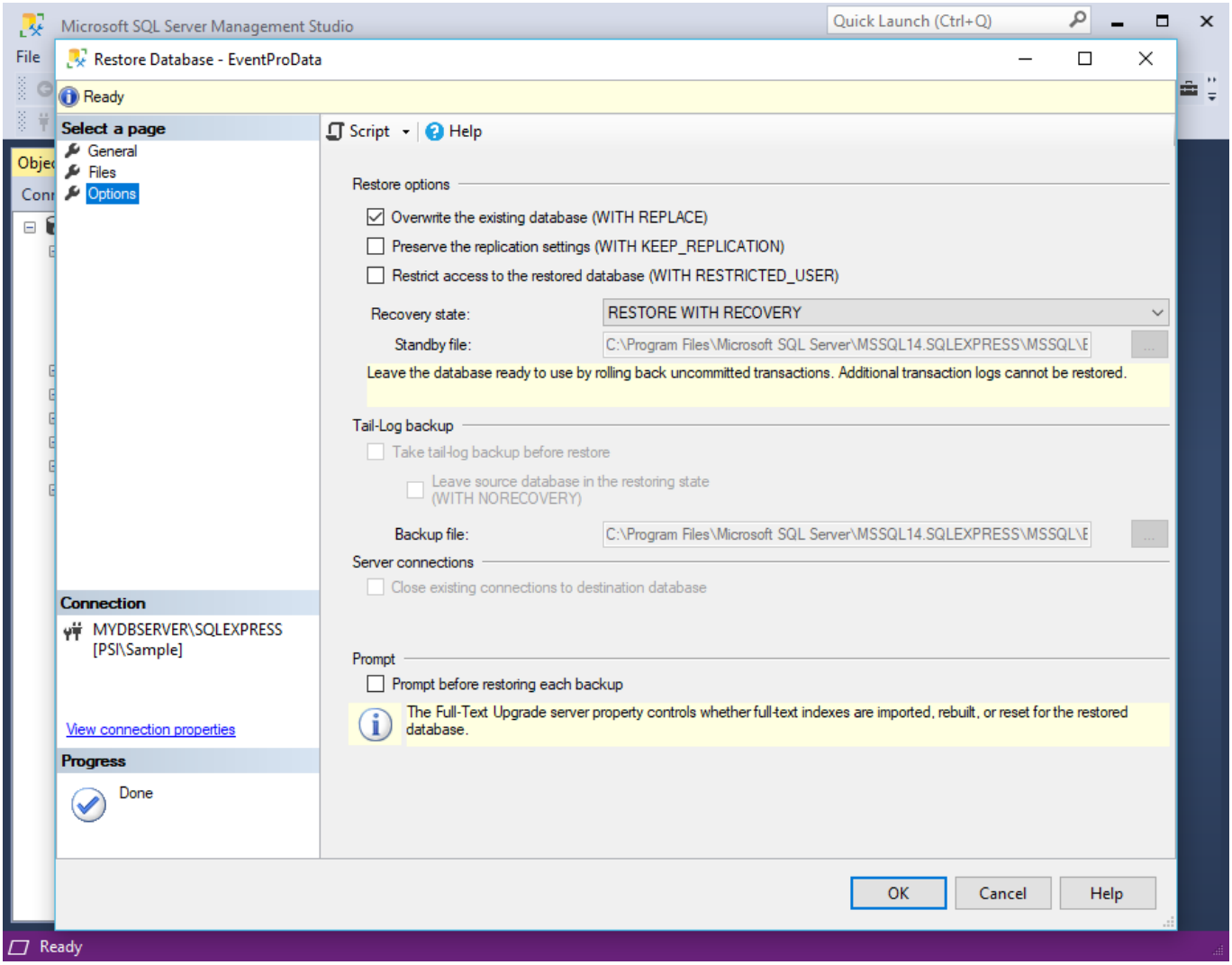


8. Ensure that **Source Device Database** and **Destination Database** have been set correctly.



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.

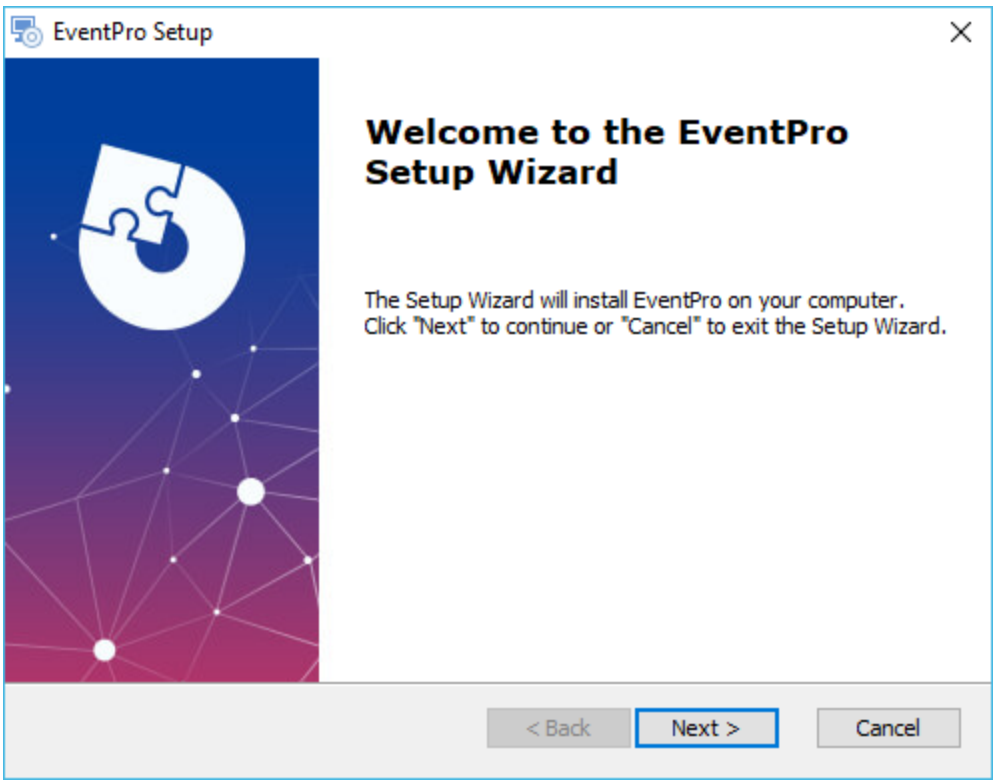


11. When the restore is complete, you should receive a dialog indicating "**Database 'EventProData' restored successfully**". Click **OK**.
12. You can now proceed to **Install EventPro** 89.

Install EventPro

1. On your computer, navigate to the **EventPro.Win.Setup.exe** you **downloaded earlier** 69, 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.

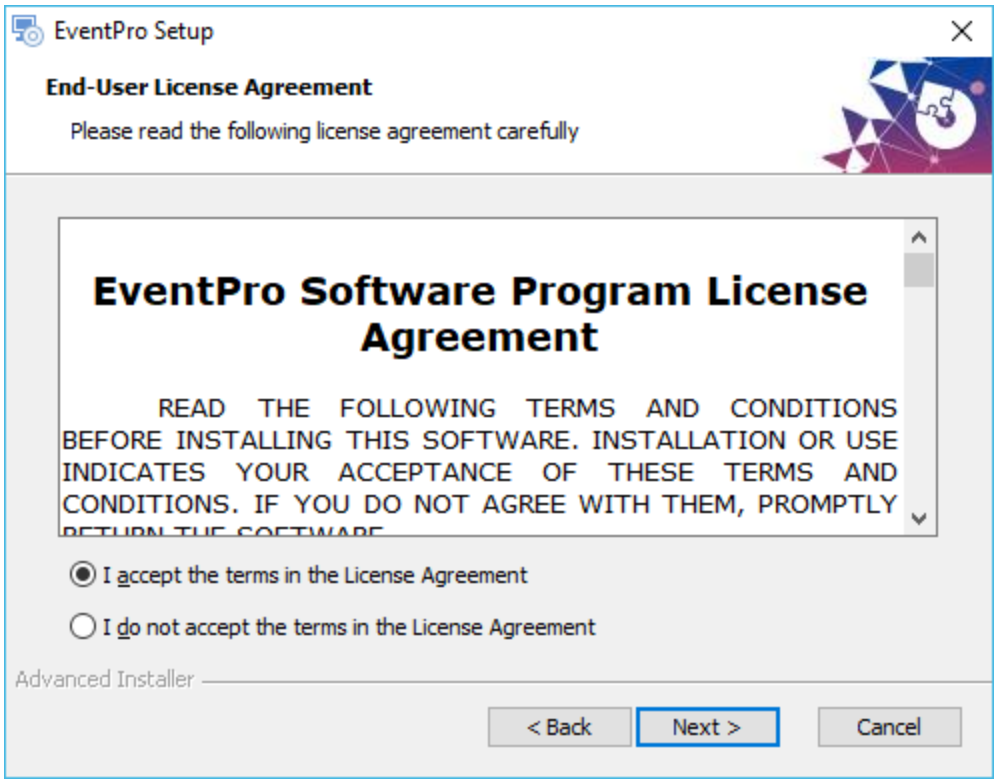


3. **End-User License Agreement**:

   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.

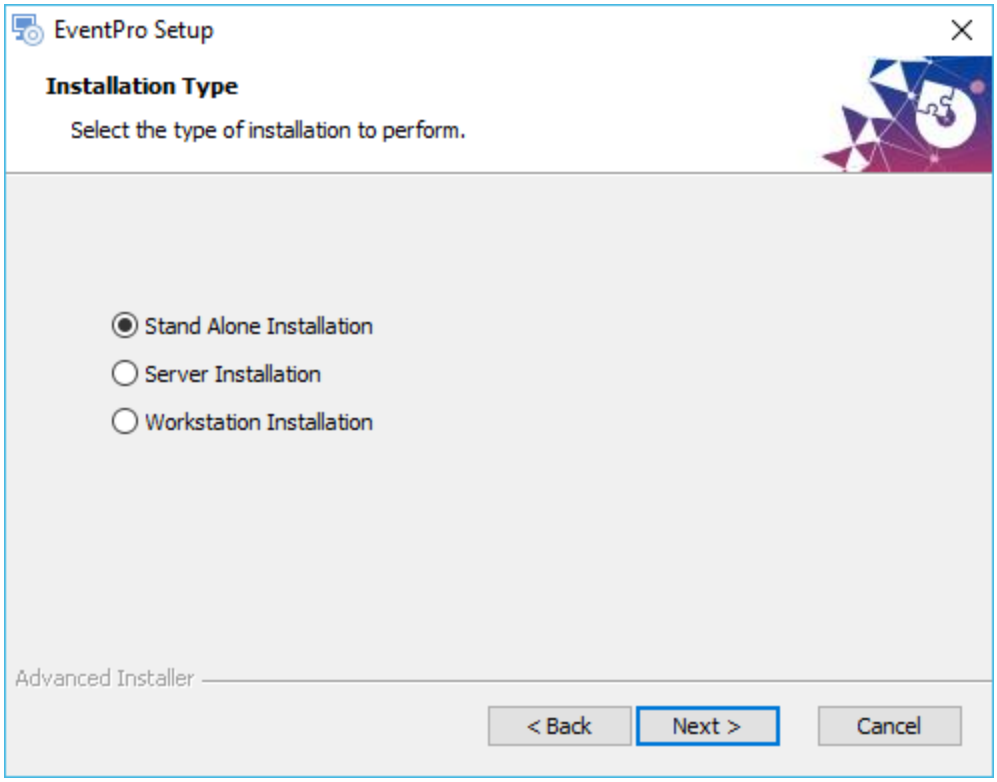
   c. Click **Next** to continue.



4. **Installation Type**:

a. Choose **Stand Alone Installation**.

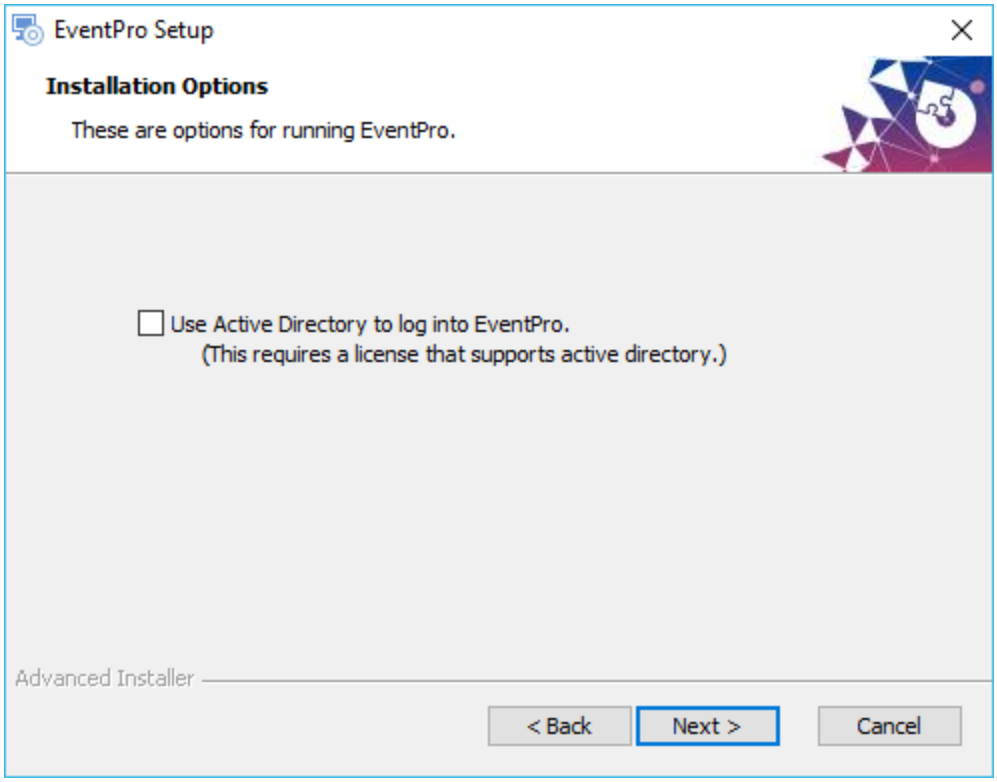
b. Click **Next**.



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**.

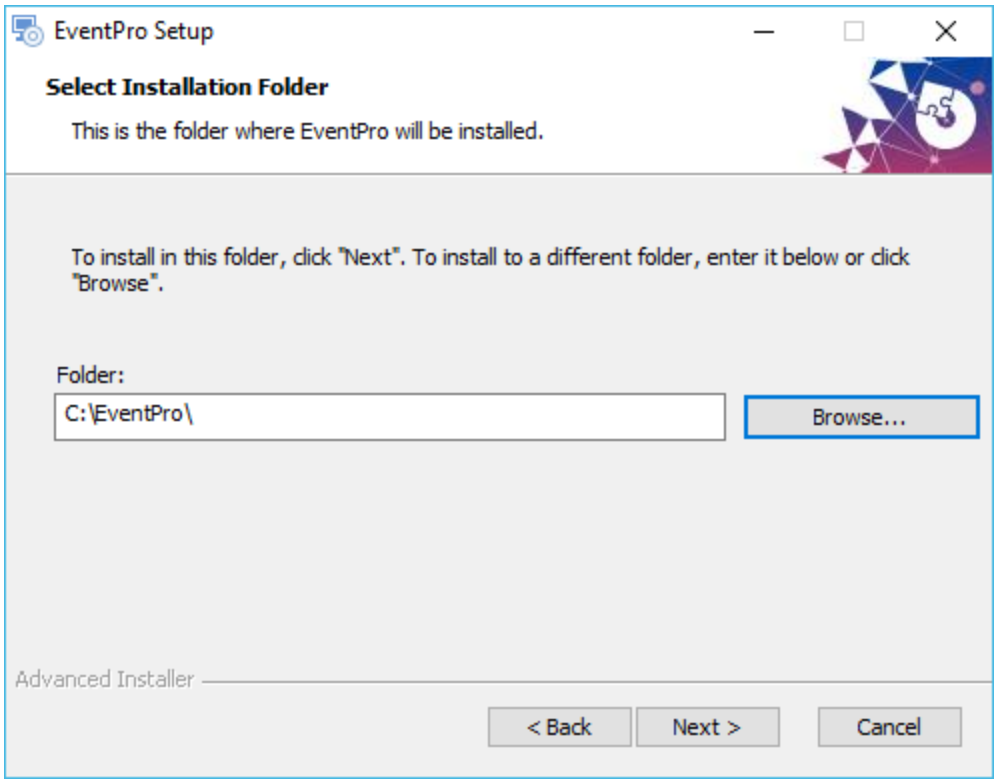


6. **Select Installation Folder**:

   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**.

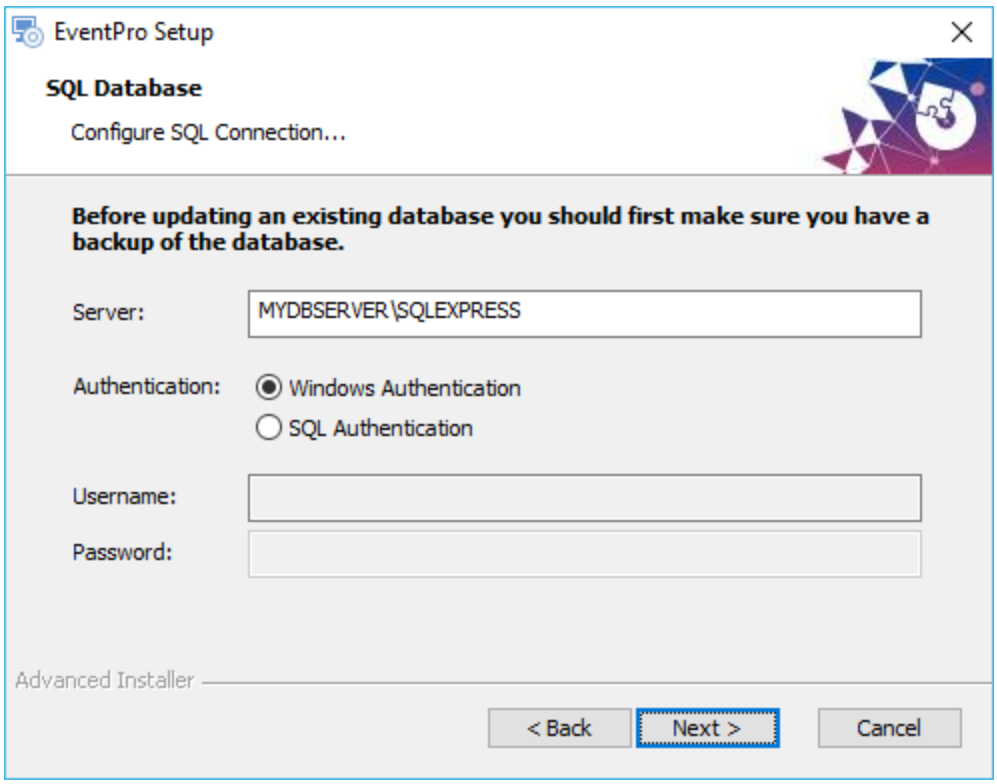


7. **SQL Database**:

   a. **Server**: Enter the **SQL Server Named Instance**, identifying the network name of the computer plus the instance name you specified **earlier**[71] when installing SQL Server. It will look something like this: **MYDBSERVER\SQLEXPRESS**.

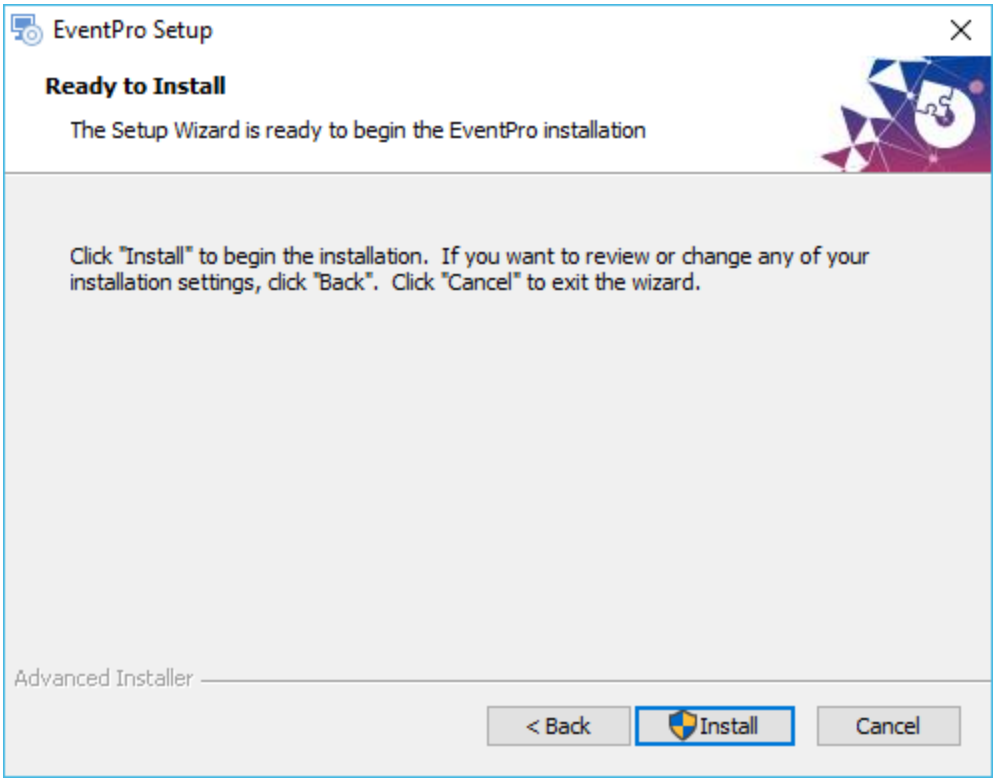
   b. **Authentication**: Select the radio button next to **Windows Authentication**, assuming that you selected Windows Authentication as the Authentication Mode when installing SQL Server **earlier**[72].

   c. Click **Next**.



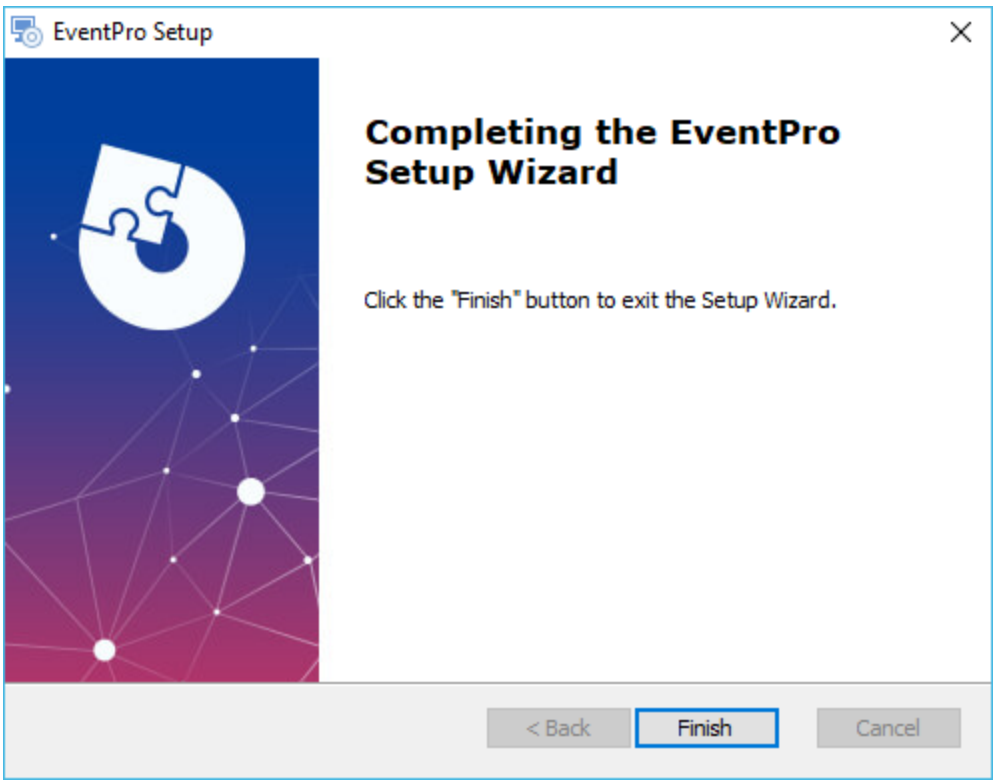
8. The Installer will test the connection to the database before you can proceed with the installation.

   When the connection test is completed, click **Install**.



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**.



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.

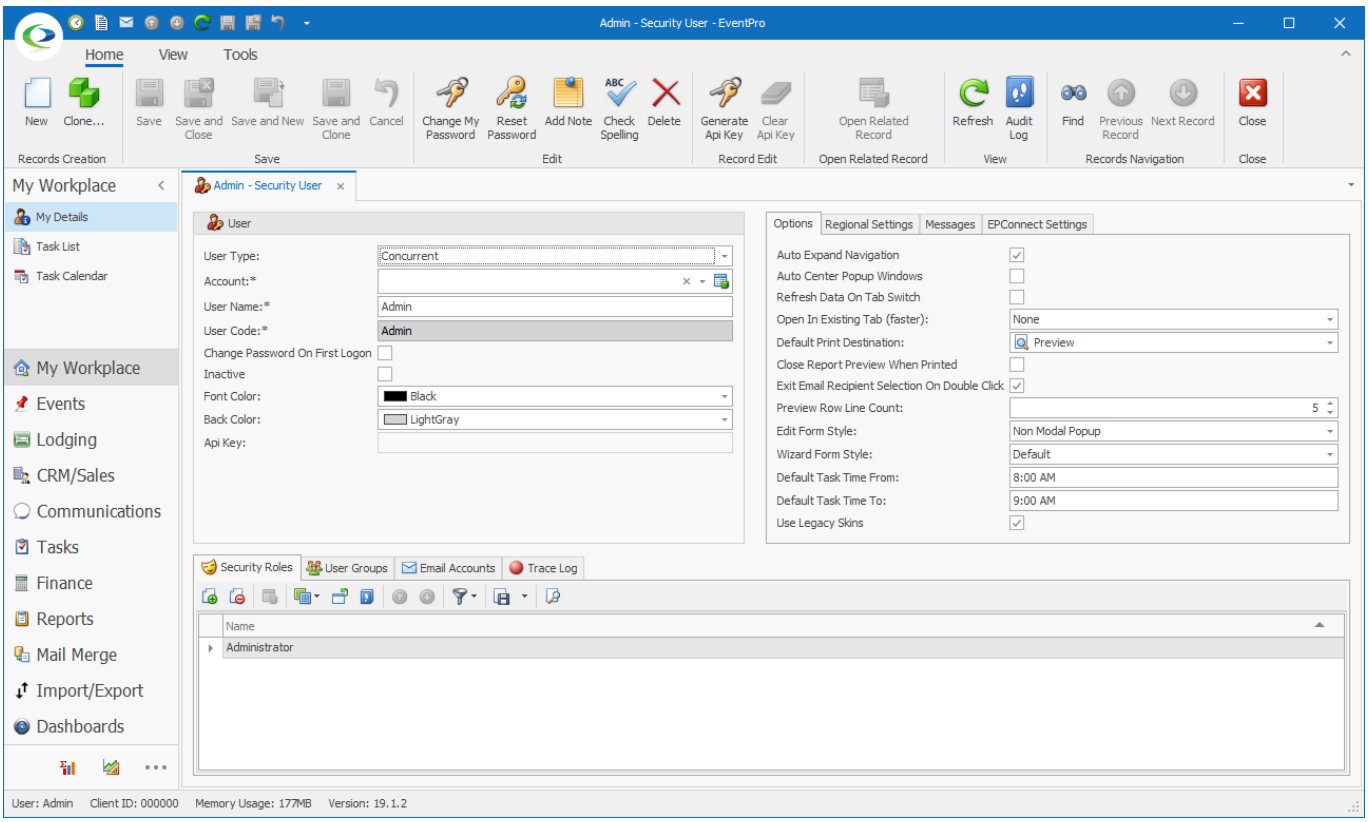
First Login to EventPro

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.
4. 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.

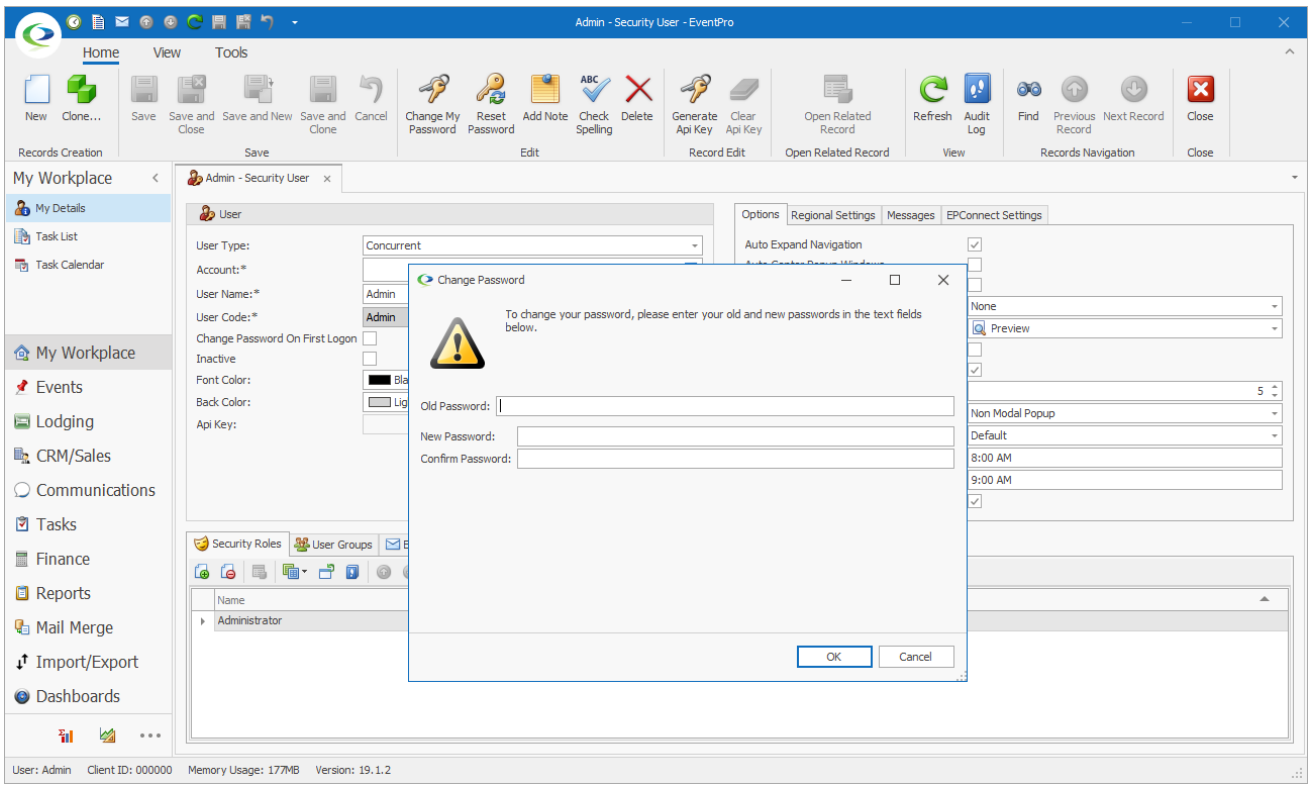


5. One of the first things you will want to do is change the **Password** for the Admin User, since it is the EventPro default that many people will know.

   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!



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 **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. **Create Active Directory Groups** 97
  2. **Install SQL Server** 105
  3. **Configure SQL Server** 109
  4. **Download EventPro Components** 112
  5. **Install Data Updater** 113
  6. **Create New Client Database** 115

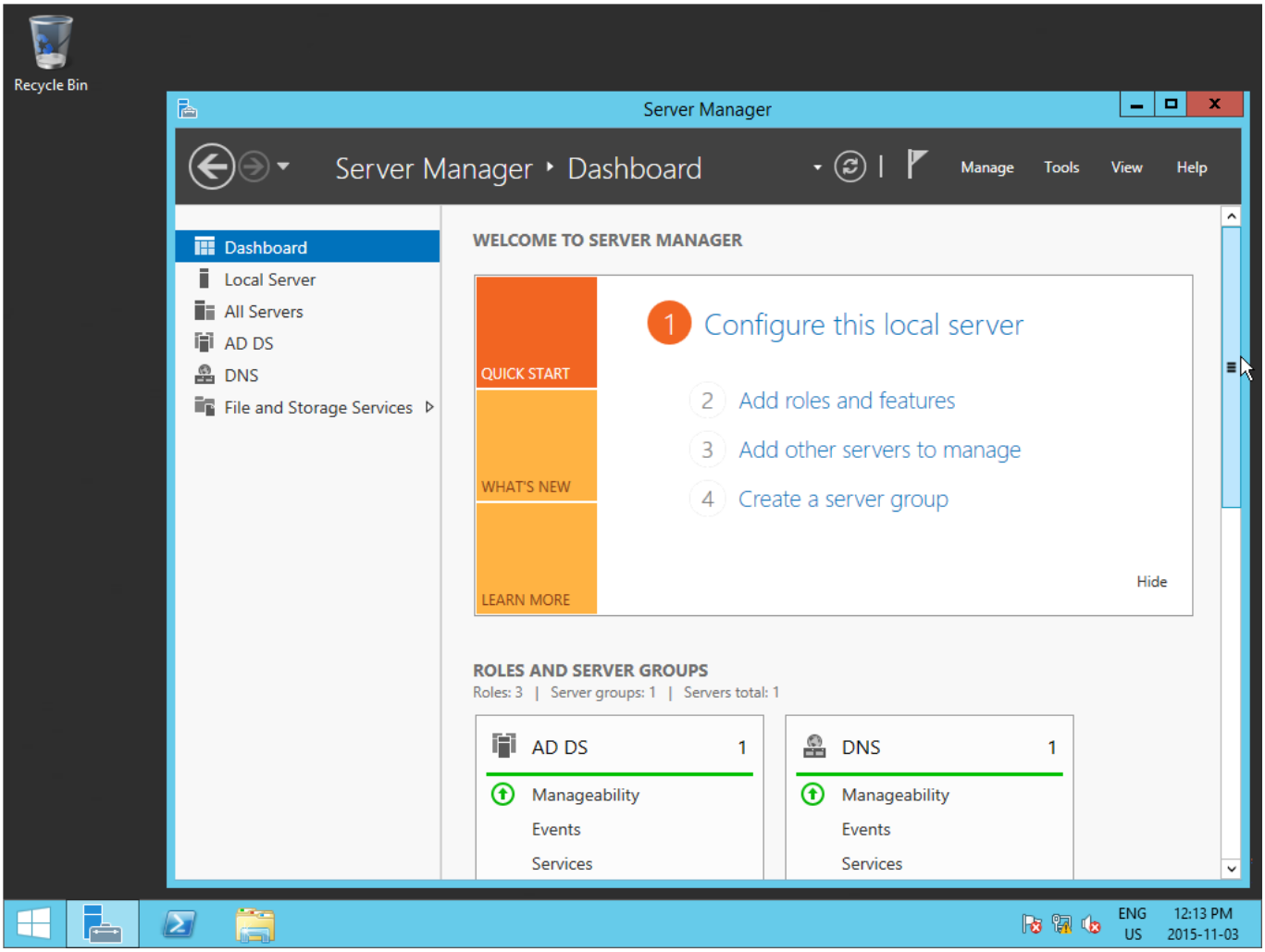
7. **Restore Existing Database over New** 118
8. **Give Database Rights to Users** 125
9. **Install EventPro to Server** 135
10. **Share Installation Folder** 141
11. **Install EventPro to Workstations** 147
12. **Admin First Login to EventPro** 153
13. **User First Login to EventPro** 160

- 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 **Alternate Database Restore Process** 280.

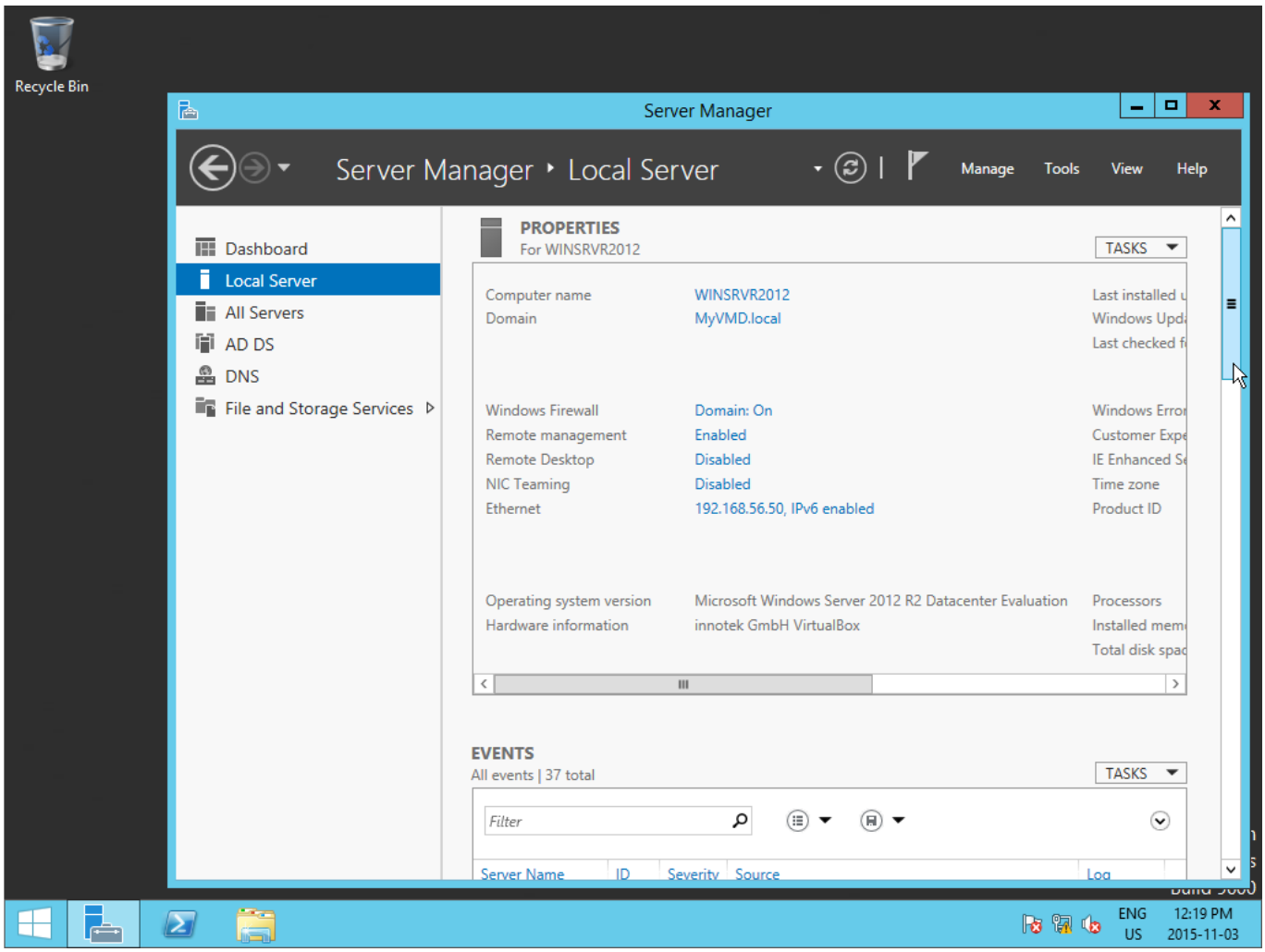
Create Active Directory Groups

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

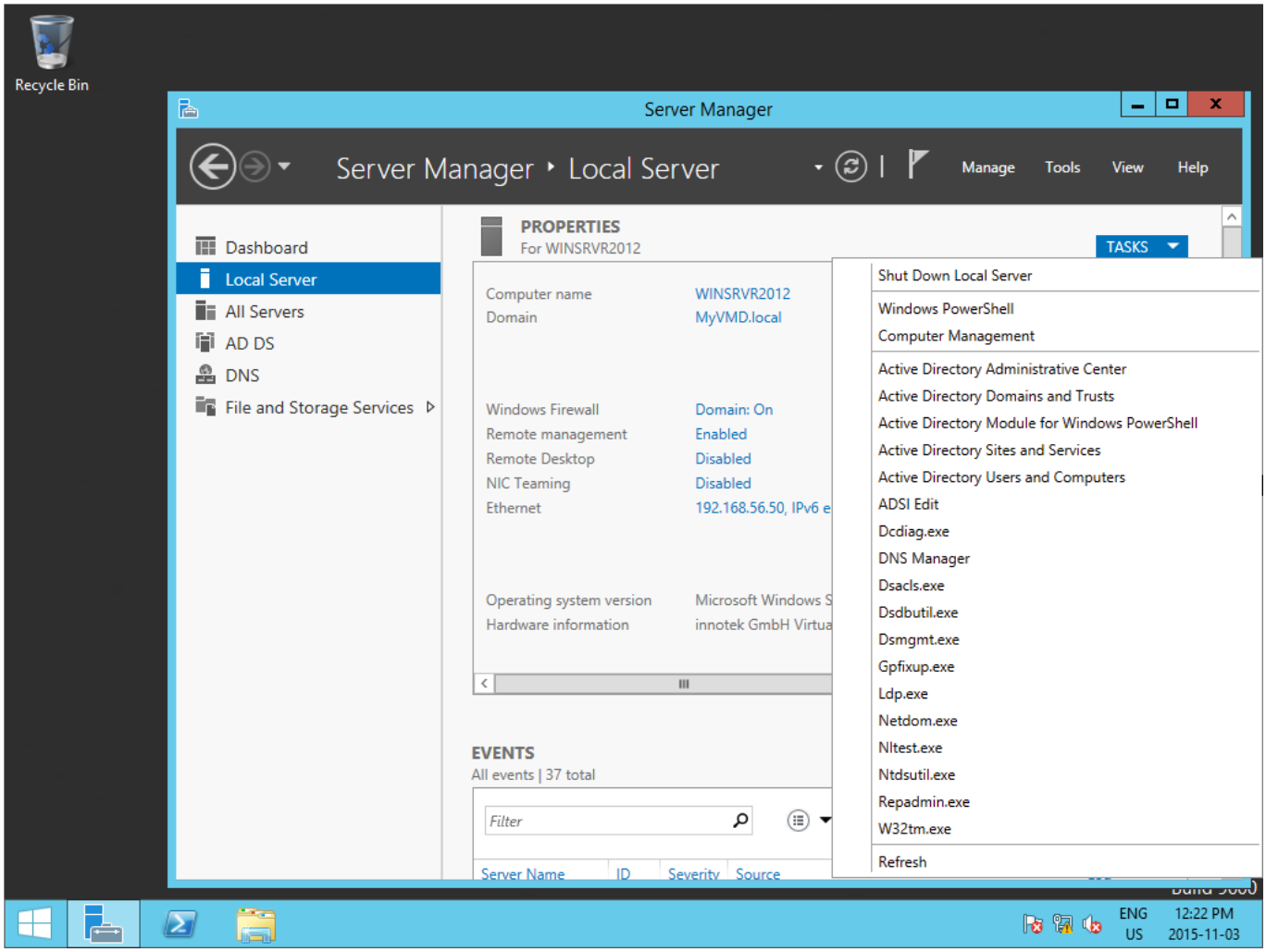
1. Log on to the **Domain Controller**, and go to **Server Manager**.



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

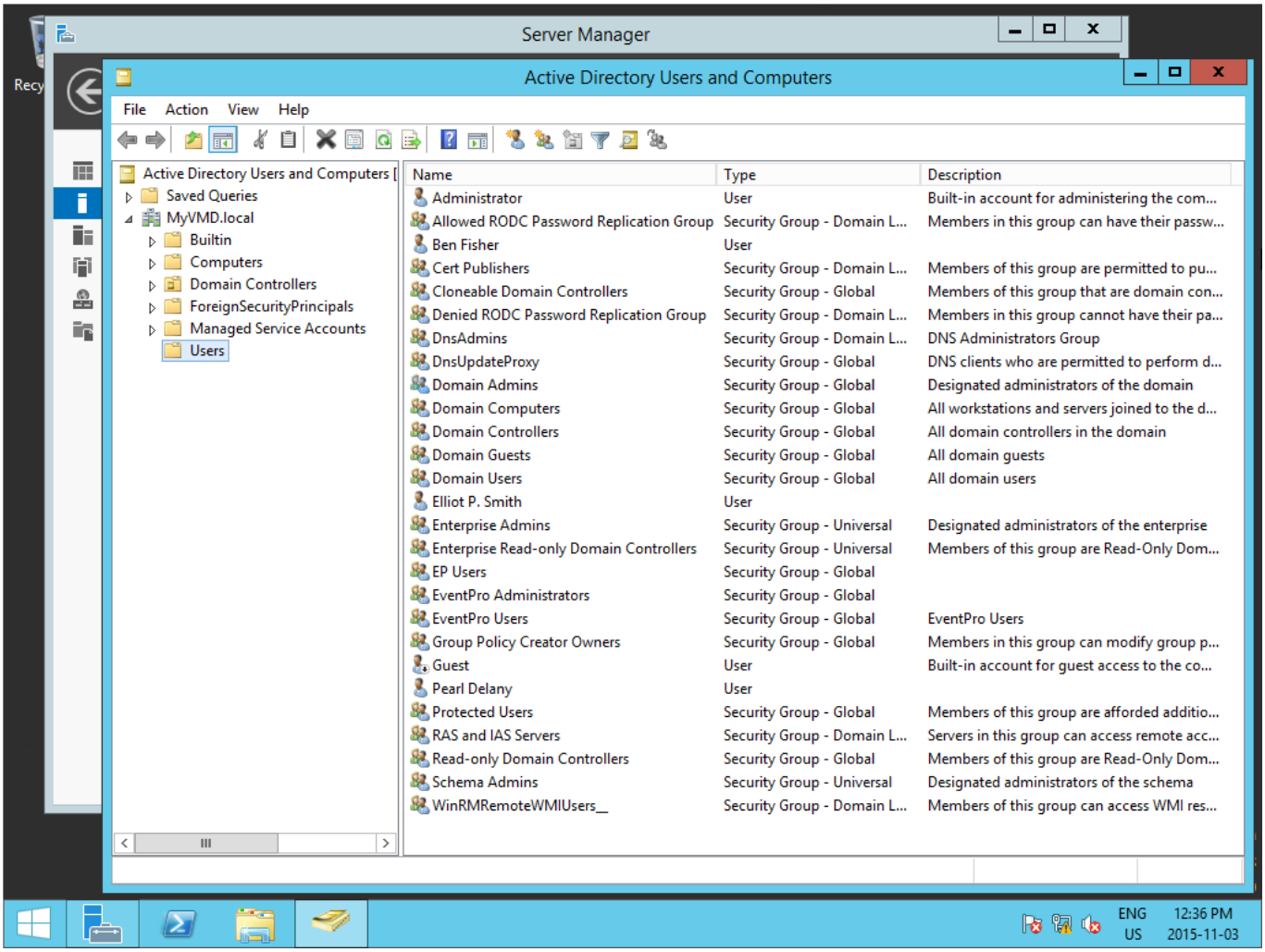


3. From the **Tasks** drop-down next to the server **PROPERTIES**, select **Active Directory Users and Computers**.

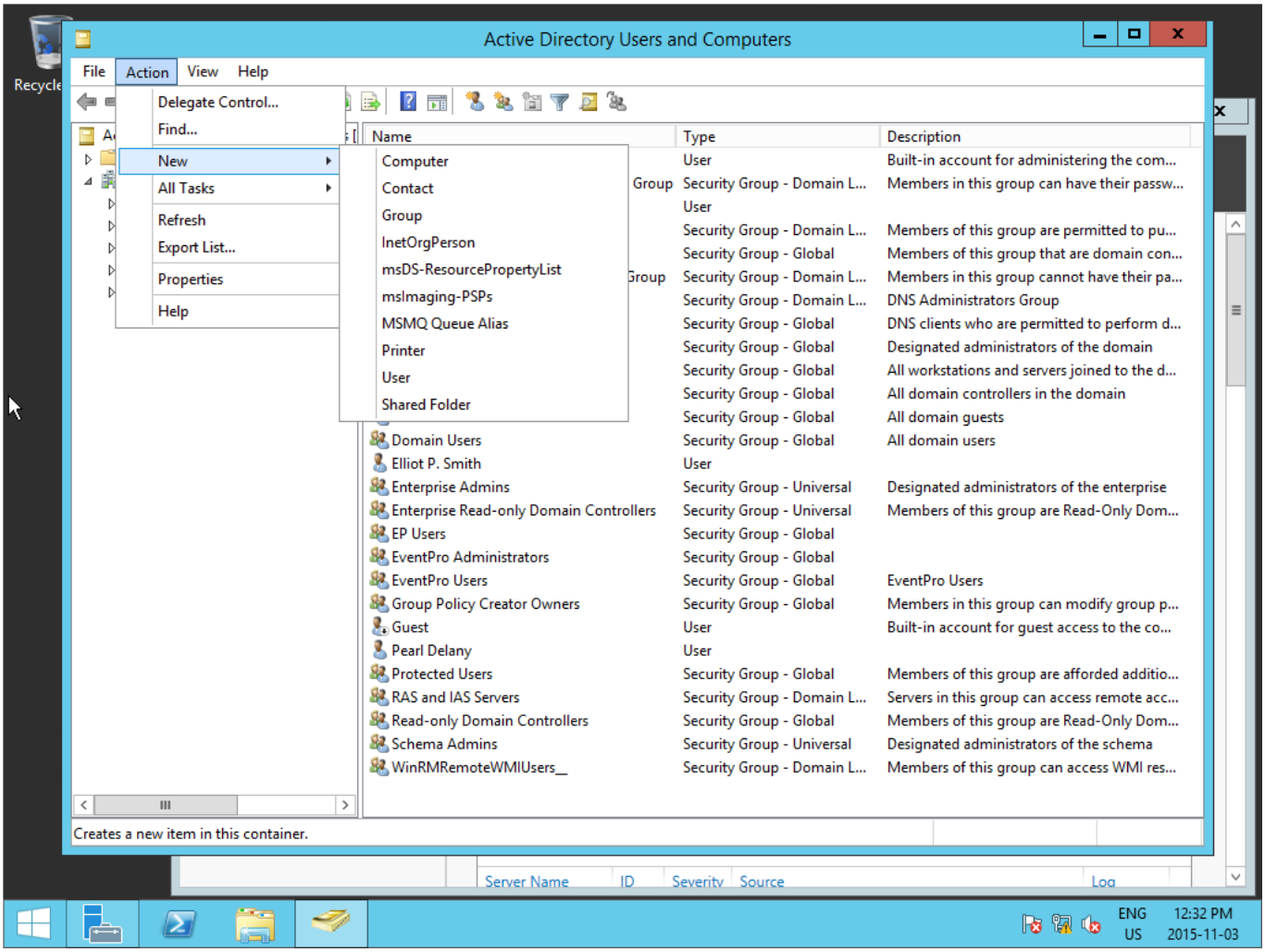


4. The **Active Directory Users and Computers** are displayed.

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



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.

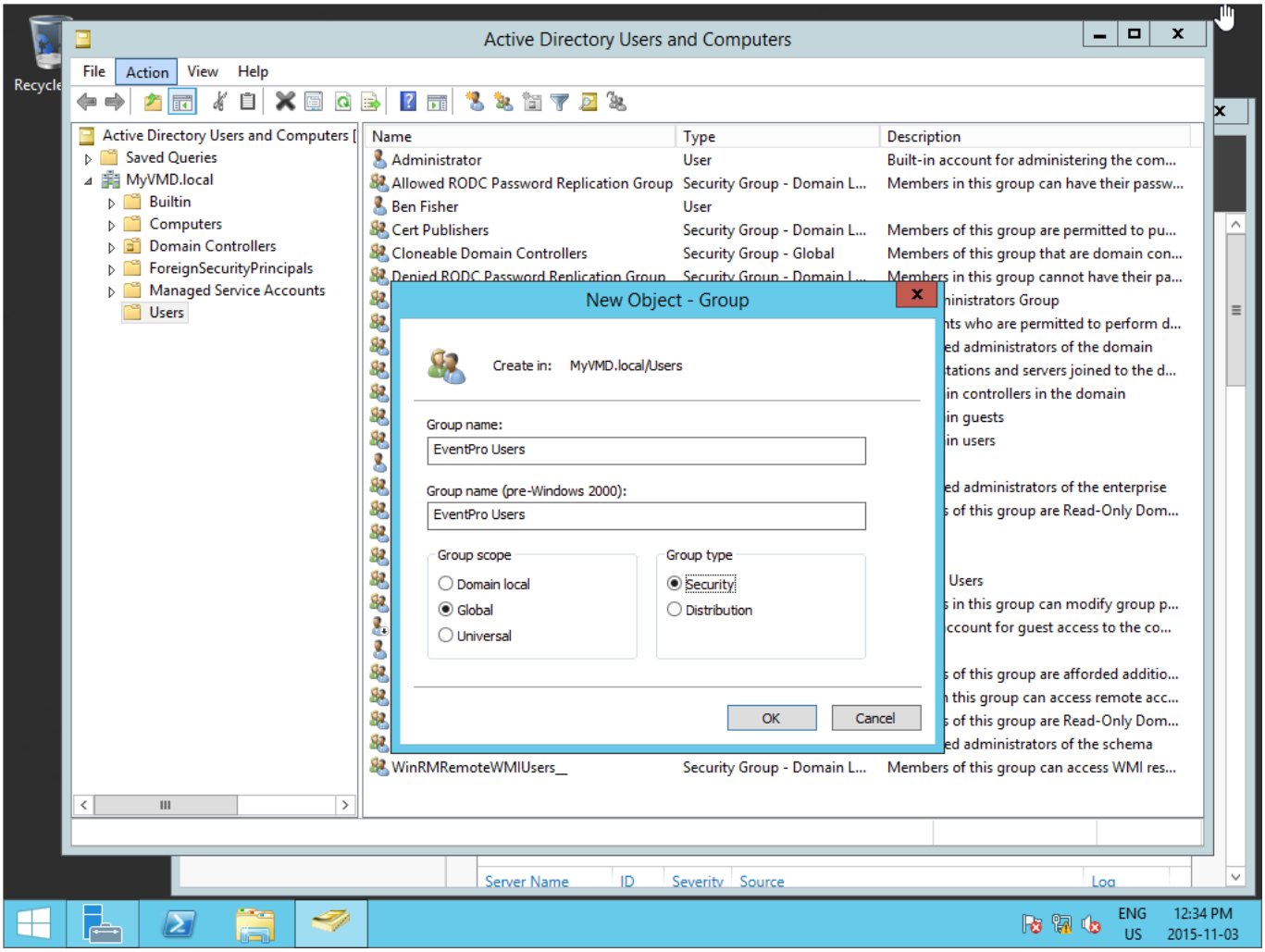


6. Name this group **EventPro Users**.

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

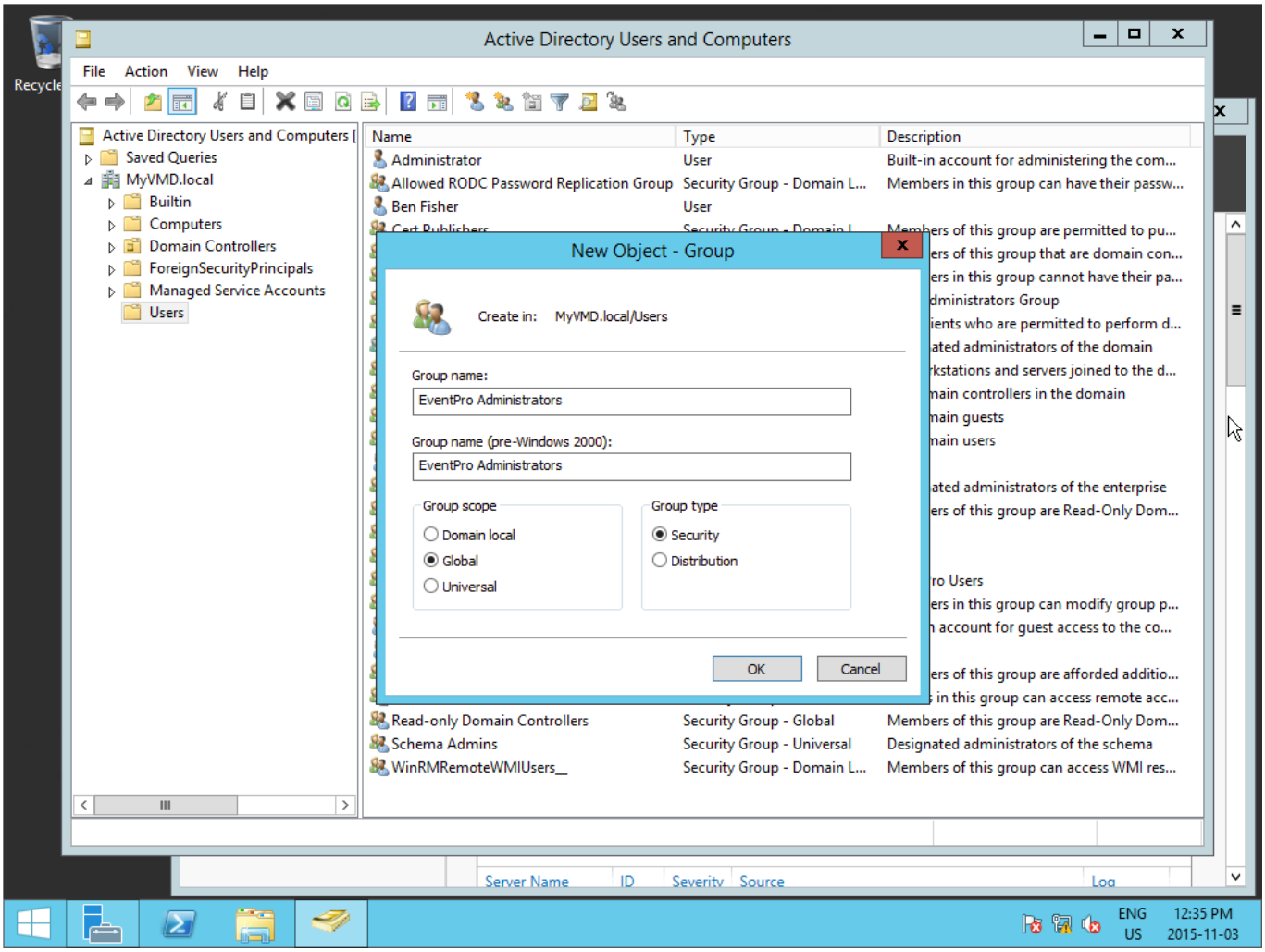
   IMPORTANT: You must set the **Group Type** to **Security**.

   Click **OK**.



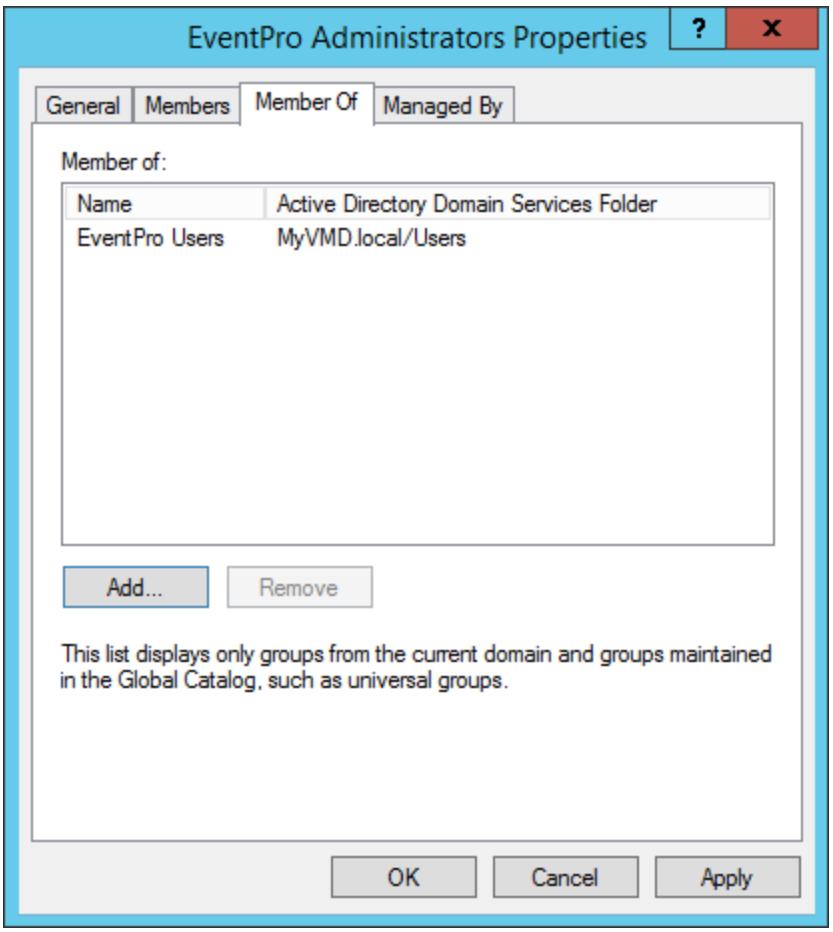
7. Create another New Group, this time called **EventPro Administrators**.

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



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.



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** 105.

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 **minimum technical requirements** 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**

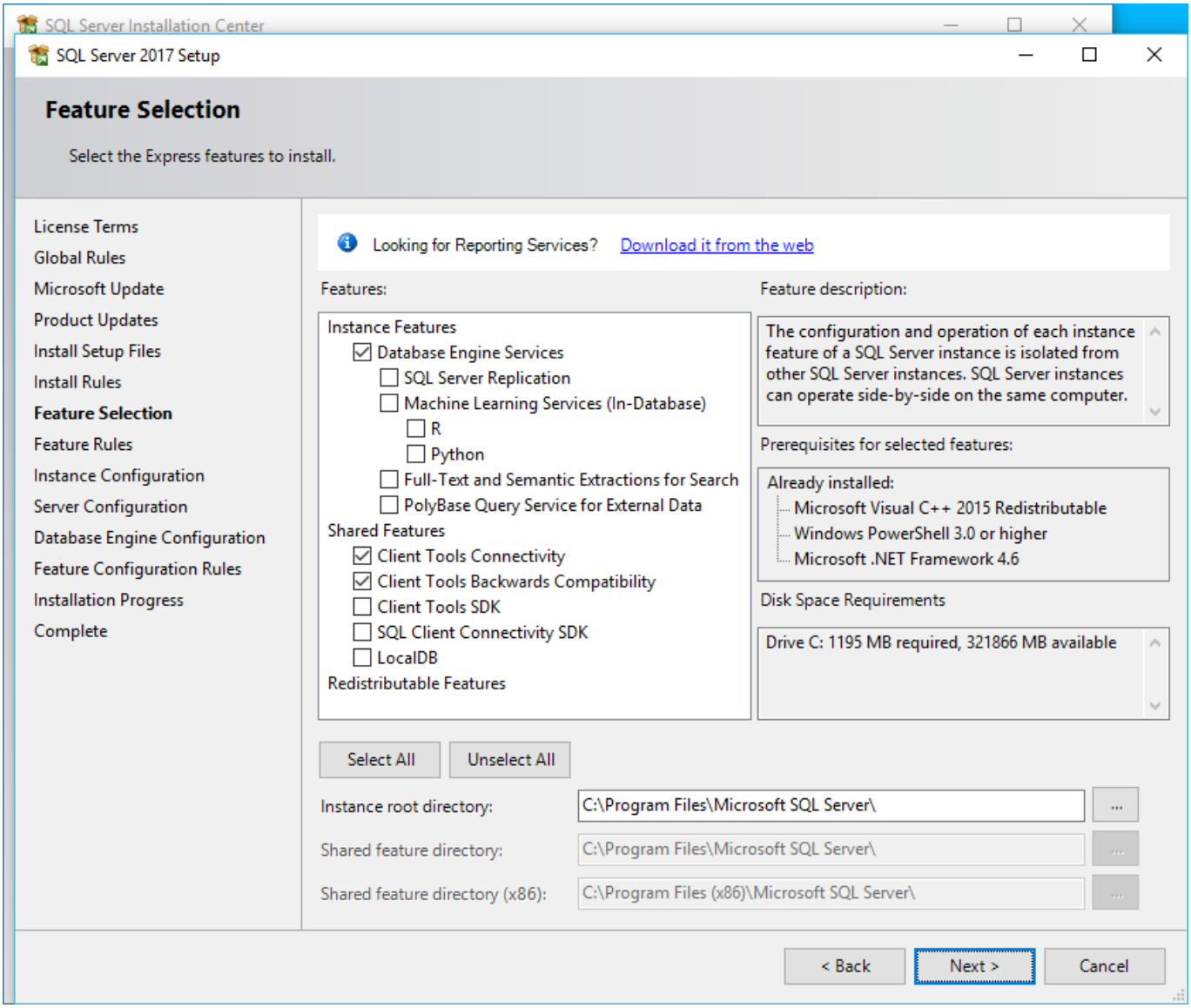
   iii. **Client Tools Backward Compatibility**

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.

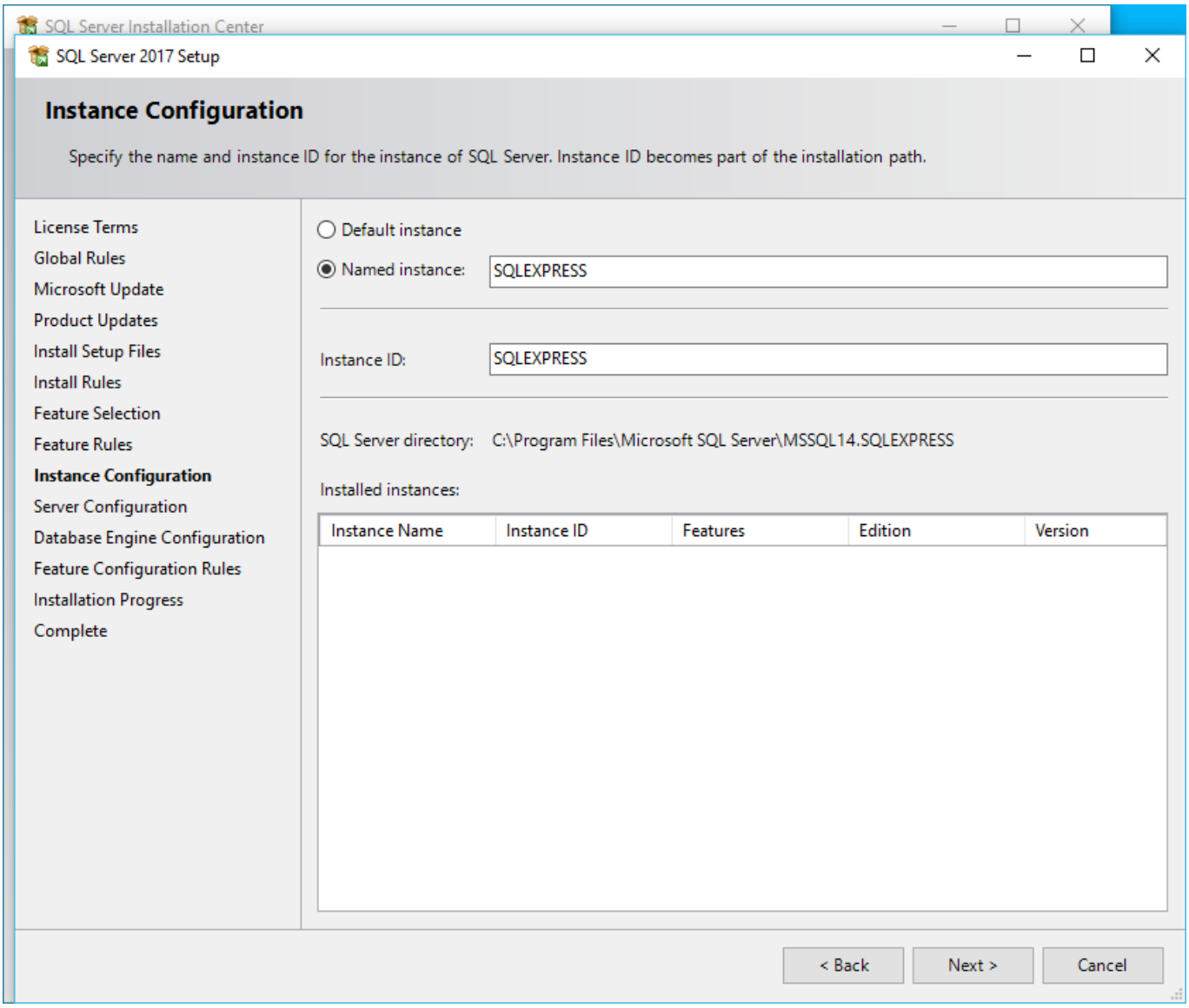


4. **Instance Configuration**:

   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.

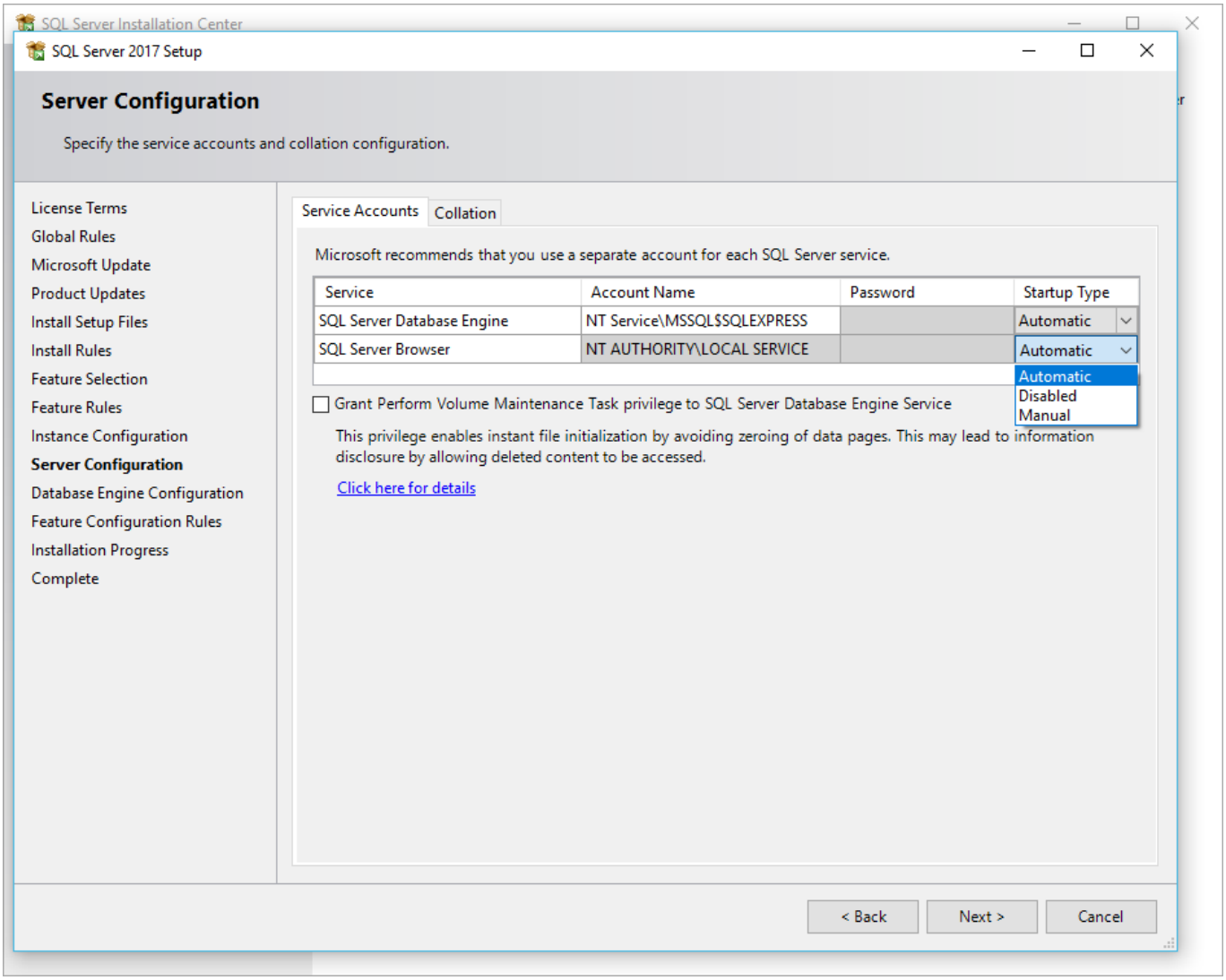
c. The **Installed Instances** grid at the bottom of this page would display any instances already installed. If there is already an installed instance, check with your IT Department whether you should use that instance.



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**.



6. **Database Engine Configuration**:

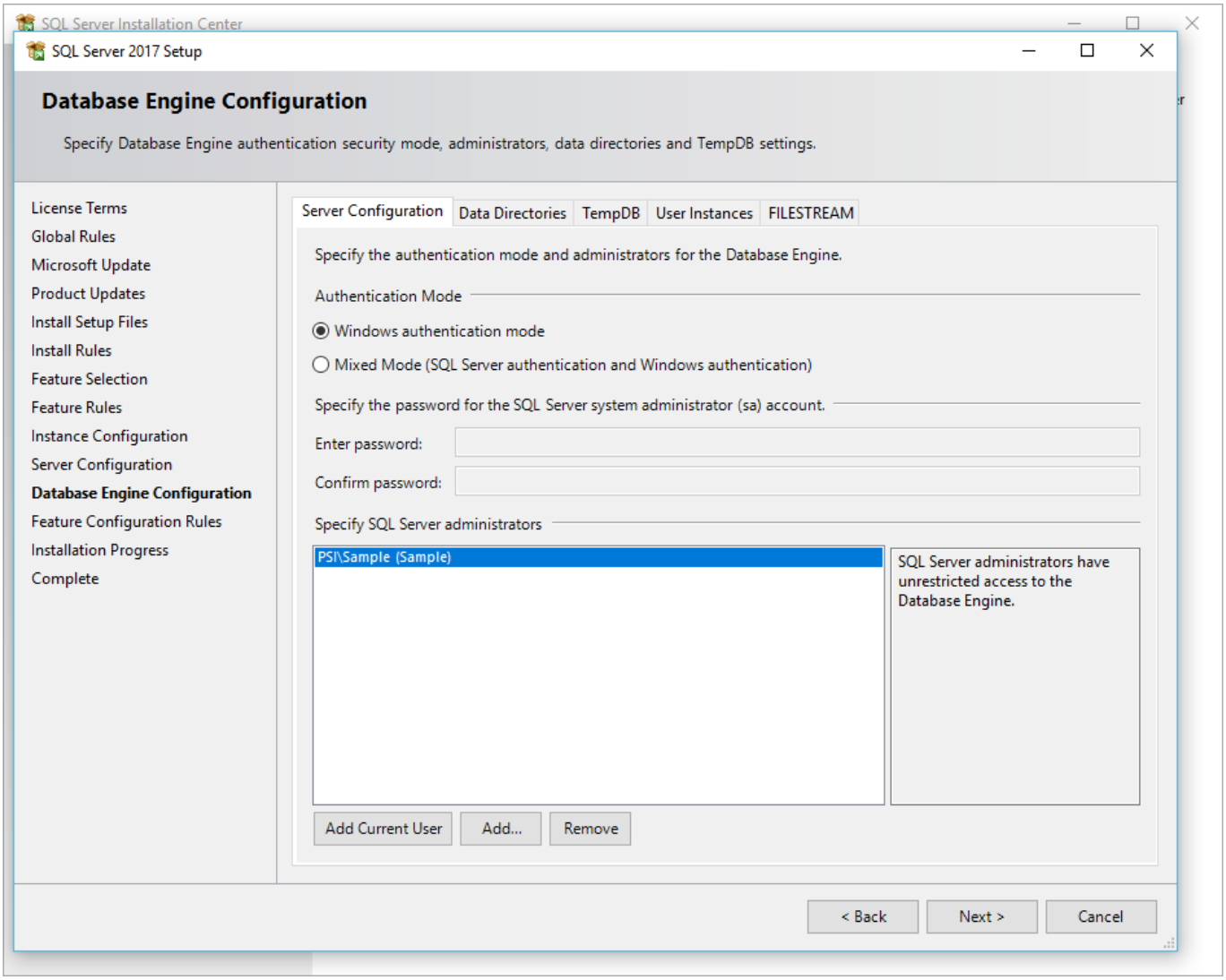
   a. Under the **Account Provisioning** tab, indicate which **Authentication Mode** the administrator will use to access the Database Engine: **Windows Authentication** or **Mixed Mode** (SQL Server Authentication and Windows Authentication).

      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.

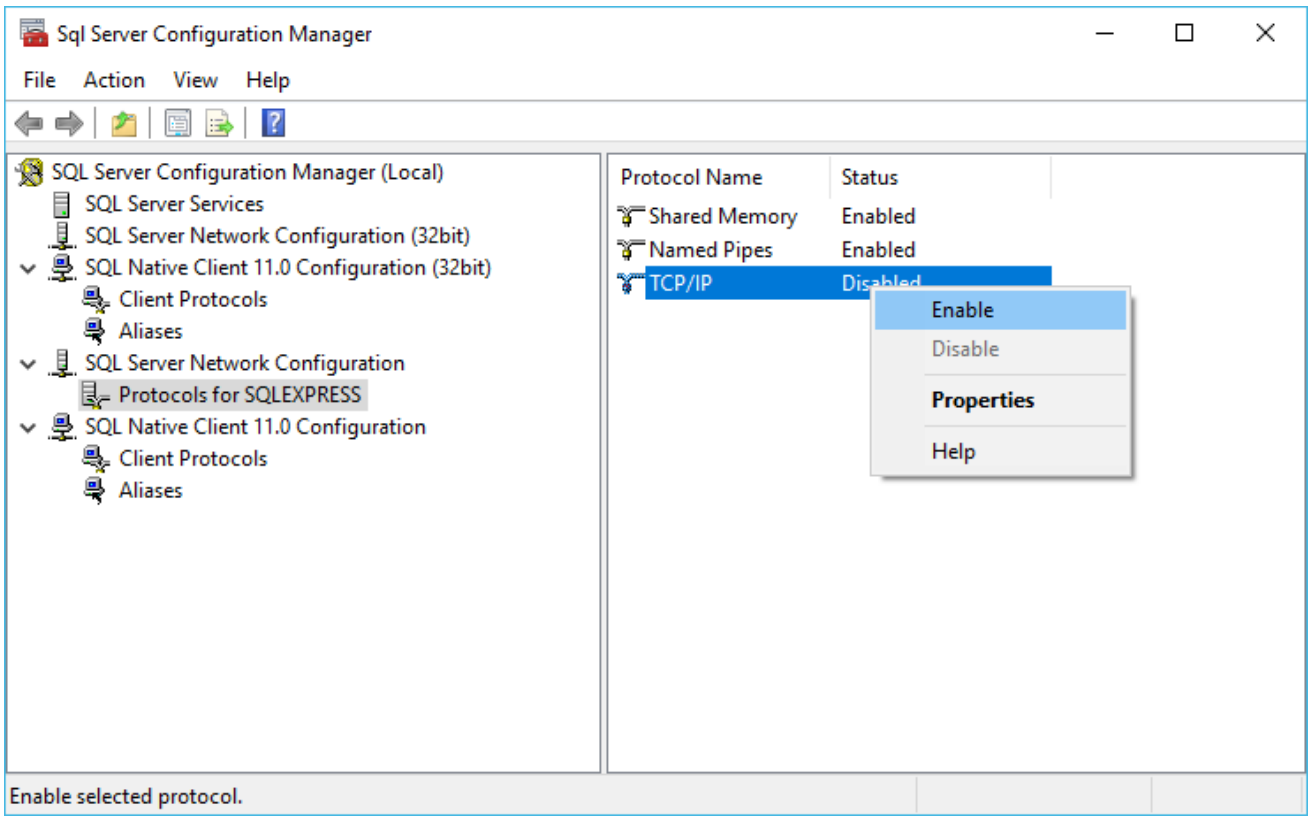


7. Complete the rest of the installation process as recommended by your IT Department.
8. As noted above, if there isn't a **Management Tools** option in the edition you are installing, you can download and install **SQL Server Management Studio** (SSMS) after installing SQL Server.

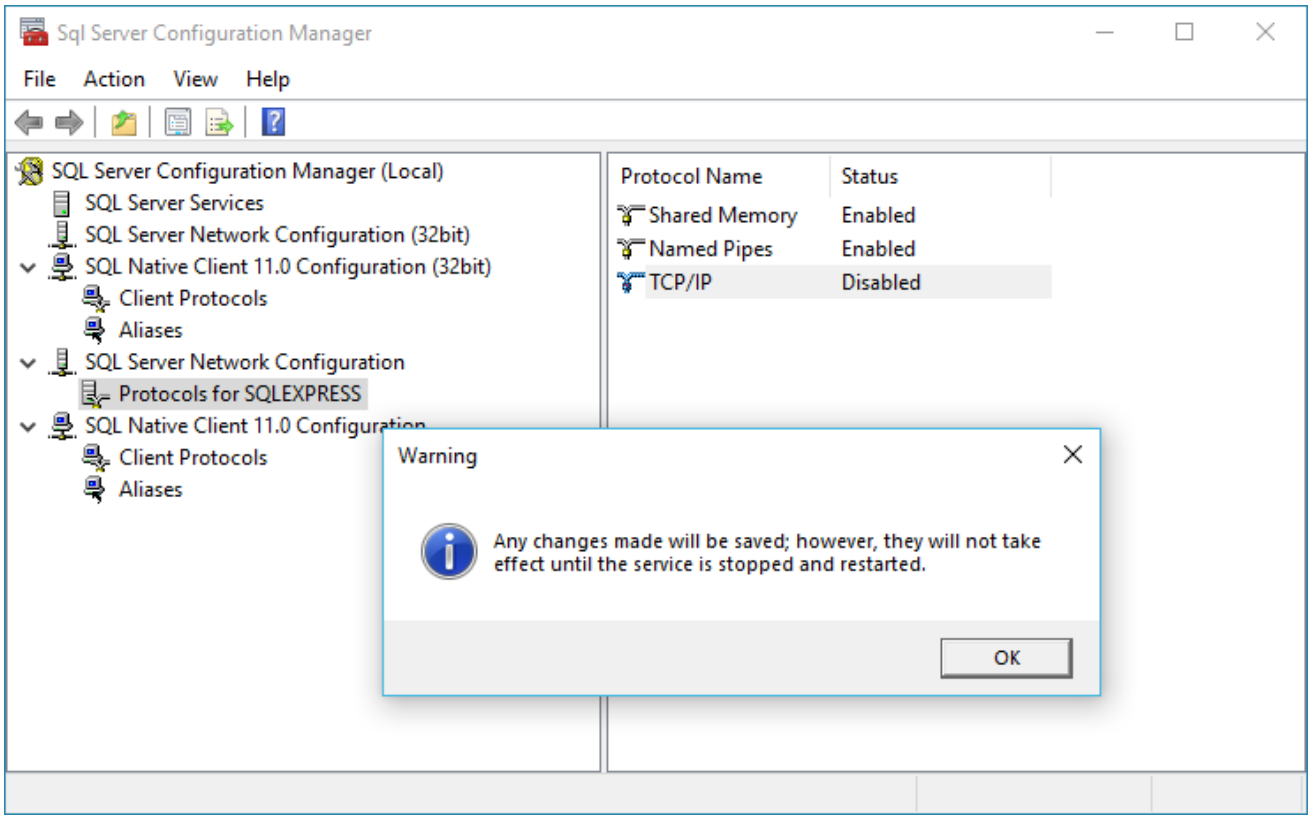
   There may be a prompt to **Install SSMS** at the end of the SQL Server Installer, or you can download **SQL Server Management Studio** (SSMS) from the Microsoft website.
9. It is recommended that you **restart** your computer once SQL Server is installed. If you install SQL Server Management Studio separately, 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 **earlier** 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.

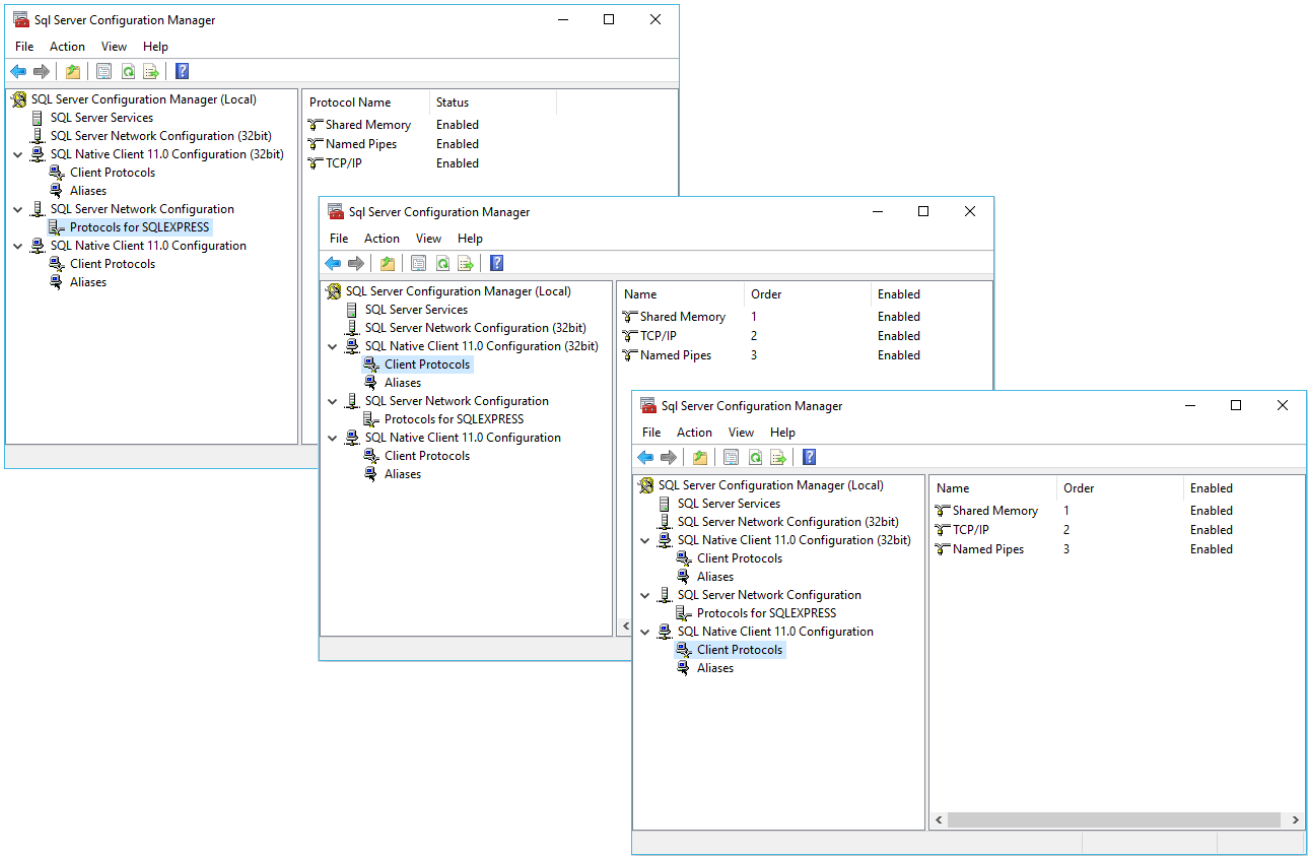


e. Click **OK**, and you will see that **TCP/IP** is now **Enabled**.

f. If necessary, repeat the process with **Named Pipes**. Right-click **Named Pipes** and select **Enable**. Click **OK** in the **Warning** dialog that follows.

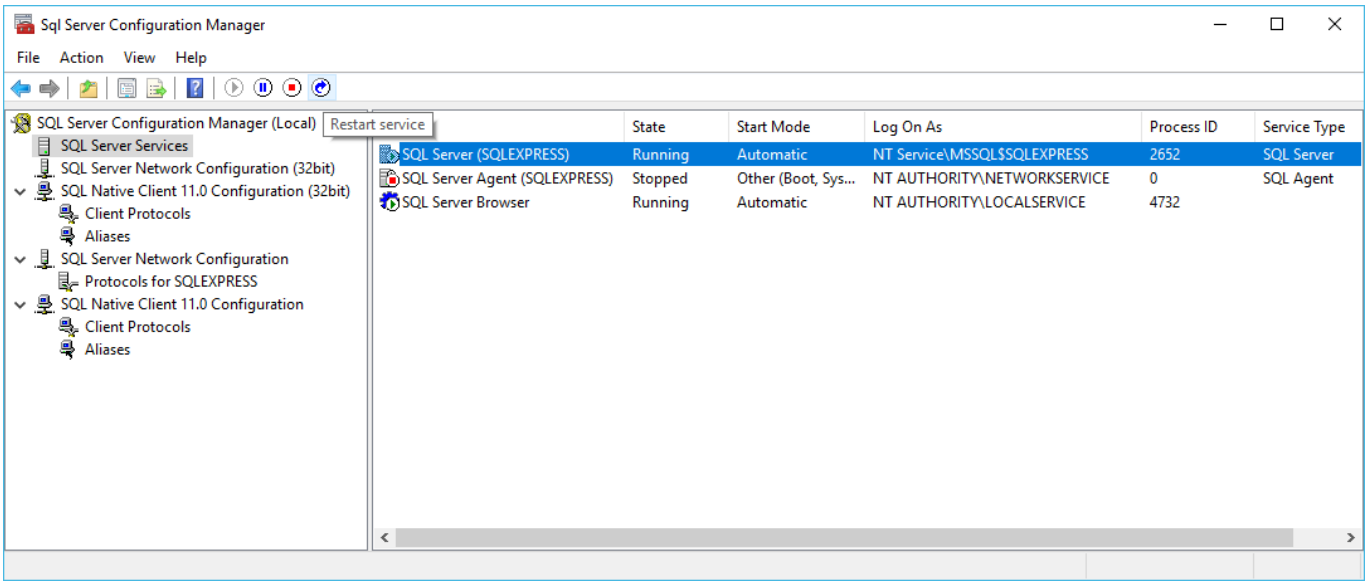
g. Now, both **TCP/IP** and **Named Pipes** should be **Enabled**.

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.



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 above. The service will stop and restart.



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.

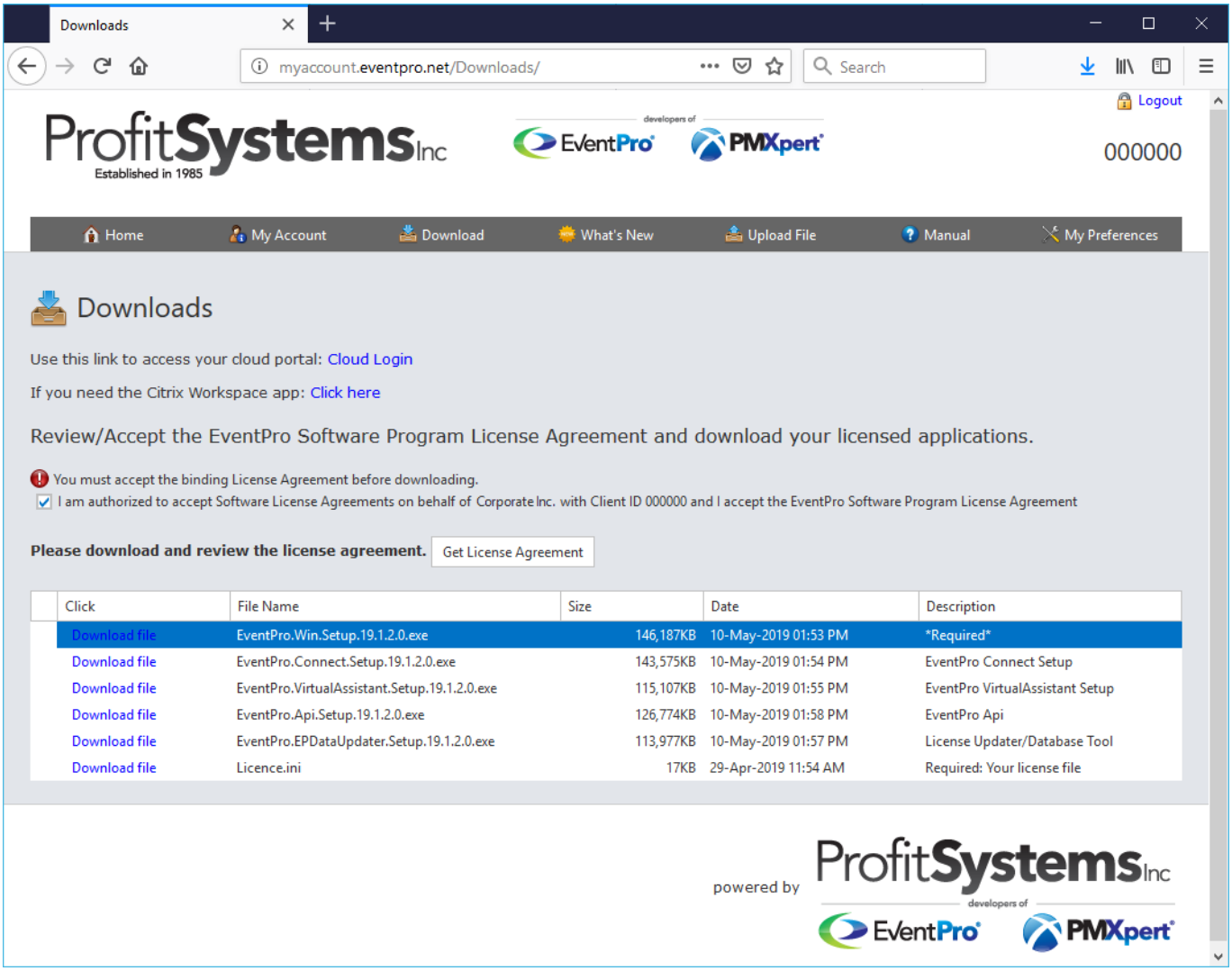
This may not work, however, as there could be other reasons that the SQL Server Browser is not running. For example, you may need to go to the **Services** area to manually enable it there.

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.



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.

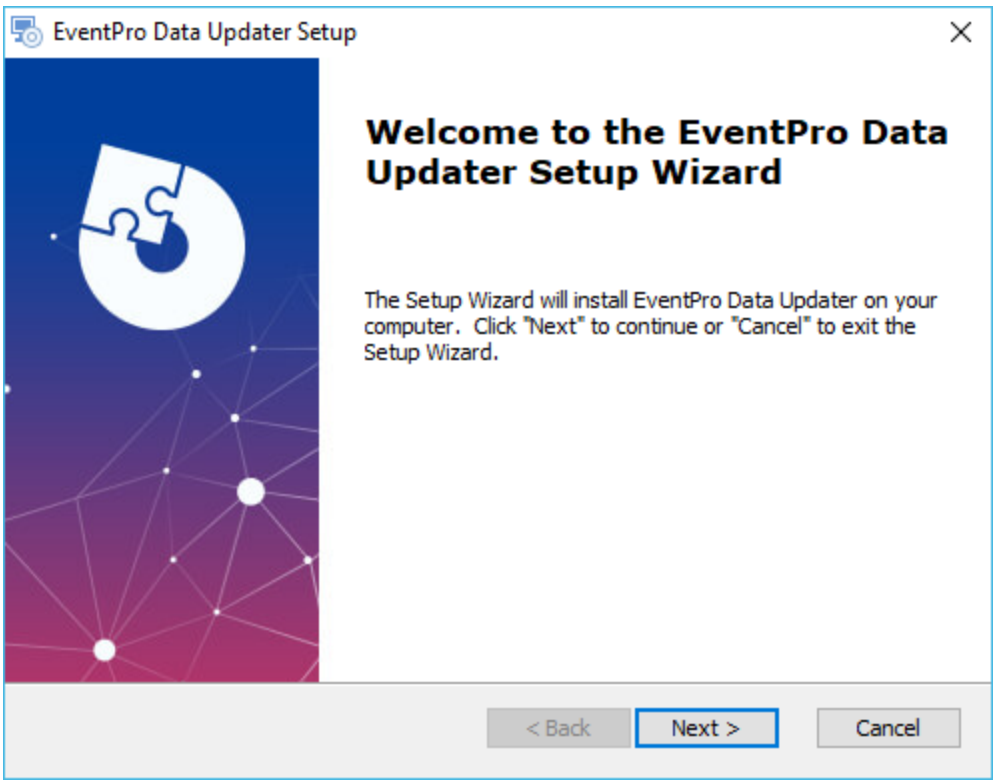
c. Note that you will need to accept the **License Agreement** before you can download files.

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.

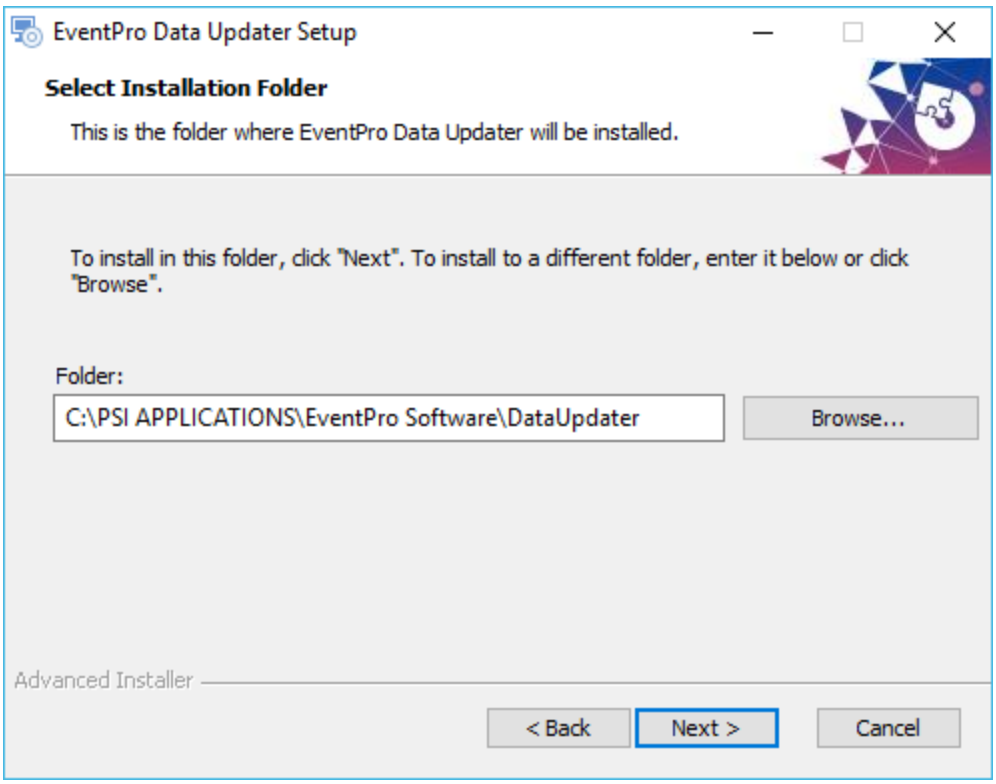
Install Data Updater

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.

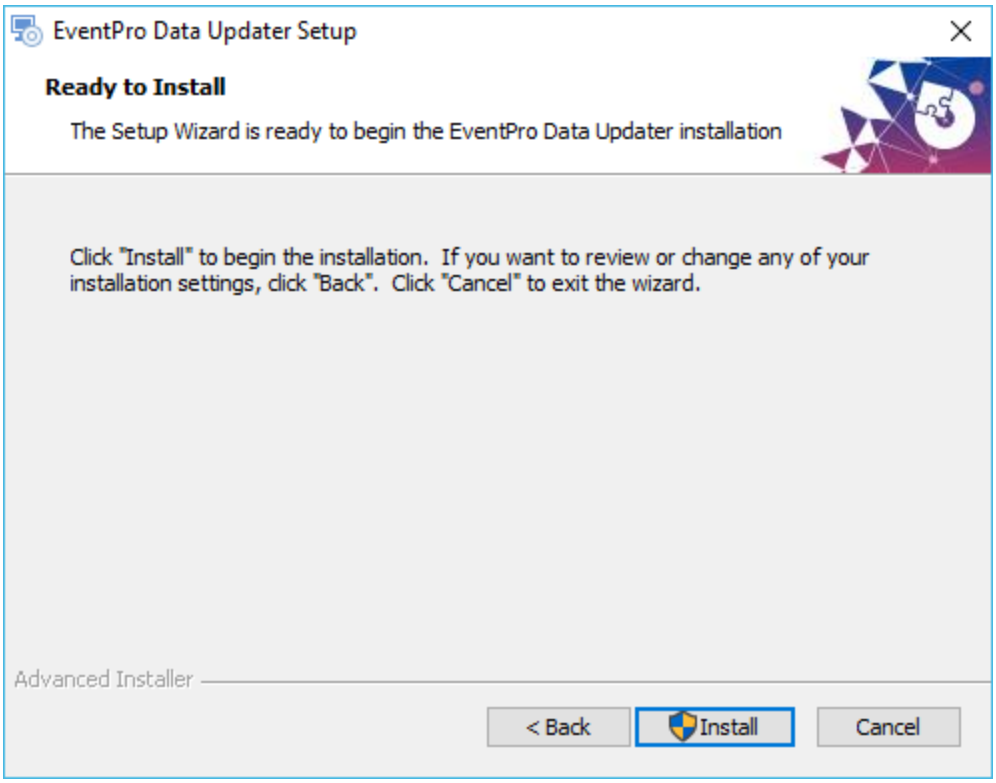


3. **Select Installation Folder**: If you don't want to use the default path, you can enter a different folder path.

   Click **Next**.

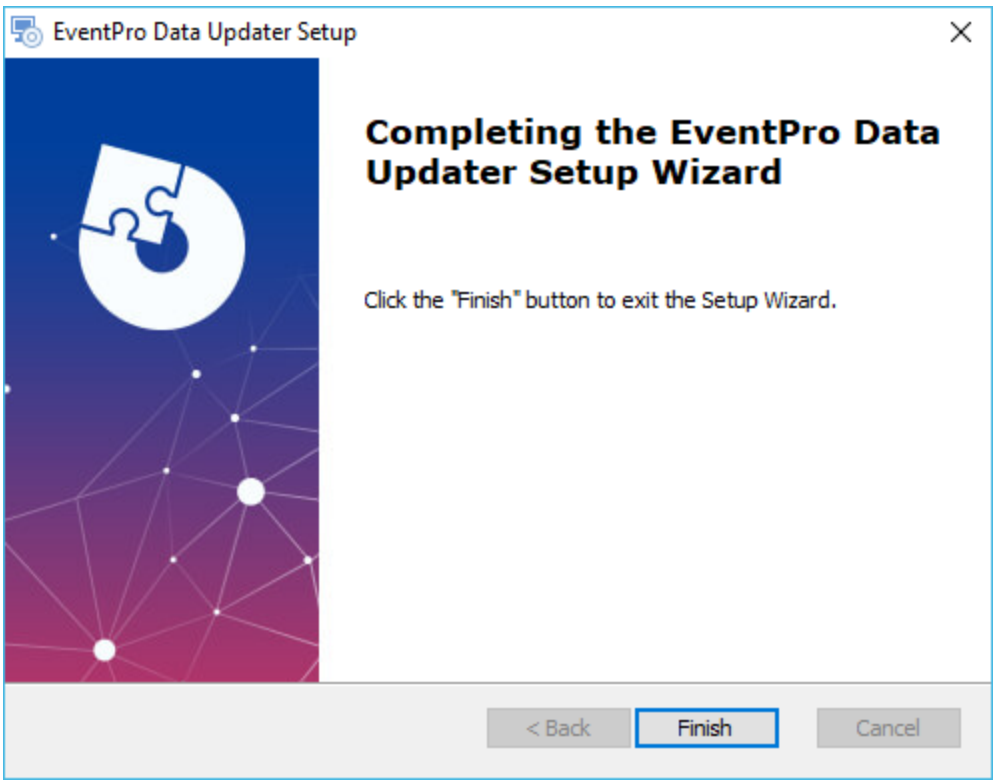


4. In the next window, click **Install**.



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.



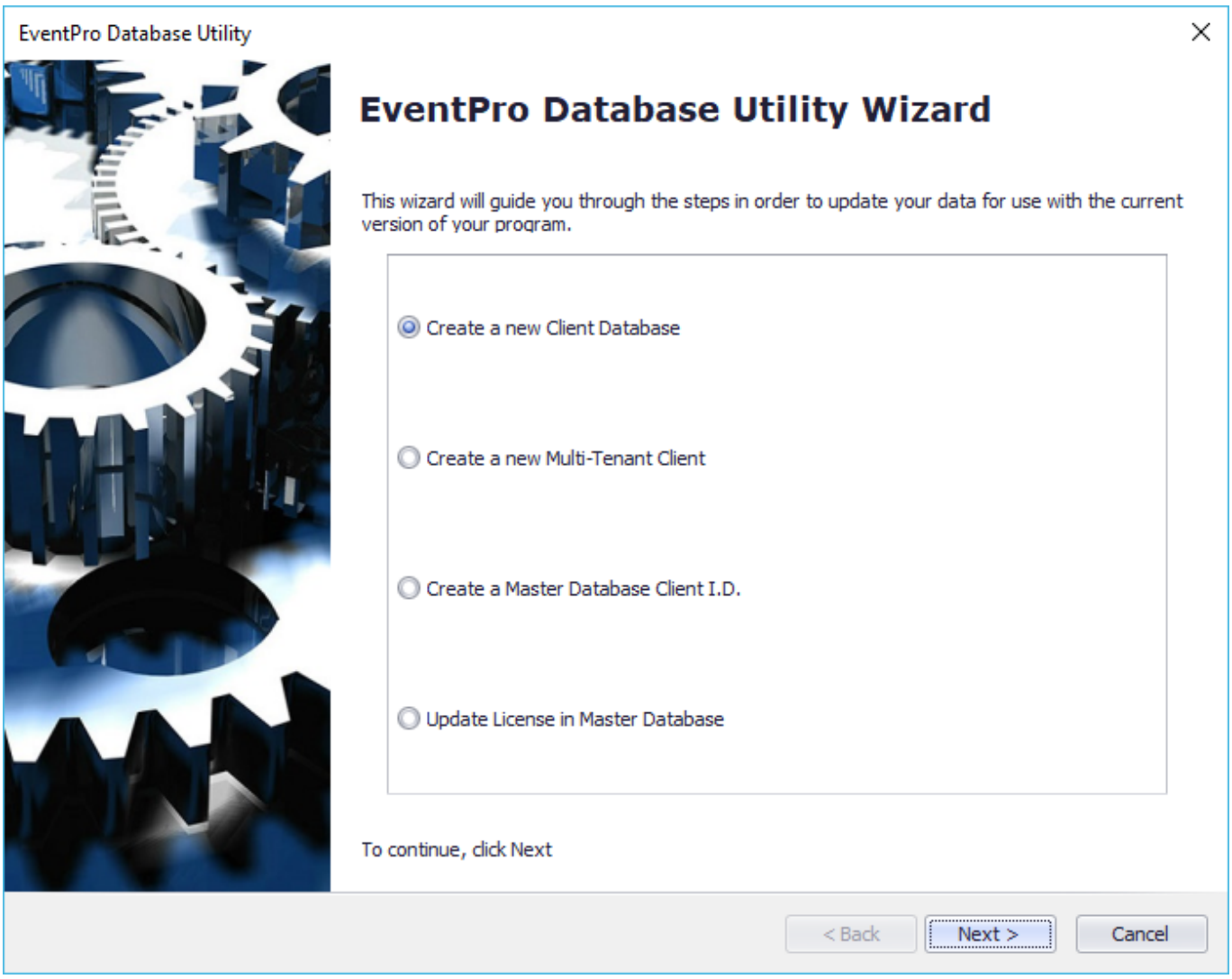
6. Next, go to **Create New Client Database** 115.

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.

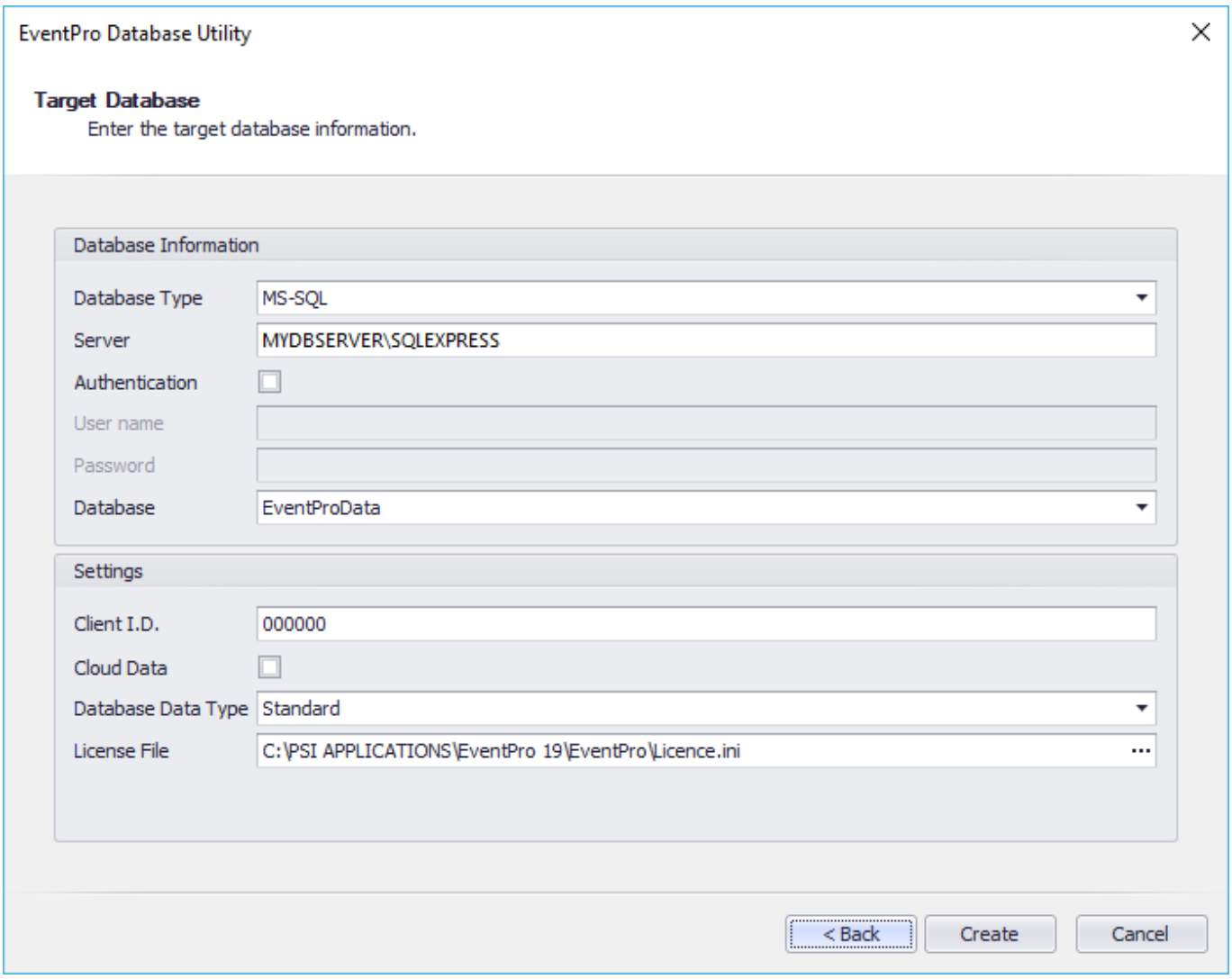
Before restoring the database, however, this process requires that you first **create a new database** with the EventPro Database Utility. The new database you are creating here is essentially a **placeholder**. Later, you will restore your existing database over this new "placeholder" database.

1. Run the **EventPro Database Utility Wizard** by selecting **EventPro Data Updater** from your **Start** Menu, or double-clicking 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.



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 **installing SQL Server** [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** 112.

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 **Give Database Rights to Users** 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**.

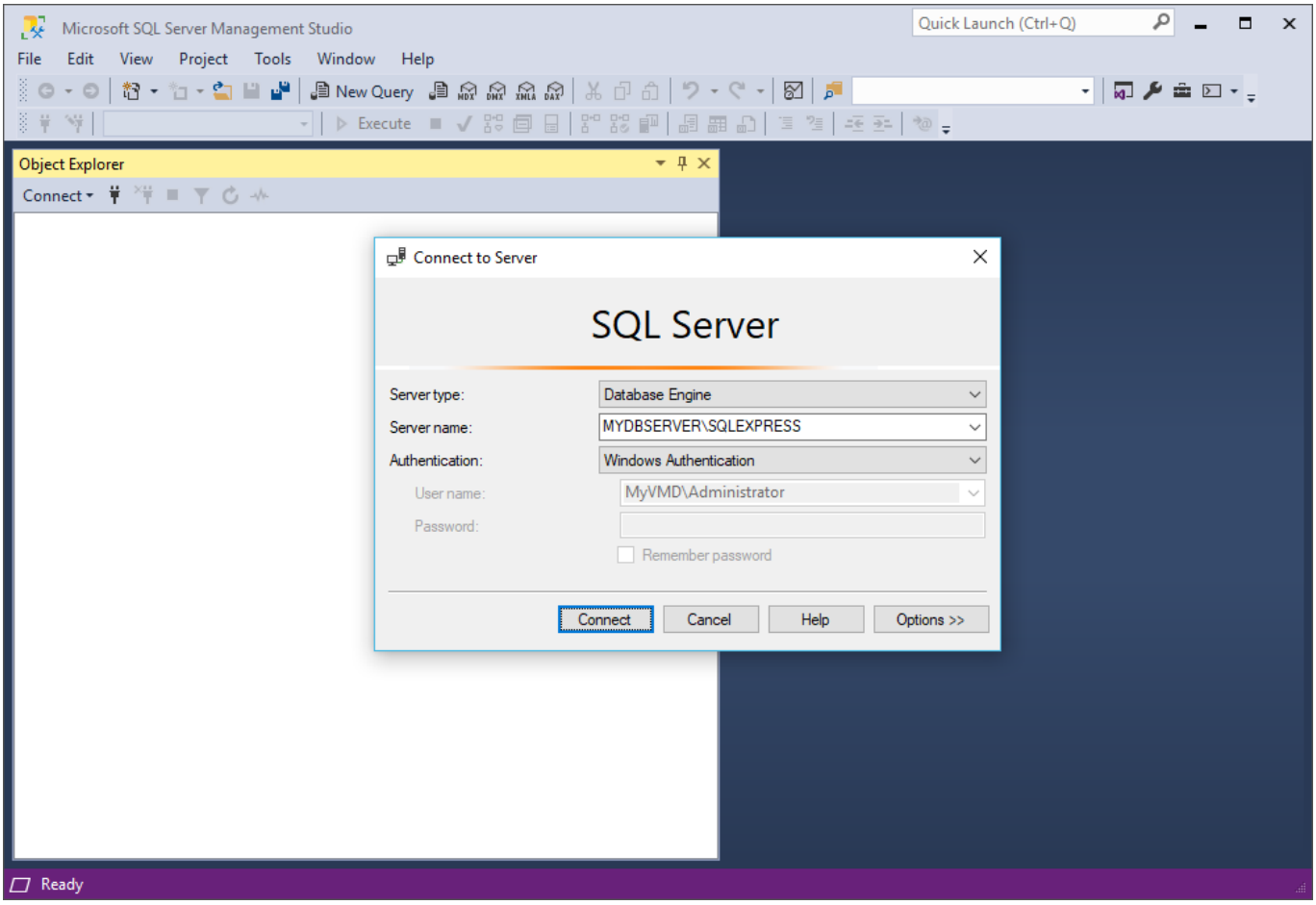
You may have a different version of SQL Server Management Studio than that depicted below, but the functions and settings should be essentially the same.

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**.

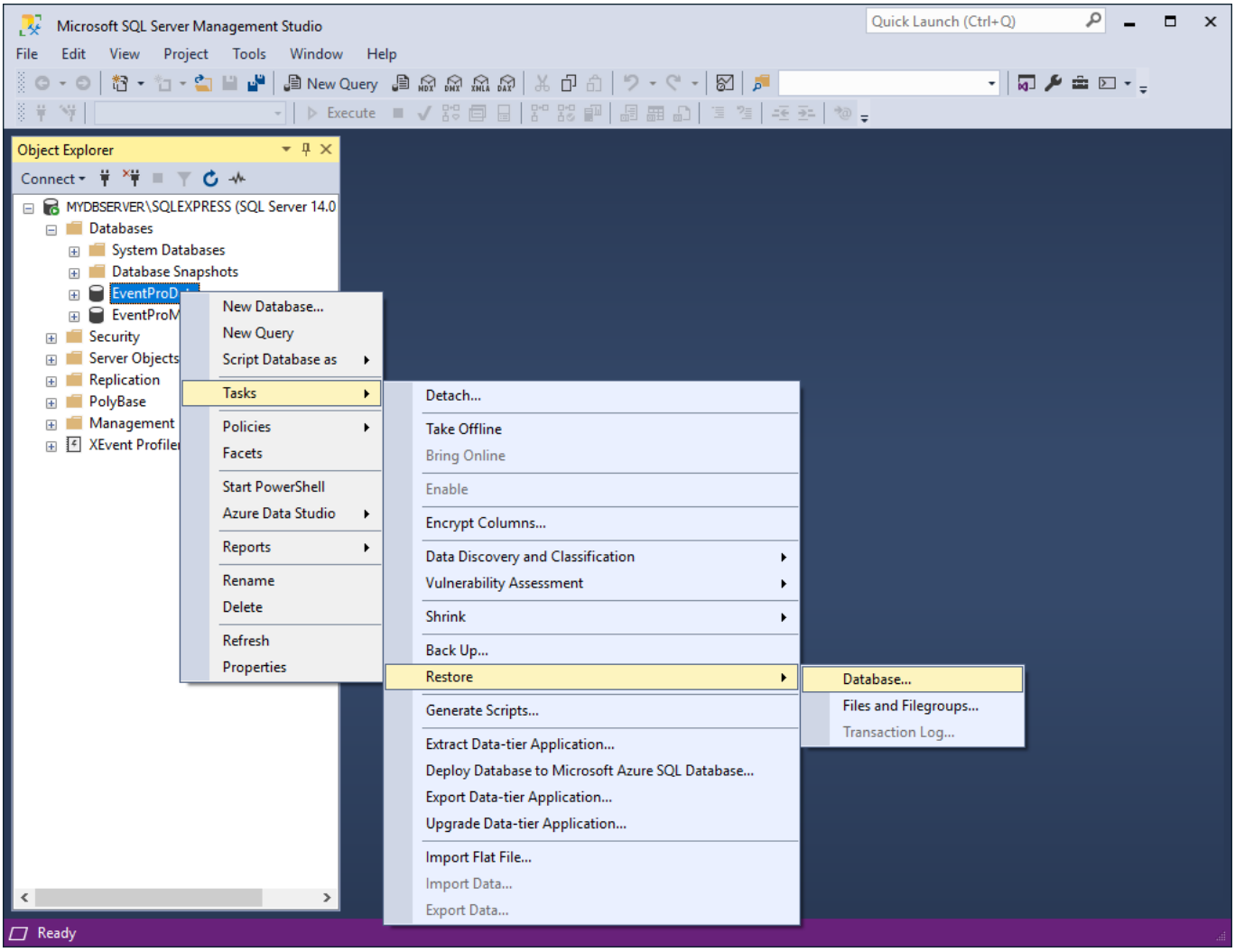
(Remember that when ***installing SQL Server*** 108*, you chose between **Windows Authentication** and **Mixed Mode** (SQL Server and Windows Authentication), and set the password for the **sa** - SQL Server System Administrator - account.)*

Click **Connect**.

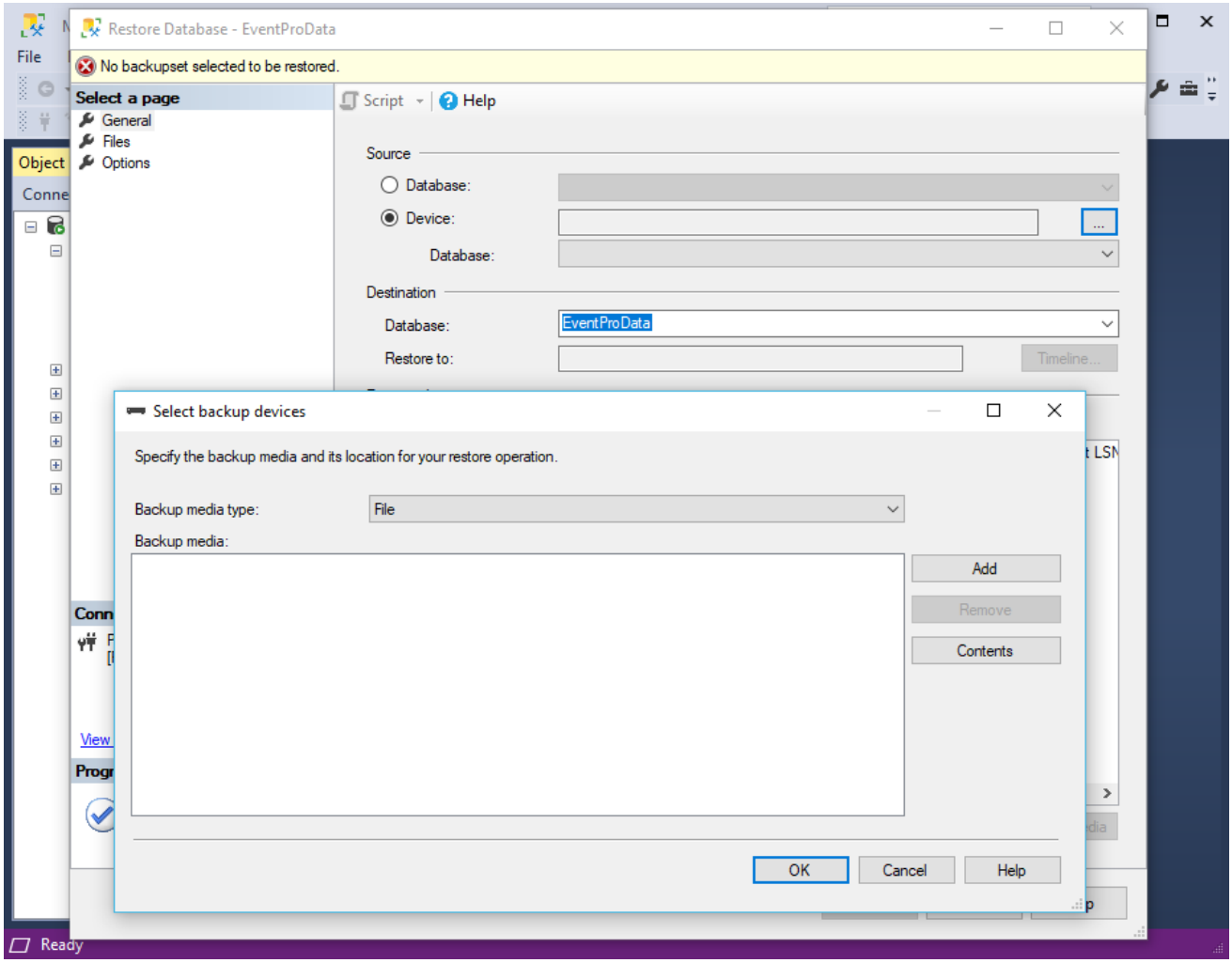


3. In the **Object Explorer** panel of **Microsoft SQL Server Management Studio**, expand the Databases so that you can see **EventProData**.

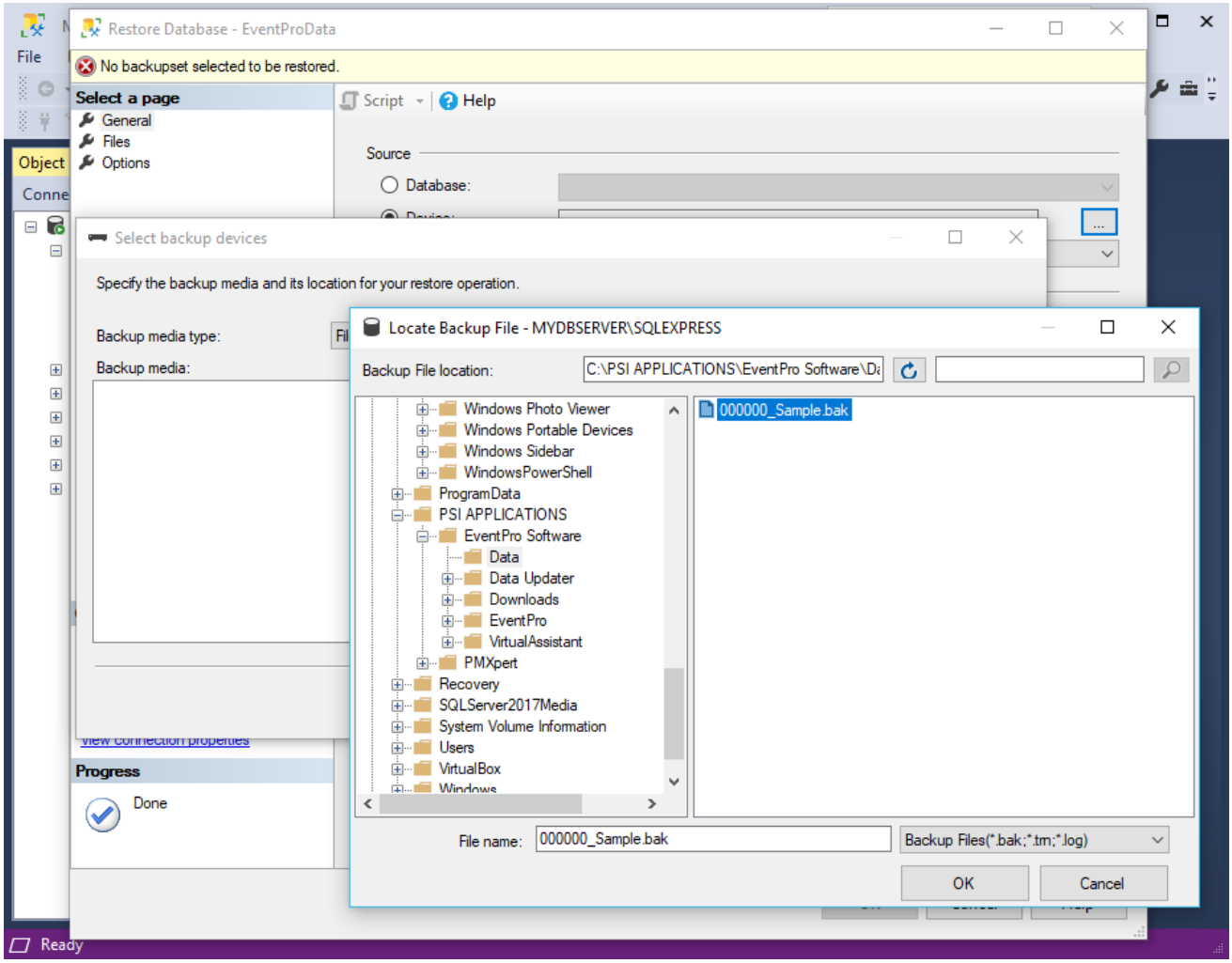
   Right-click on EventProData, and select **Tasks > Restore > Database**.



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.



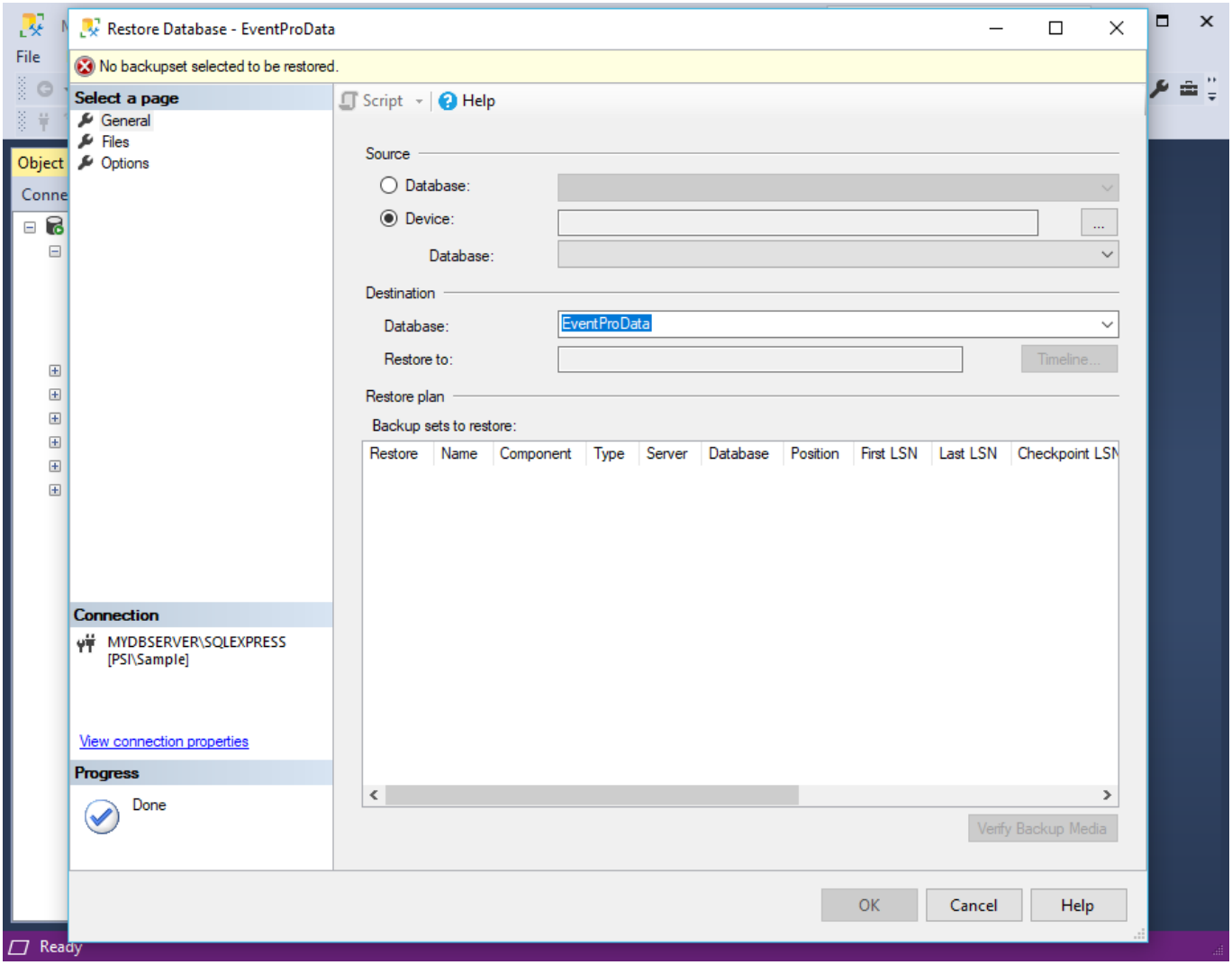
b. Click the **Add** button. The **Locate Backup File** window appears.



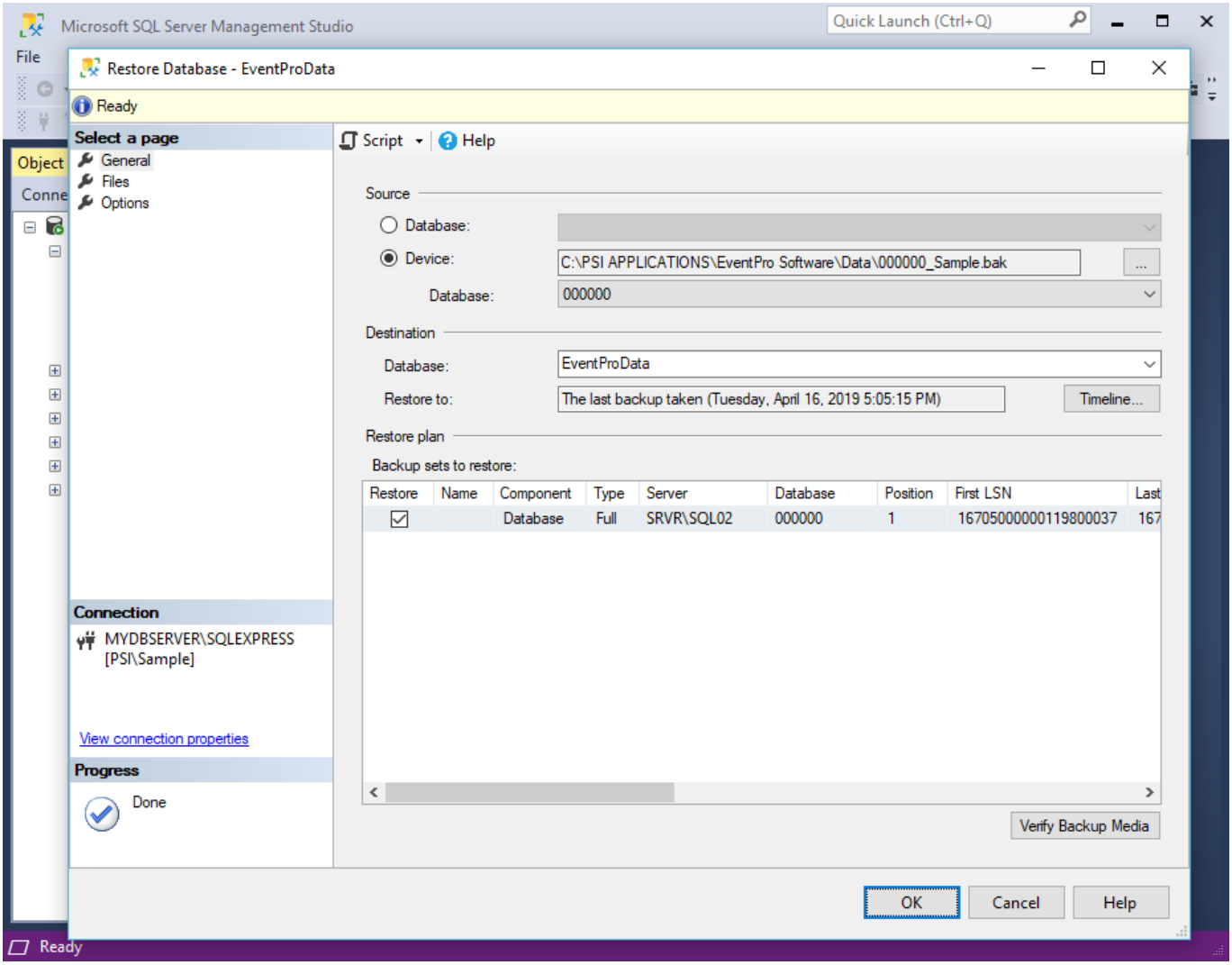
c. In the **Locate Backup File** window, locate the existing database that your EventPro Trainer sent to you, which should have been saved on the same machine as SQL Server, as noted above.

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**.

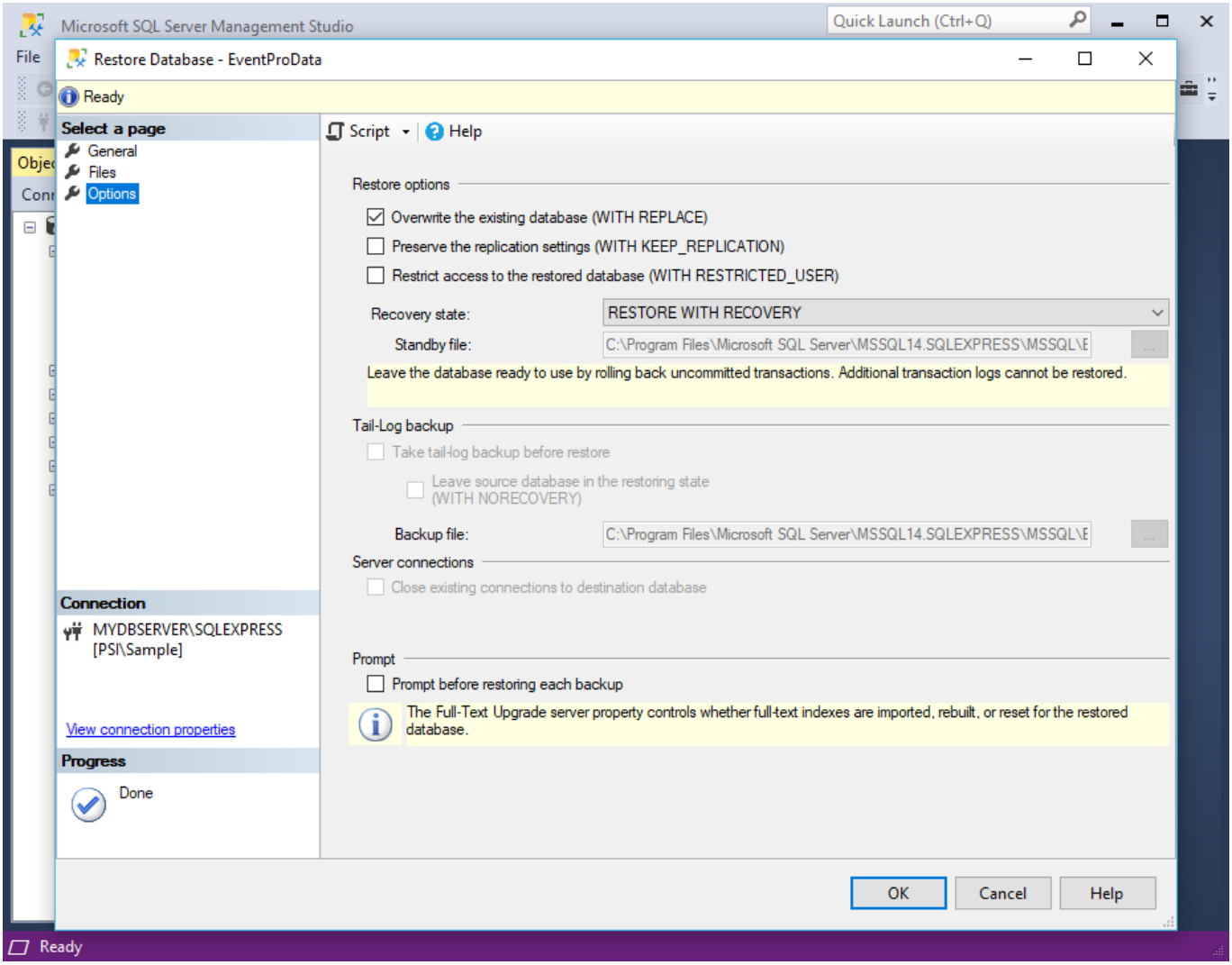


7. Ensure that you have selected the correct Source and Destination.



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

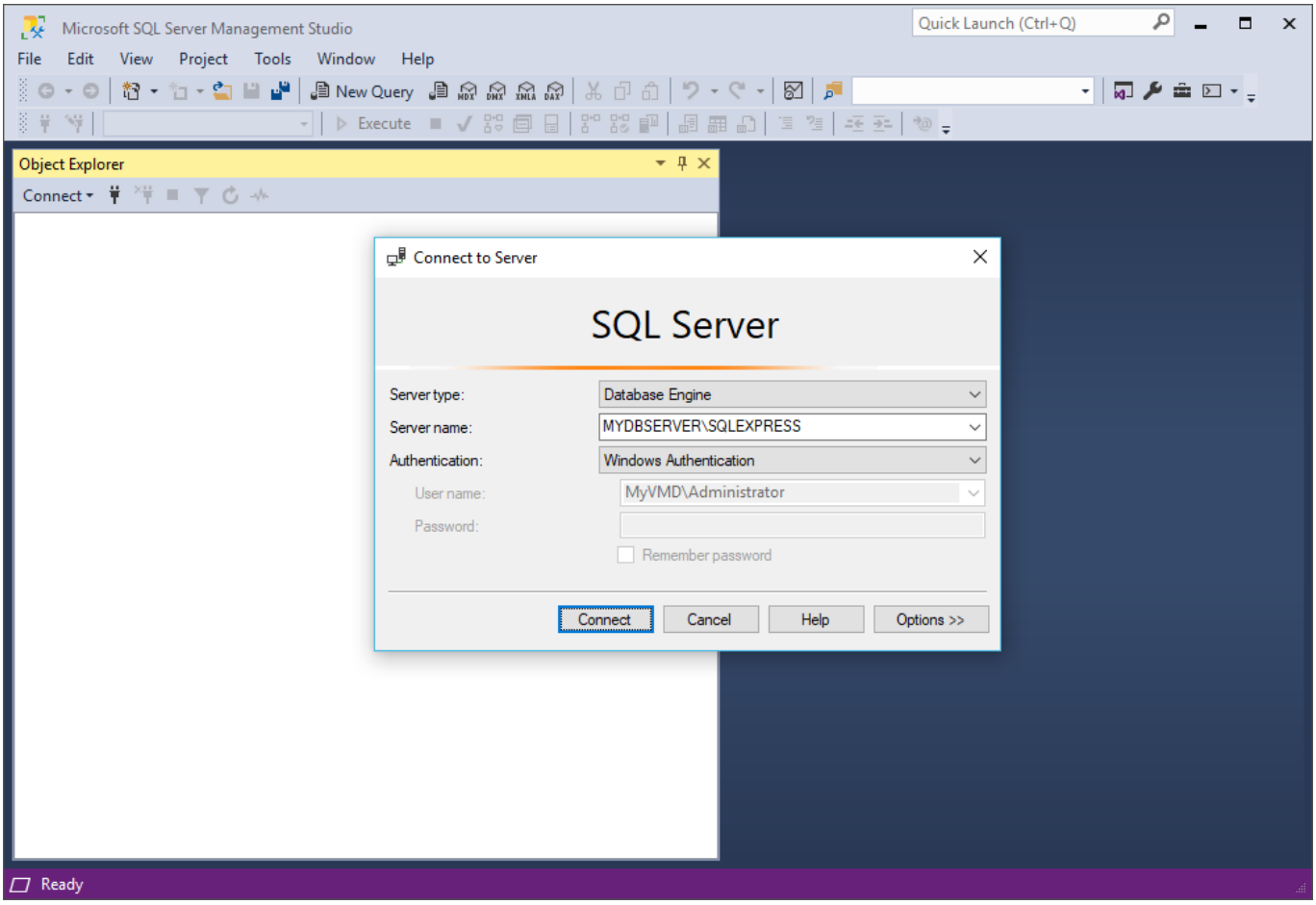
   Select the **Overwrite the Existing Database (WITH REPLACE)** checkbox. (In this situation, we want the restored, prepared database from EventPro Training/Support to overwrite the blank "placeholder" database that we created in the previous step.)



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.



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

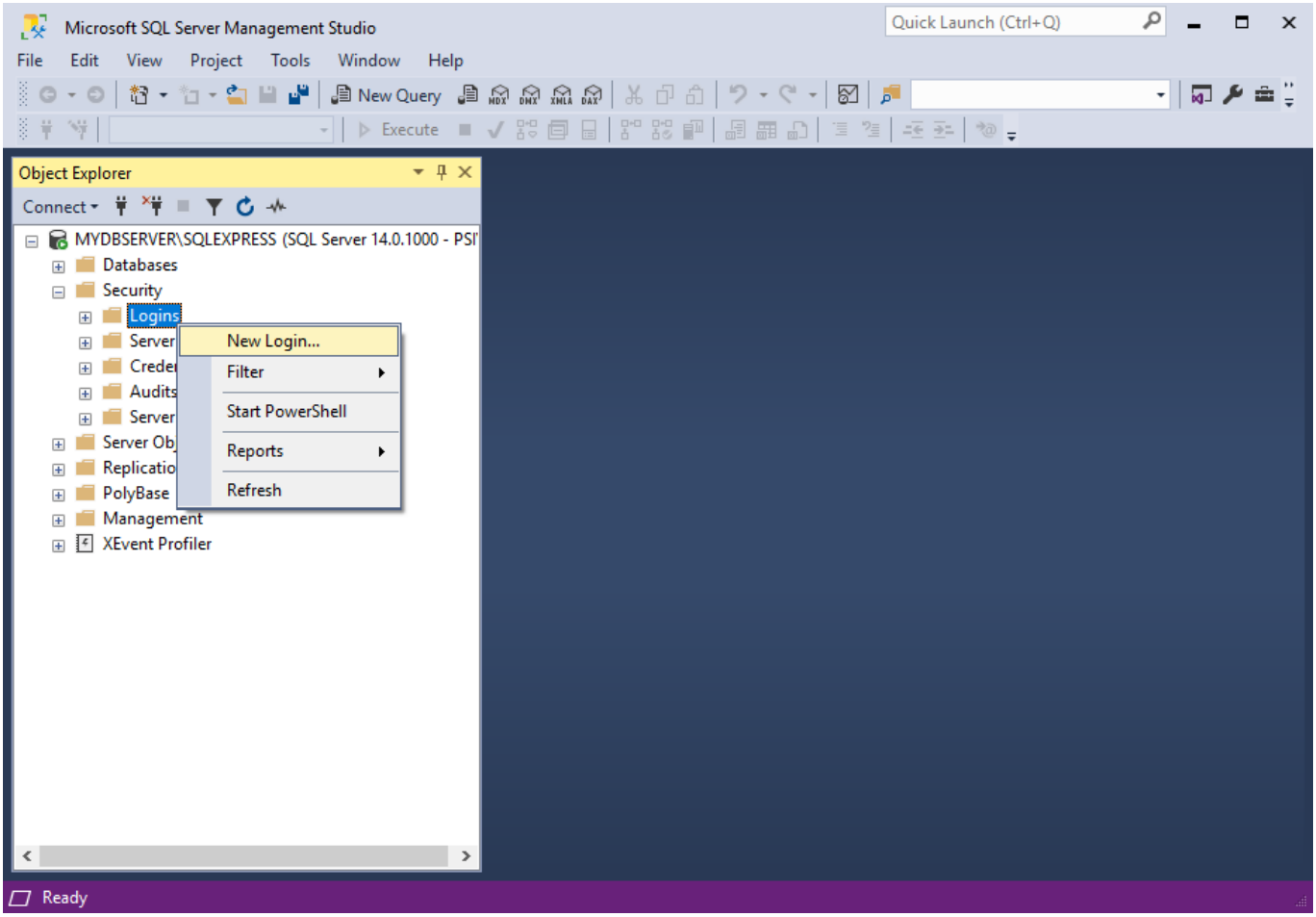
b. Select either **Windows Authentication** or **SQL Server Authentication**. If you choose SQL Server Authentication, enter the **User Name** and **Password**.

   *(Remember that when **installing SQL Server** 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.)*

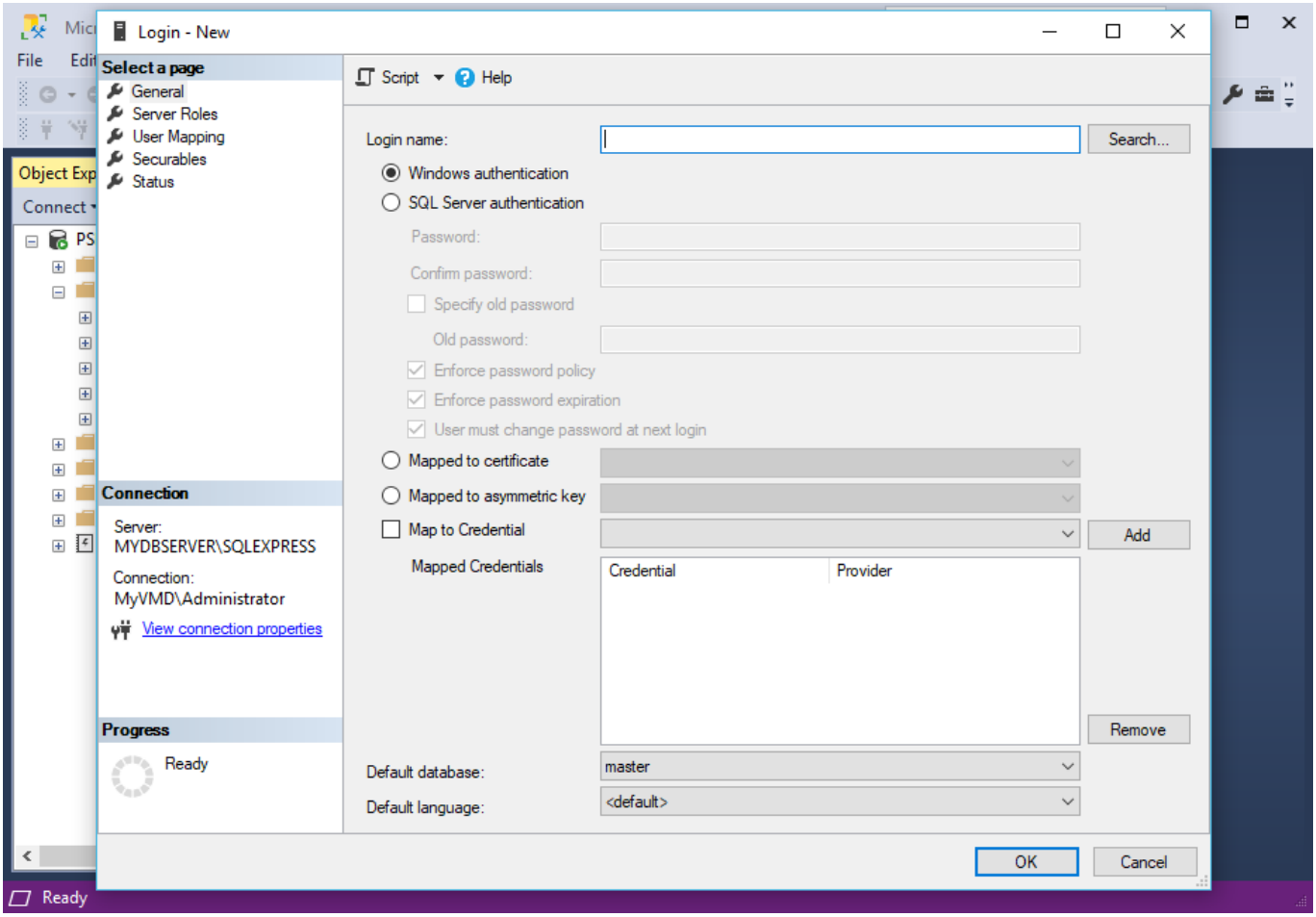
c. Click **Connect**.

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**.



4. The **Login - New** form appears.

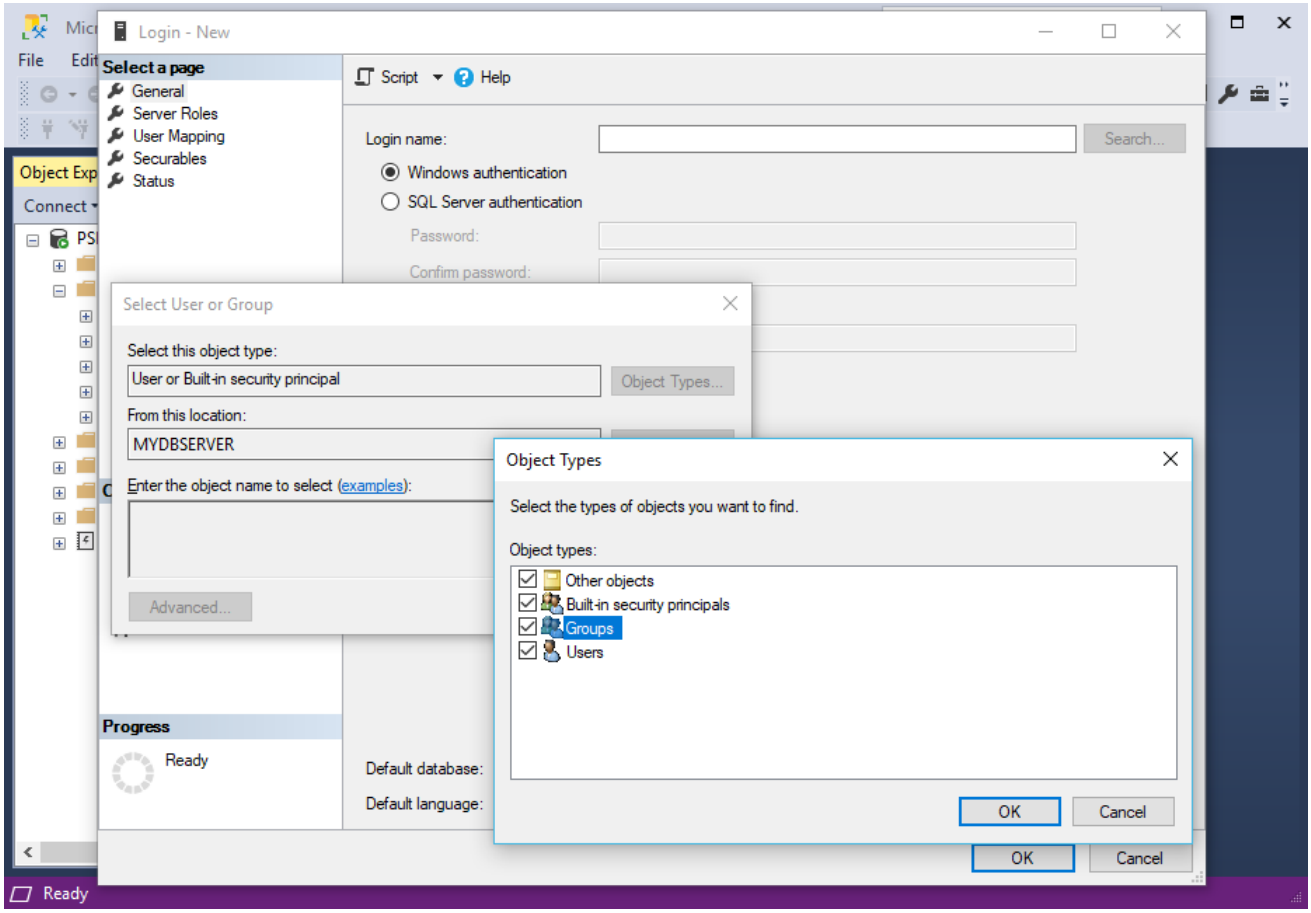


5. Select the radio button next to **Windows Authentication** to indicate that you want **Users** to connect to the SQL Server Instance using **Windows Authentication**.

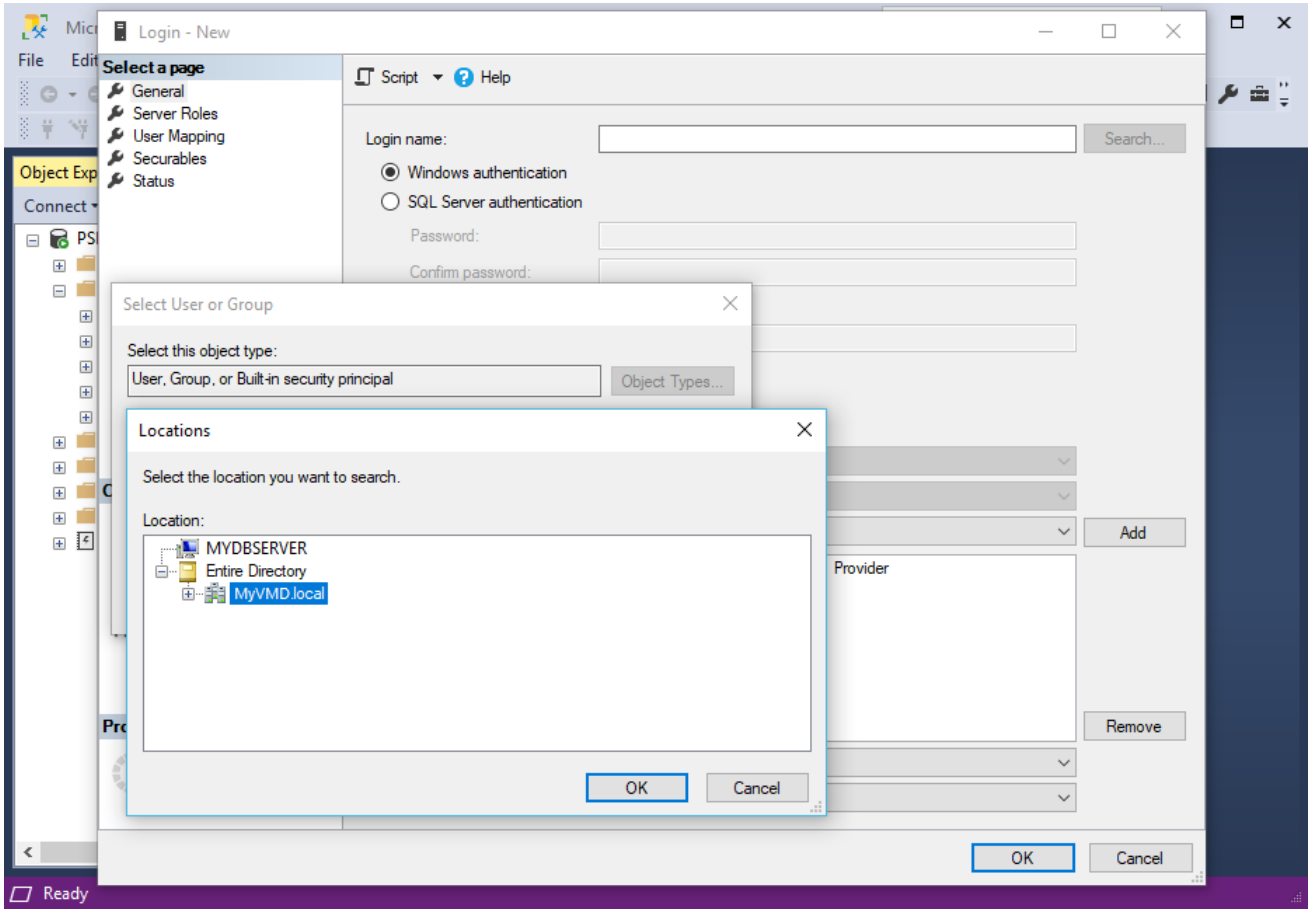
6. You now need to search for the EventPro Security Groups that you created back in **Create Active Directory Groups** 97.

   a. Click the **Search** button next to the **Login Name** field. The **Select User or Group** window appears.

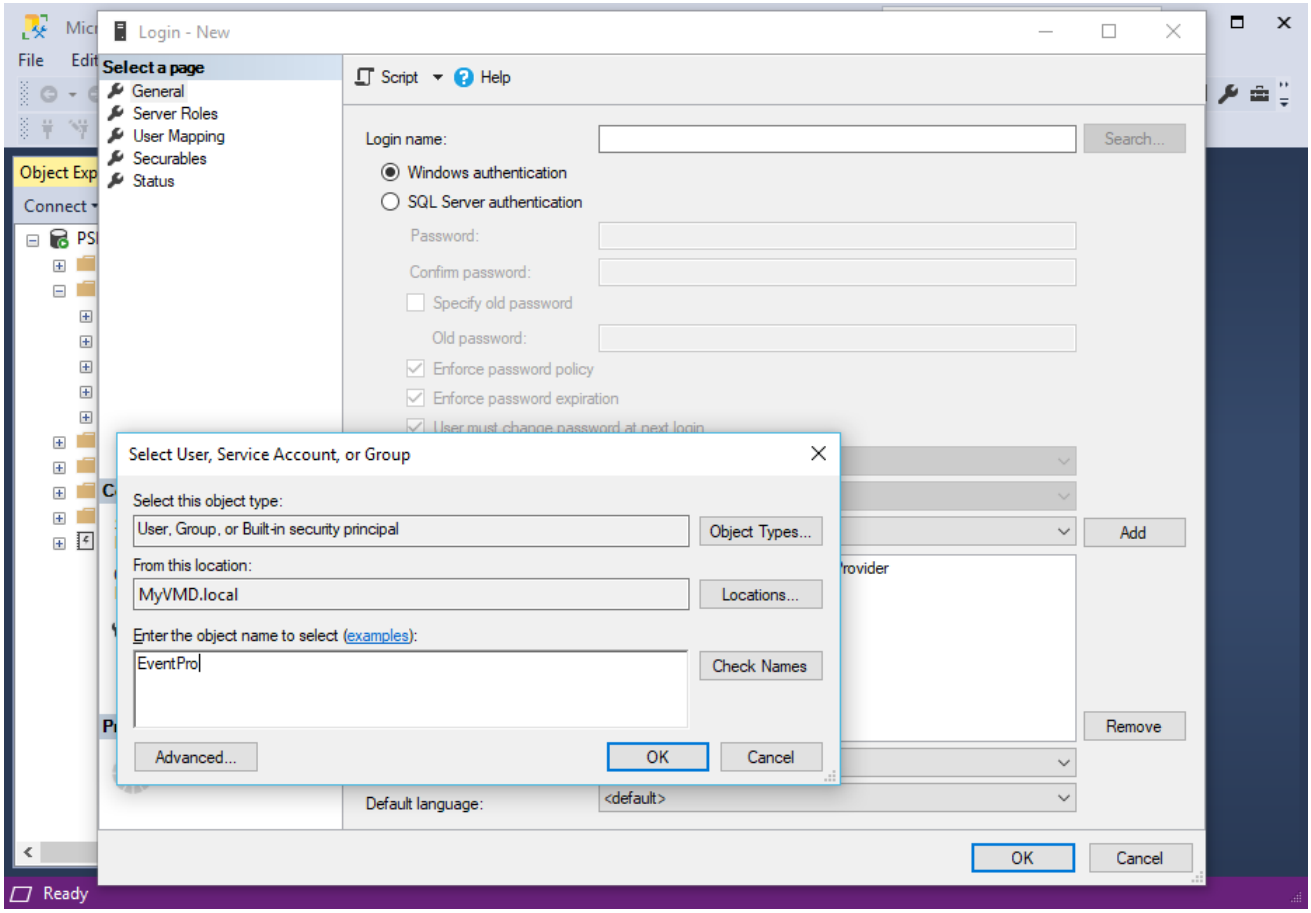
   b. Click the **Object Type** button. In the **Object Types** window, select the **Groups** checkbox and click **OK**.



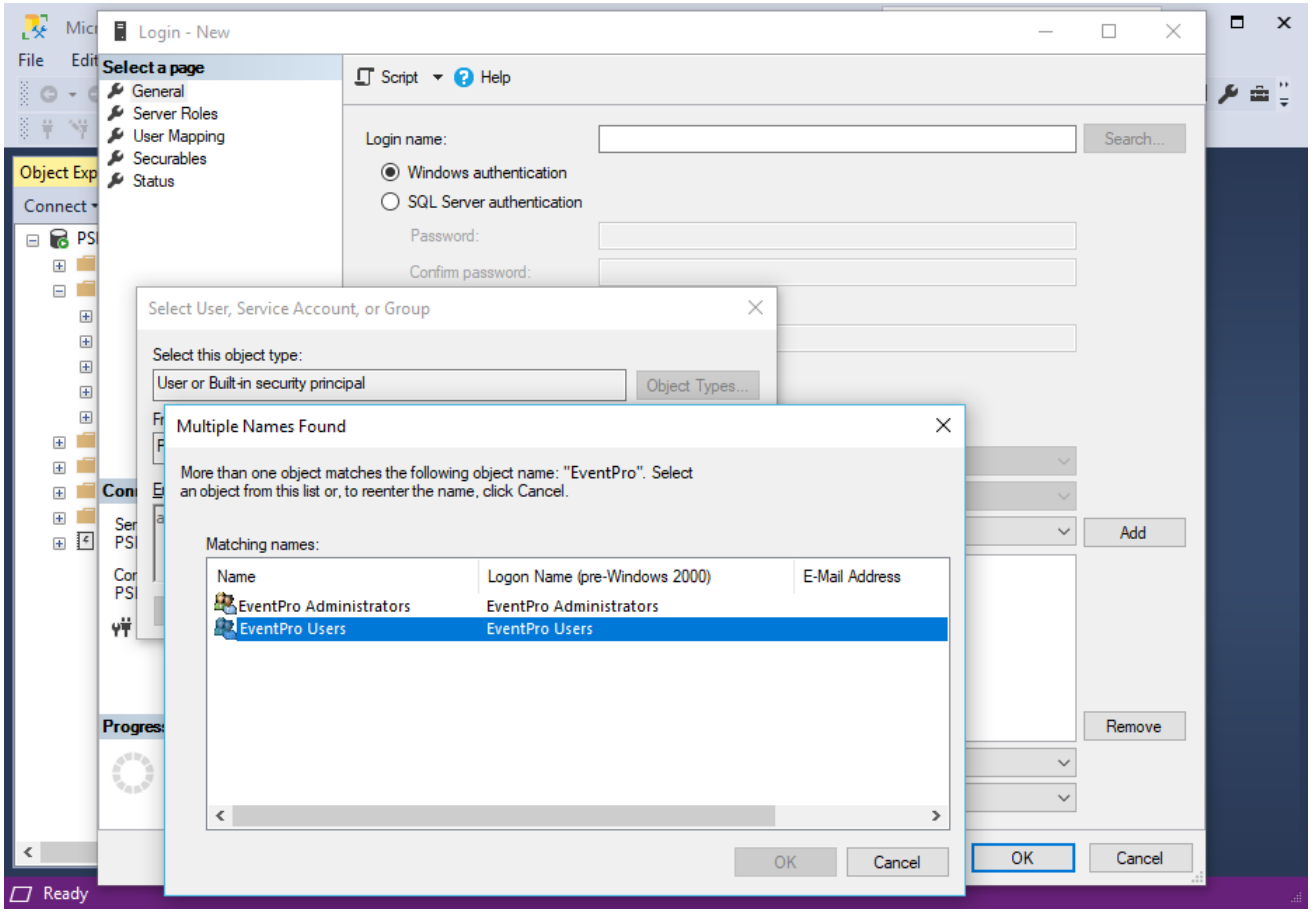
c. Back in the **Select User or Group** window, click the **Locations** button. Select the correct **Domain** in the **Locations** window, and click **OK**. This is the Domain in which you created the EventPro User Security groups.



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.

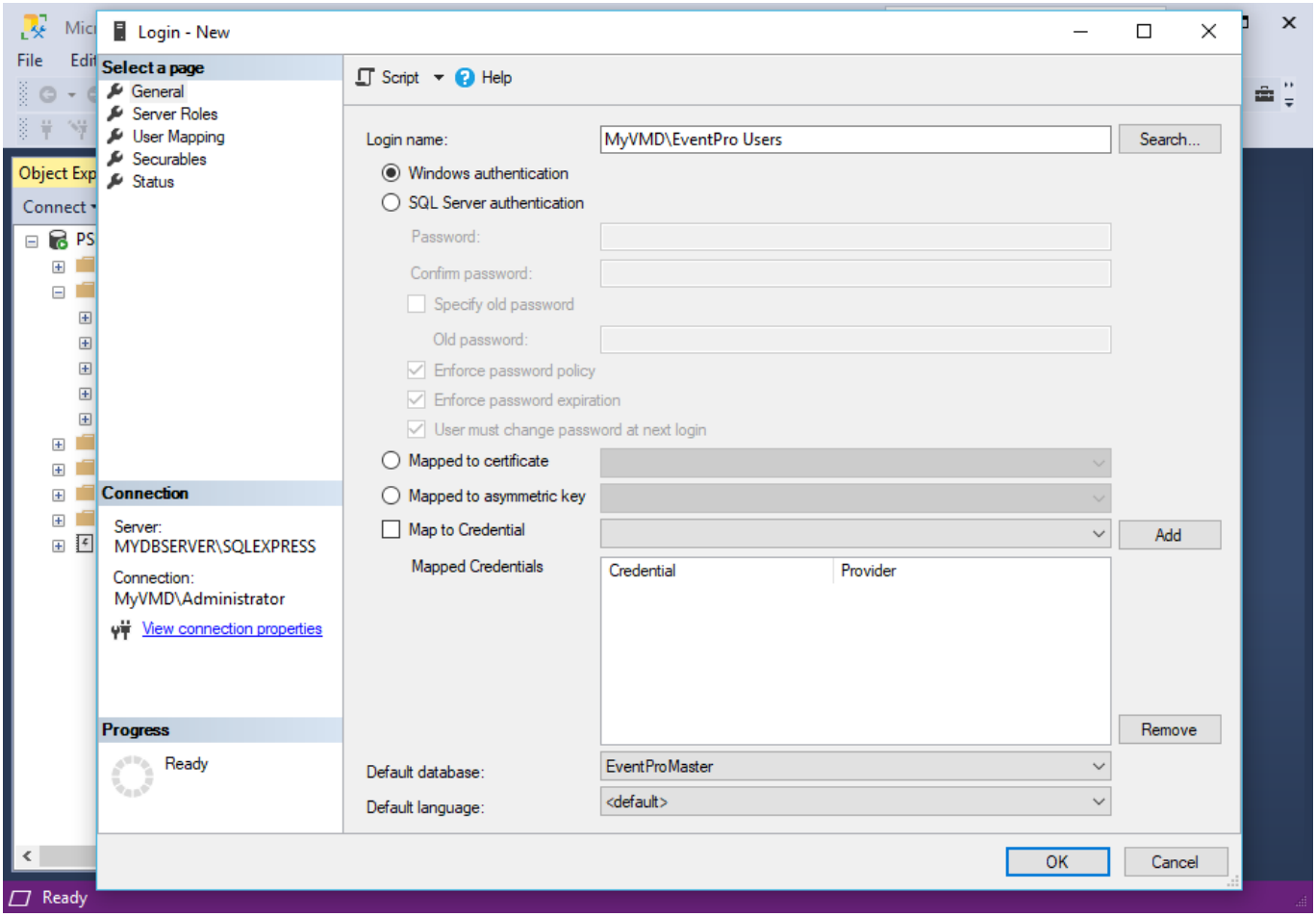


e. If there are multiple matching results in the **Multiple Names Found** window, select the group(s) for which you want to assign database rights, and click **OK**. In this example, we will select the **EventPro Users** security group.



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**.

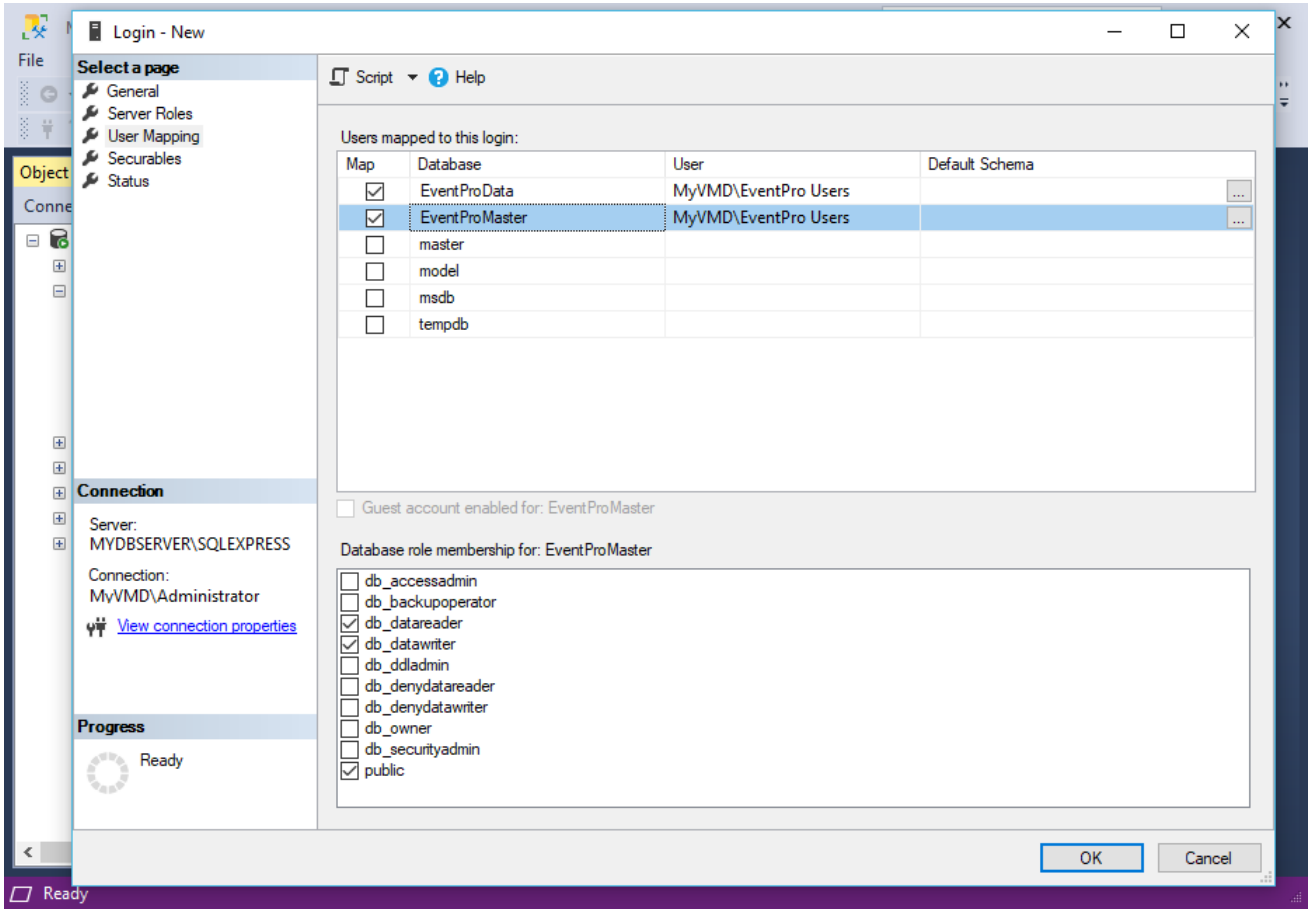


10. Next, in the **Select a Page** panel of the **Login - New** form, select the **User Mapping** page.

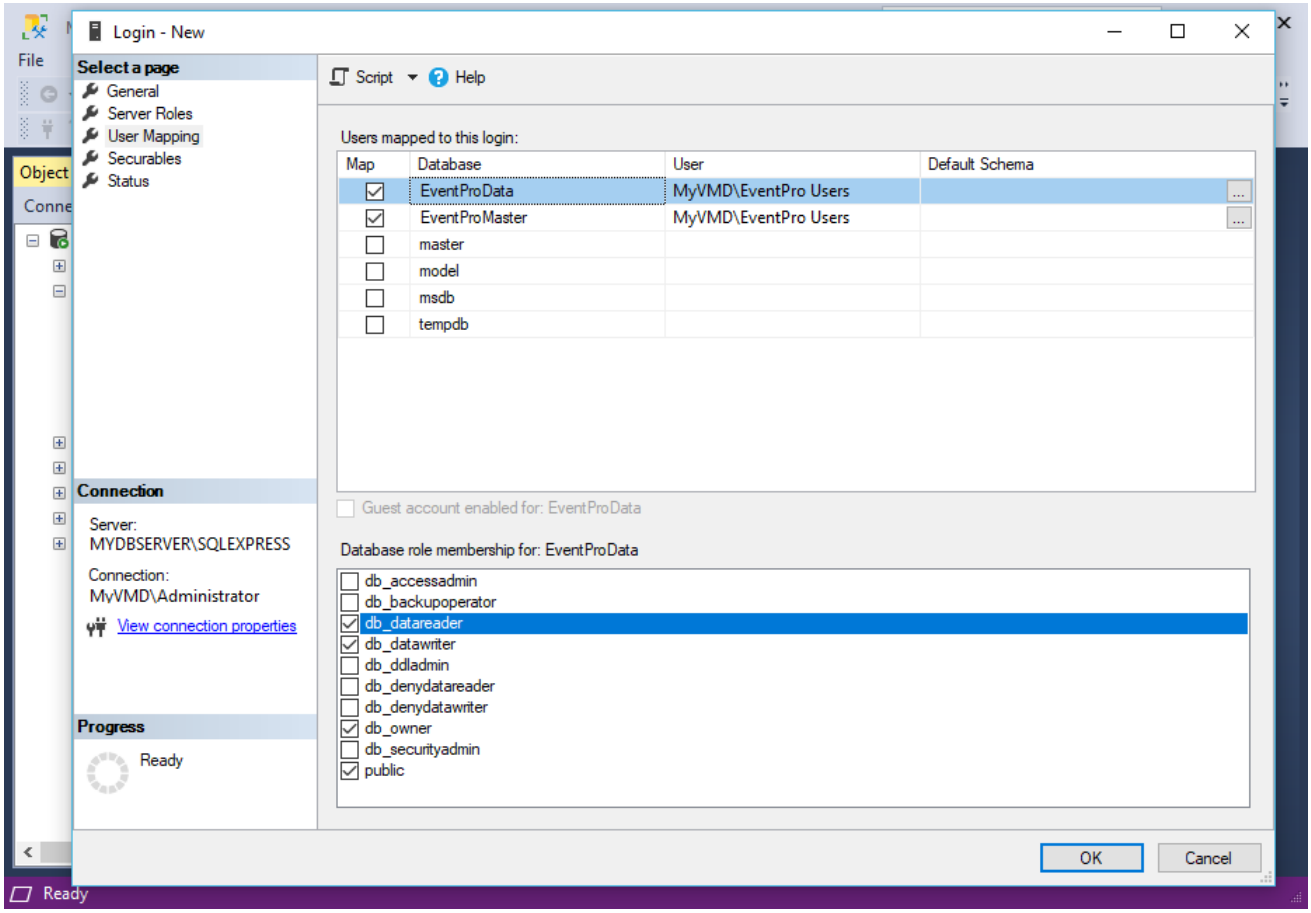
    Select the **Map** checkboxes for the **EventProData** and **EventProMaster** databases.

    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.



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



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** 97.

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** 135.

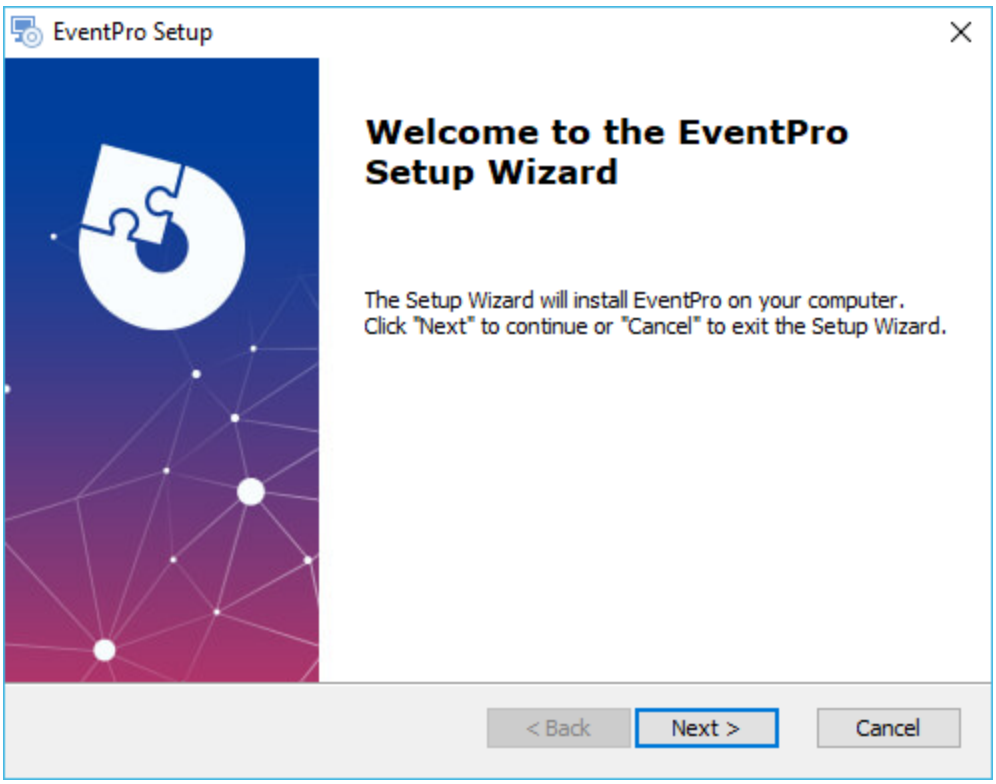
Install EventPro to Server

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** 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.

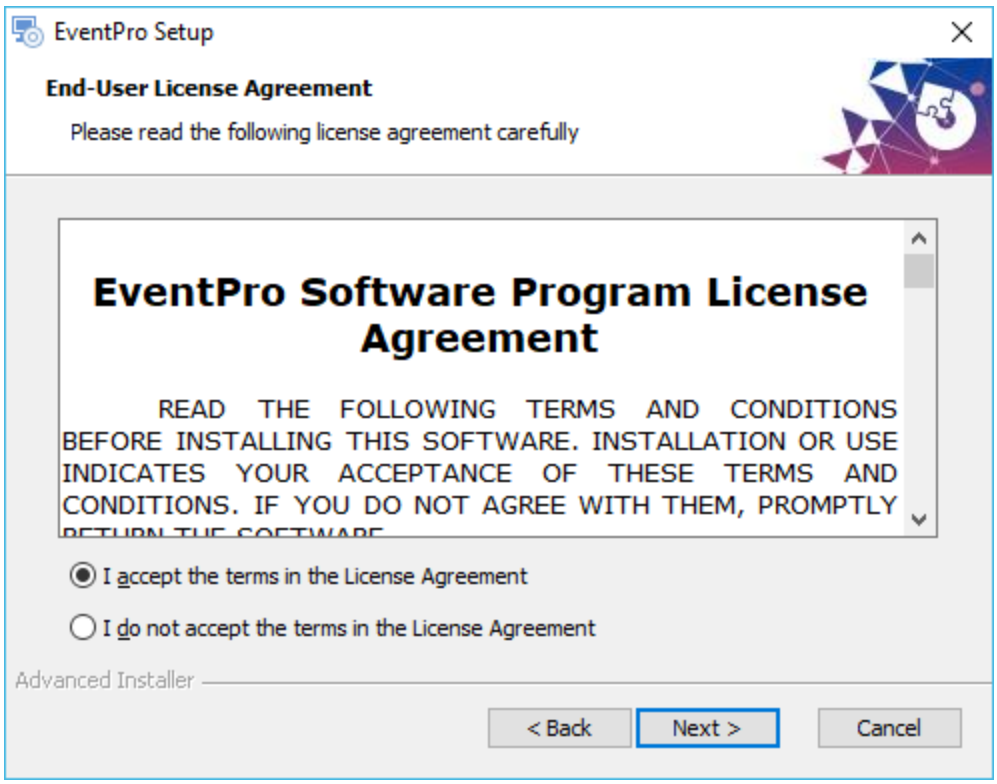


3. **End-User License Agreement**:

   a. Please read the **EventPro Software Program License Agreement**.

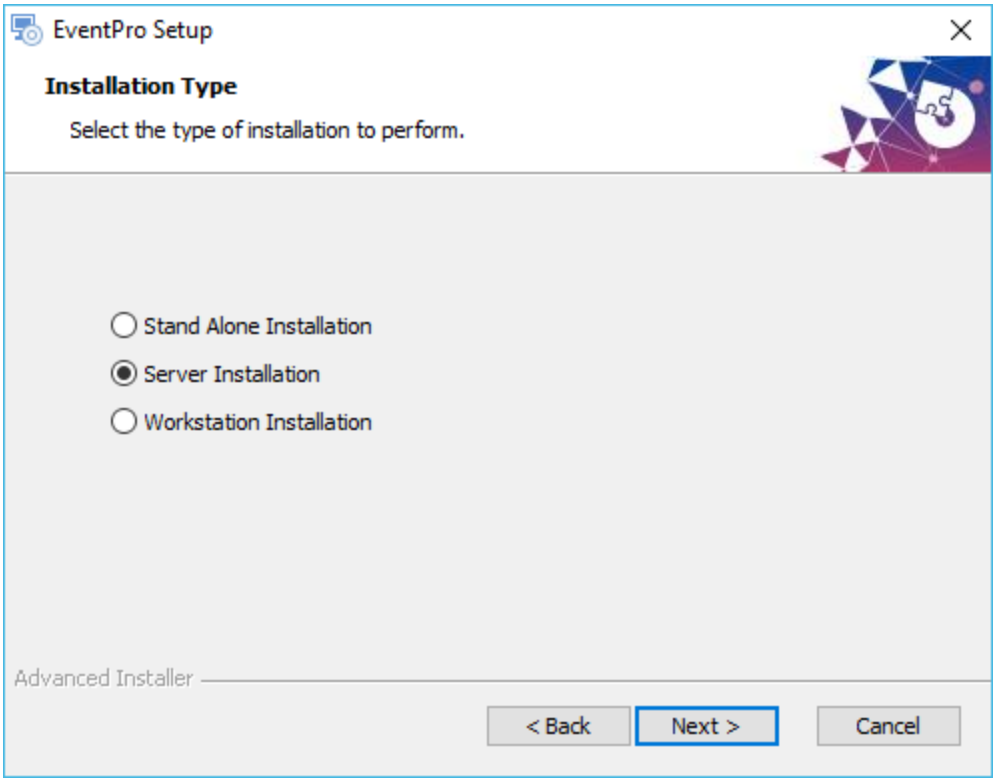
   b. Select **I ACCEPT** or **I DO NOT ACCEPT** below. If you do not accept the license agreement, you cannot continue with the installation process.

   c. Click **Next** to continue.



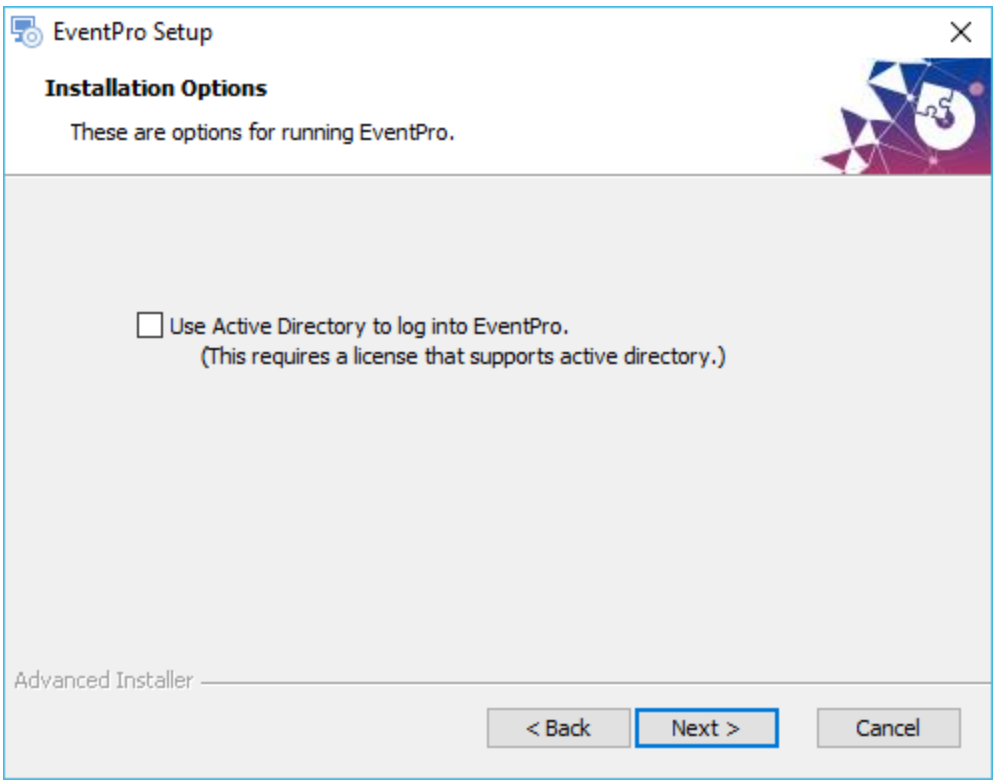
4. **Installation Type**: Choose **Server Installation**, and click **Next**.

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

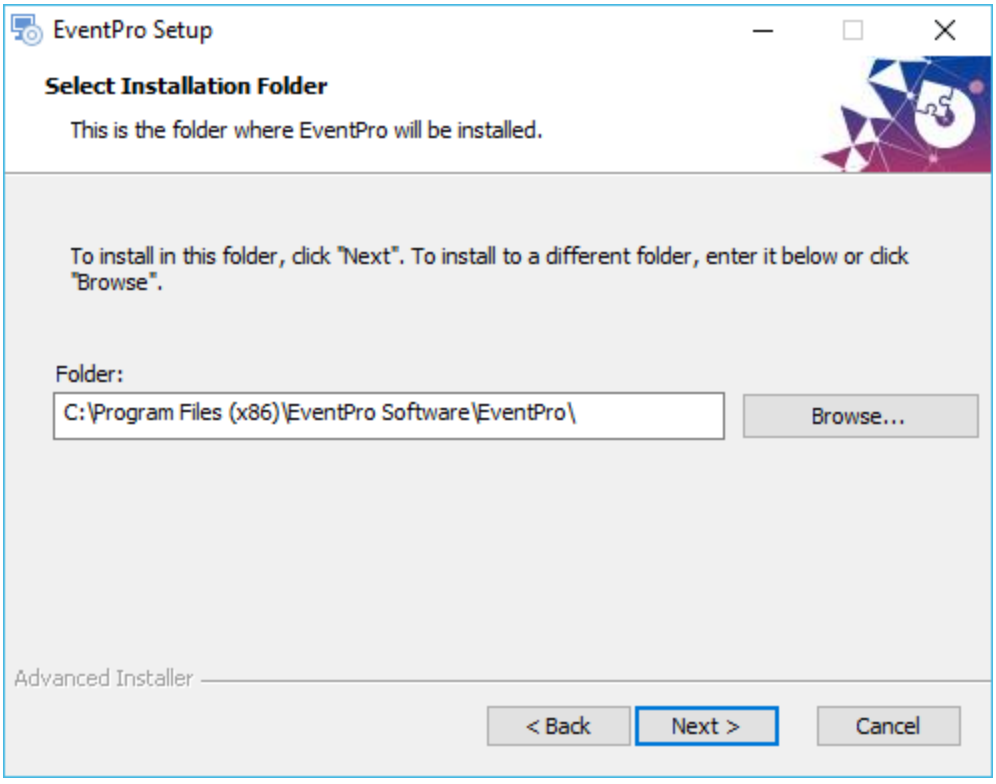


5. **Installation Options**: **Do not** select the checkbox next to **Use Active Directory to log into EventPro**. *(That option requires the EventPro Active Directory Module, and is covered under* ***Network Install: Active Directory Integration*** 162 *.)*

   Click **Next**.



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**.

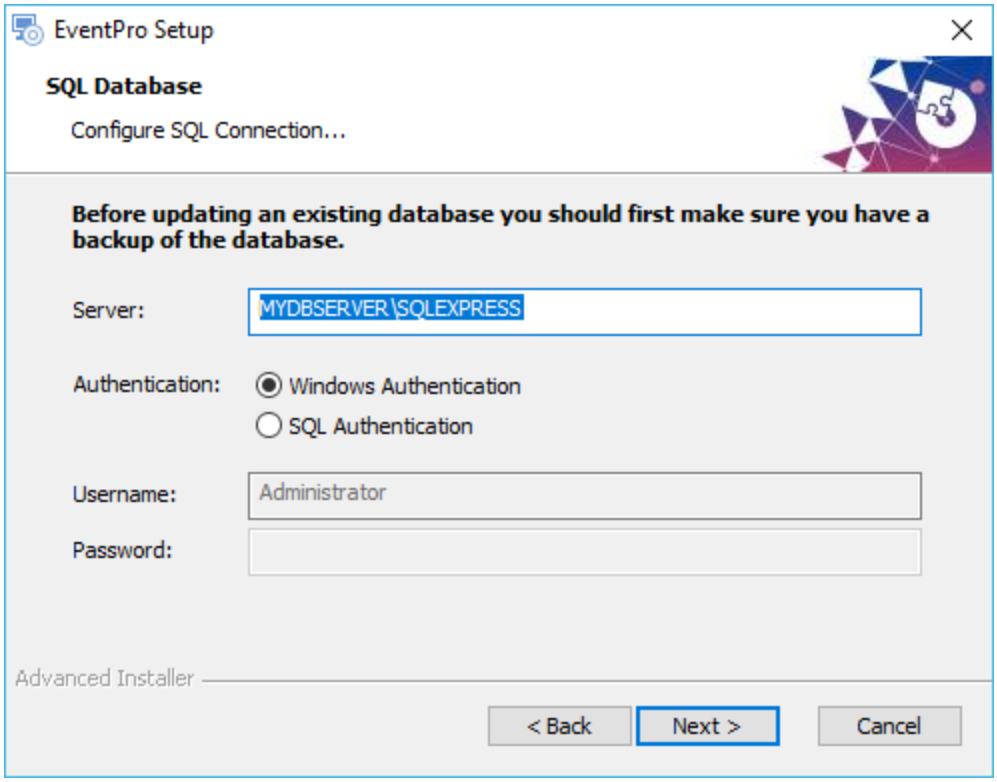


7. **SQL Database**:

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**.

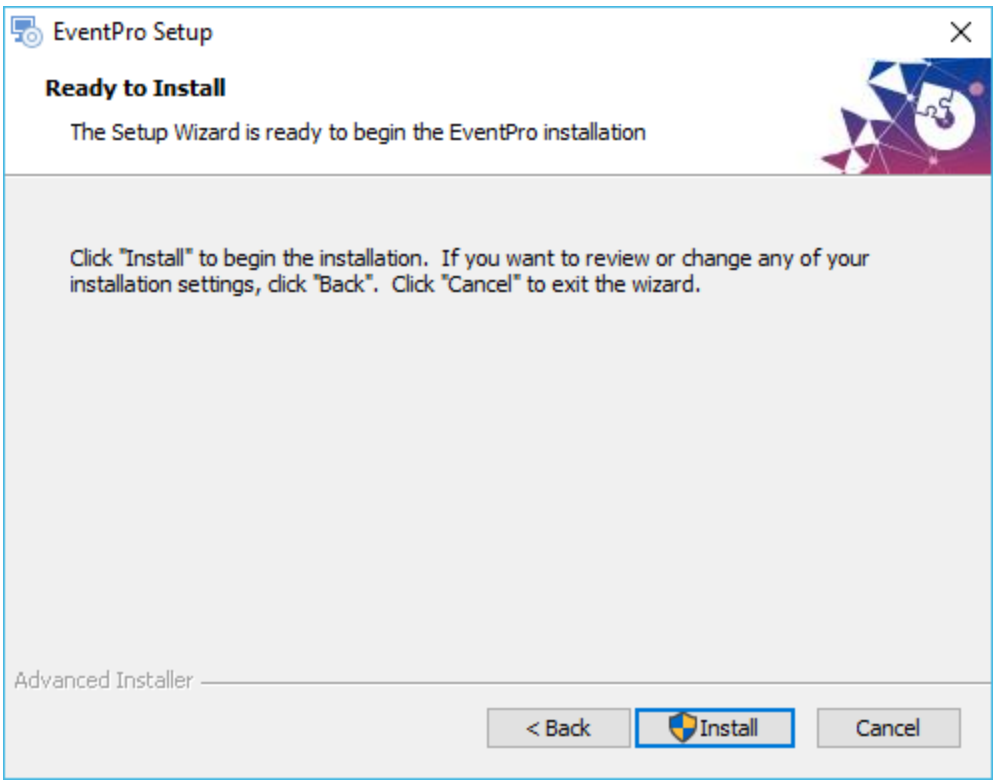
b. Select the radio button next to **Windows Authentication**. (As you will recall from **above** 125, you set up the **SQL Server Logins** to use **Windows Authentication**.)

c. Click **Next**.



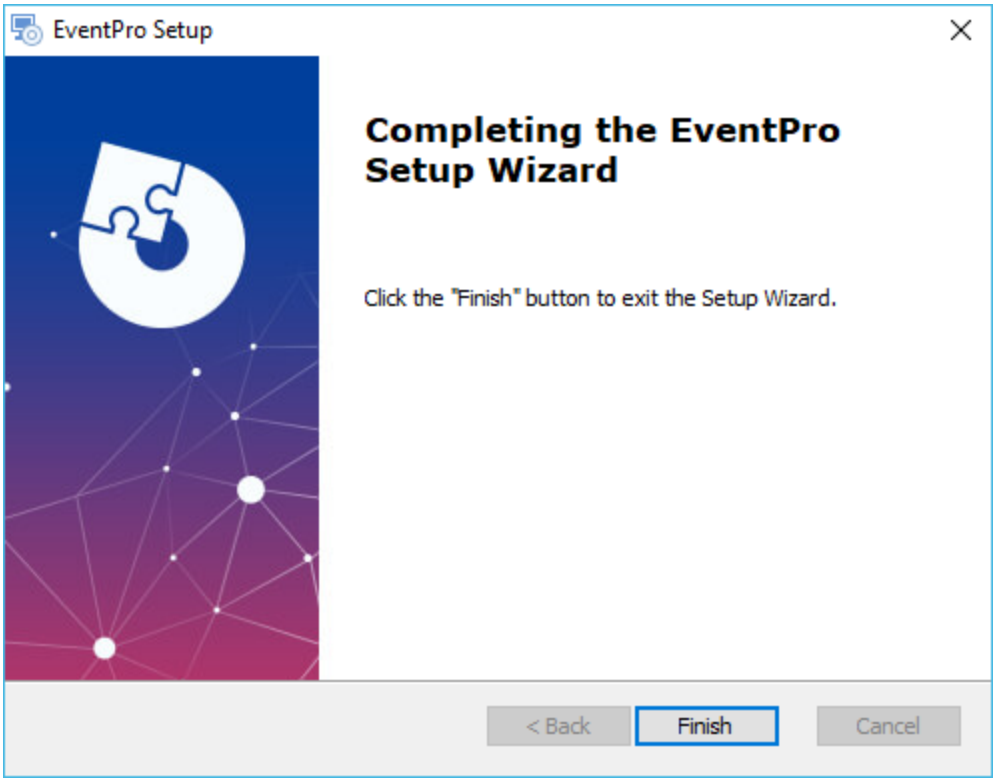
8. The Installer will test the connection to the database before you can proceed with the installation.

9. When the connection test is completed, click **Install**.



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 **Share the Installation Folder** 141.

Share Installation Folder

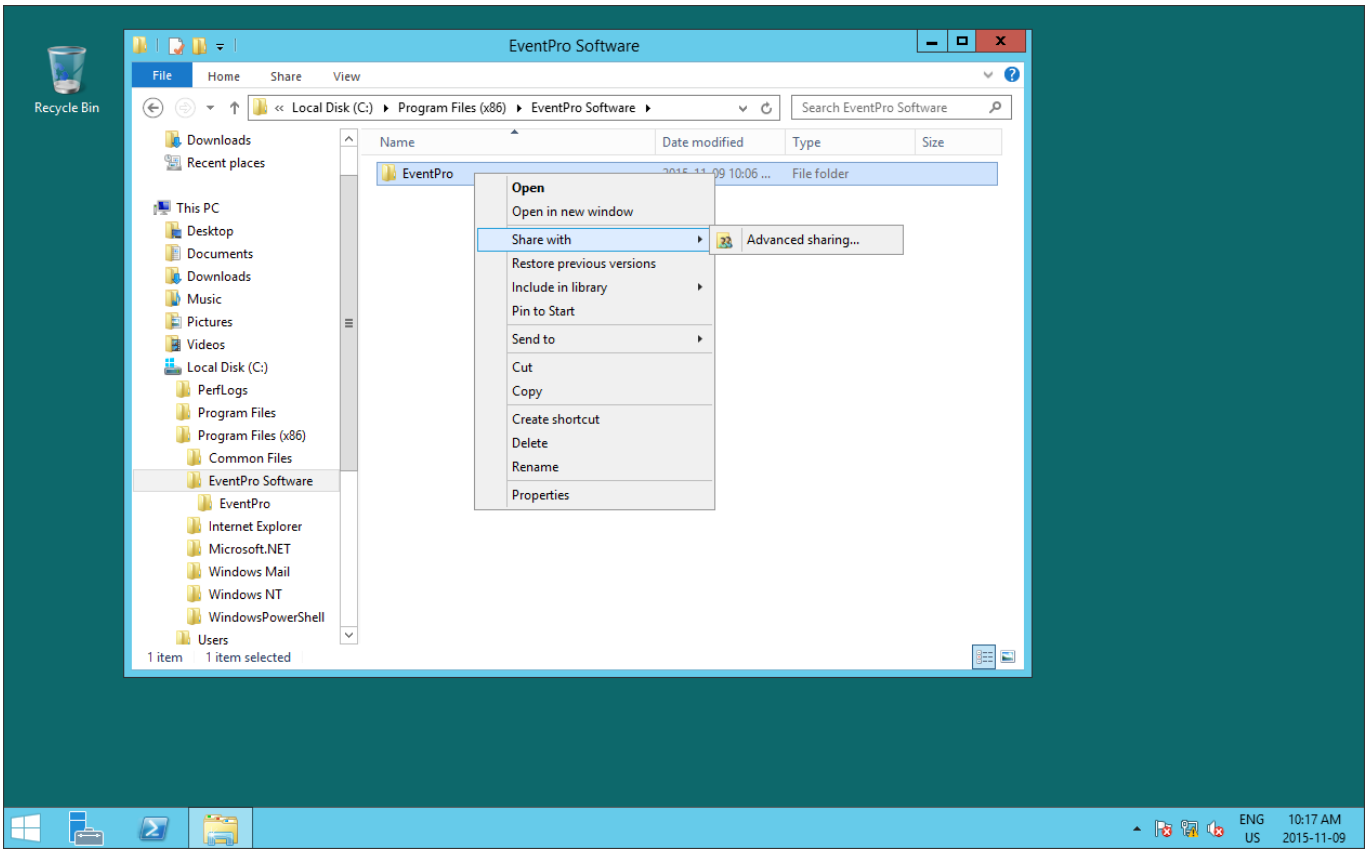
On the server to which you just installed EventPro, locate the folder in which EventPro was installed. By default, it would be **C:\ProgramFiles (x86)\EventPro Software\EventPro**, but you may have selected a different folder path in the **Select Installation Folder** 138 page of the installation wizard.

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.

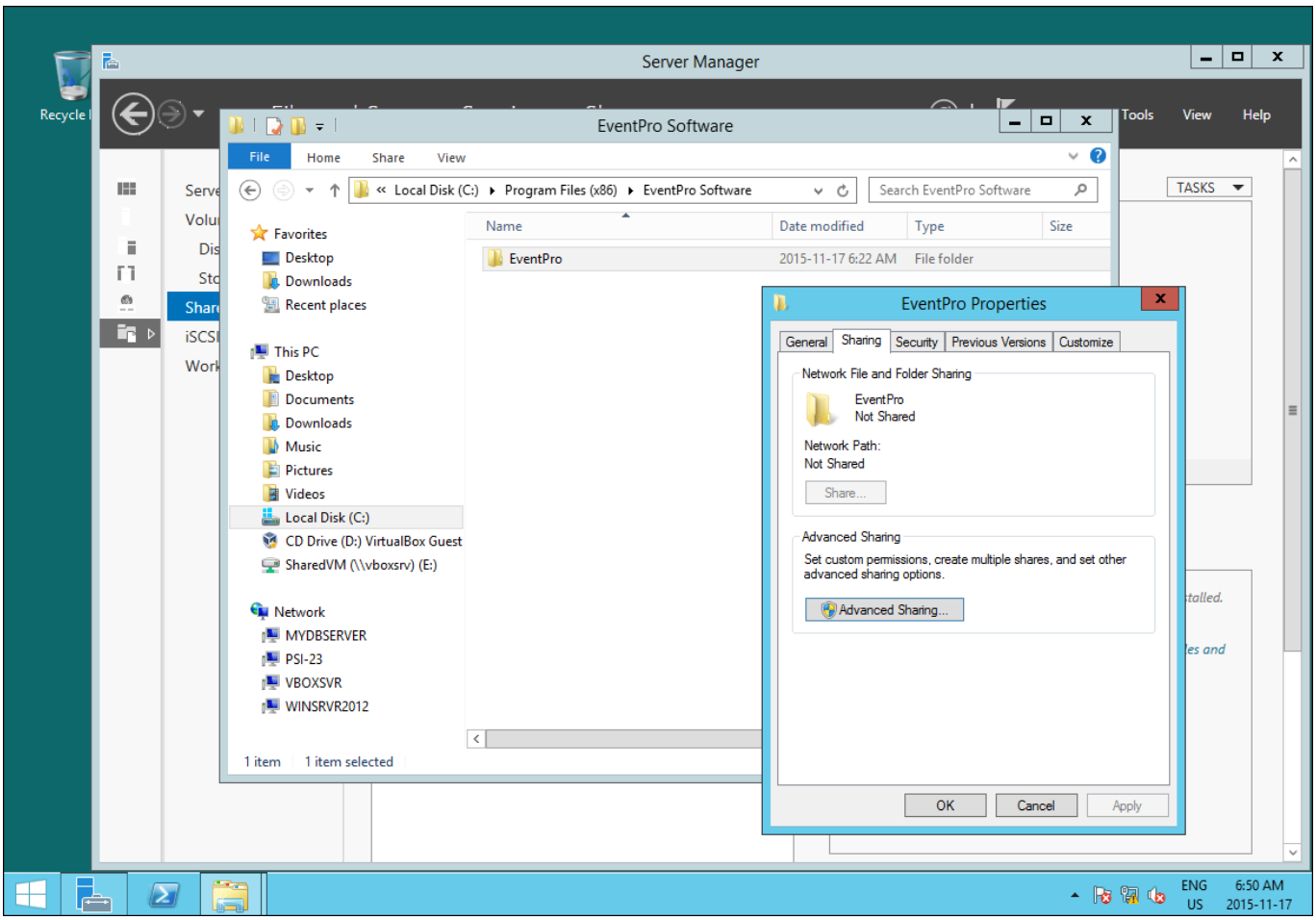
The instructions below provide an example, but you may have to consult the documentation for your network and operating system to determine how to share the Installation Folder from the Application Server to Workstations.

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



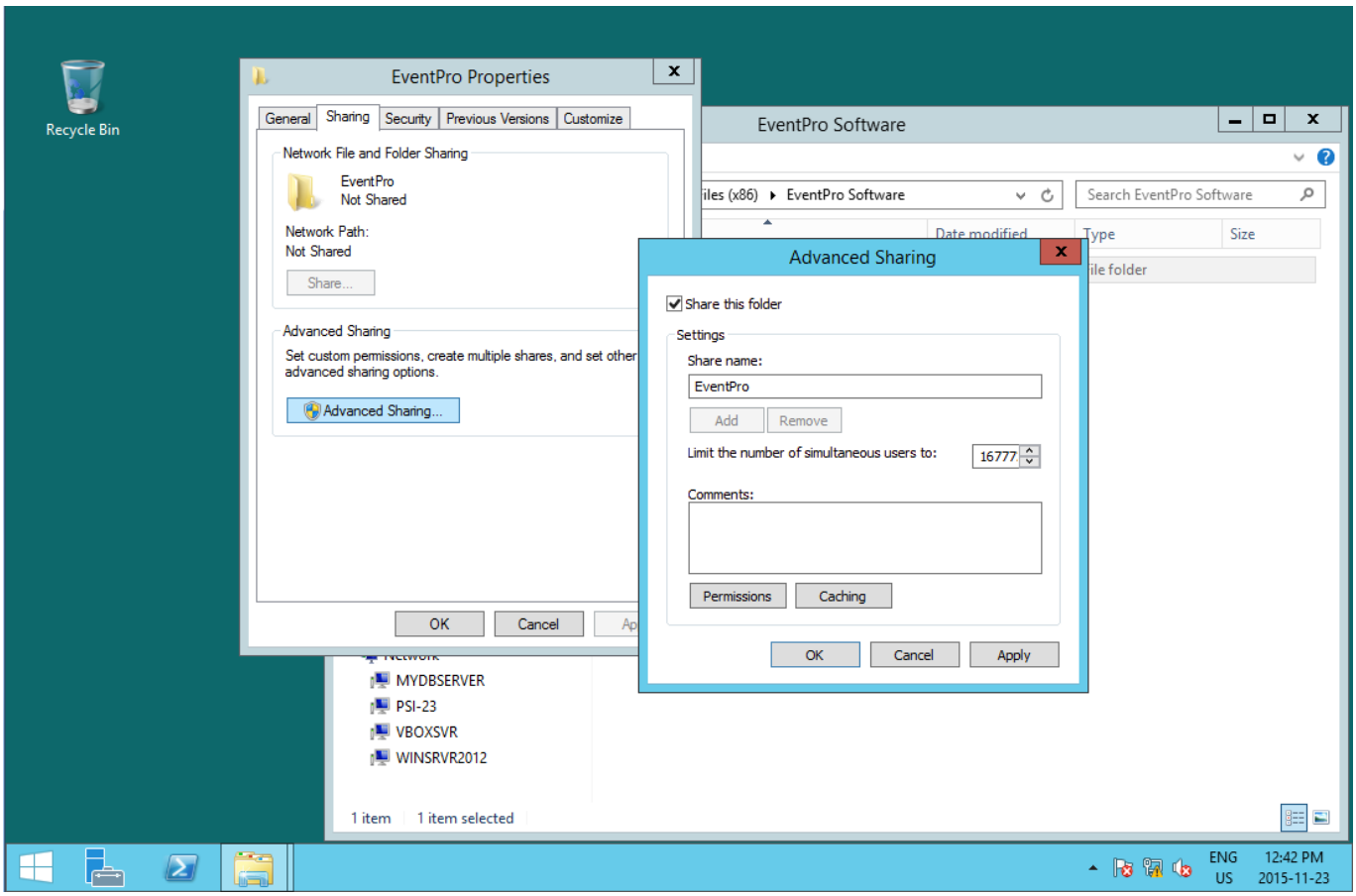
2. The folder's **Properties** will appear. Initially, the **Sharing** tab will indicate that the folder is **Not Shared**.

   Click the **Advanced Sharing** button.



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

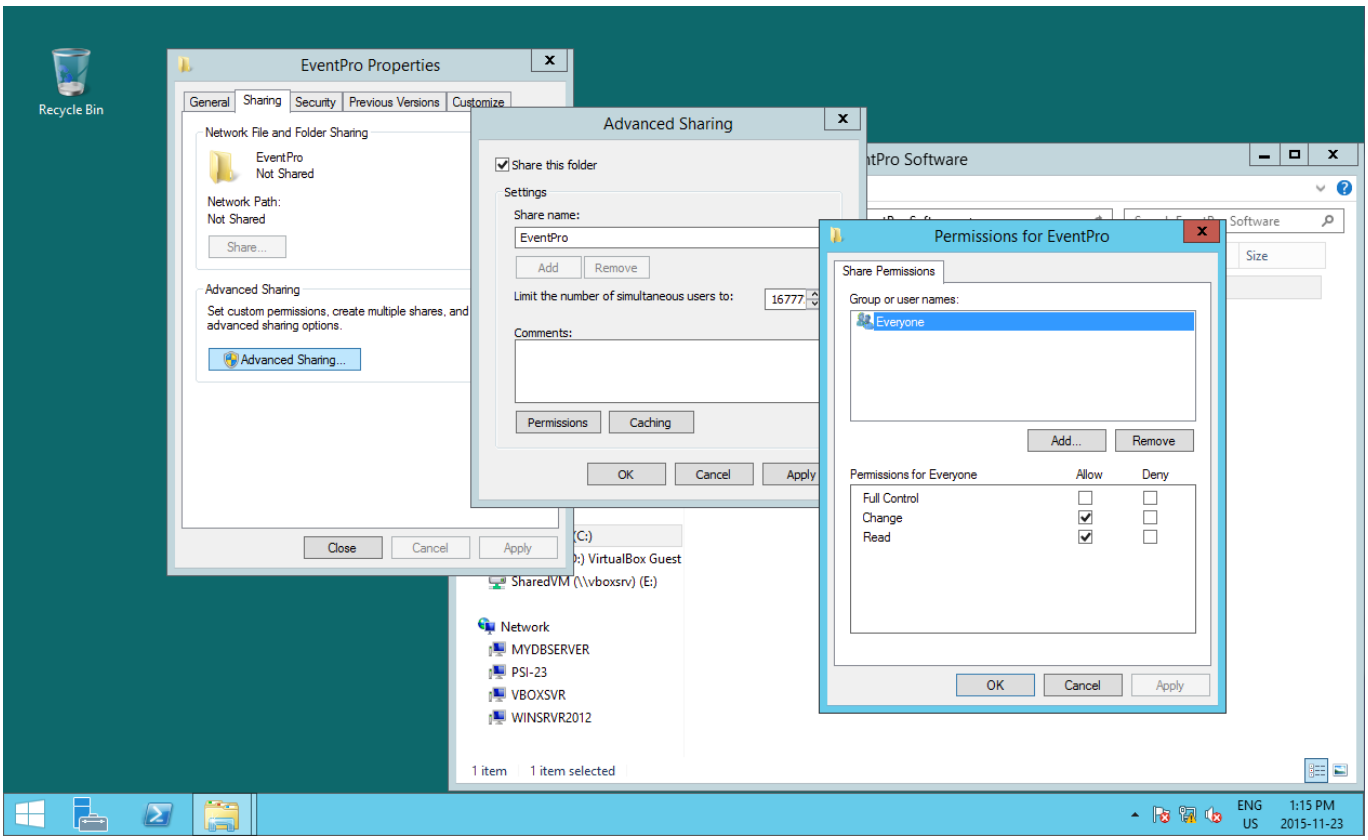
   You can leave the Share Name as EventPro.



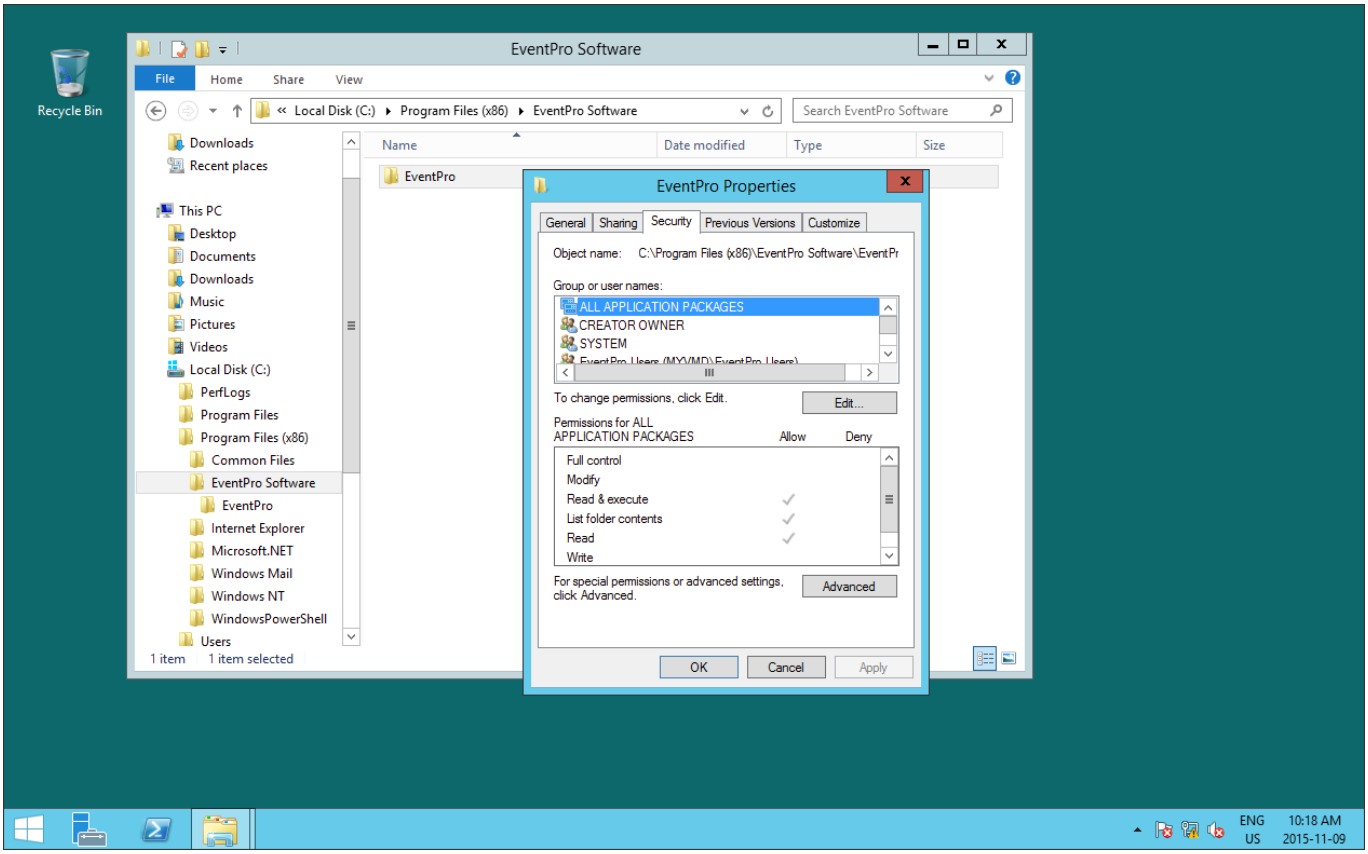
4. Click the **Permissions** button to view the **Share Permissions** for the EventPro folder.

   Users installing EventPro to their workstations require **Read** and **Change** permissions to this folder.

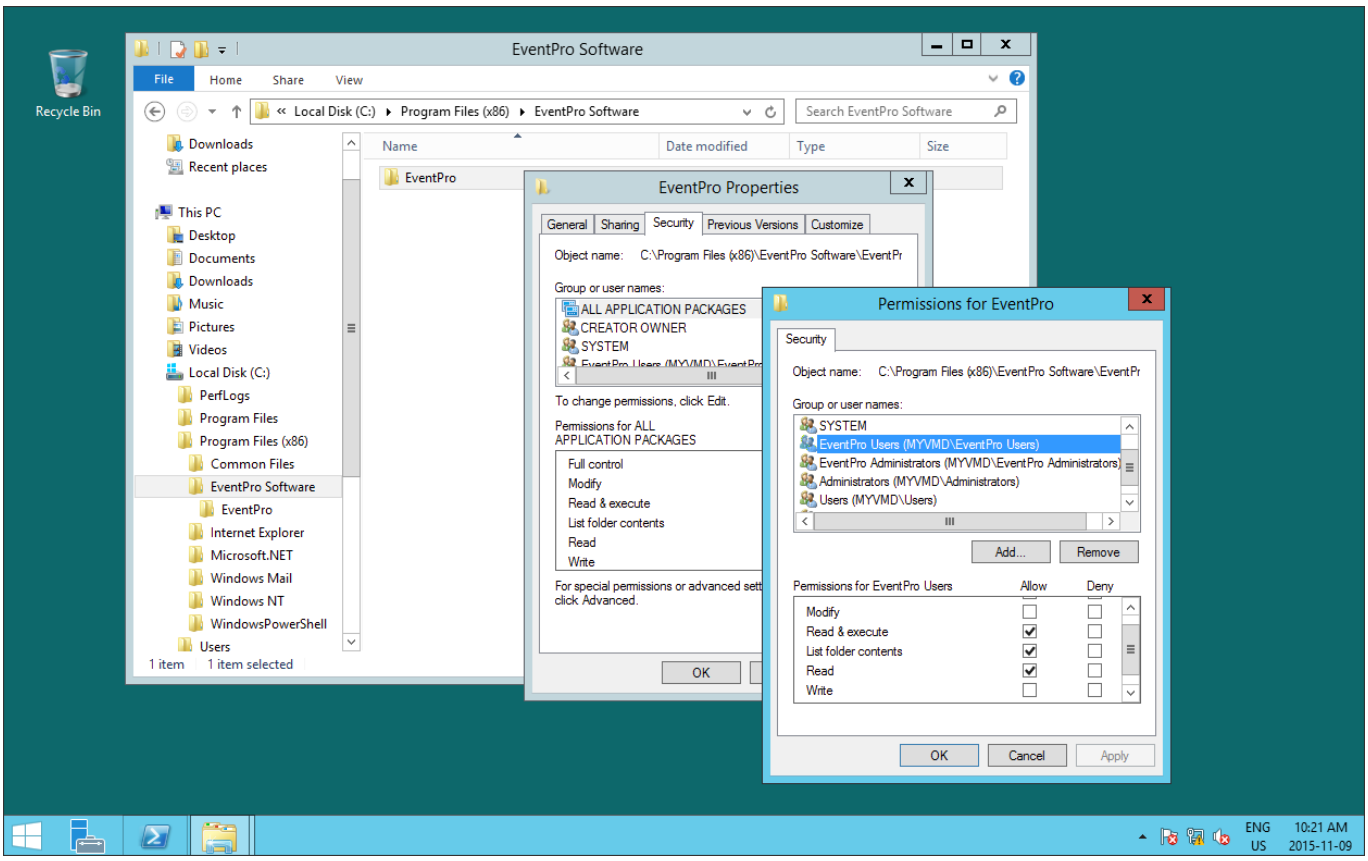
   Click **OK**, and **OK** again to return to the **EventPro folder Properties**.



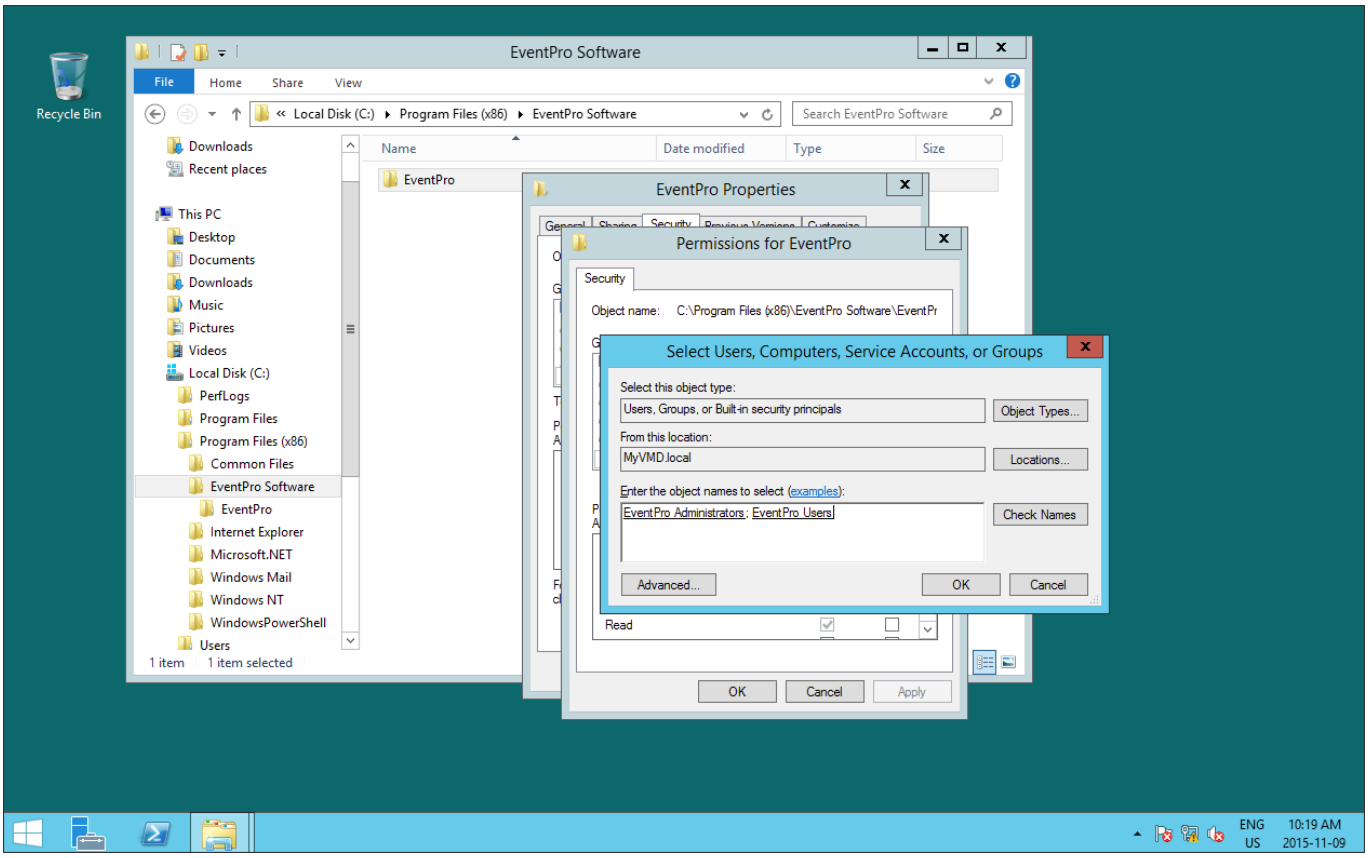
5. Go to the **Security** tab in **EventPro Properties**, and click the **Edit** button to open the **Permissions for EventPro** window.



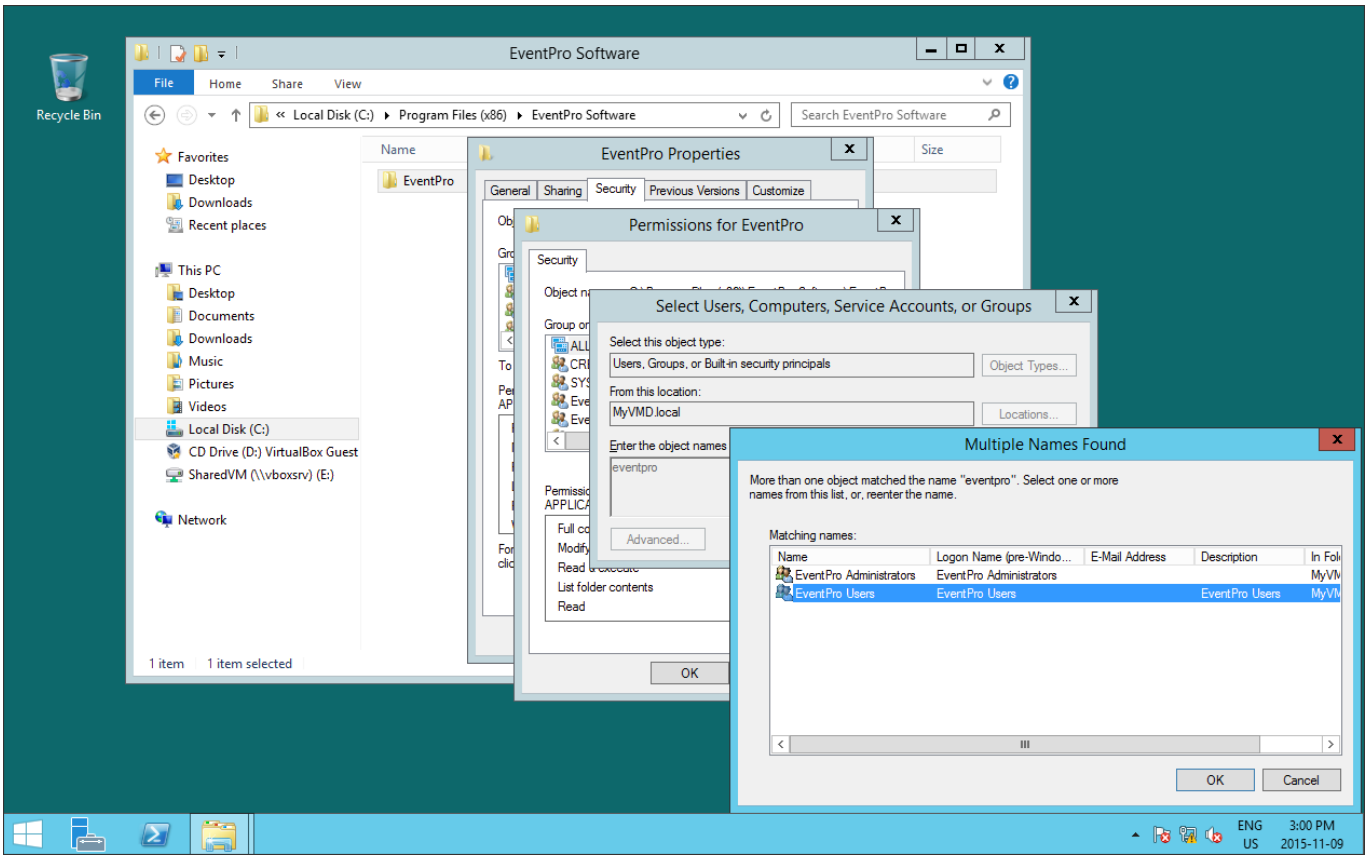
6. In **Permissions for EventPro**, click the **Add** button to open the **Select Users, Computers, Service Accounts, or Groups** window.



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).



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**.

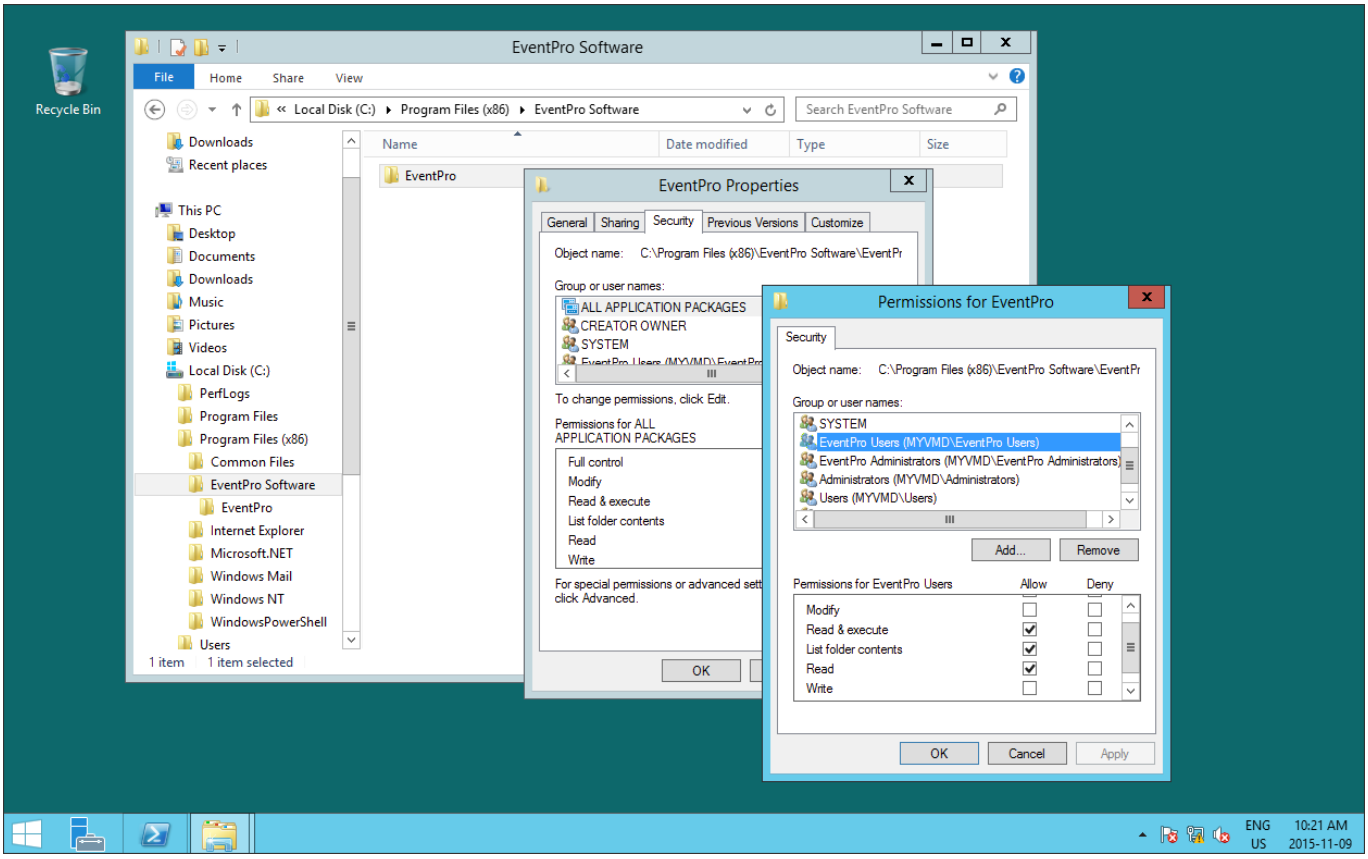
Click **OK** in the **Select Users, Computers, Service Accounts, or Groups** window.

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.

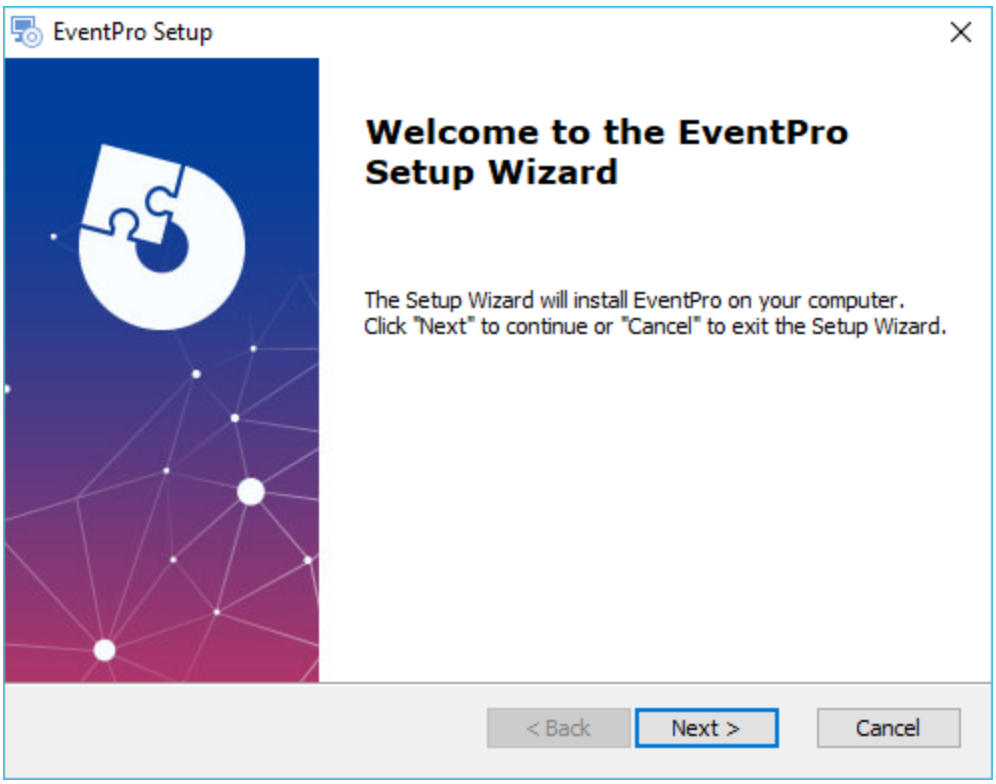


9. Now that you have shared the folder with the EventPro Users, you can proceed to [Install EventPro to Workstations](#) 147.

Install EventPro to Workstations

1. Login to the **Workstation** computer as the Administrator.
2. Navigate to the **EventPro.Win.Setup.exe** you [downloaded earlier](#) 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.

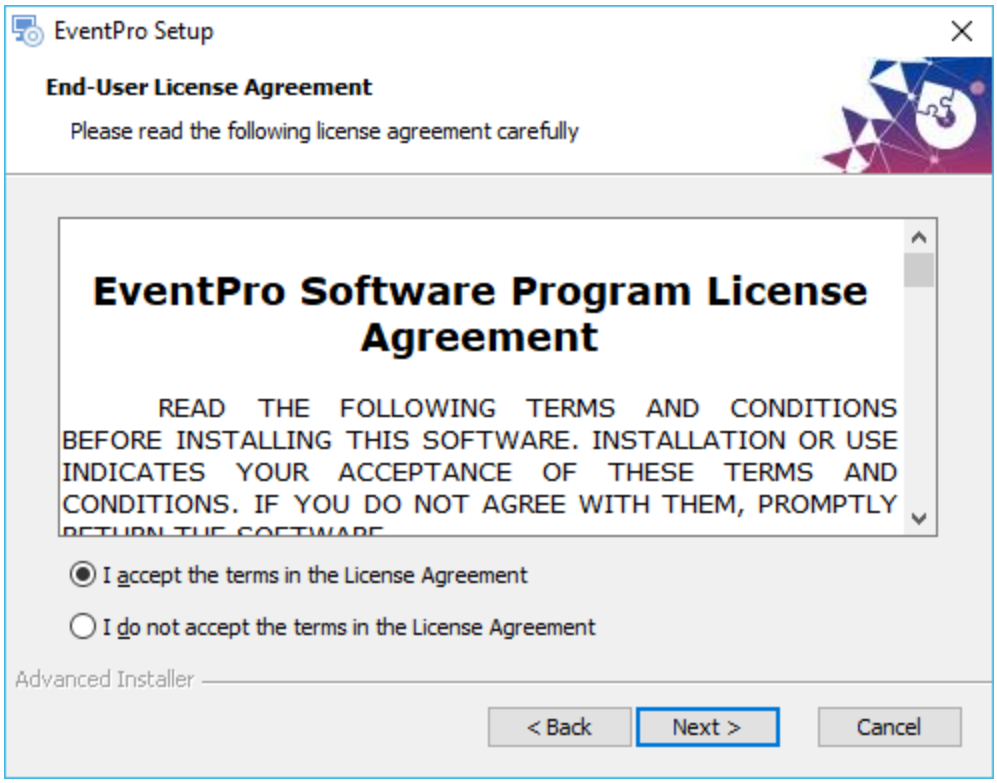


4. **End-User License Agreement**:

   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.

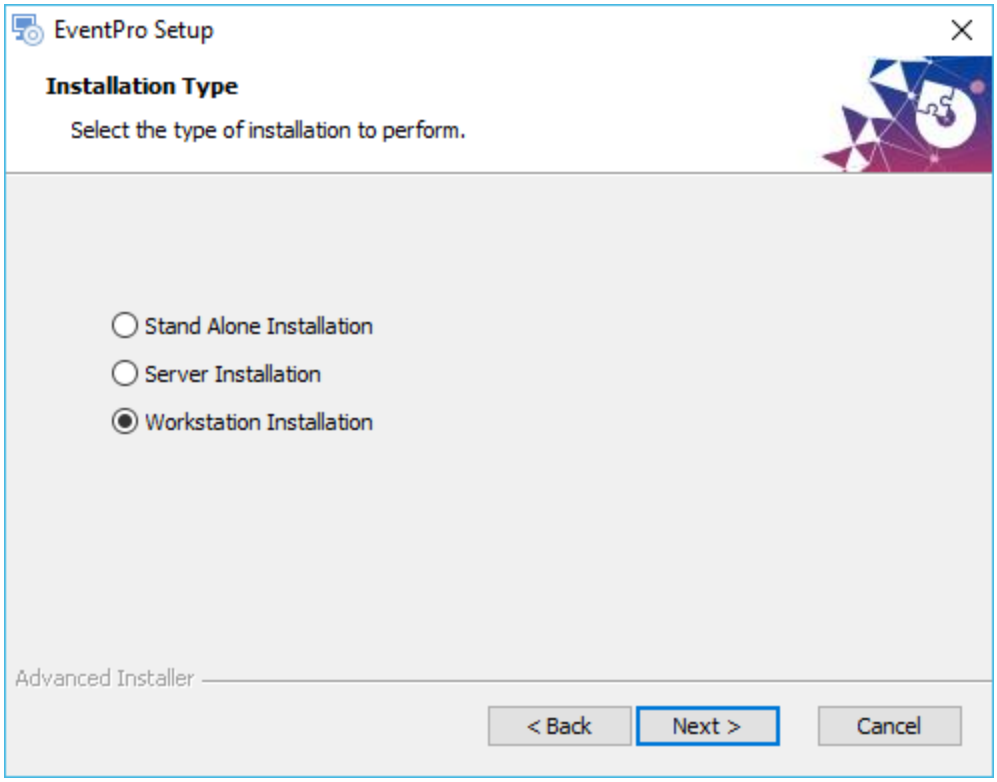
   c. Click **Next** to continue.



5. **Installation Type**:

a. This time, choose **Workstation Installation**.

b. Click **Next**.

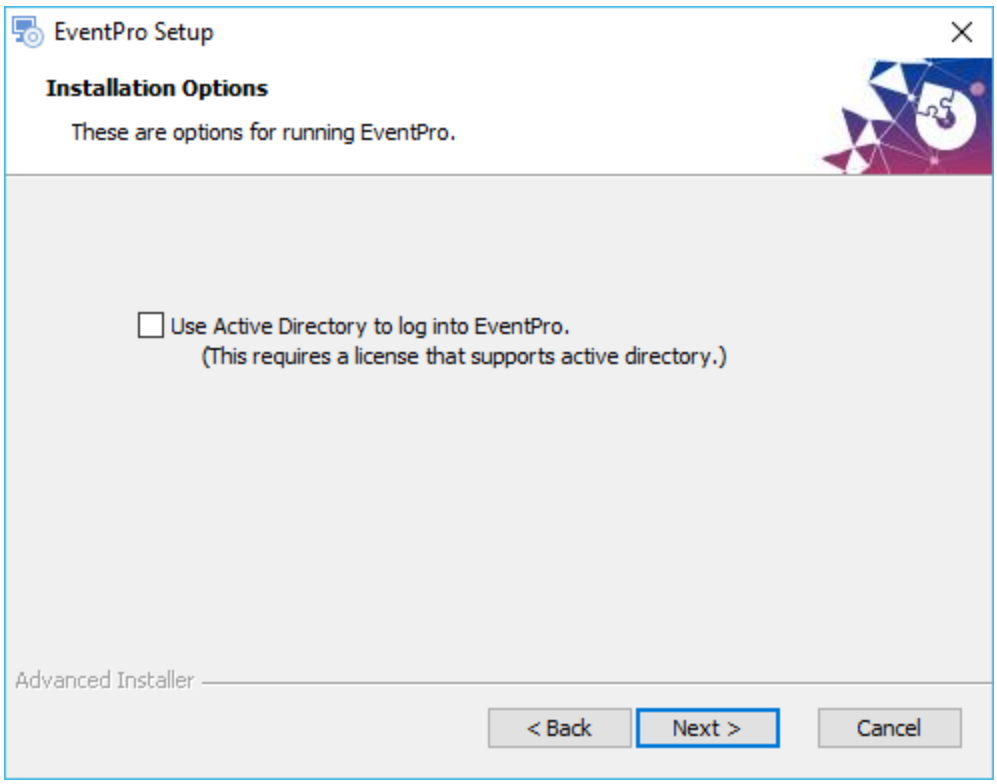


6. **Installation Options**:

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 ***Network Install: Active Directory Integration*** 162*.)*

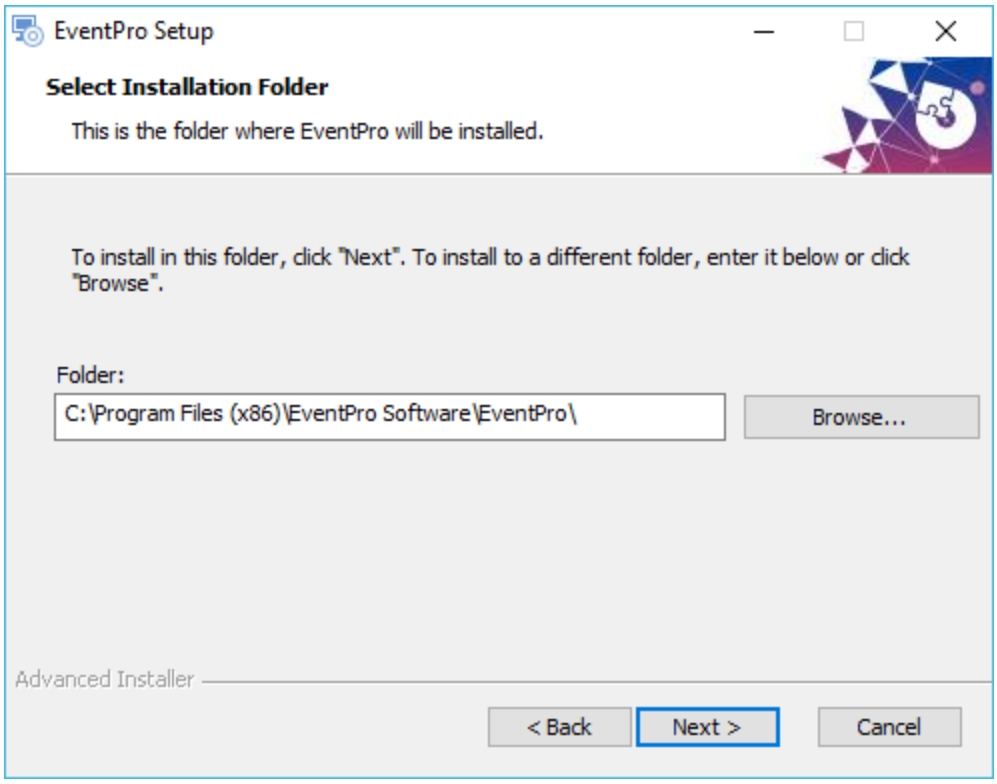
b. Click **Next**.



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**.



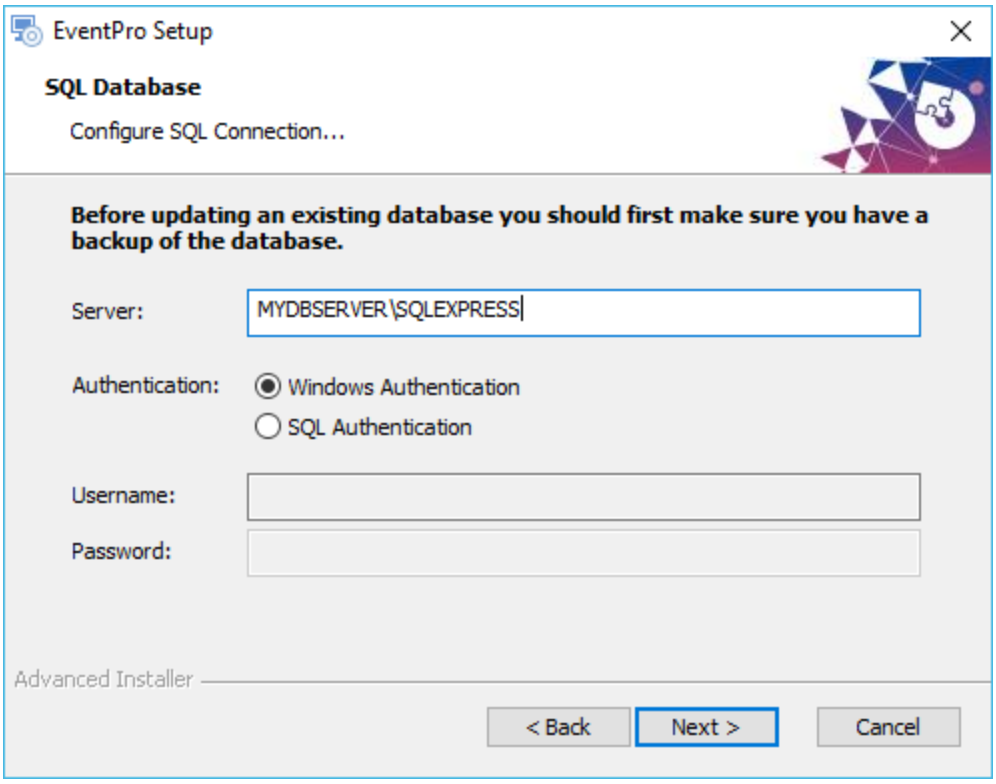
8. **SQL Database**:

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 **above** 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.

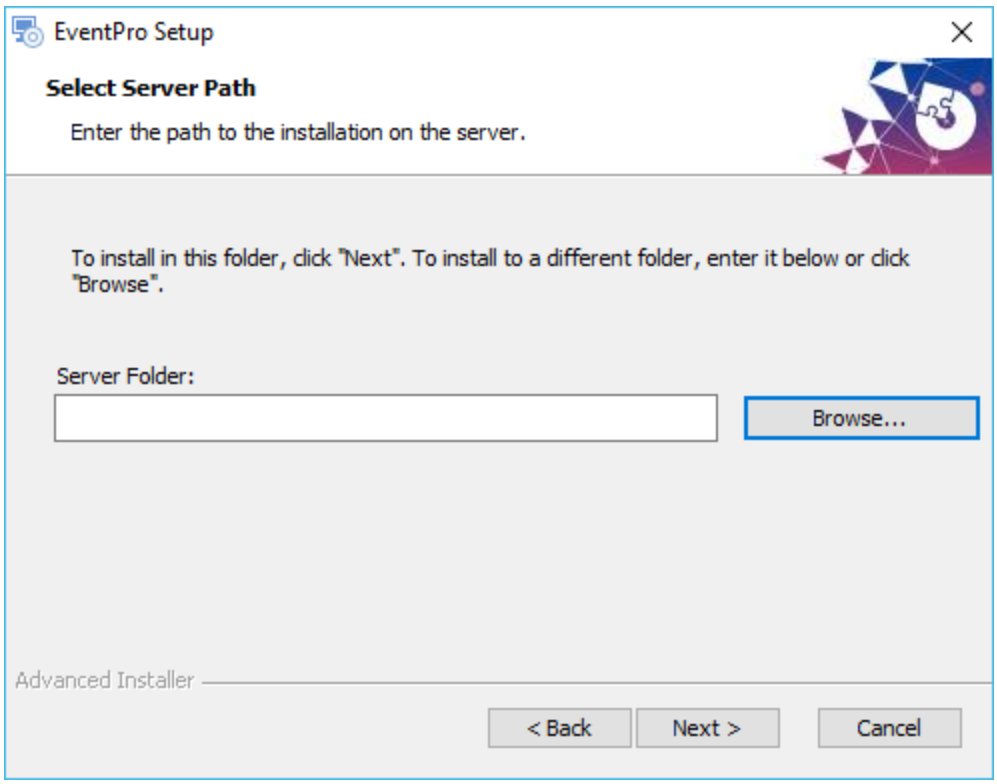


9. **Select Server Path**:

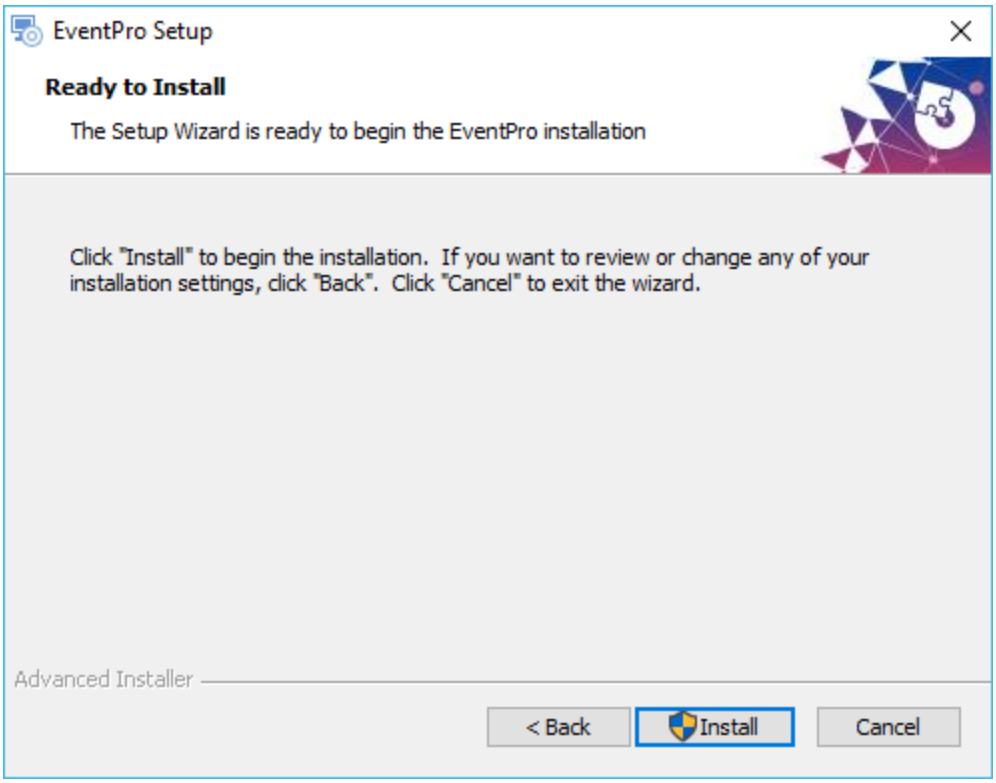
a. Enter the path to the installation on the server. This is the **Installation Folder** 138 you selected during the Server Installation, and **shared** with the EventPro User Group in the **previous step** 141.

b. Click the **Browse** button, locate that folder on the Network, and click **Select Folder**.

c. Click **Next**.

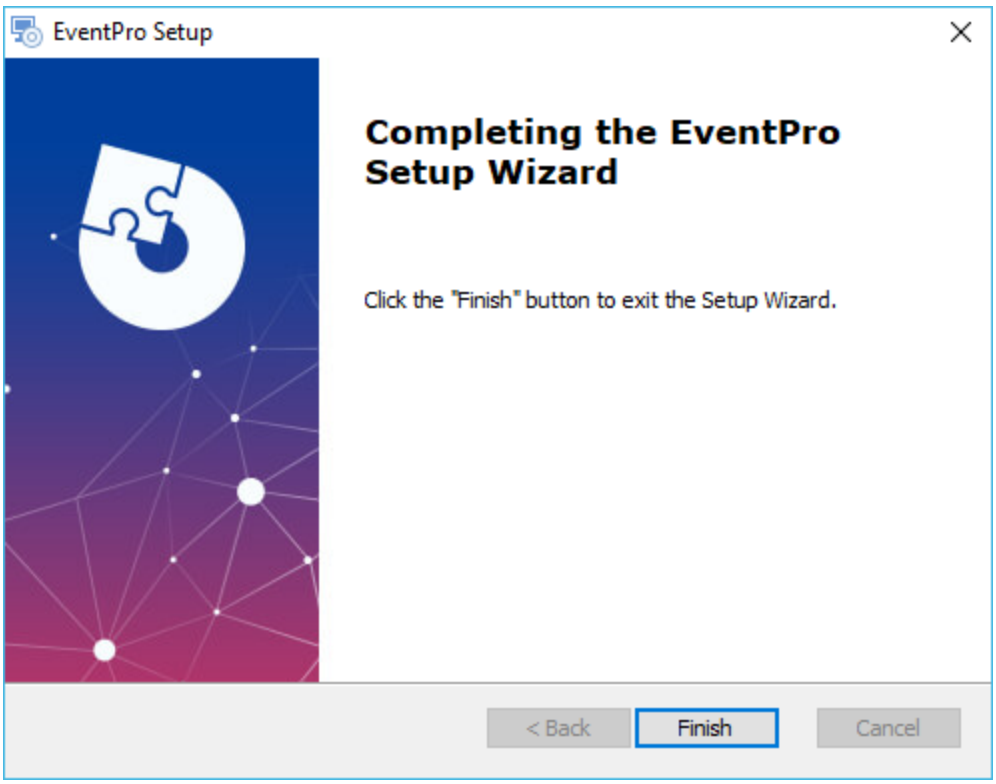


10. **Ready to Install**: Click **Install**.



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 **Admin First Login to EventPro** 153.

Admin First Login to EventPro

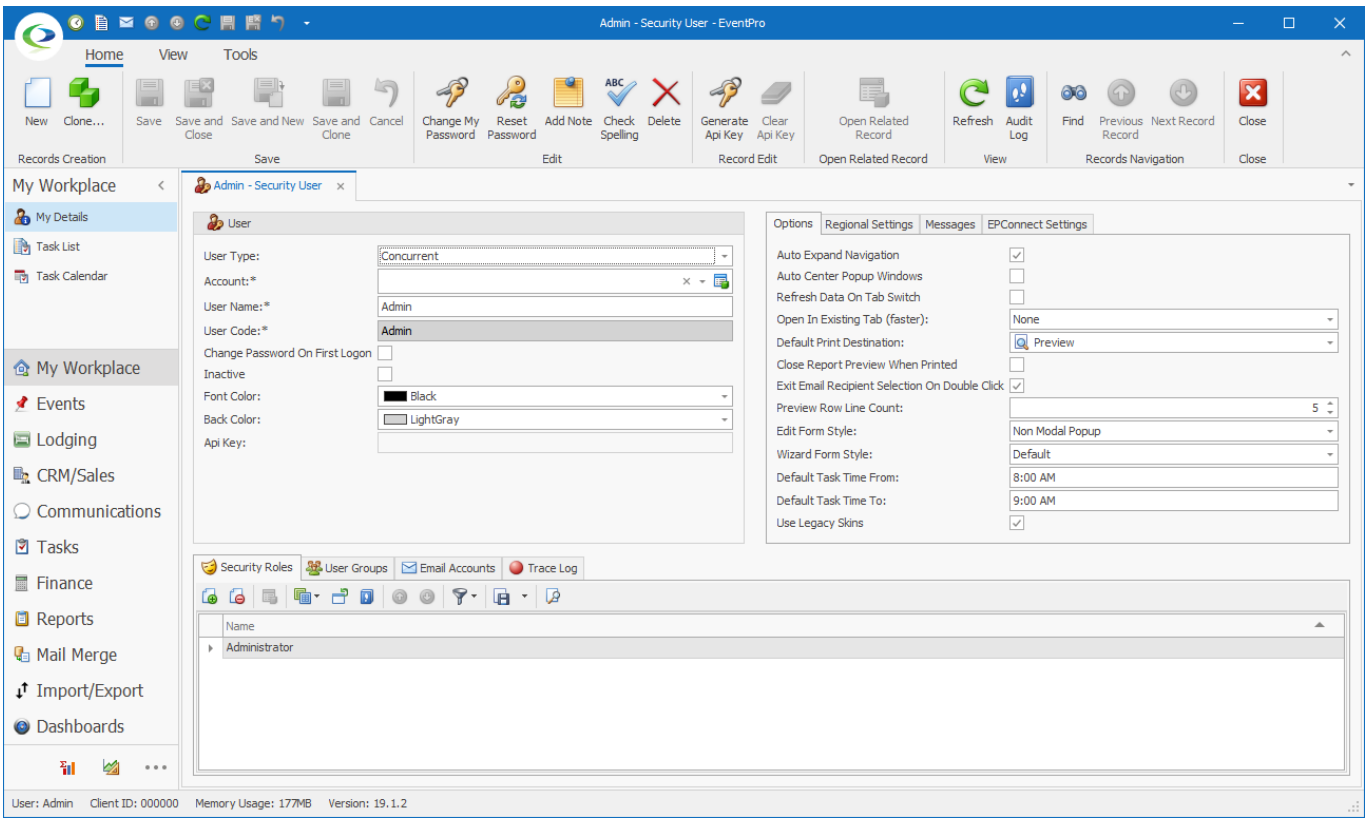
Once EventPro has been installed on your network, you can log in using the **default Administrator account** that has been pre-set in EventPro.

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.

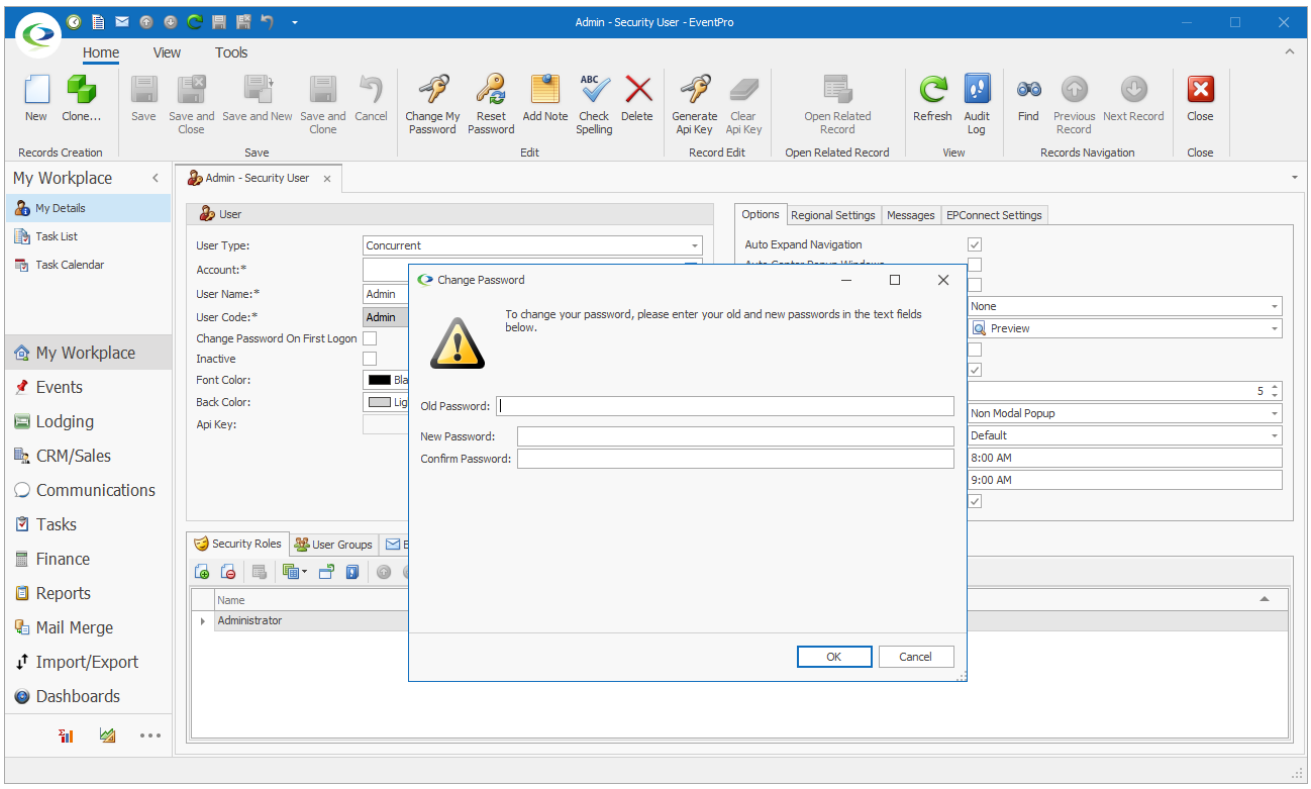


4. One of the first things you will want to do is change the **Password** for the Admin User, since it is the EventPro default that many people will know.

   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!



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. **Create Security Roles** 155

   b. **Create Users** 158

   c. **Create Internal Company & Contacts** 160

7. When you have finished the steps described above, you can allow other Users to log into EventPro. See **User First Login to EventPro** 160.

Create Security Roles

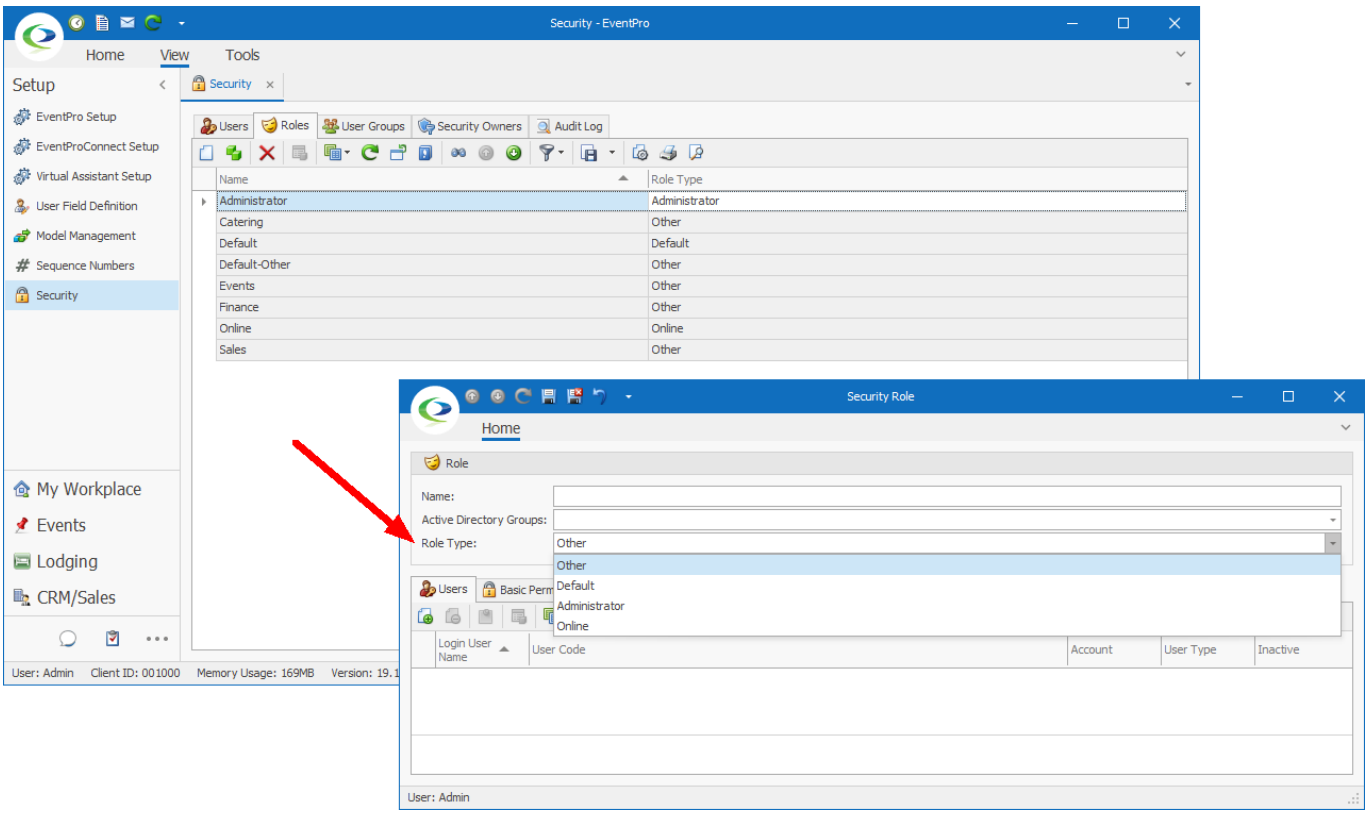
A **Security Role** allows you to define a standard set of permissions for each category of Users according to their ability to access data in EventPro.

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 **EventPro User Manual**.)

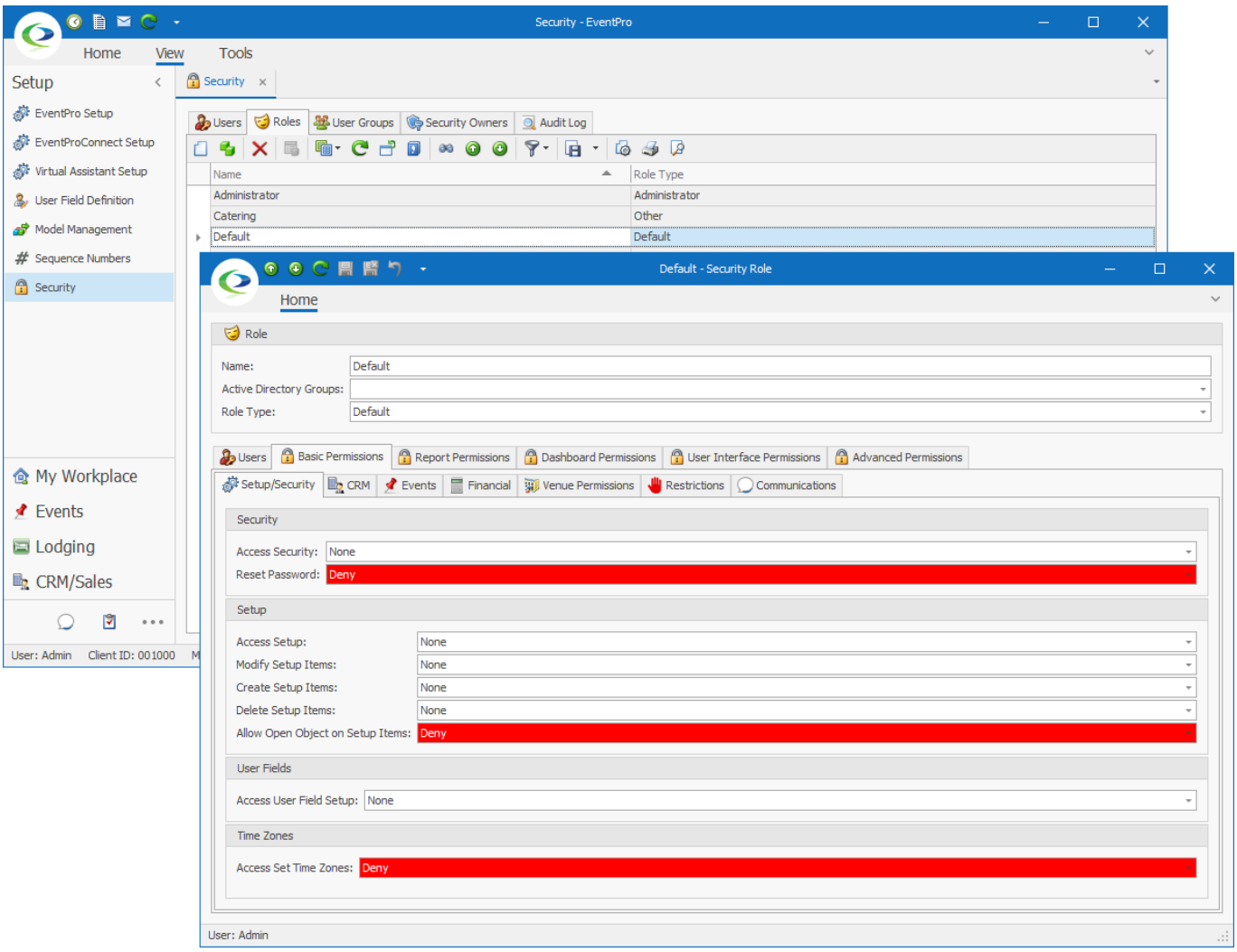


3. The **Administrator Security Role** is assigned to the default EventPro Admin User. Typically, very few Users should get this Security Role, as it allows full access to the program.

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**.)

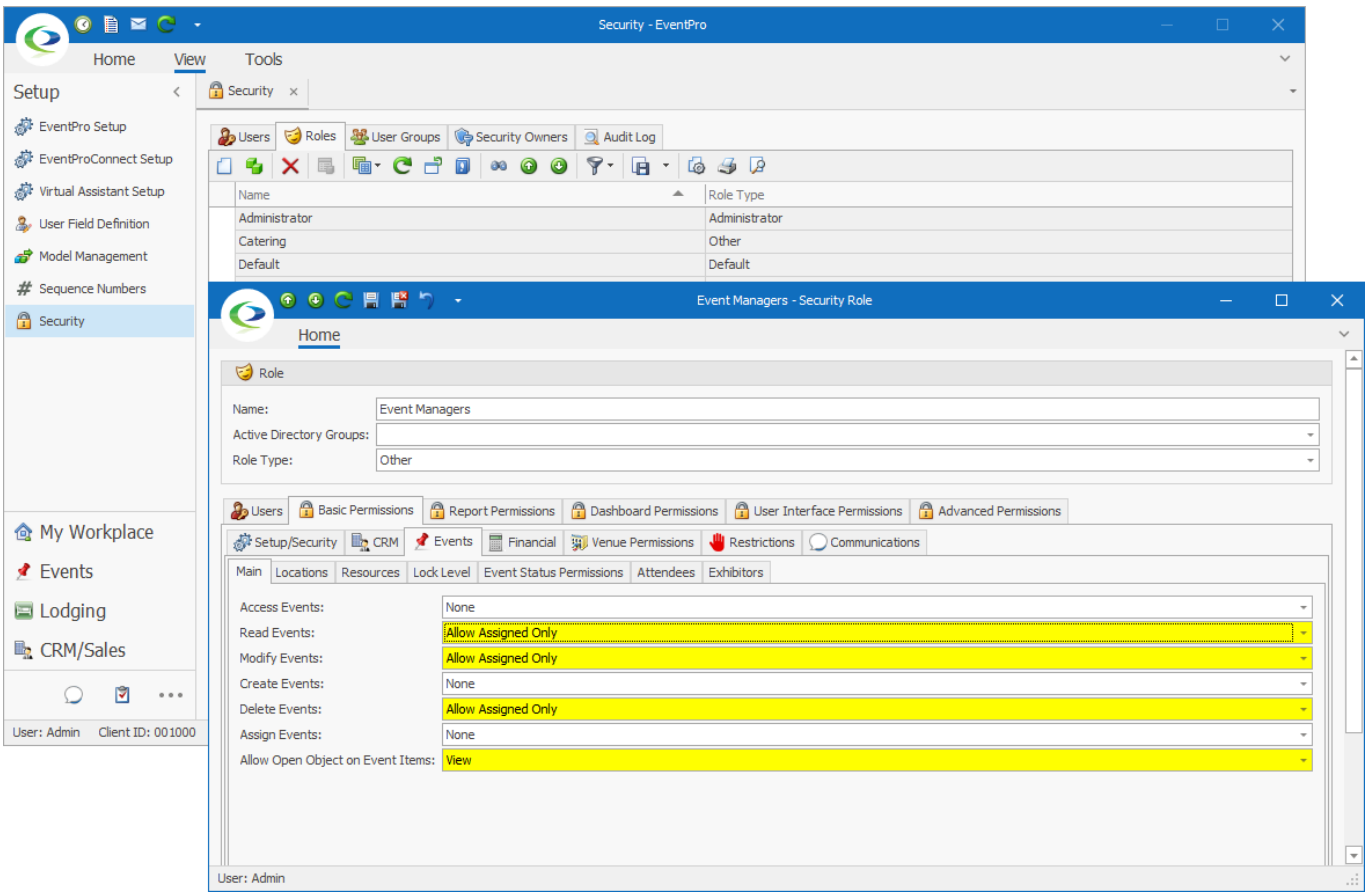


5. If one Default Security Role for all Users is not sufficient, and you want to further compartmentalize User security permissions in EventPro - for example, differentiating rights based on department or management hierarchy - you need to create **additional EventPro Security Roles** of the "**Other**"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

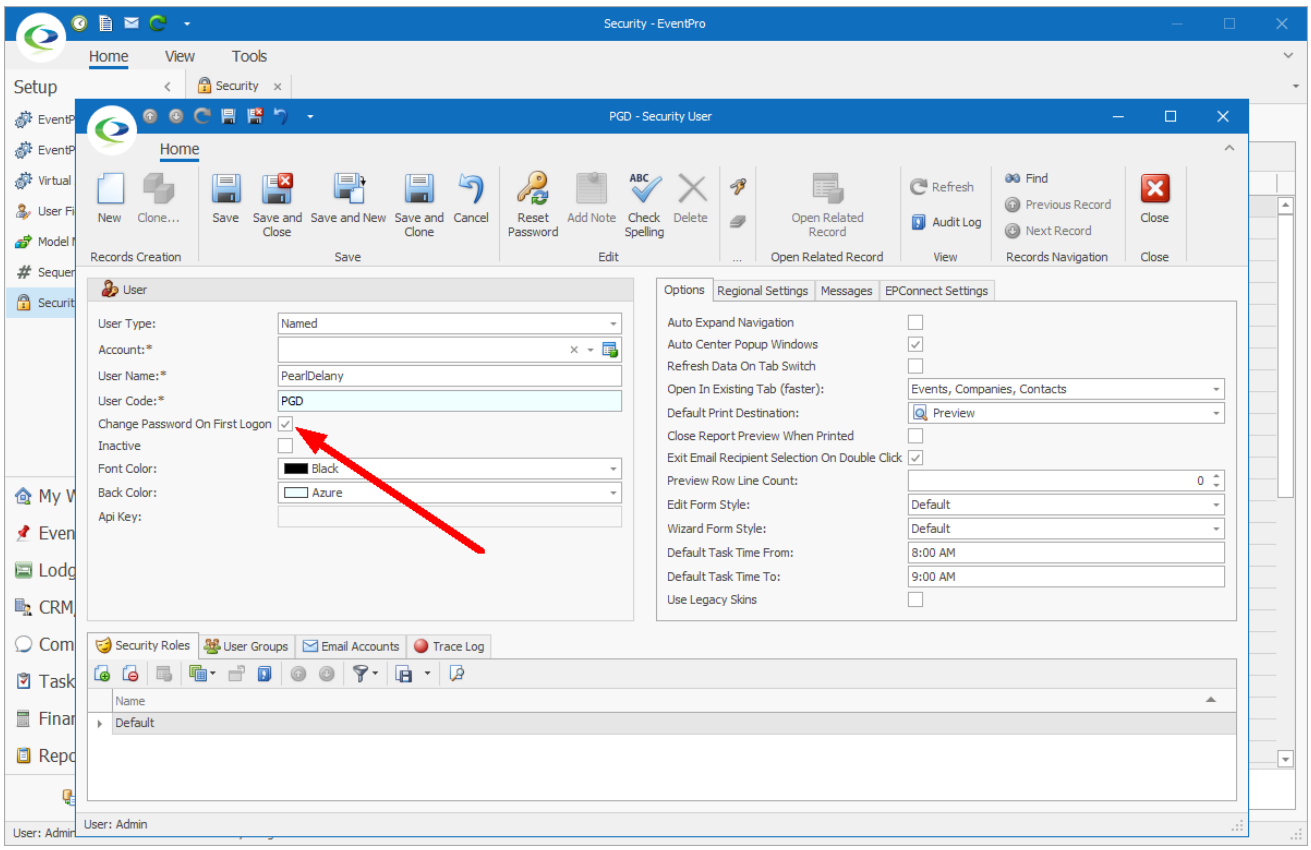


6. When you are done editing and/or creating Security Roles, you can proceed to **Create Users** 158.

Create Users

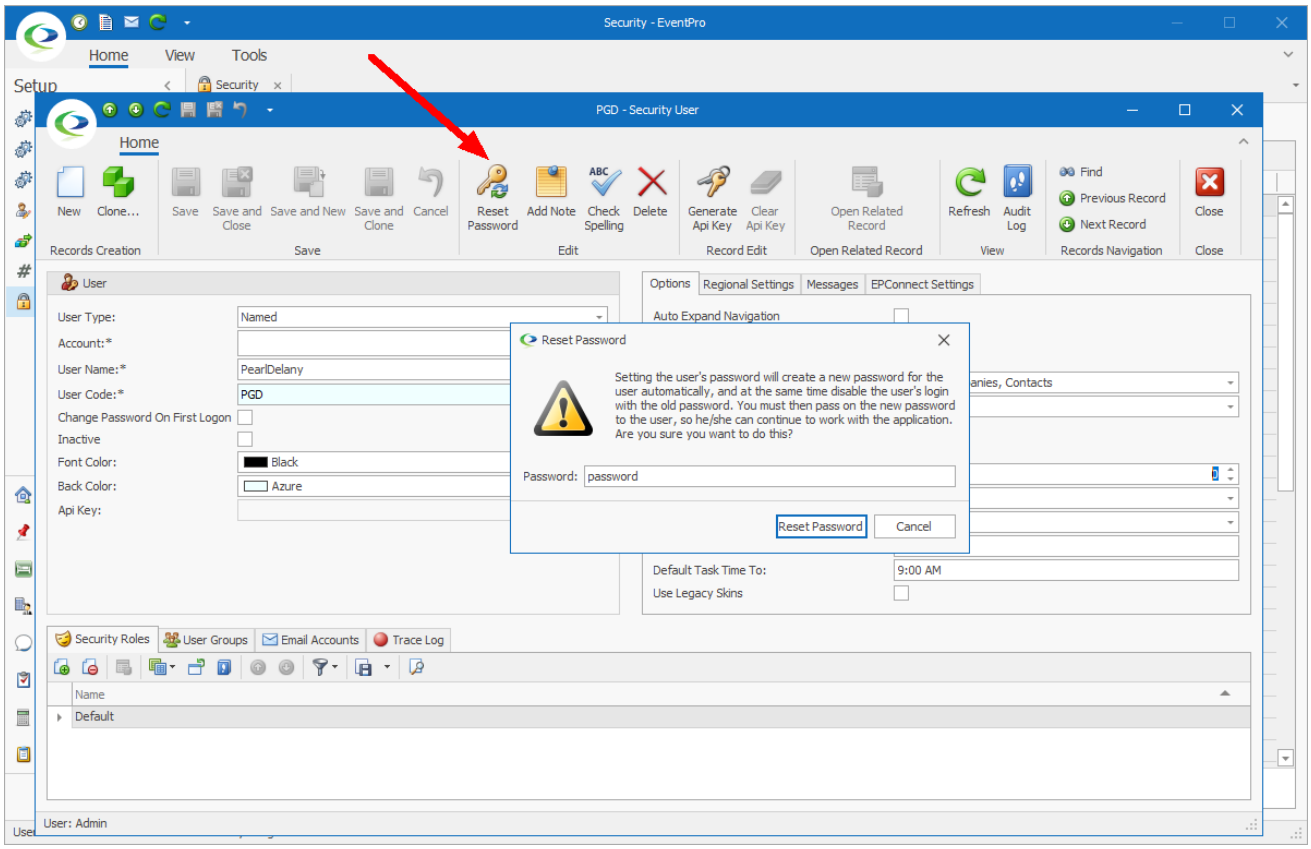
1. You can now create the Security Users to match the staff members that will be using EventPro. Review the instructions under **Security Setup > Users > Create New User** in the **EventPro User Manual**.
2. Make sure that you assign each User the correct **Security Role**, particularly if you created 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.



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.



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.

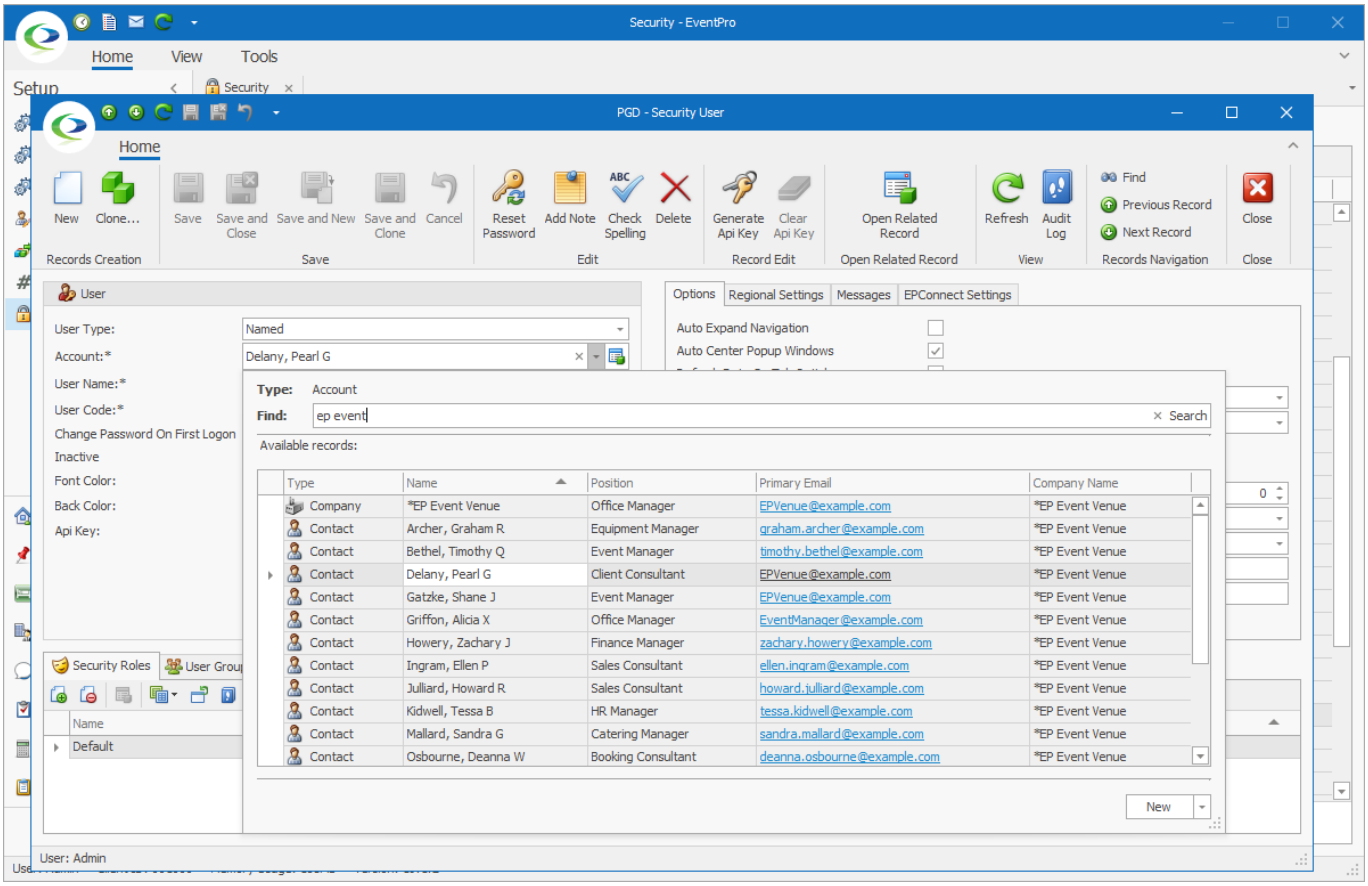
2. You can create your internal Contacts and Company, if applicable, by following these instructions:

   a. **Company/Contact Management (CRM) > Add New Company (Company Edit Form)** in the [EventPro User Manual](#).

   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.



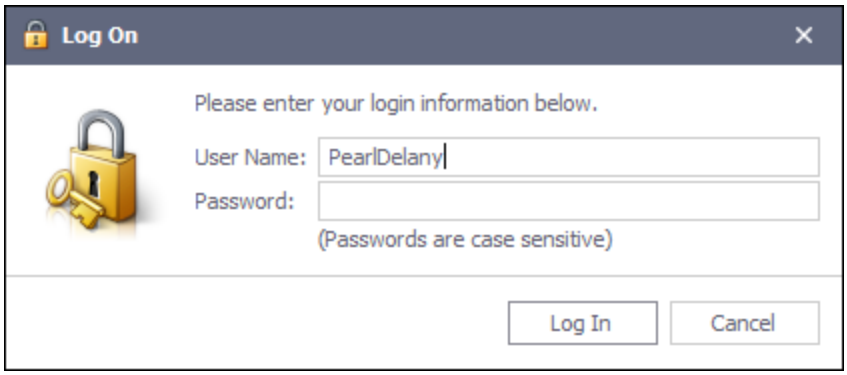
5. When you are done assigning Accounts to Users, you can proceed to [First User Login to EventPro](#) 160.

User First Login to EventPro

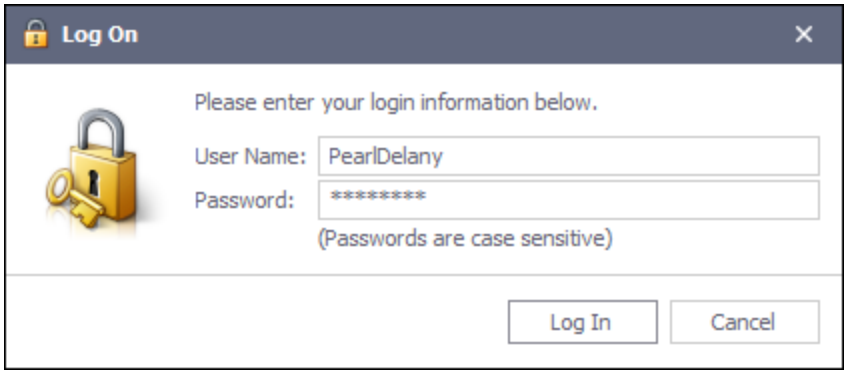
1. When you are done creating Users, you can distribute **User Names** (and default **Passwords**, if applicable) to the relevant members of your organization, and ask them to run EventPro on their workstations.

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.

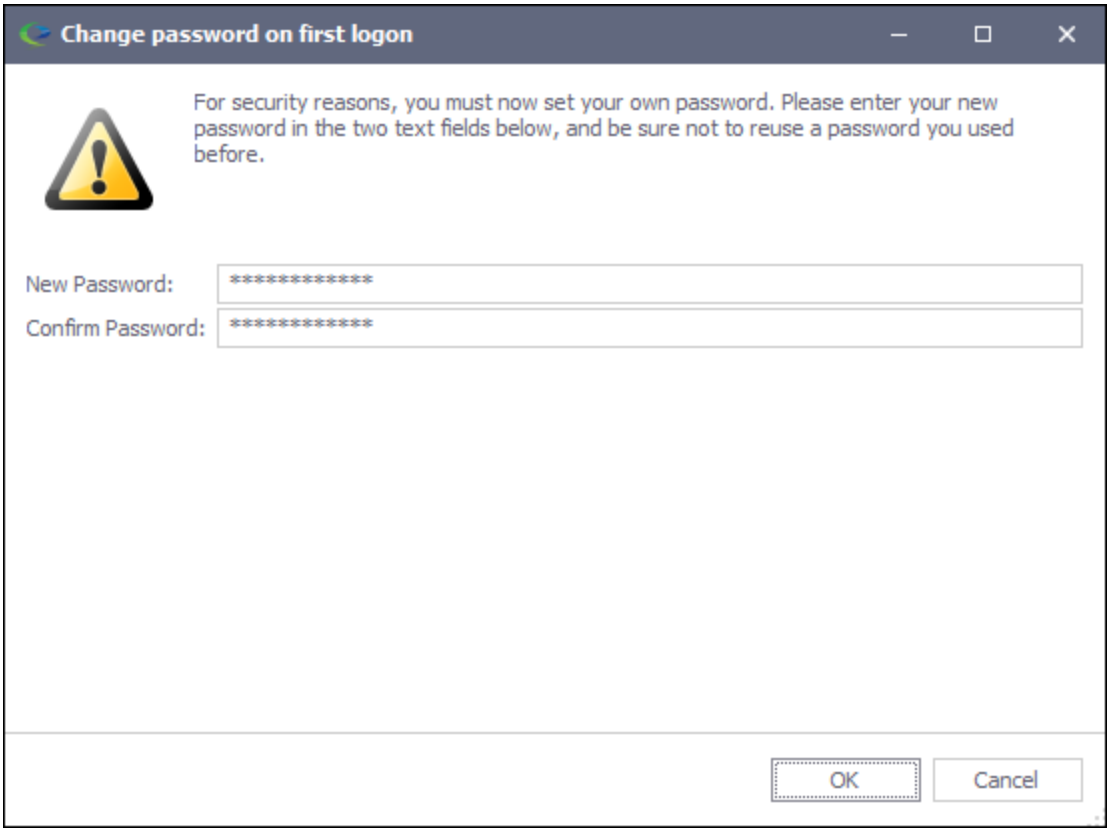


b. If you **Reset** the Password on the User's profile, the User can enter the User Name and the temporary password that you set on the User's profile.



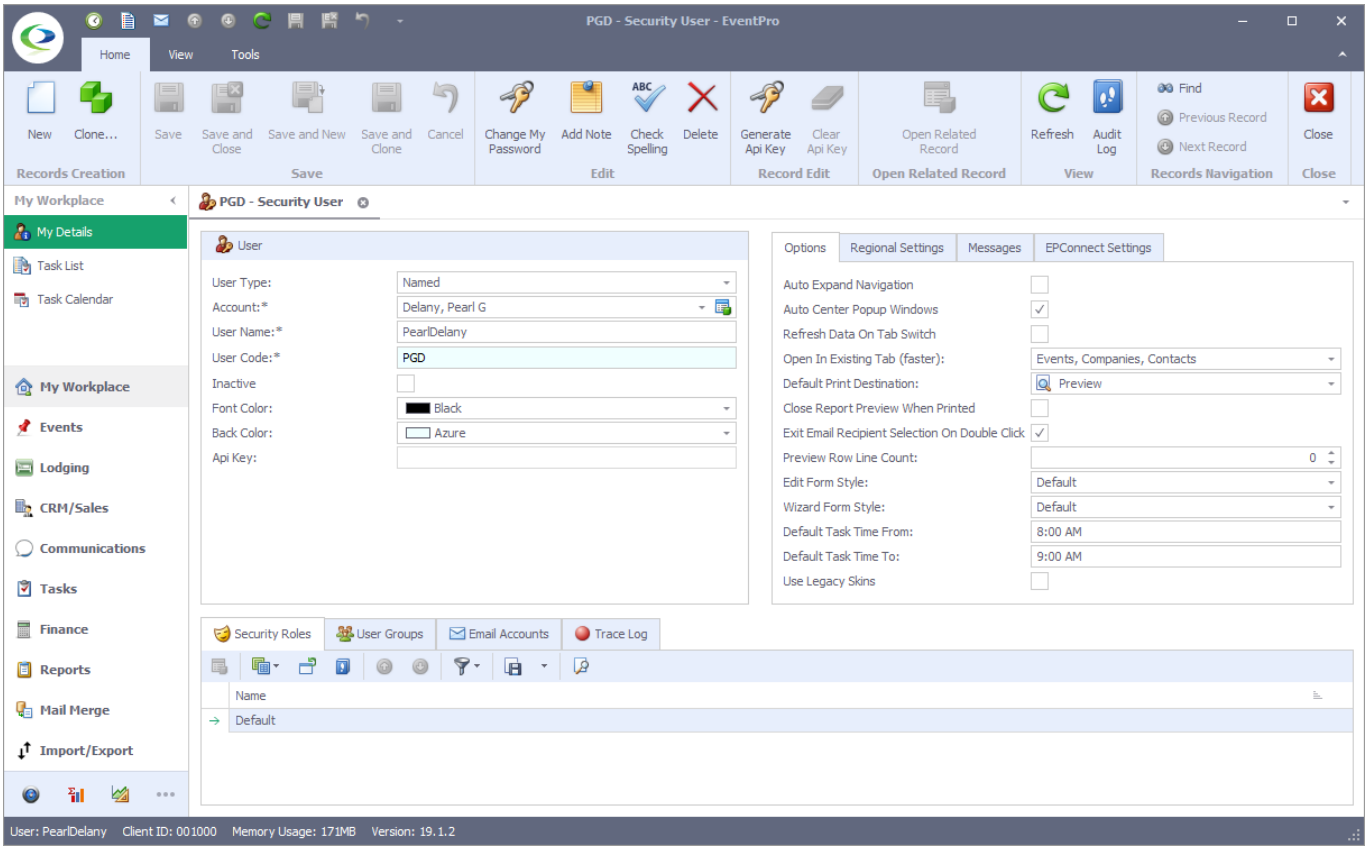
3. Either way, the **Change Password on First Logon** dialog appears.

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



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.



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 **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. **Create Active Directory Groups for Integration** 163
  2. **Install SQL Server** 175
  3. **Configure SQL Server** 179
  4. **Download EventPro Components** 182
  5. **Install Data Updater** 183
  6. **Create New Client Database** 185

7. **Restore Existing Database over New** 188
8. **Give Database Rights to Users** 195
9. **Install EventPro to Server** 206
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

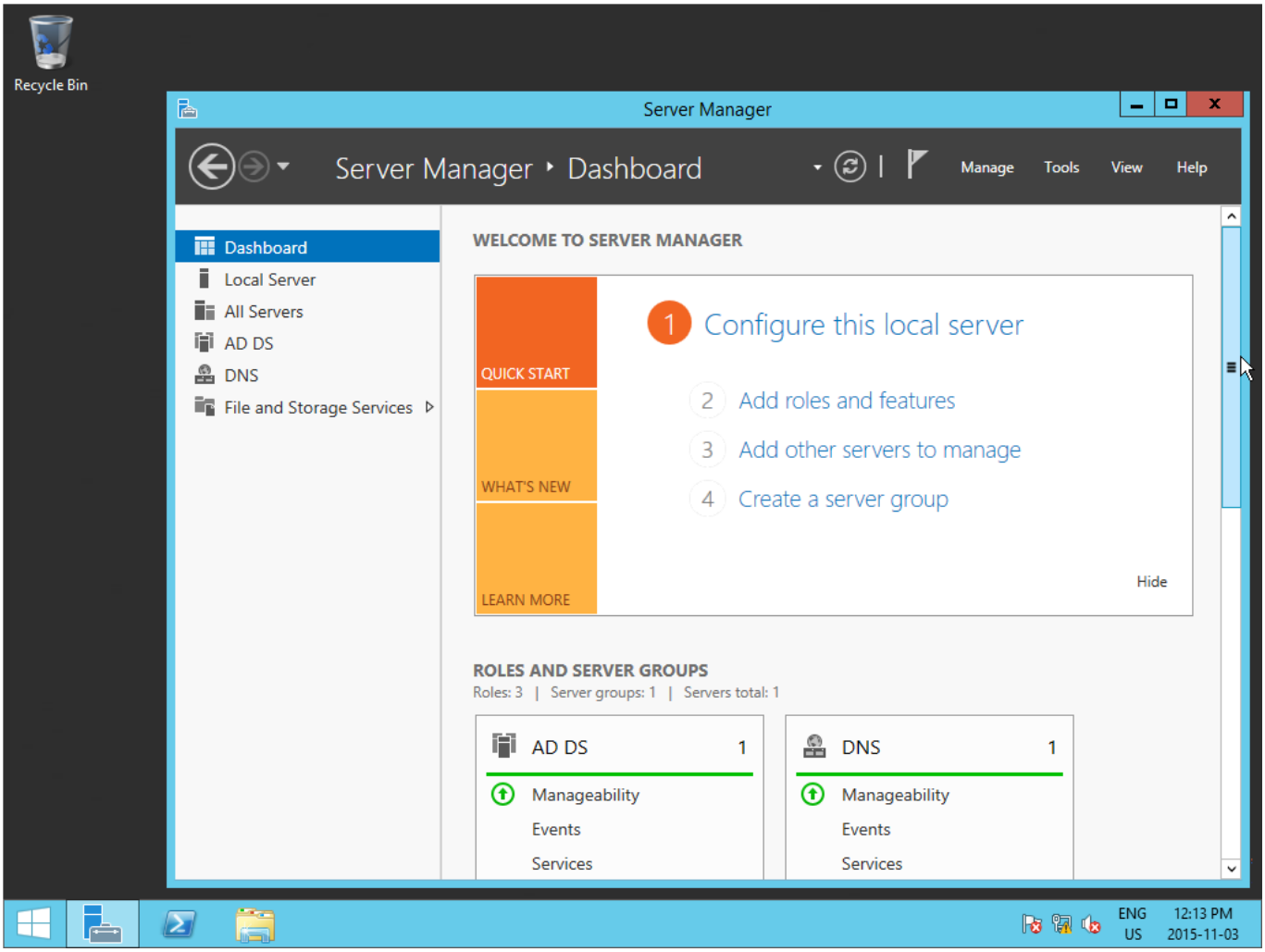
- In this sample installation process, we follow a particular sequence of steps to prepare your EventPro database. We run the EventPro Database Utility Wizard to create two databases: EventProMaster, a required database that controls program licensing, and a named database, typically called EventProData, 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 **Alternate Database Restore Process** 280.

Create Active Directory Groups for Integration

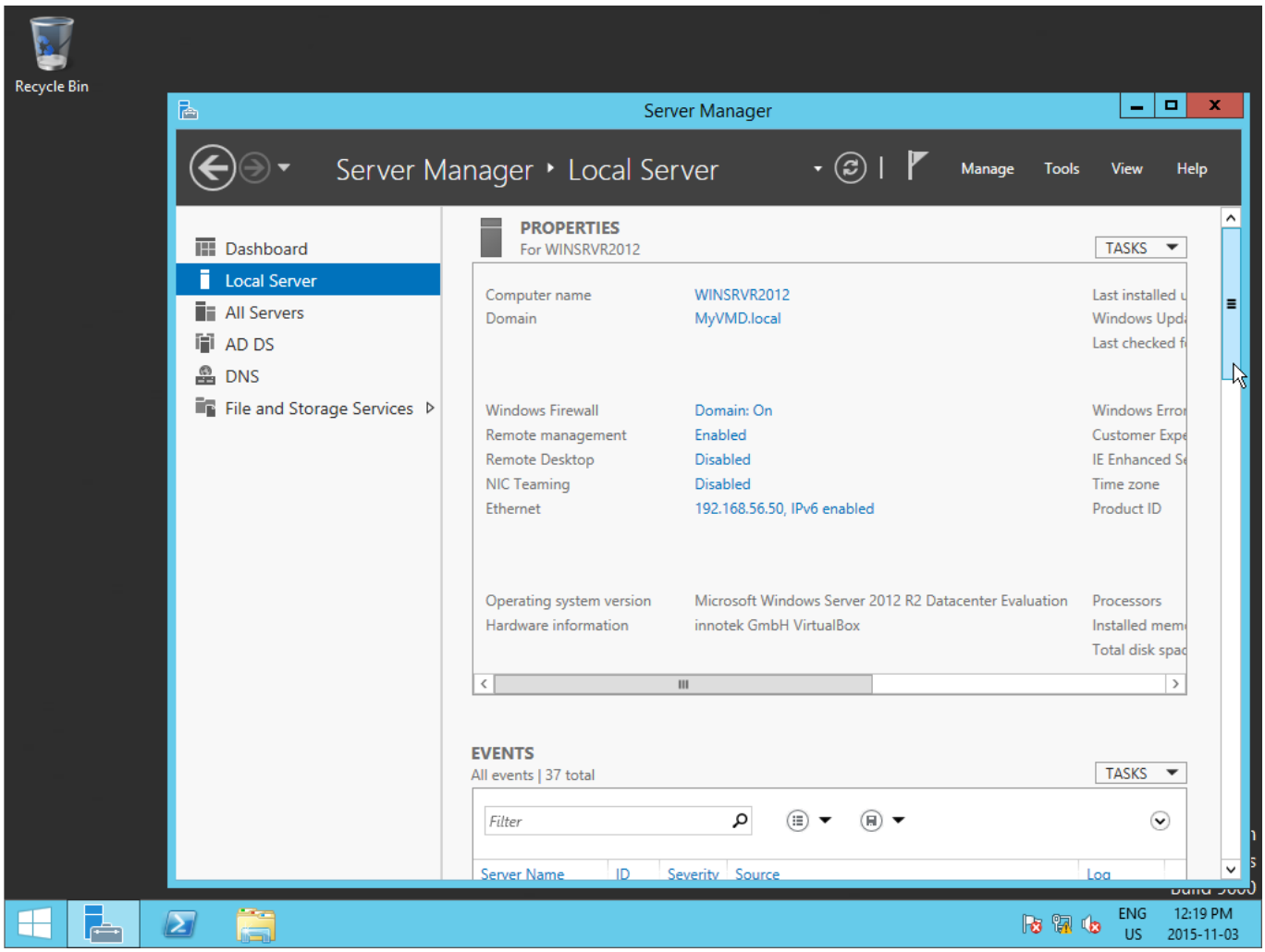
In **Active Directory**, you will create **Security Groups**.

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.

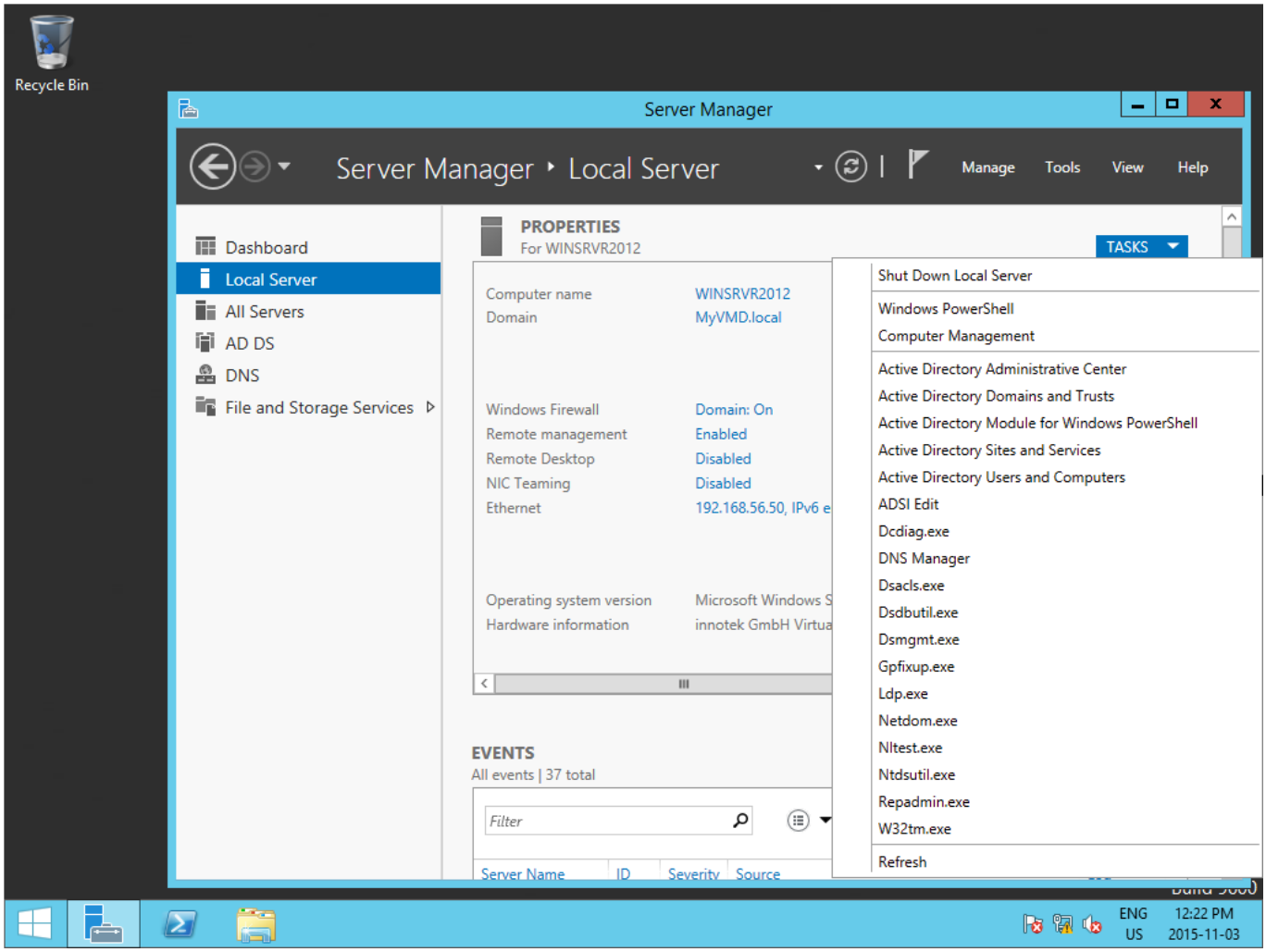
1. Log on to the **Domain Controller**, and go to **Server Manager**.



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

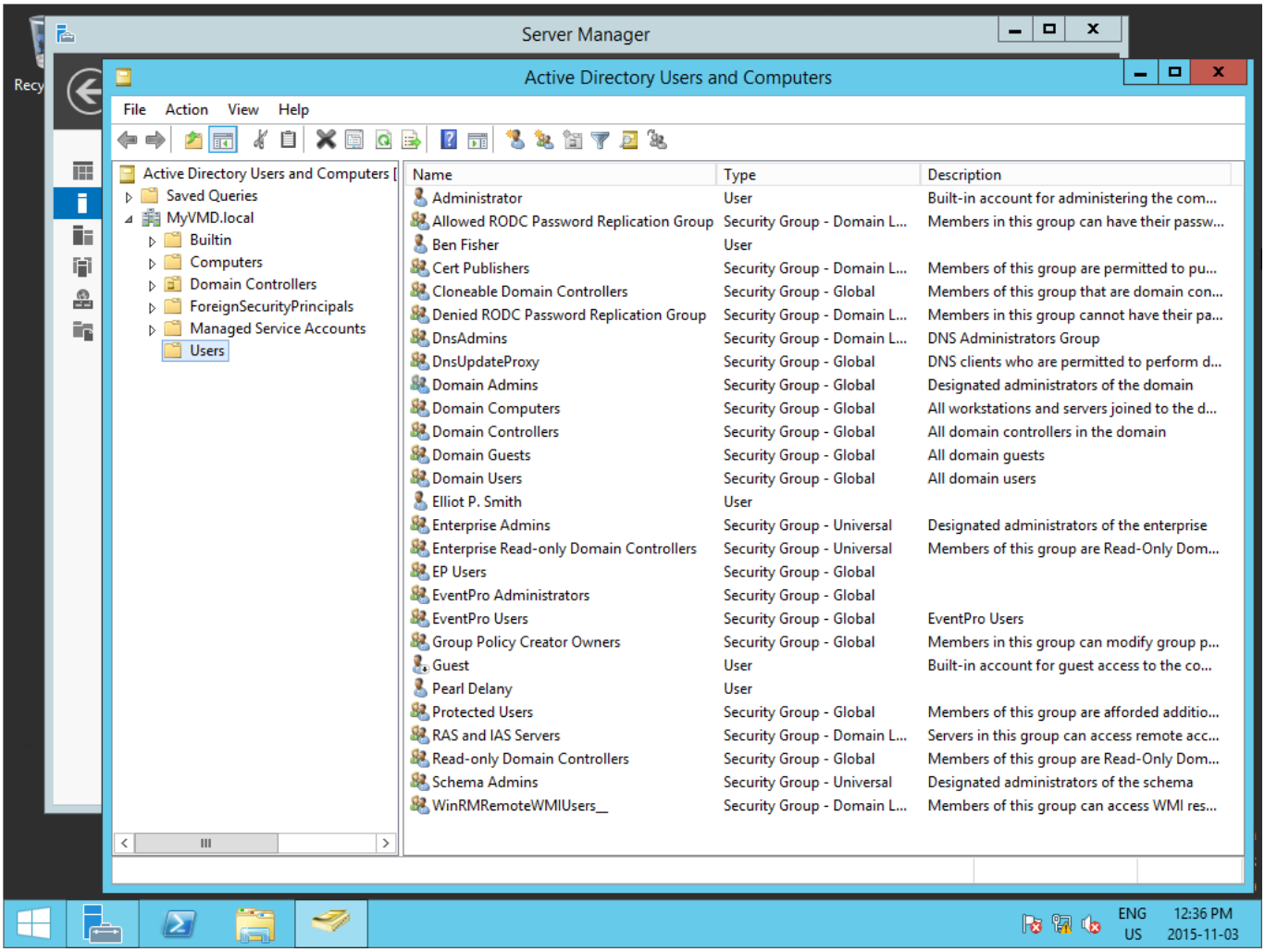


3. From the **Tasks** drop-down next to the server **PROPERTIES**, select **Active Directory Users and Computers**.



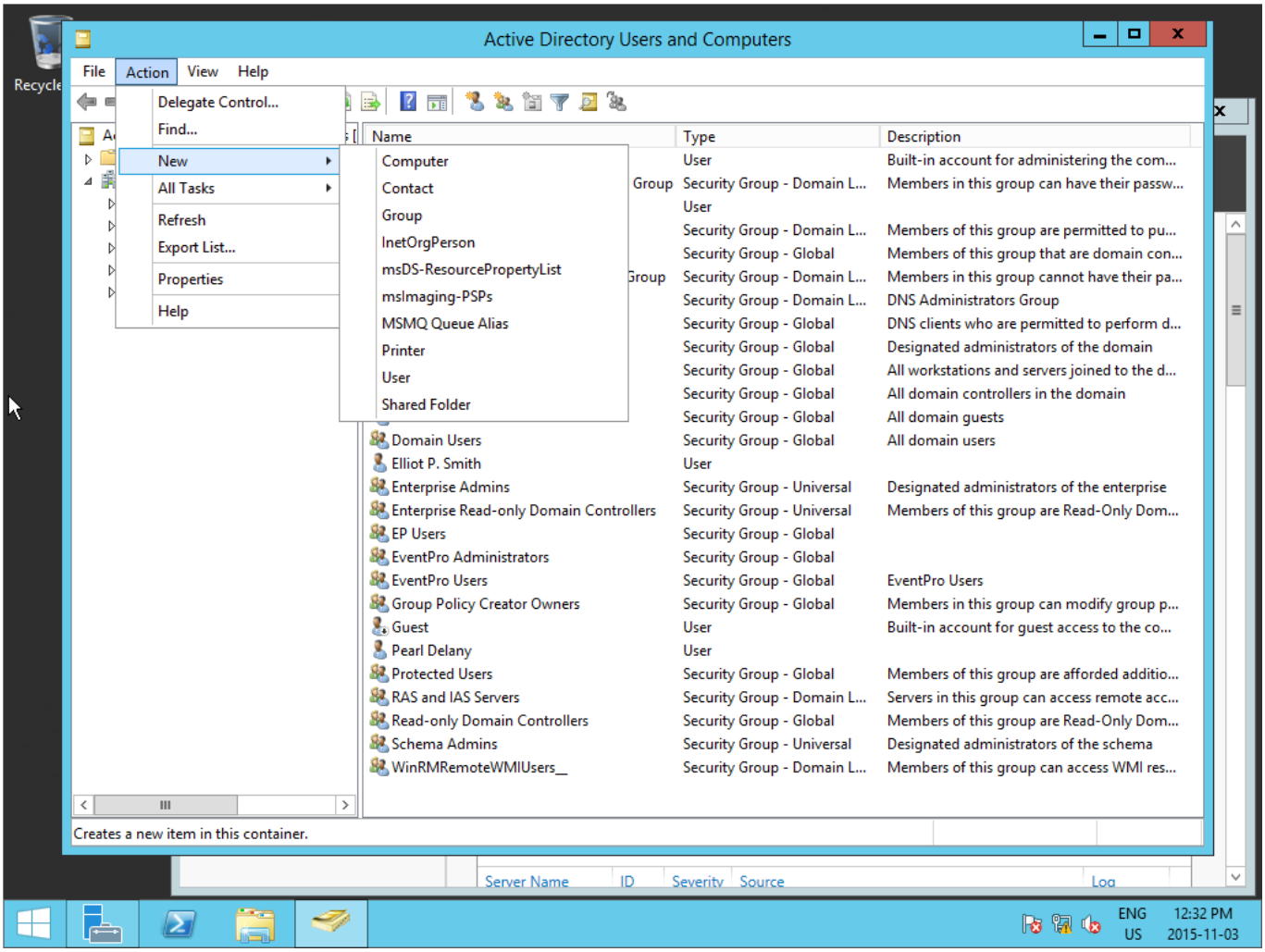
4. The **Active Directory Users and Computers** are displayed.

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



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.

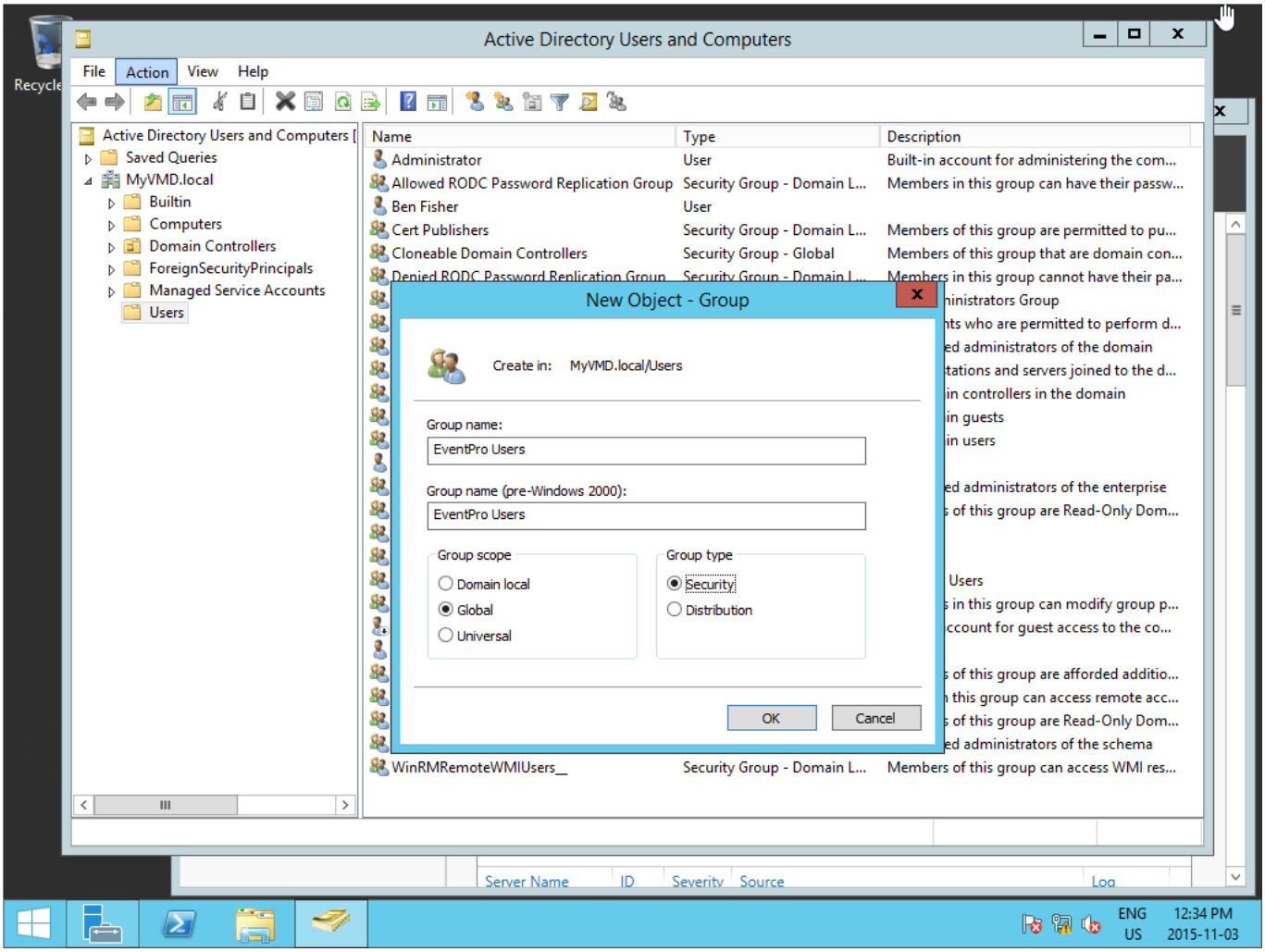


6. In our example, we name this group **EventPro Users**.

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

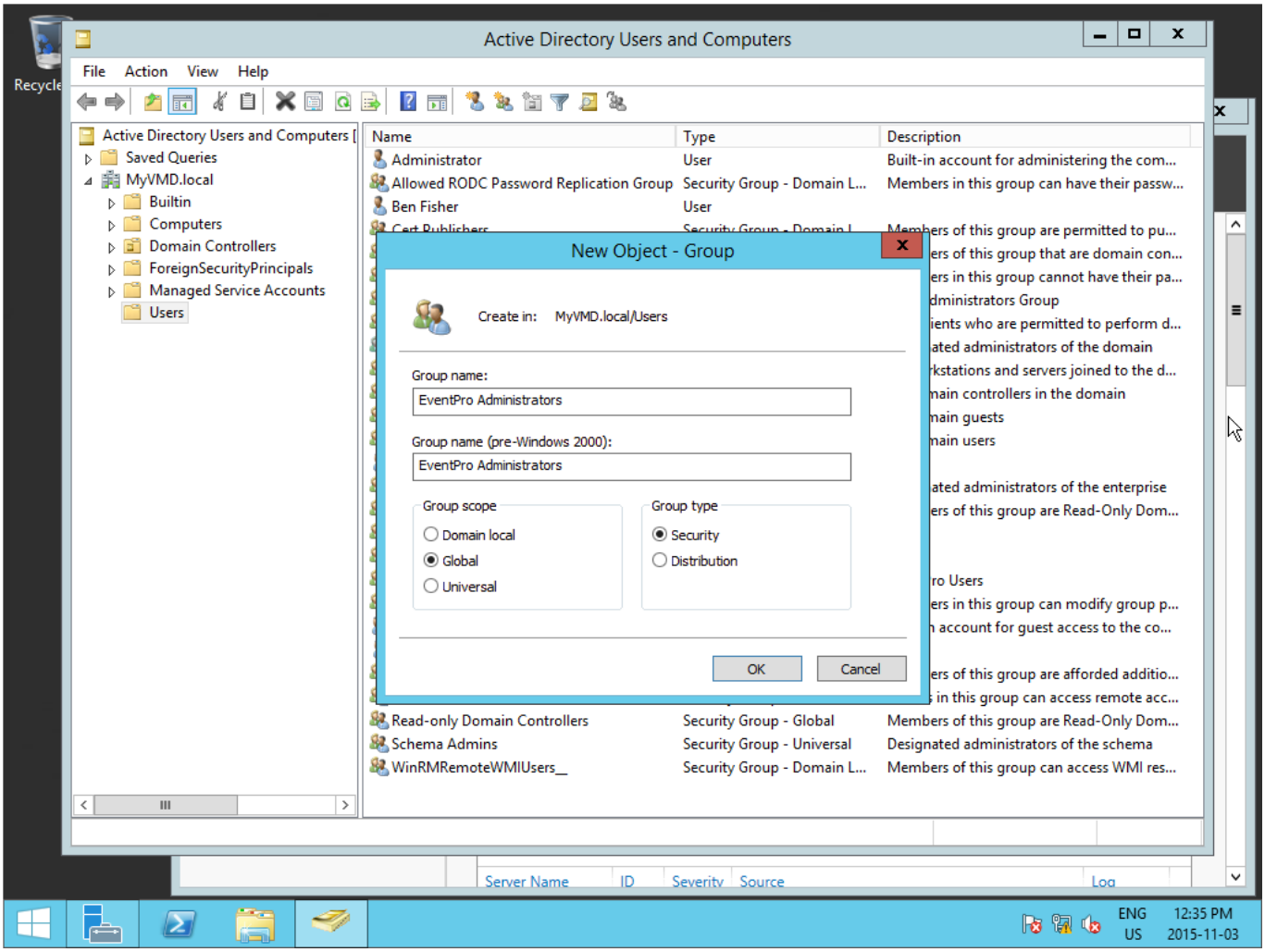
   IMPORTANT: You must set the **Group Type** to **Security**.

   Click **OK**.



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

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



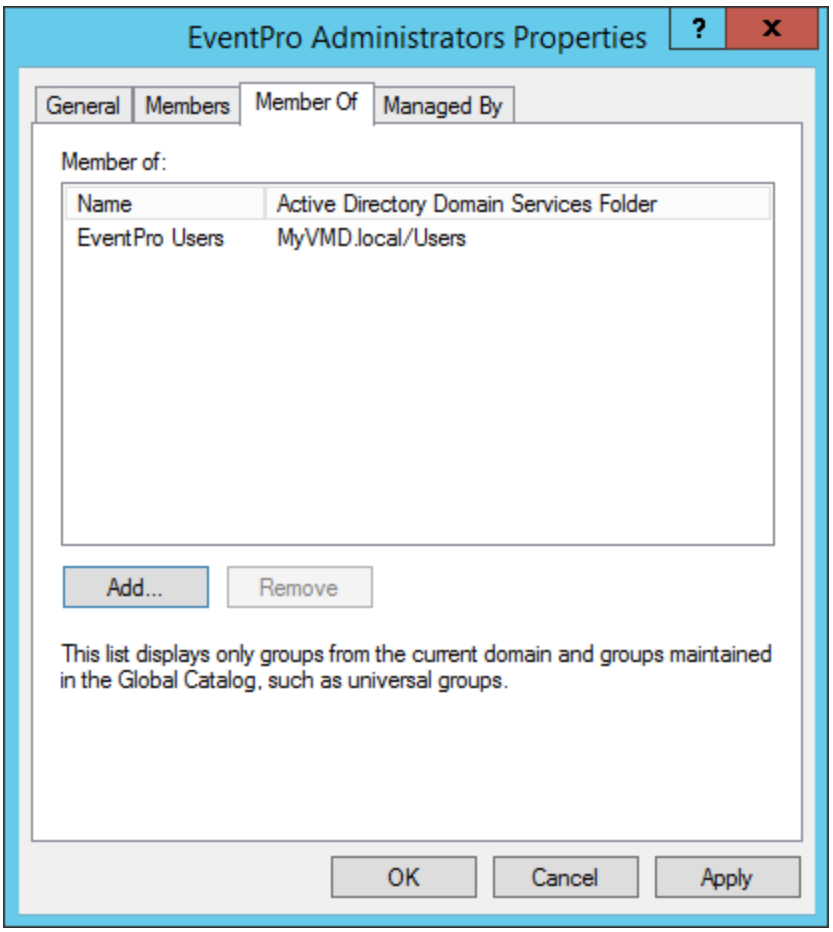
8. To **edit a User or Group**, double-click the record in the Users selection grid.

   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.

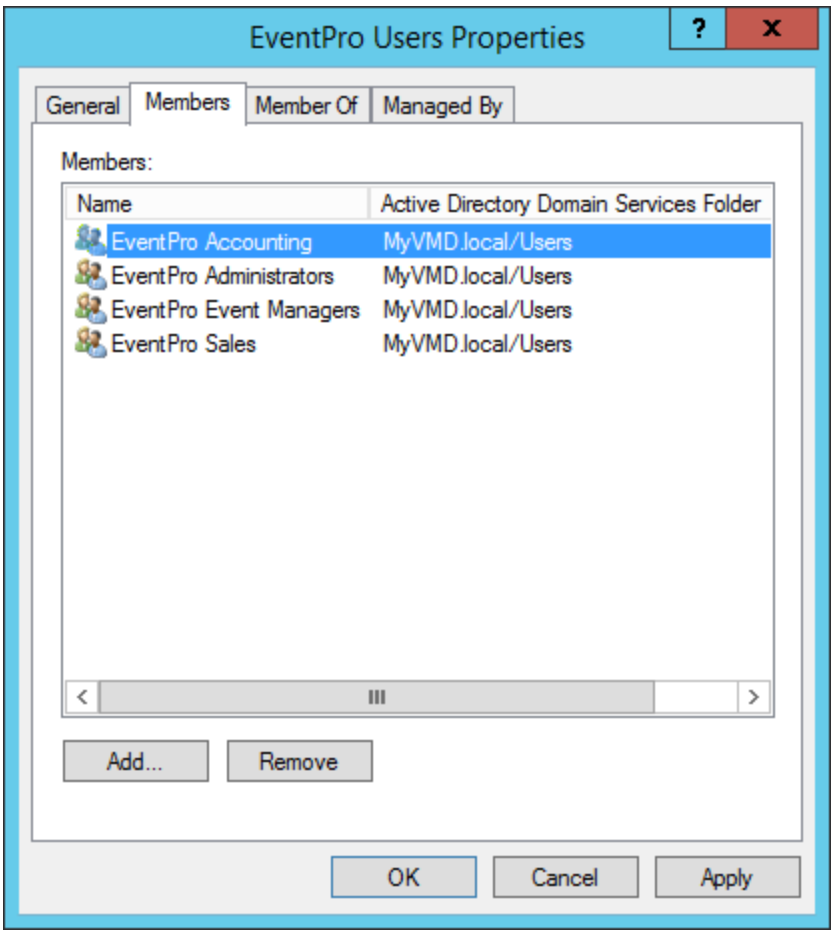
   If you want EventPro Administrators nested within EventPro Users, you need to make the EventPro **Administrators** Security Group a **member of** the EventPro **Users** Security Group. In the **EventPro Administrators Properties**, select the **Member Of** tab and **Add** the EventPro Users Group.



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.



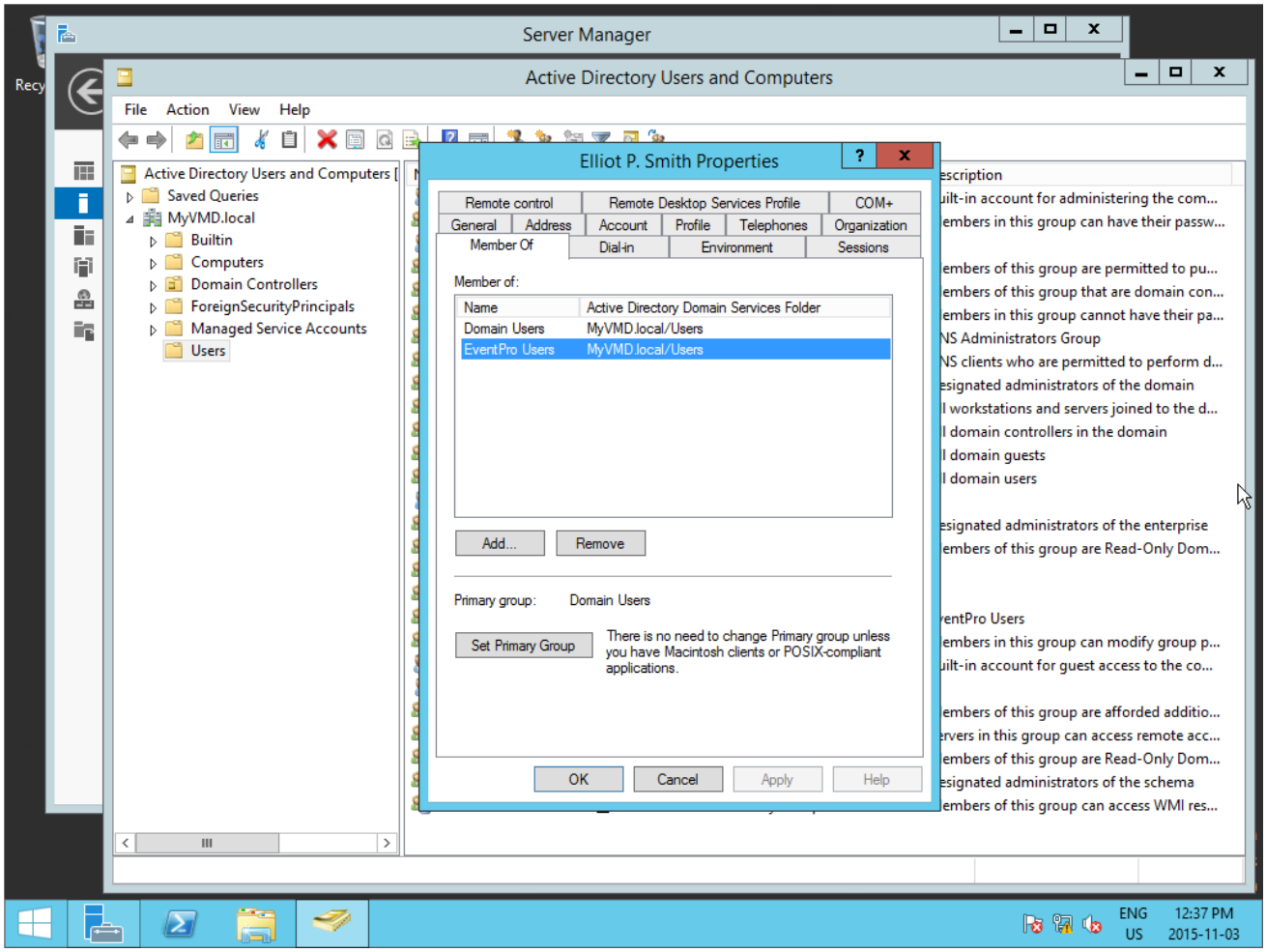
The reason for nesting all of those departmental sub-groups within the EventPro User Security Group is efficiency of assigning database permissions to the SQL Server. Instead of assigning permissions to each of the multiple department-based groups, you can simply assign database permissions to the all-encompassing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

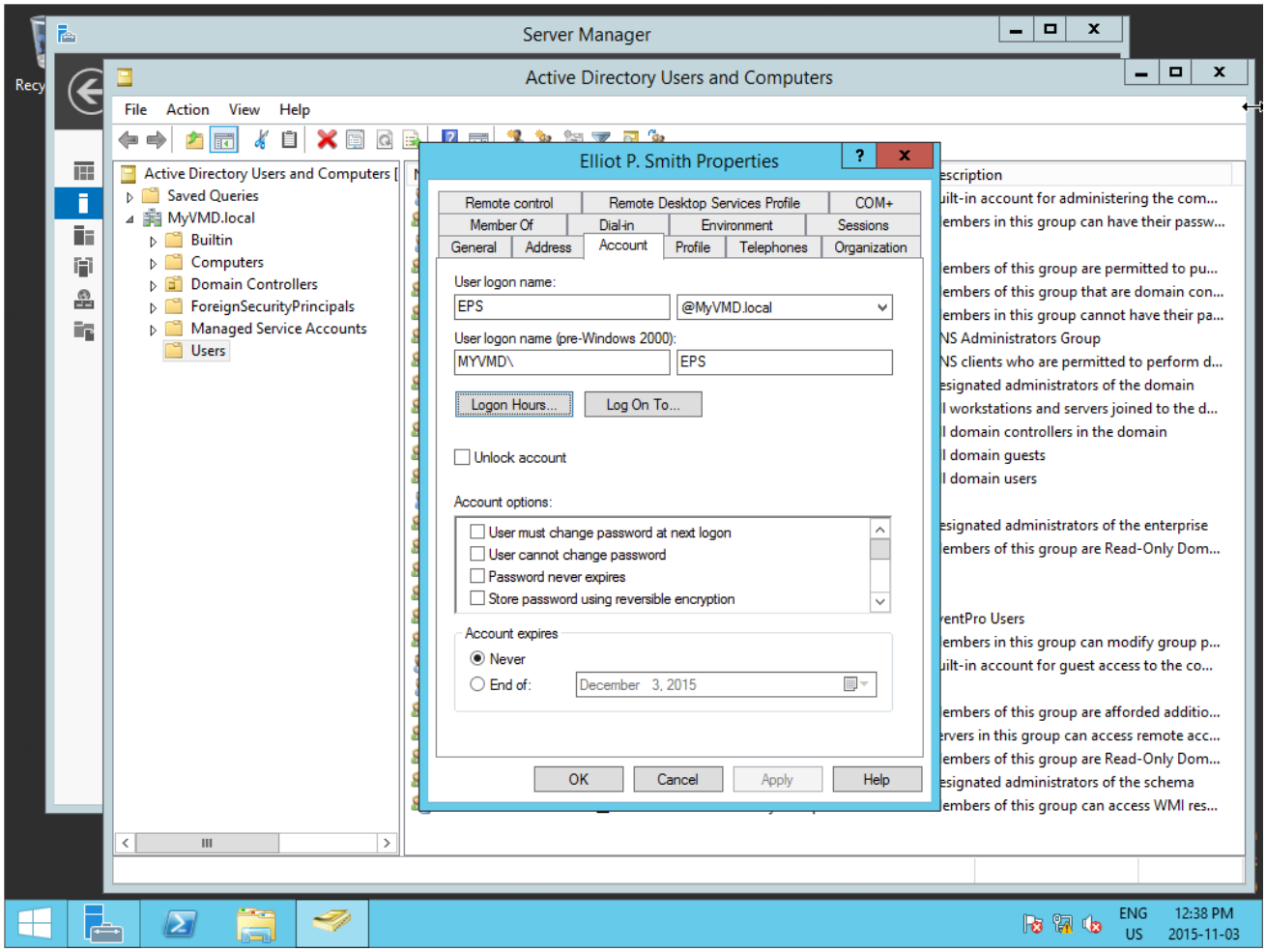
    There are **three important factors** to remember when creating or editing these Users:

    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.

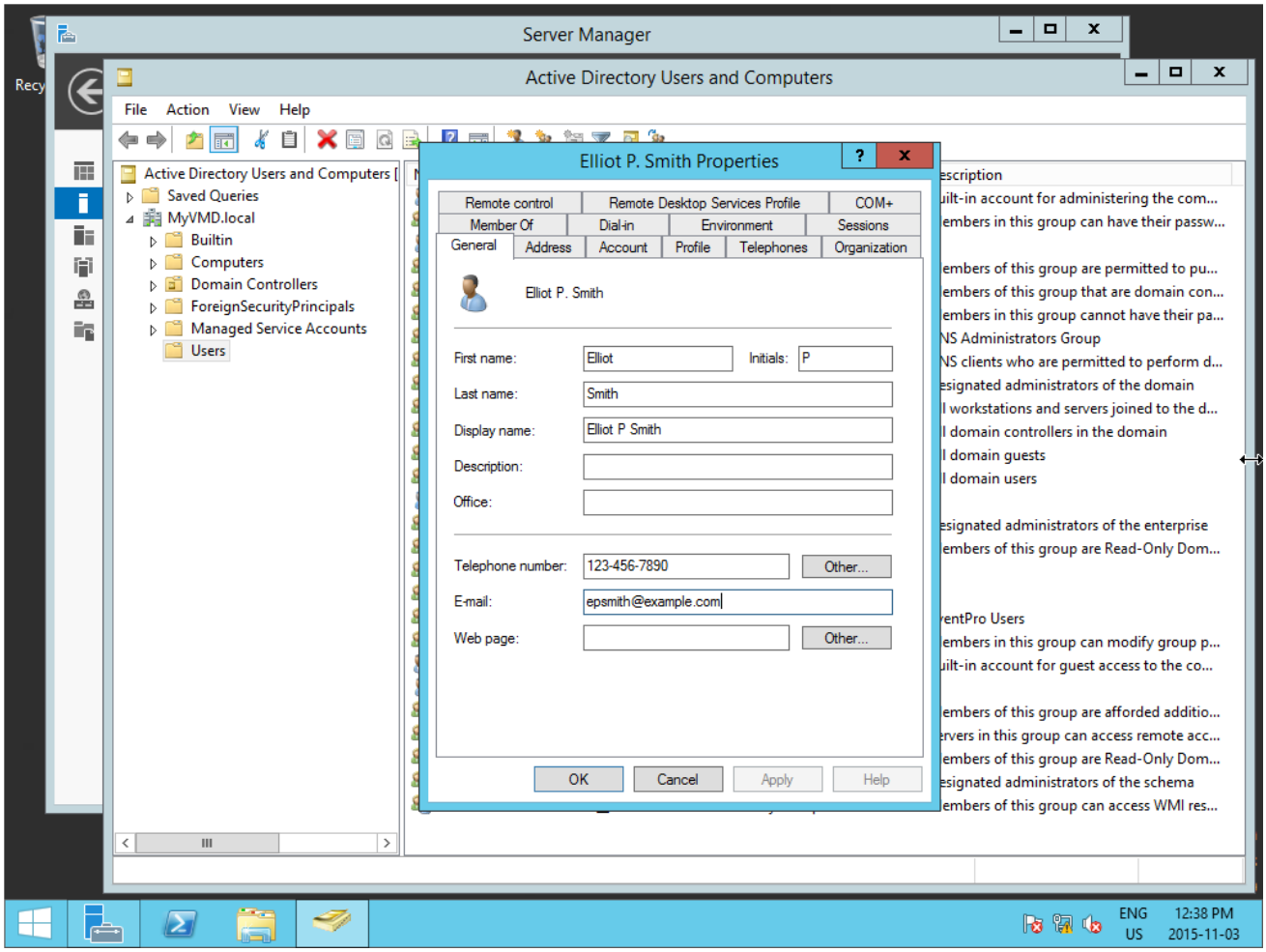


b. The User's **EventPro User Name** will be created from a combination of the **domain** name and **User Logon Name** from Active Directory Users and Computer

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



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).



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 **minimum technical requirements** 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**

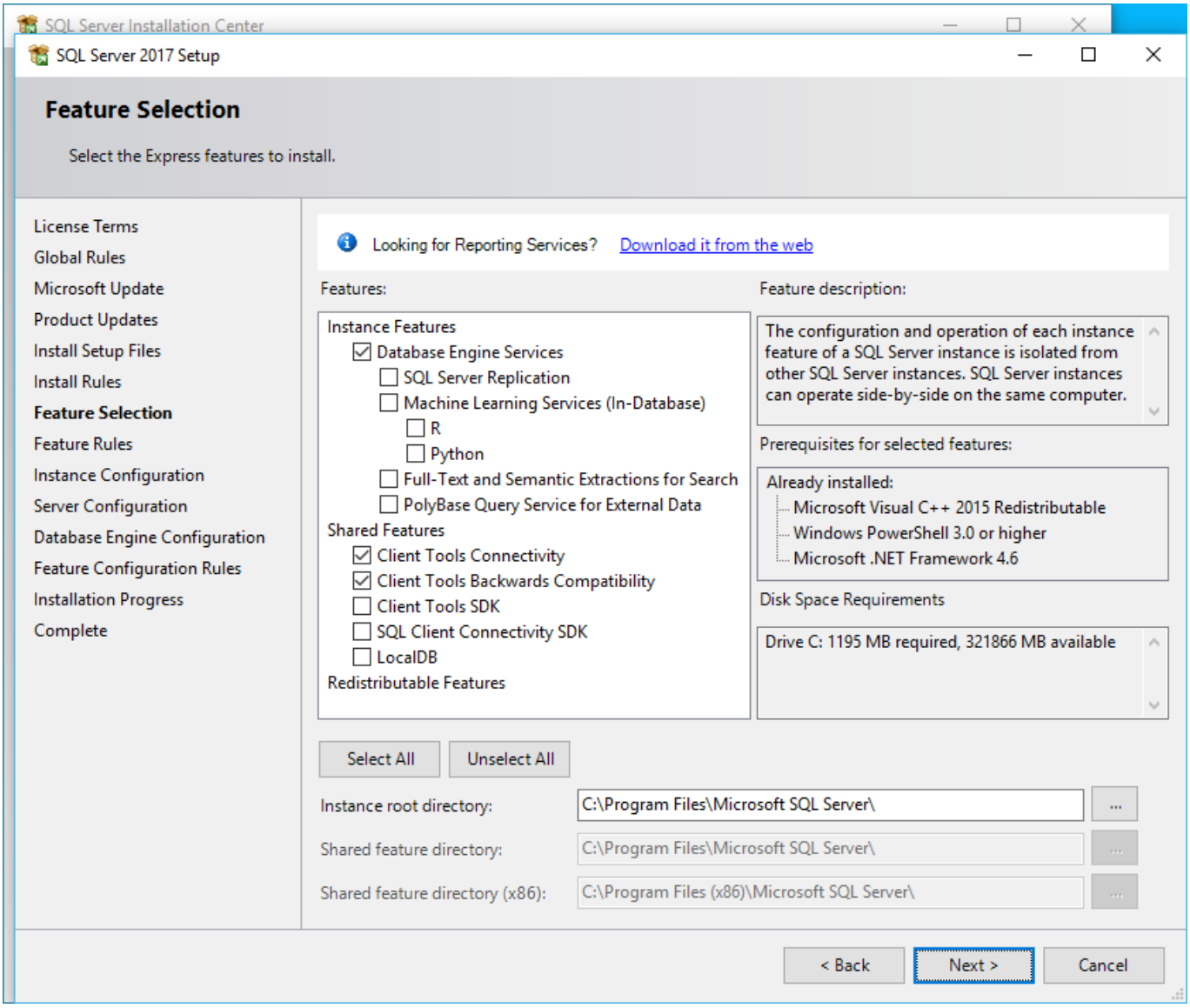
iii. **Client Tools Backward Compatibility**

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.

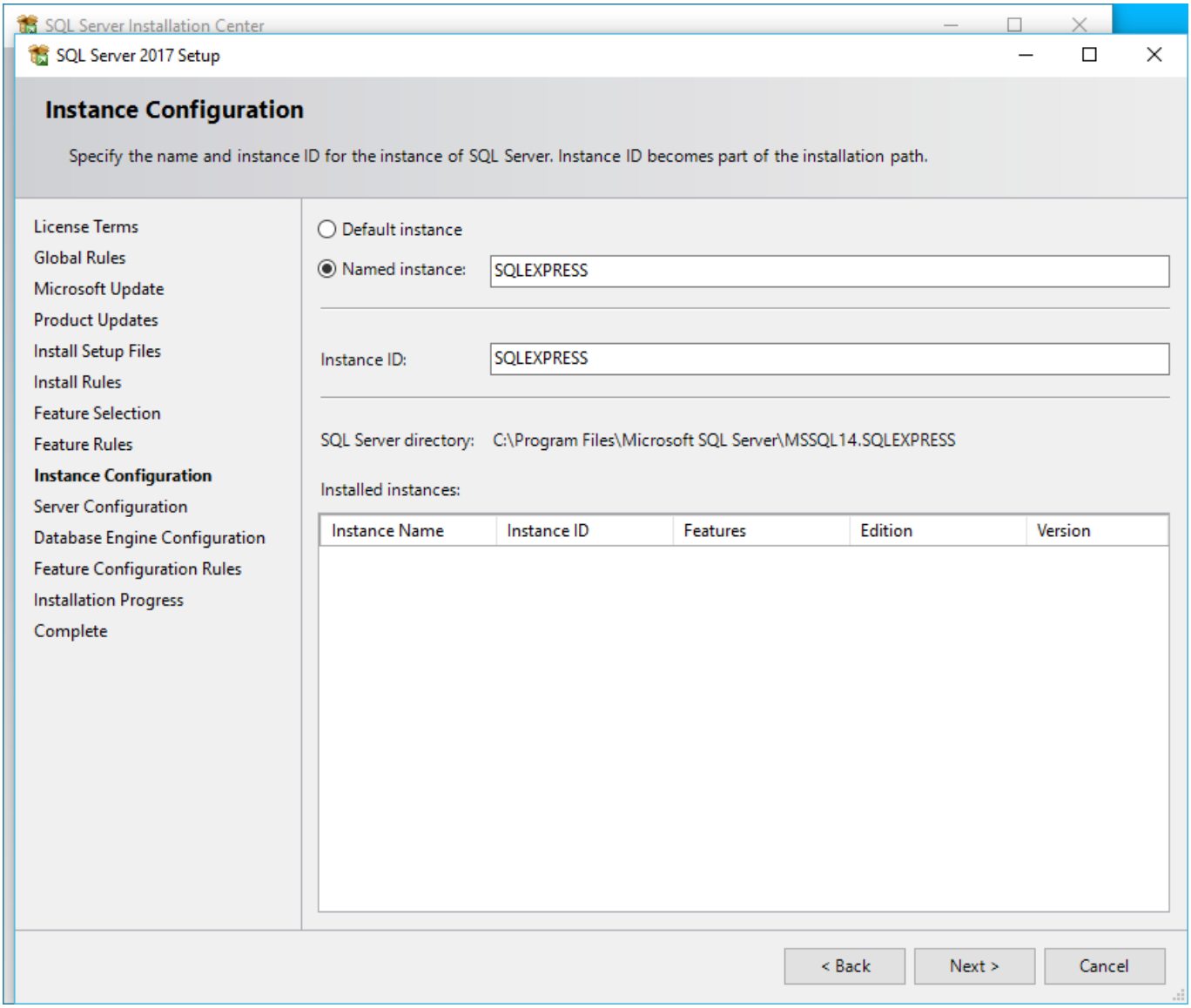


4. **Instance Configuration**:

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.

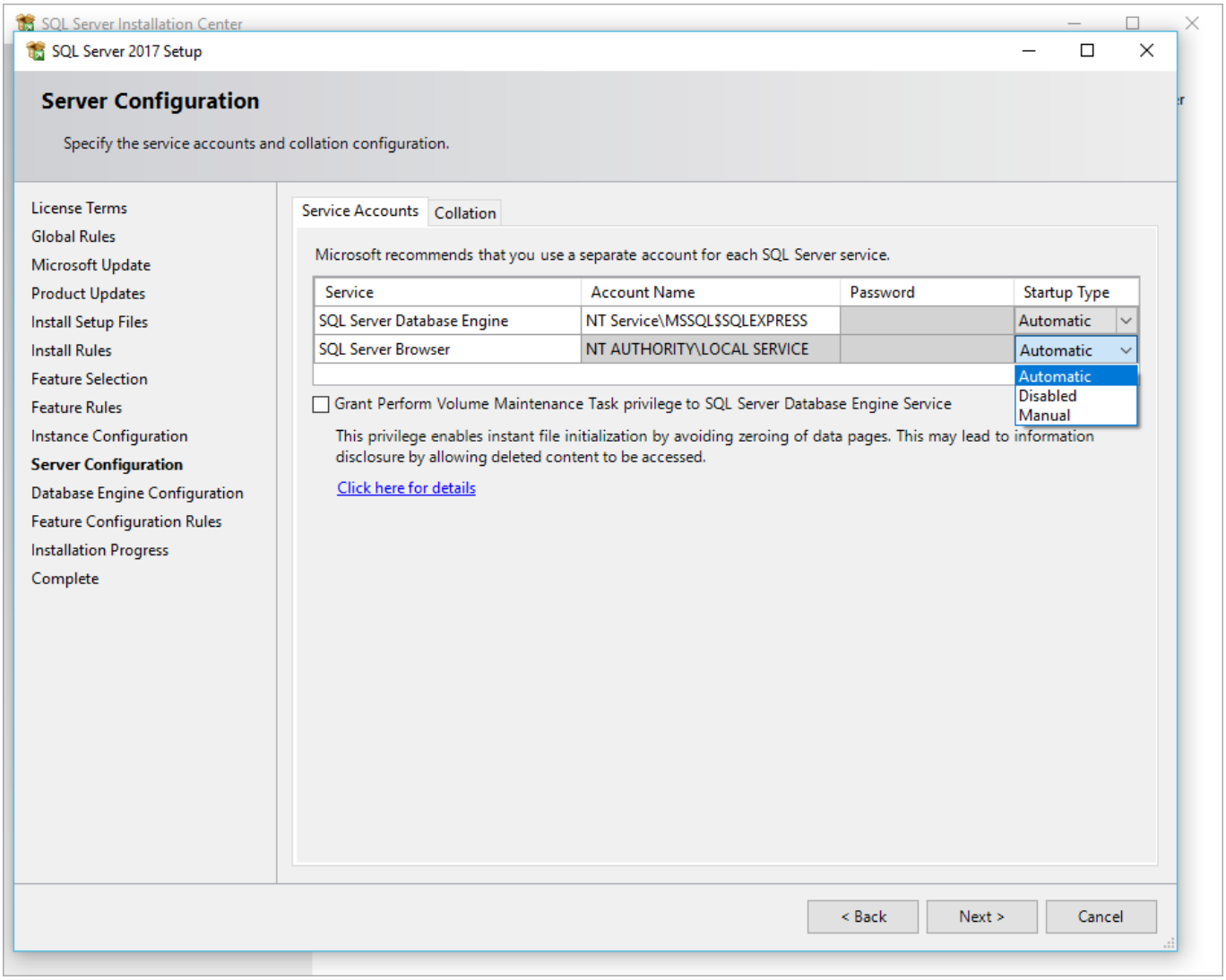
c. The **Installed Instances** grid at the bottom of this page would display any instances already installed. If there is already an installed instance, check with your IT Department whether you should use that instance.



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**.



6. **Database Engine Configuration**:

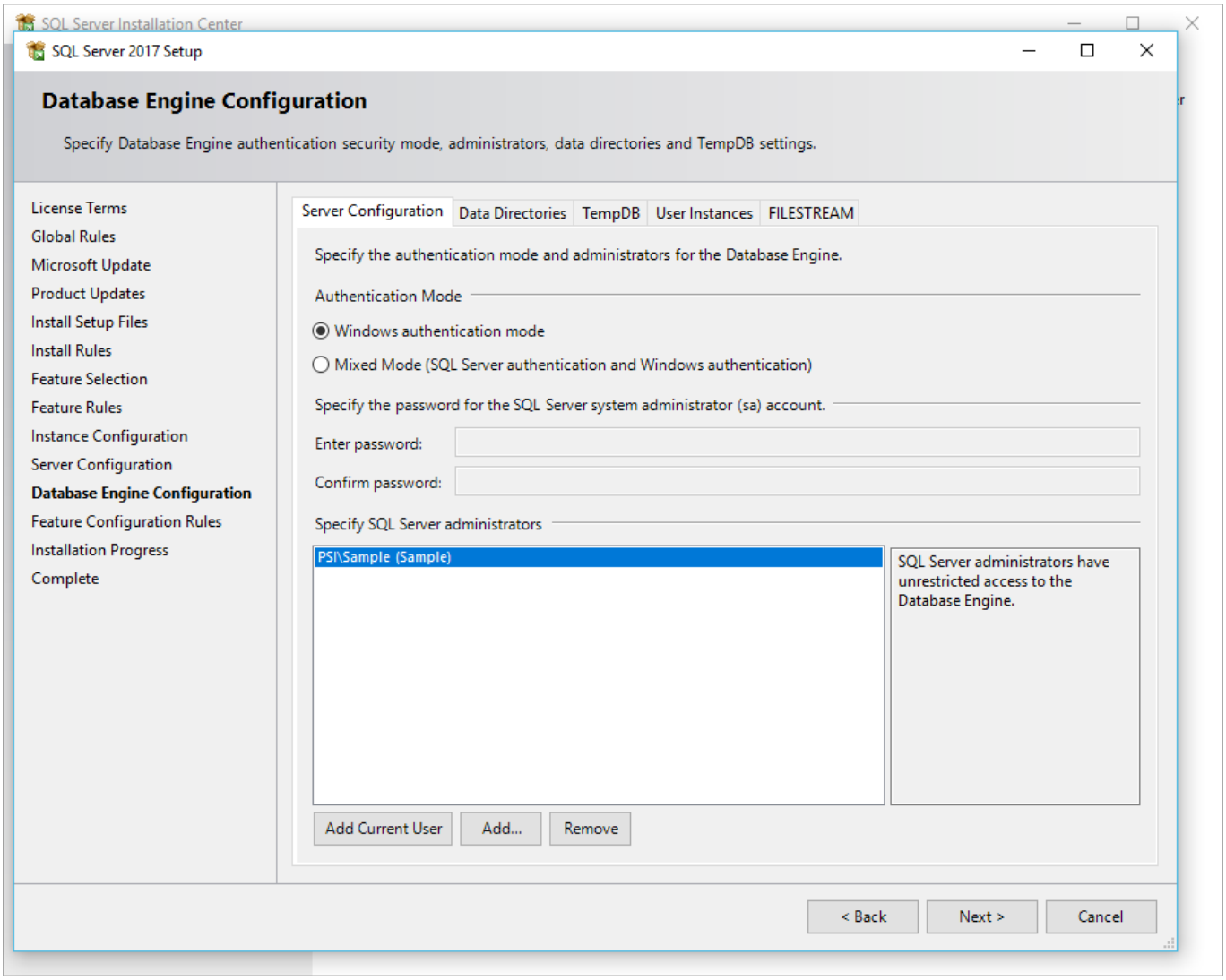
   a. Under the **Account Provisioning** tab, indicate which **Authentication Mode** the administrator will use to access the Database Engine: **Windows Authentication** or **Mixed Mode** (SQL Server Authentication and Windows Authentication).

      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.

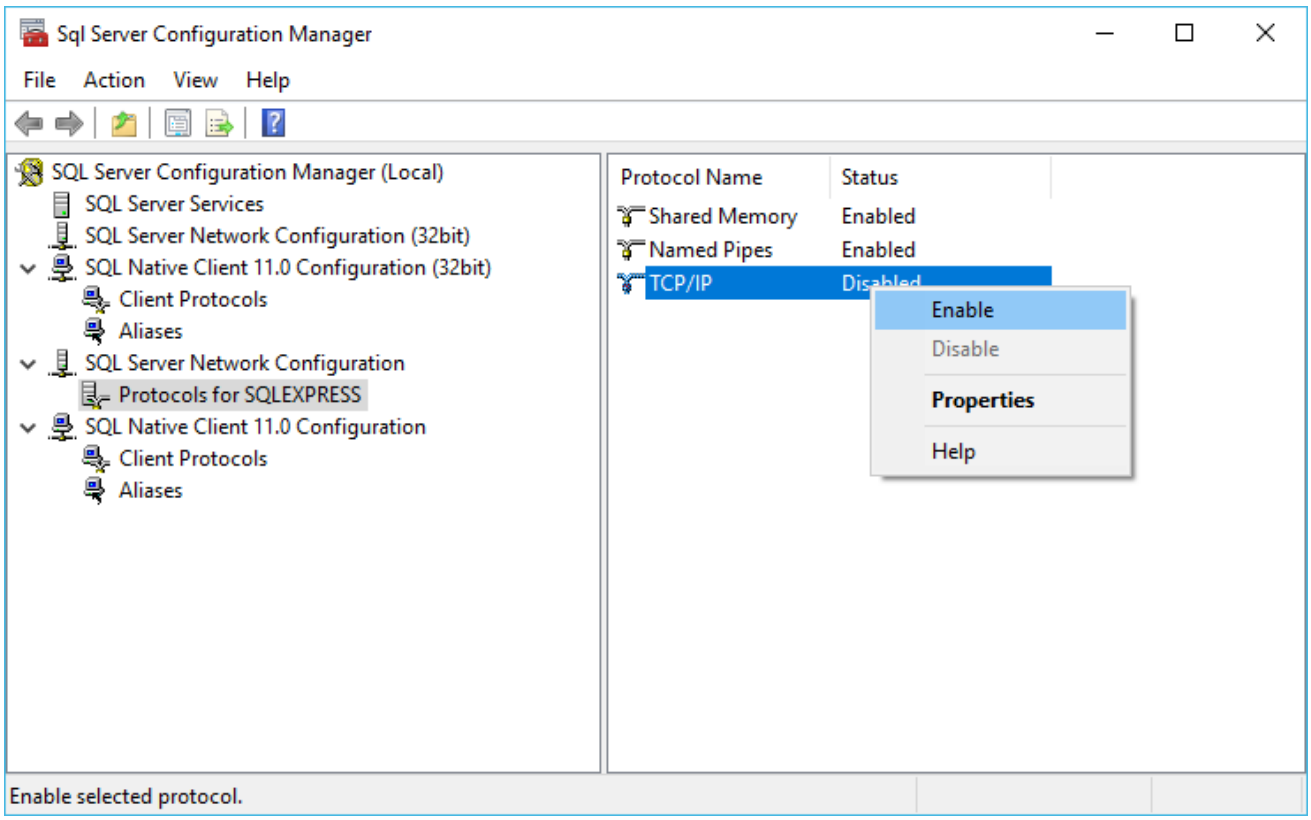
   b. Also, under the **Specify SQL Sever Administrators** grid, click the **Add Current User** button.



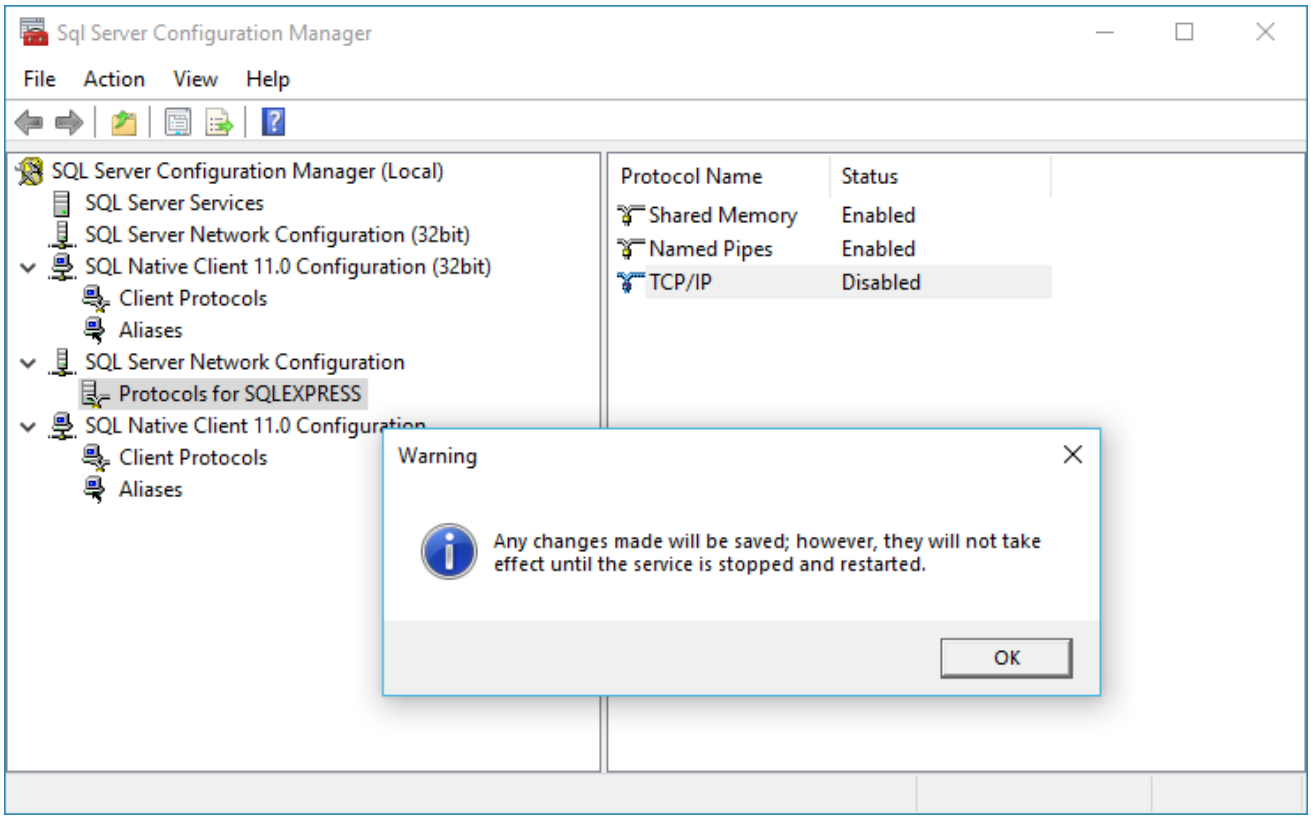
7. Complete the rest of the installation process as recommended by your IT Department.
8. As noted above, if there isn't a **Management Tools** option in the edition you are installing, you can download and install **SQL Server Management Studio** (SSMS) after installing SQL Server. There may be a prompt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

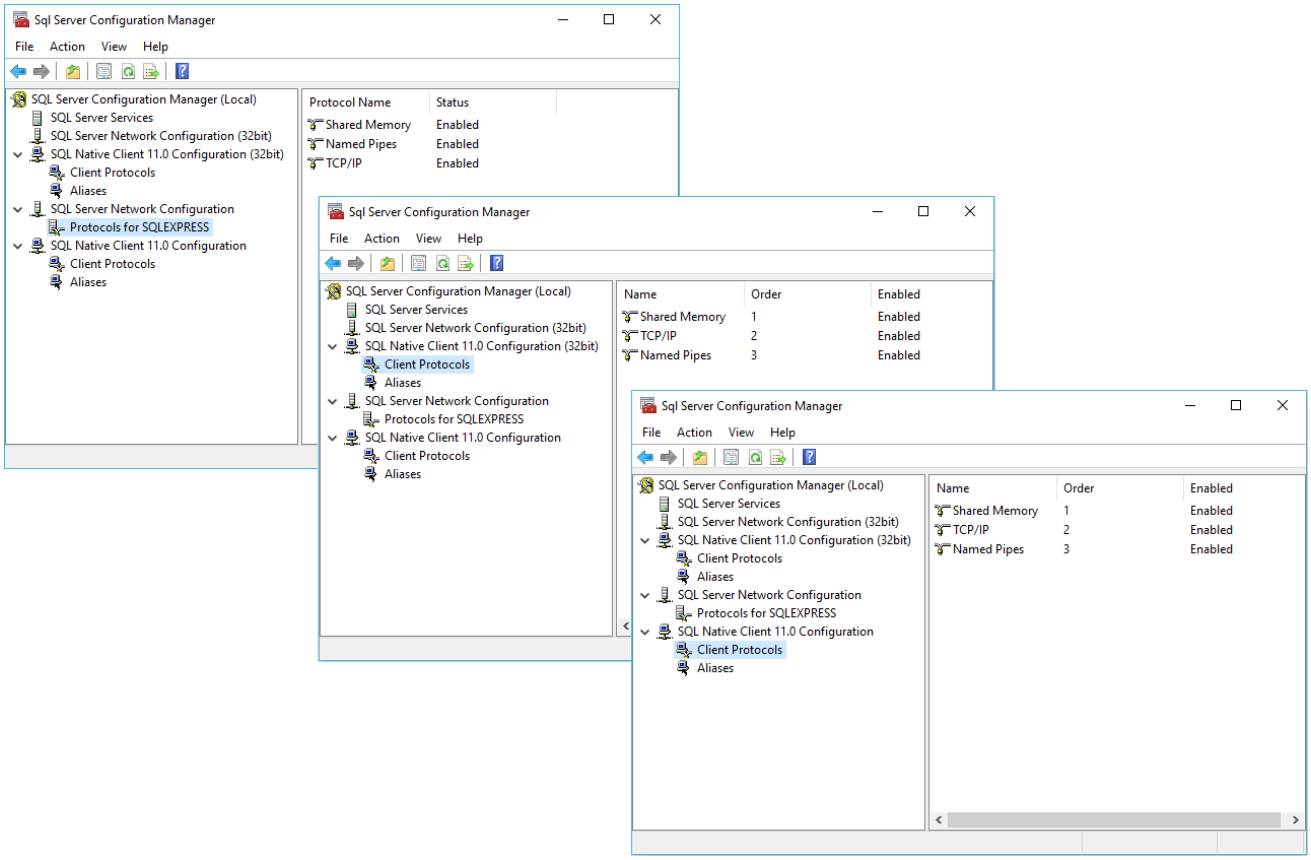


e. Click **OK**. You should then see that **TCP/IP** is **Enabled**.

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.

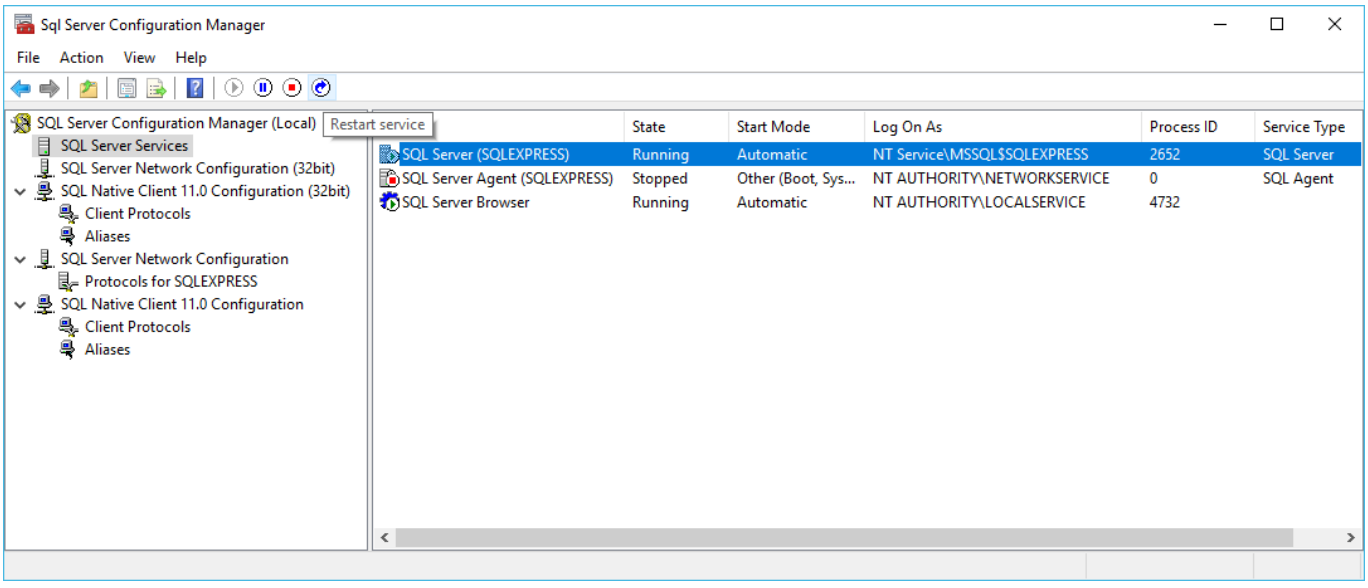
g. Both **TCP/IP** and **Named Pipes** should now be **Enabled**.

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.



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 above. The service will stop and restart.



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

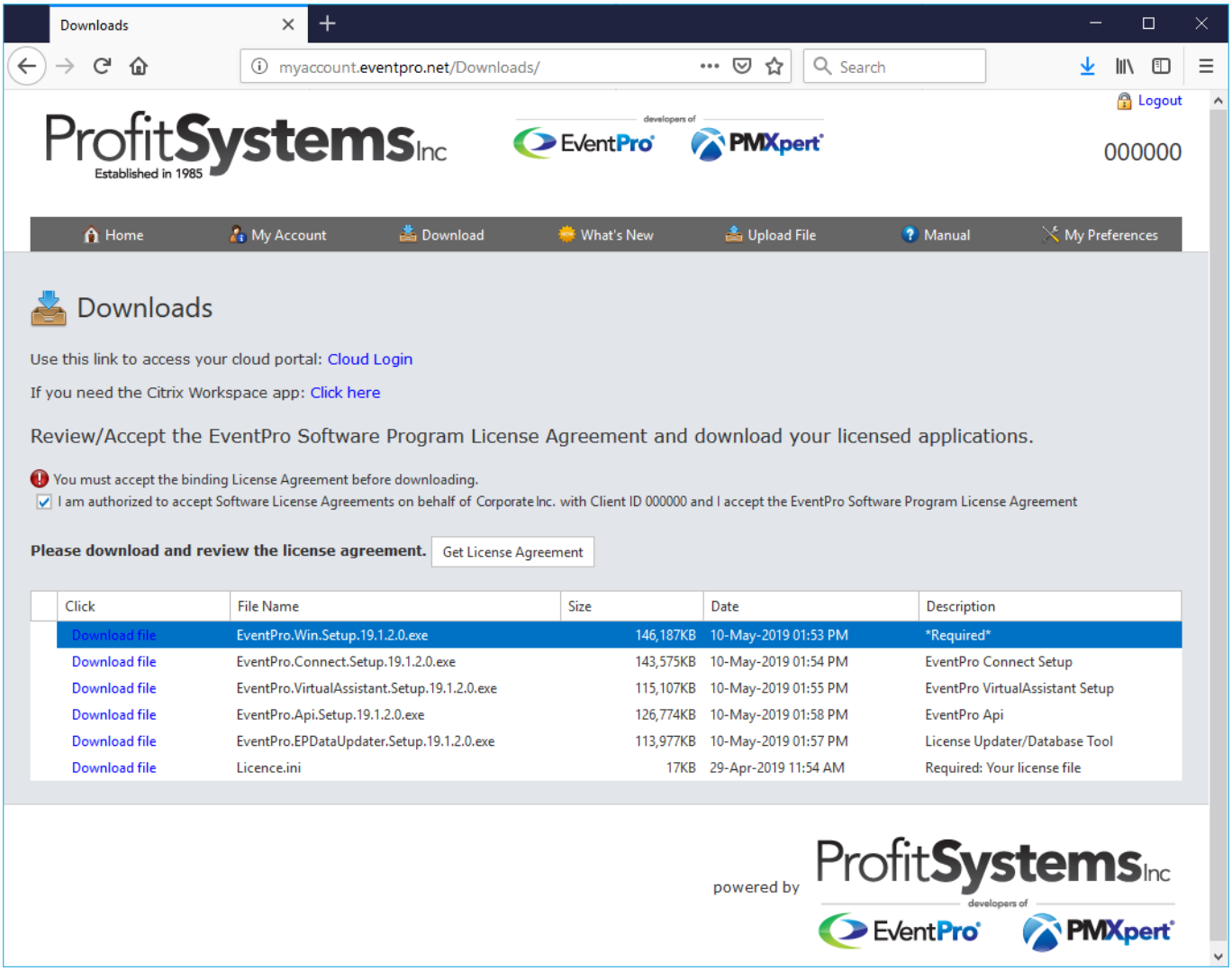
If it is not, you can try to start it by clicking the **Start** button above. This may not work, however, as there could be other reasons that the SQL Server Browser is not running. For example, you may need to go to the **Services** area to manually enable it there.

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** 182.

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.



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.

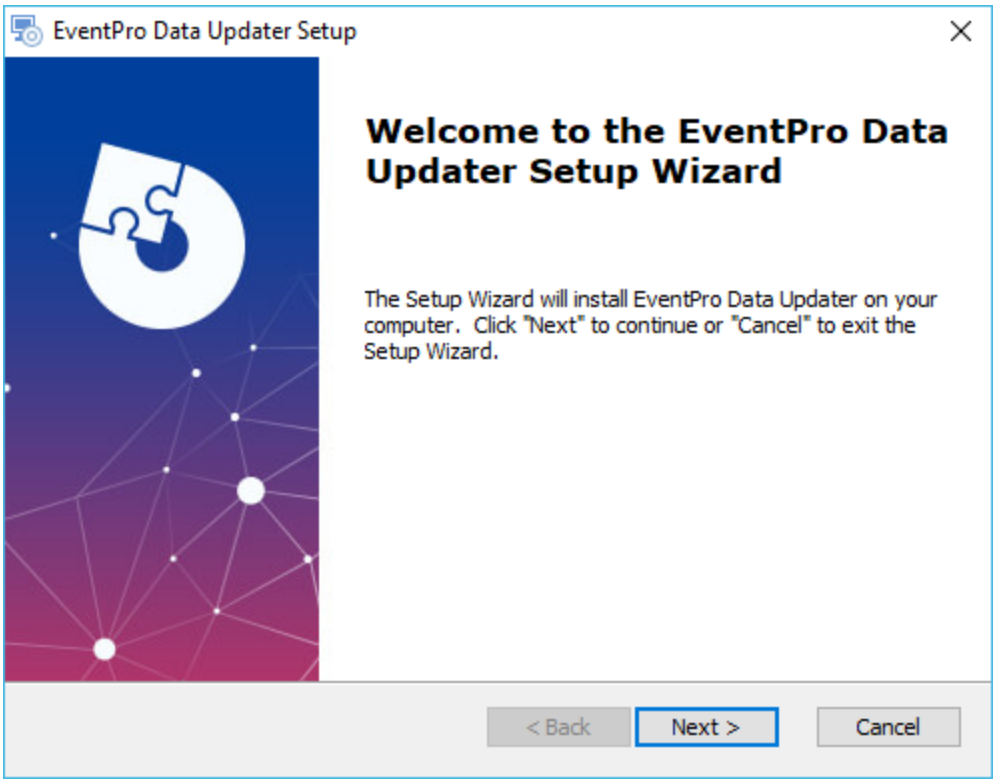
5. While downloading the files, take note of the folder to which you save these files so that you can later retrieve them.

   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

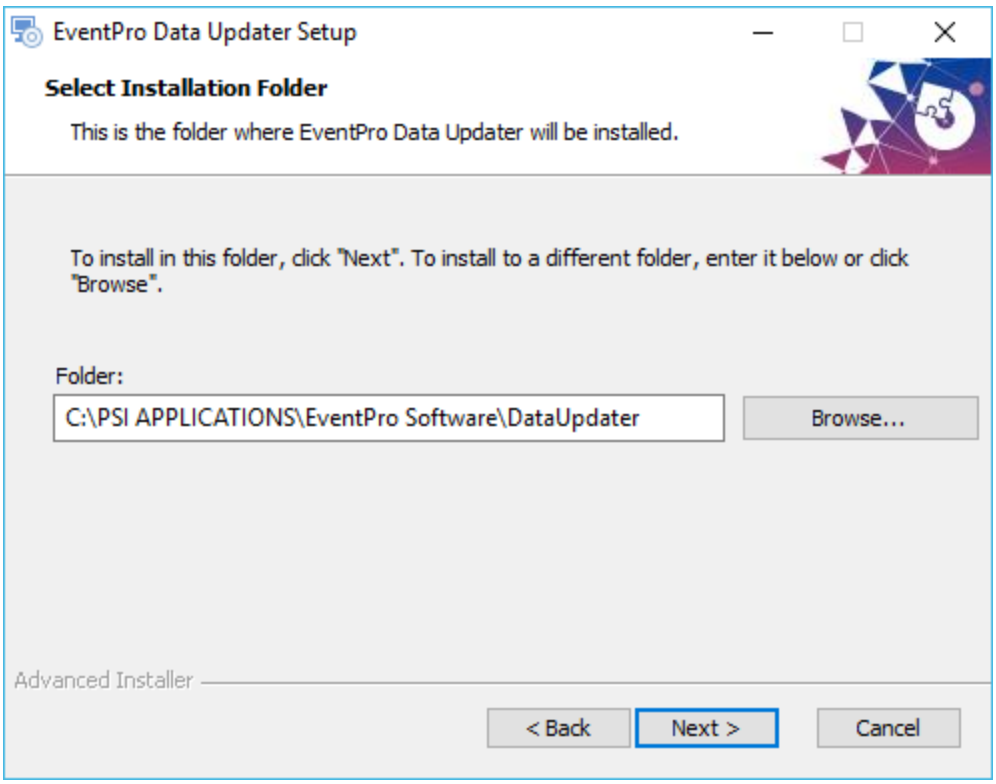
1. Navigate to the downloaded **EventPro.EPDataUpdater.Setup.exe** and double-click to run it.
2. The installation wizard will begin. Click **Next** to continue.



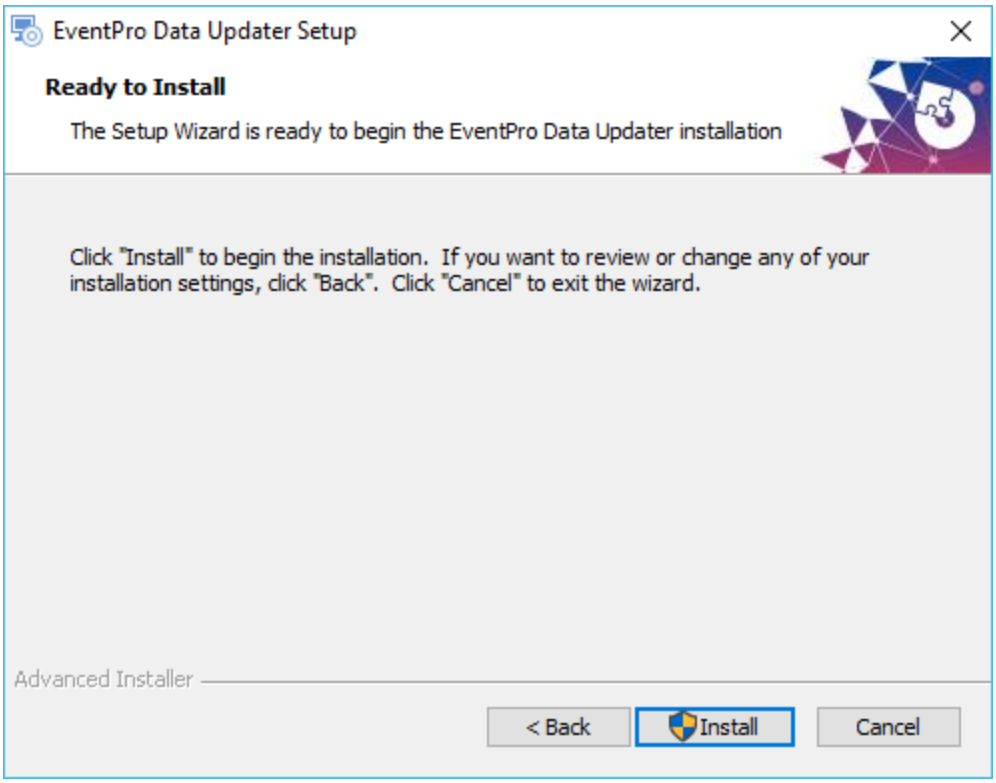
3. **Select Installation Folder**:

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

   Click **Next**.

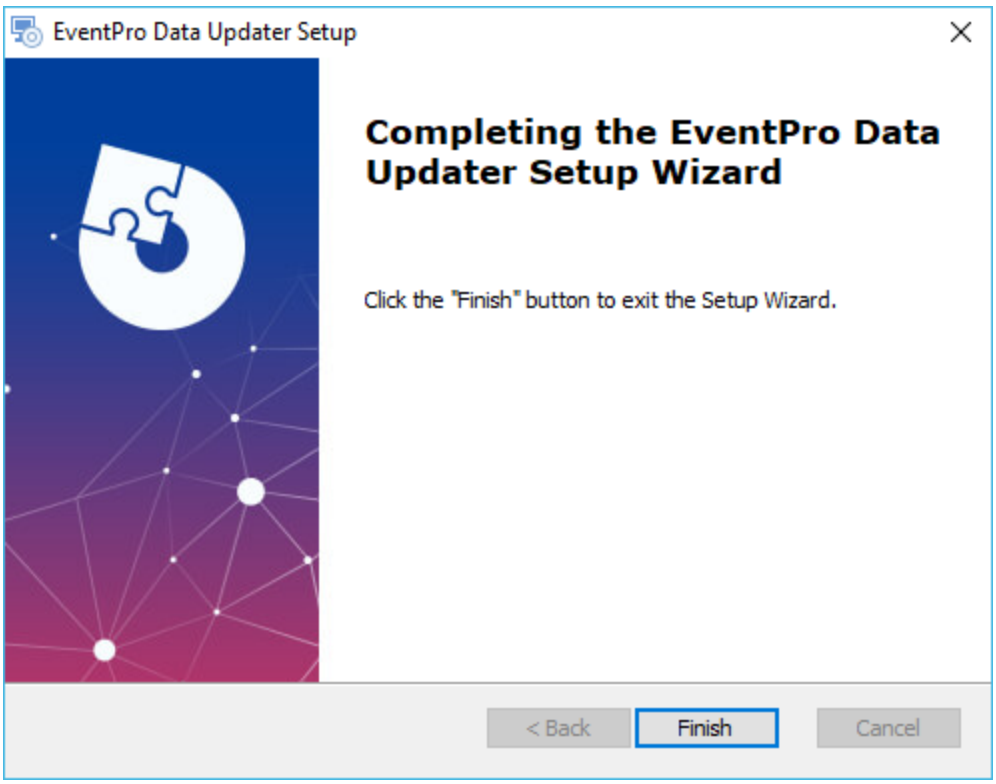


4. In the next window, click **Install**.



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.



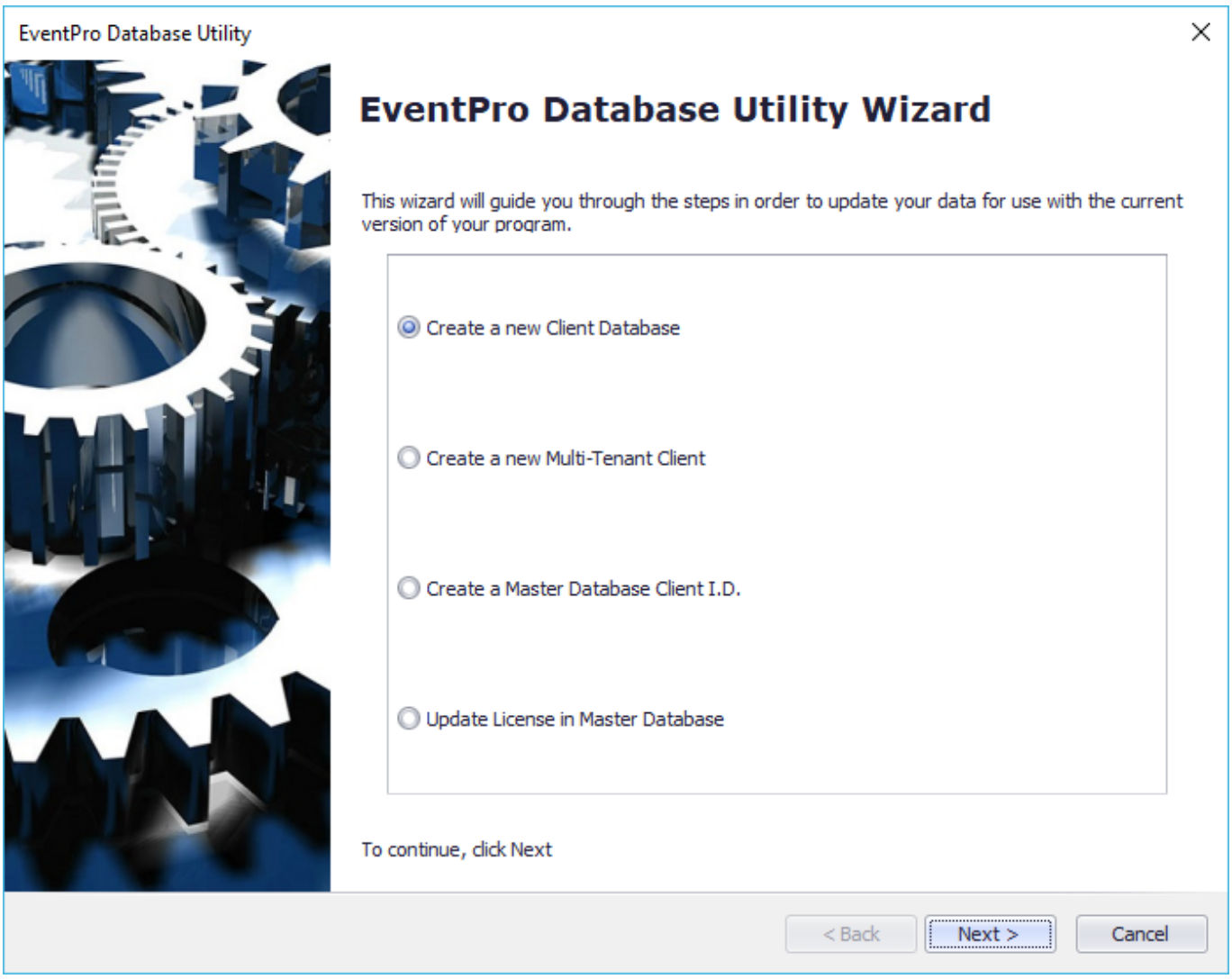
6. Next, go to **Create New Client Database** 185.

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.

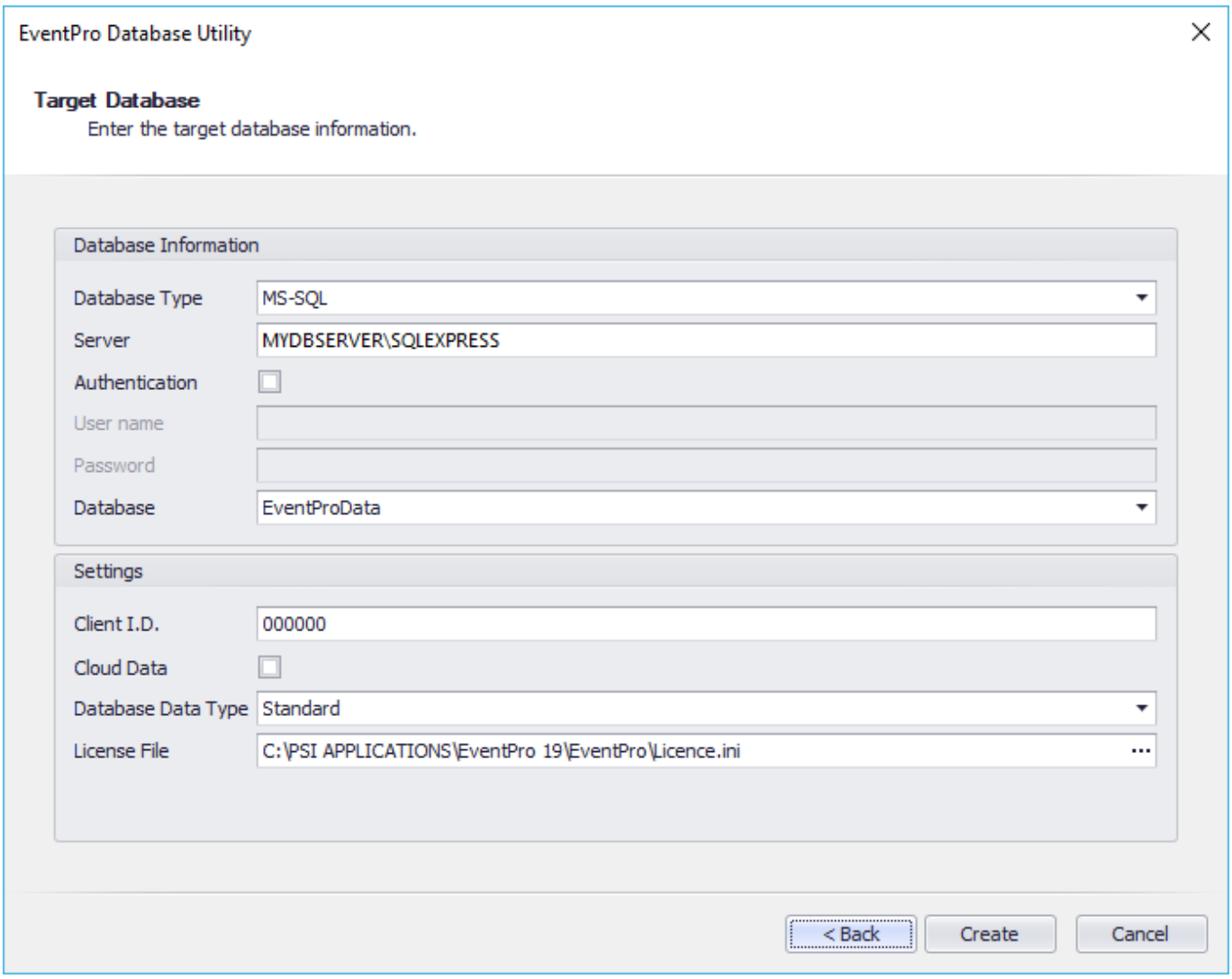
Before restoring the database, however, this process requires that you first **create a new database** with the EventPro Database Utility. The new database you are creating here is essentially a **placeholder**. Later, you will restore your existing database over this new "placeholder" database.

1. Run the **EventPro Database Utility Wizard** by selecting **EventPro Data Updater** from your **Start** Menu, or double-clicking 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.



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 **installing SQL Server** [175] (*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** 188.

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 **Give Database Rights to Users** 195.

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**.

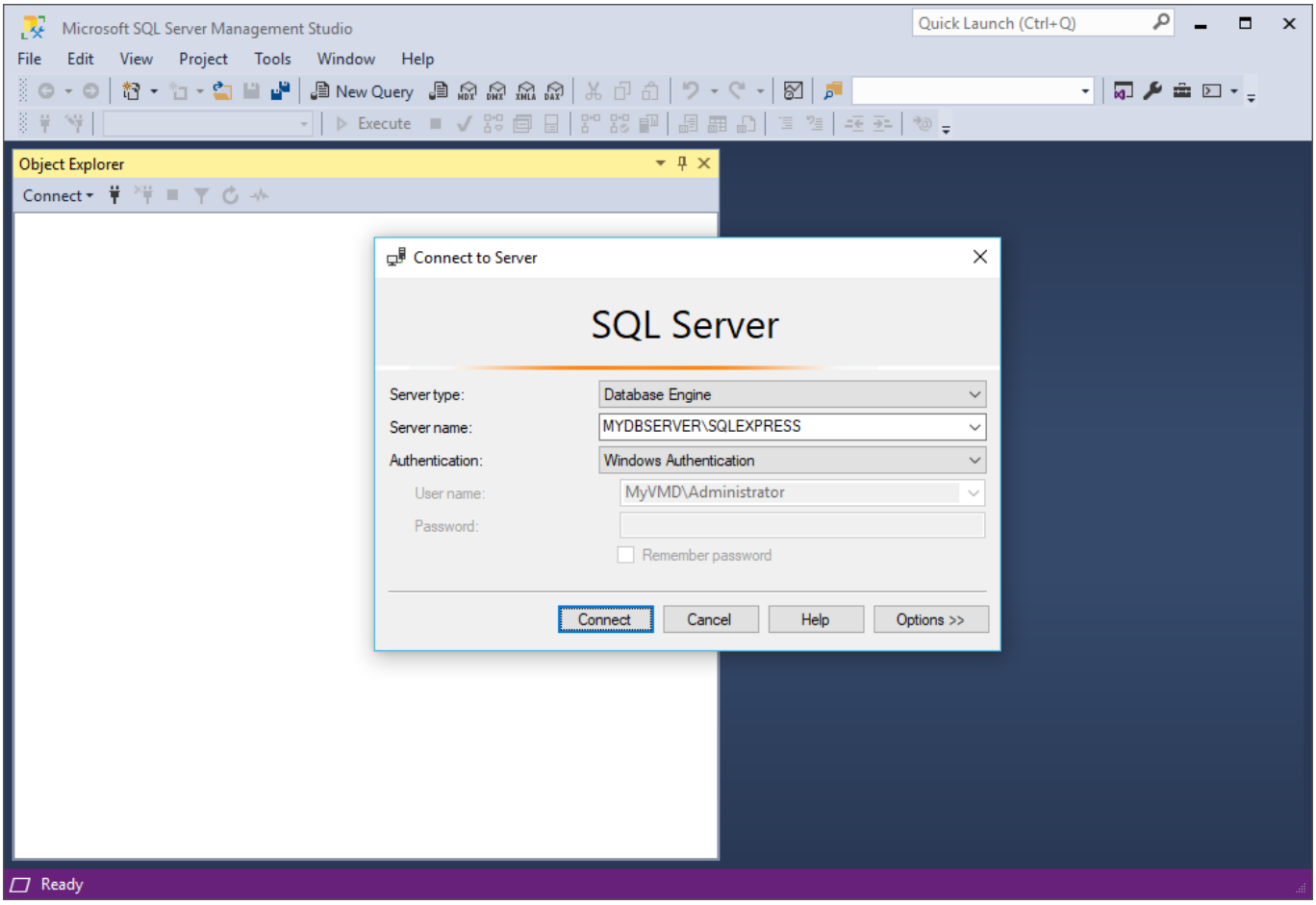
   You may have a different version of SQL Server Management Studio than that depicted below, but the functions and settings should be essentially the same.

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**.

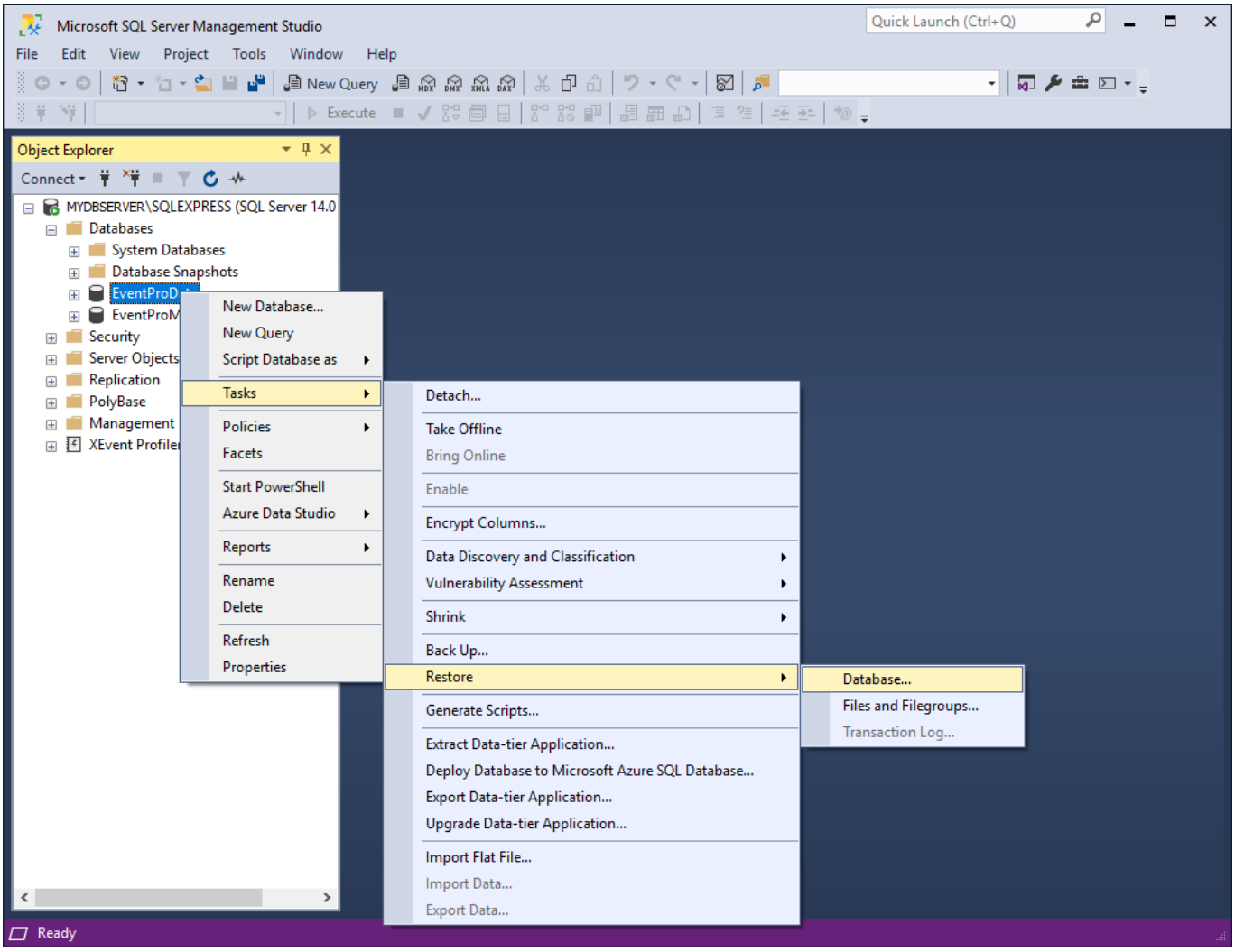
   (Remember that when ***installing SQL Server*** 178 *earlier, you chose between* ***Windows Authentication*** *and* ***Mixed Mode (SQL Server + Windows Authentication)****, and set the password for the* ***sa*** *account.)*

   Click **Connect**.

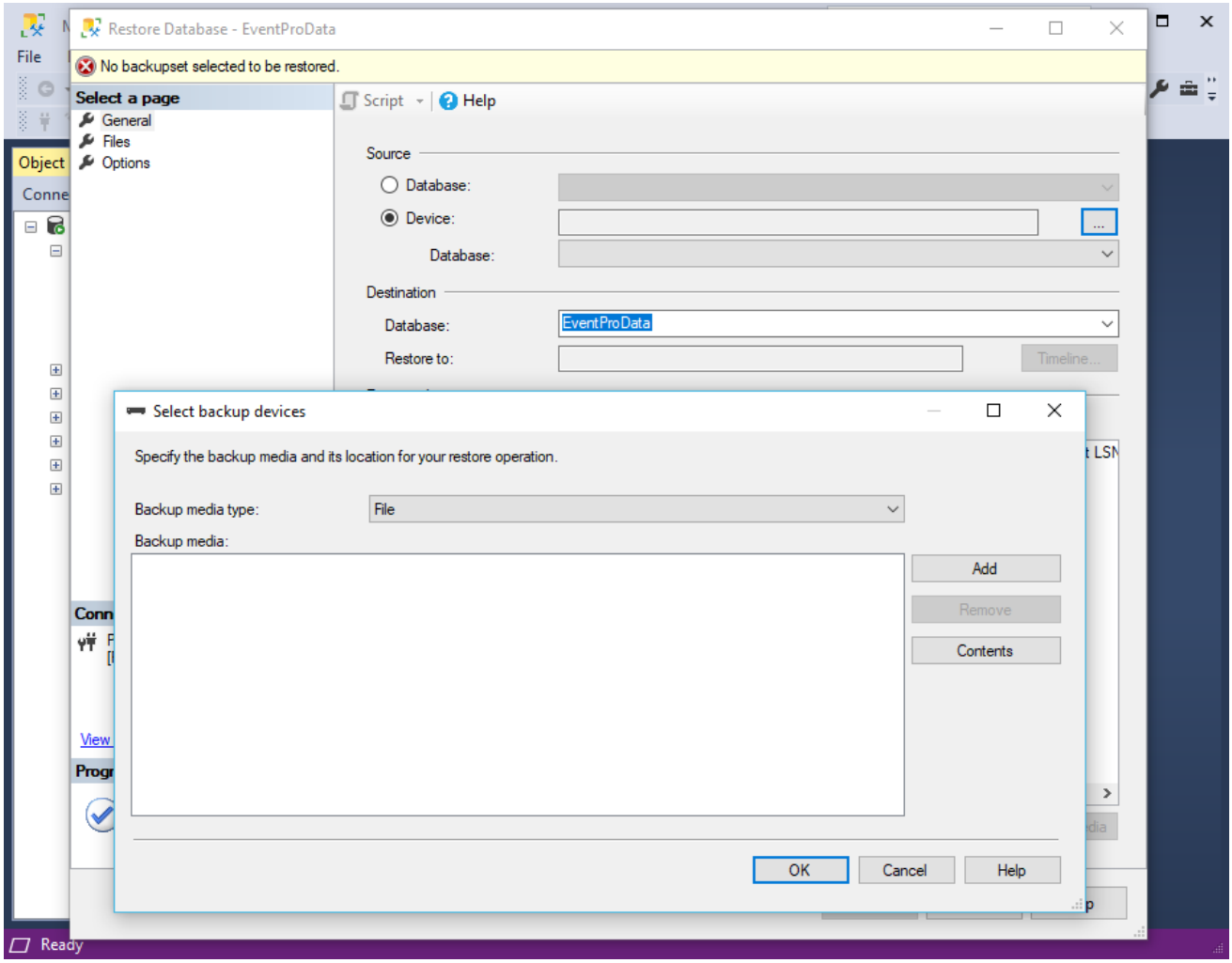


3. In the **Object Explorer** panel of **Microsoft SQL Server Management Studio**, expand the Databases so that you can see **EventProData**.

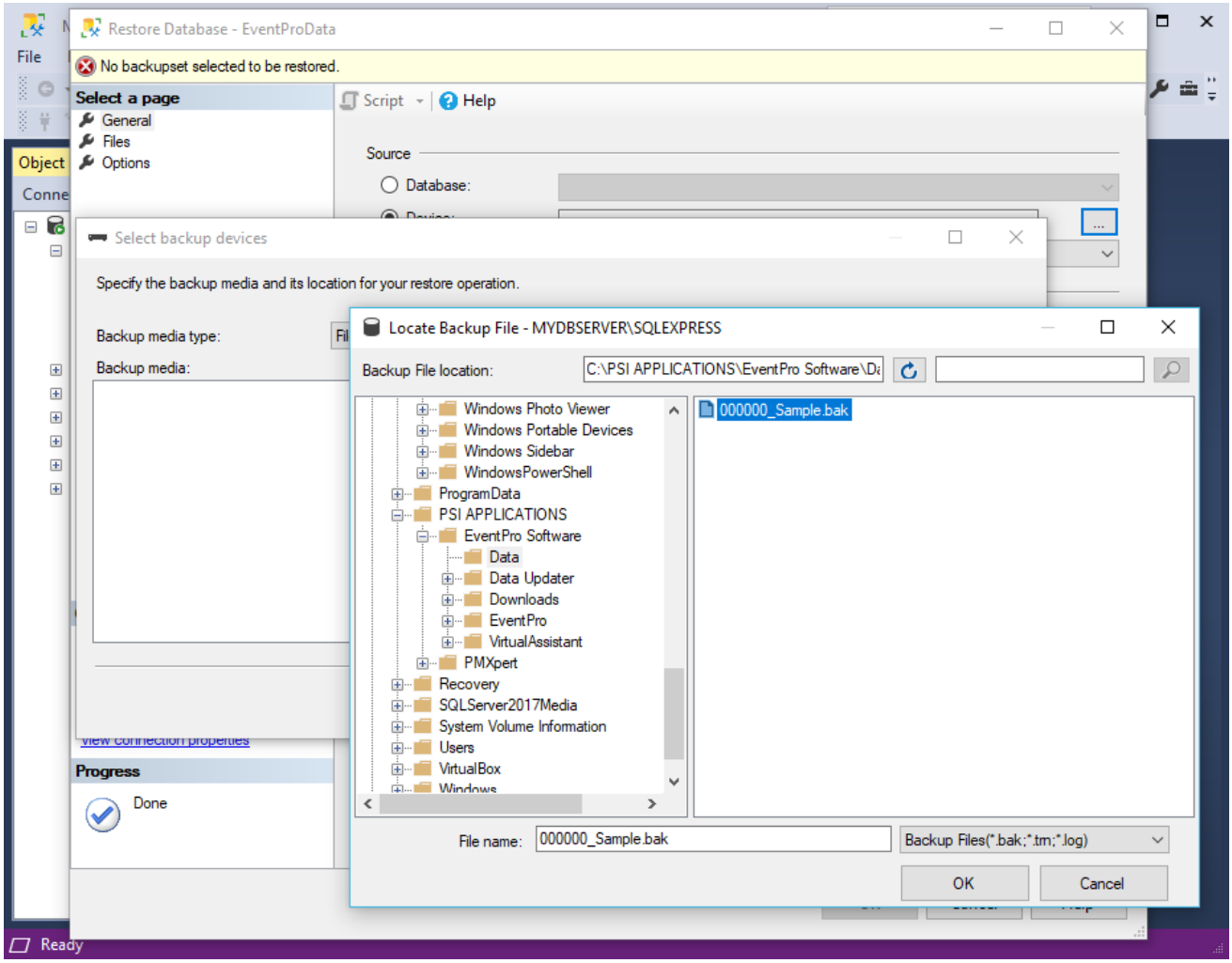
   Right-click on EventProData, and select **Tasks > Restore > Database**.



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.



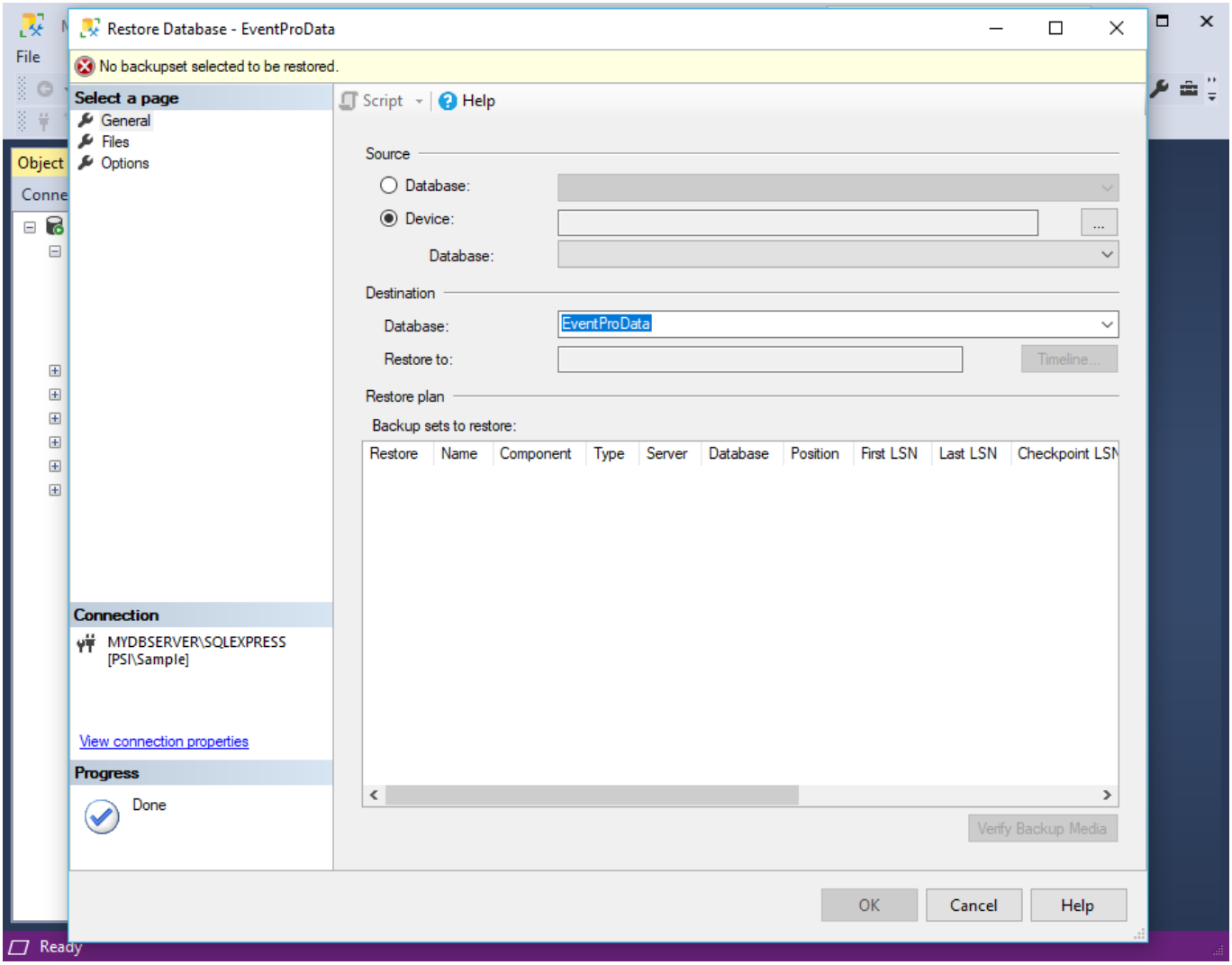
b. Click the **Add** button. The **Locate Backup File** window appears.



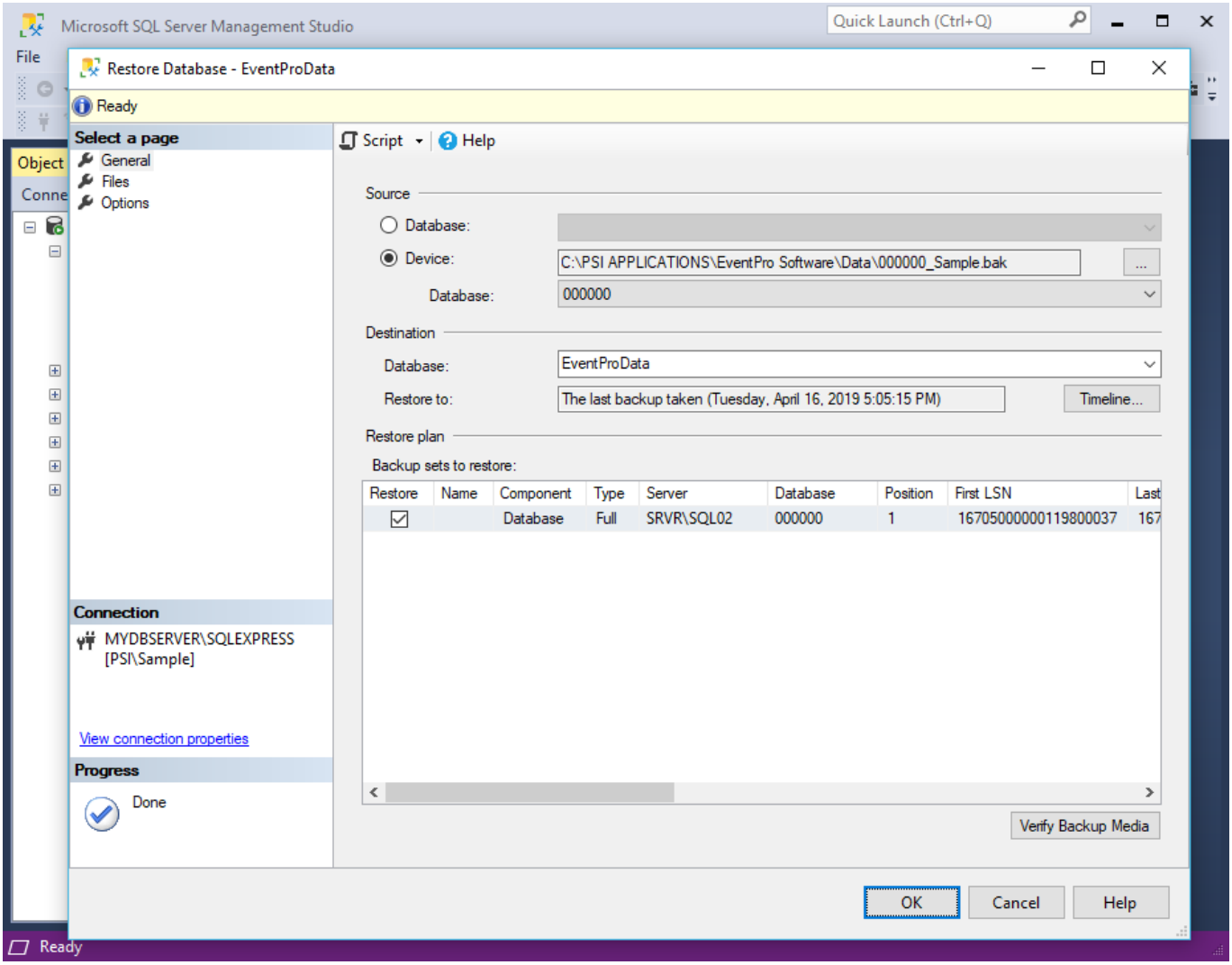
c. In the **Locate Backup File** window, locate the existing database that your EventPro Trainer sent to you, which should have been saved on the same machine as SQL Server, as noted above.

d. Click **OK** in the **Locate Backup File** window, and again in the **Select Backup Devices** window to return to the **Restore Database** form.

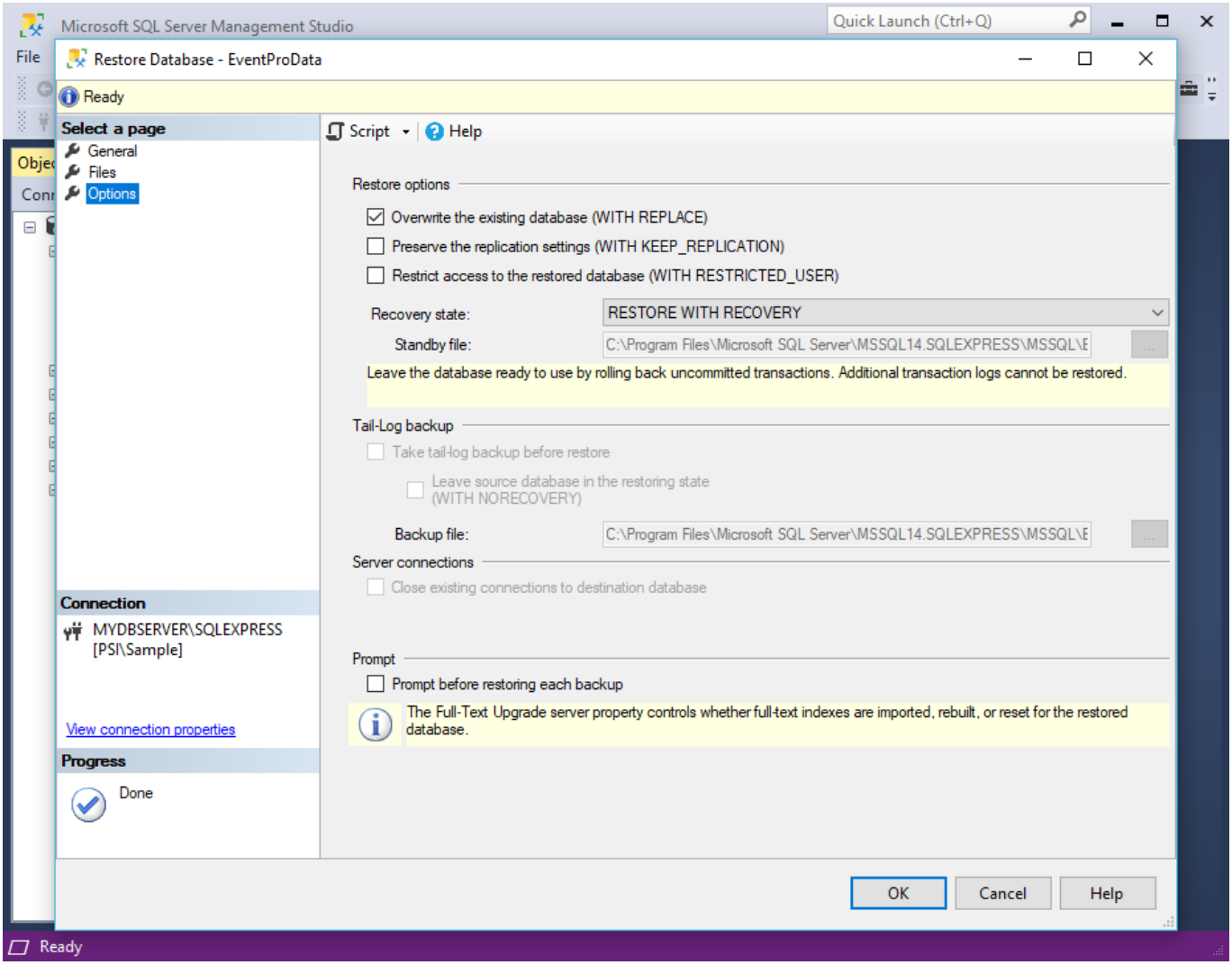
6. Back in the **Restore Database** form, under **Destination**, the **Database** should be set to **EventProData**.



7. Ensure that you have selected the correct Source and Destination.



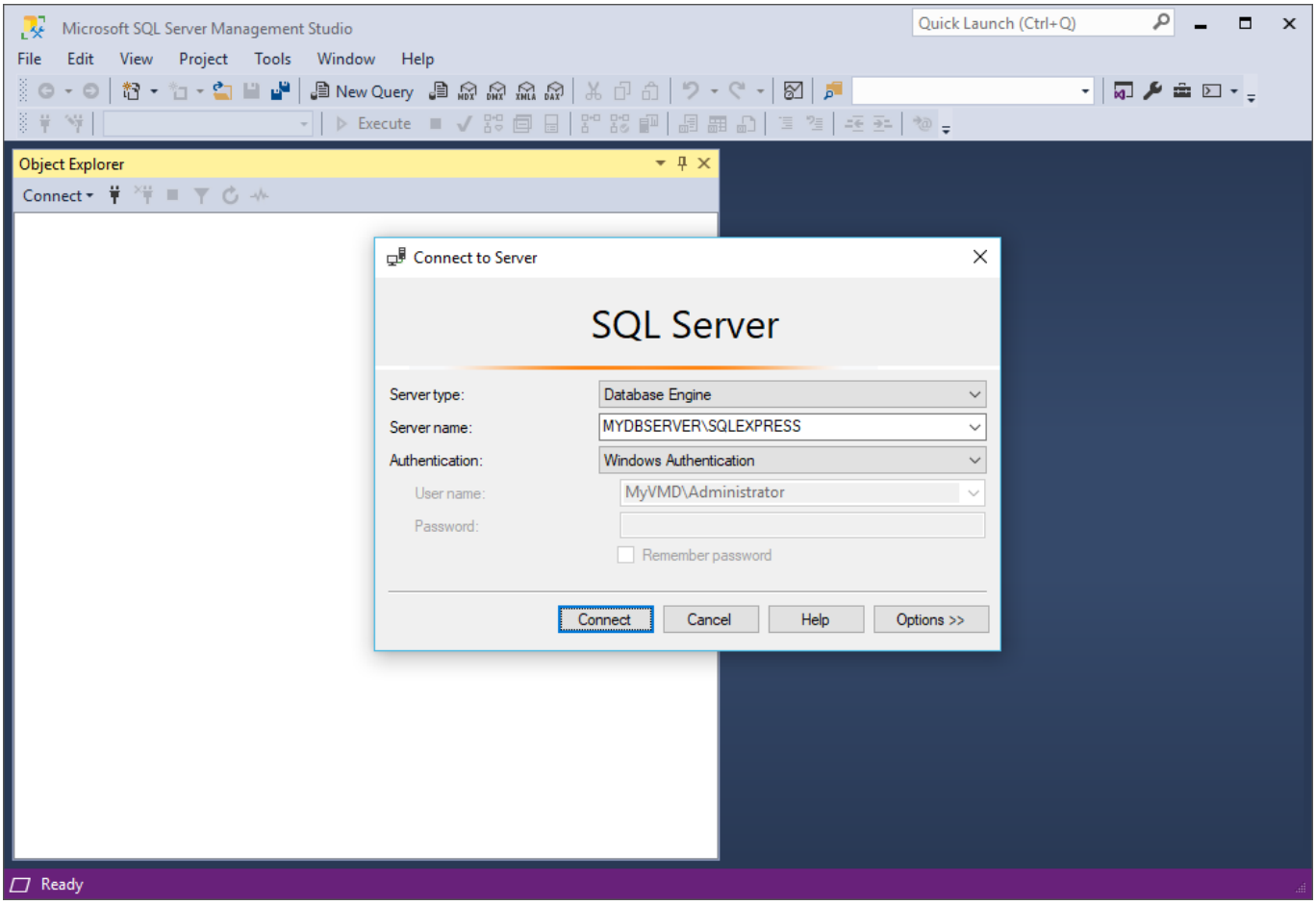
8. In the left **Select a Page** panel, click on **Options**. Select the first checkbox, **Overwrite the Existing Database (WITH REPLACE)**. (In this situation, we want the restored, prepared database from EventPro Training/Support to overwrite the blank "placeholder" database that we created in the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



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 195.

Give Database Rights to Users

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



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

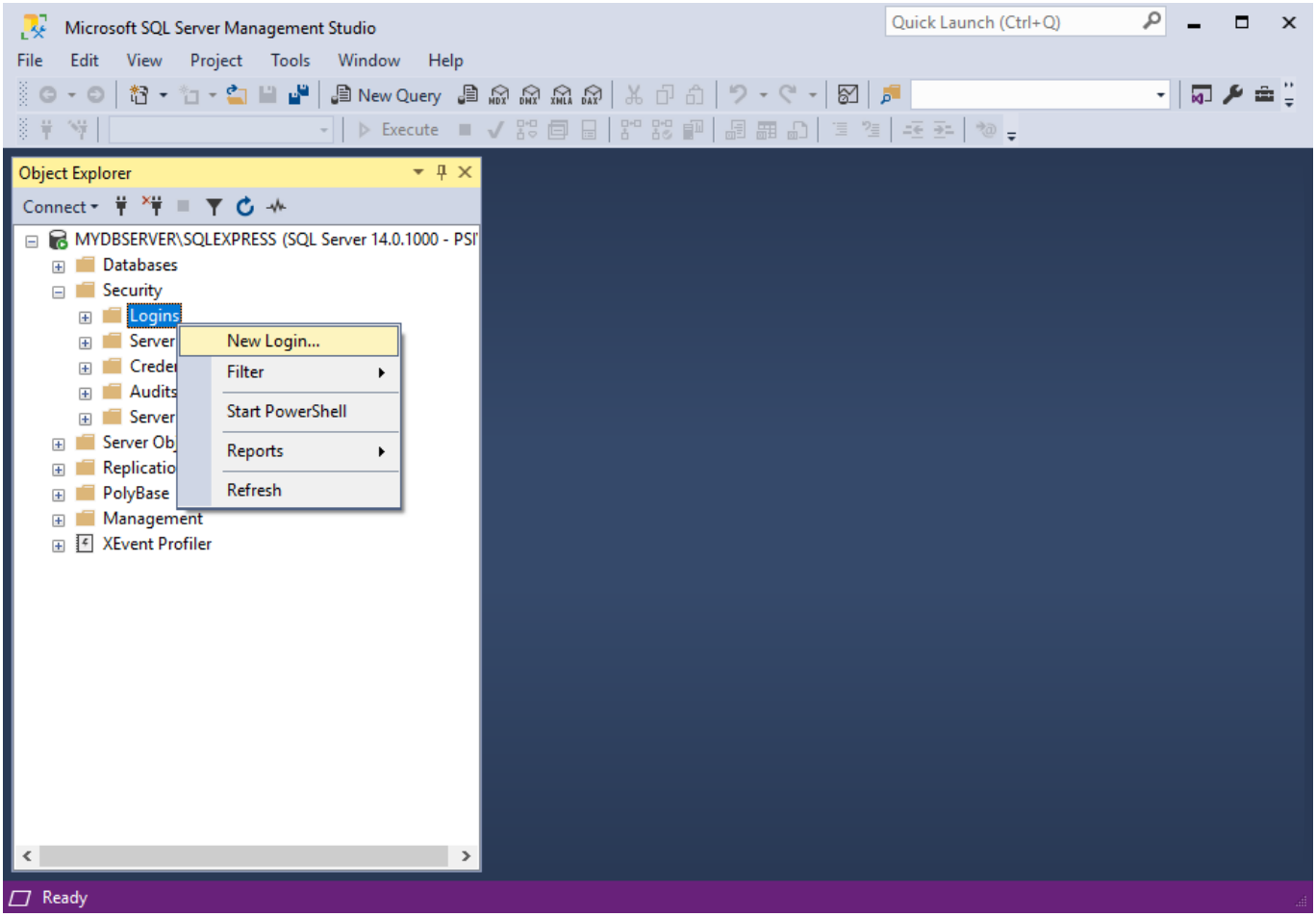
b. Select either **Windows Authentication** or **SQL Server Authentication**. If you choose SQL Server Authentication, enter the **User Name** and **Password**.

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

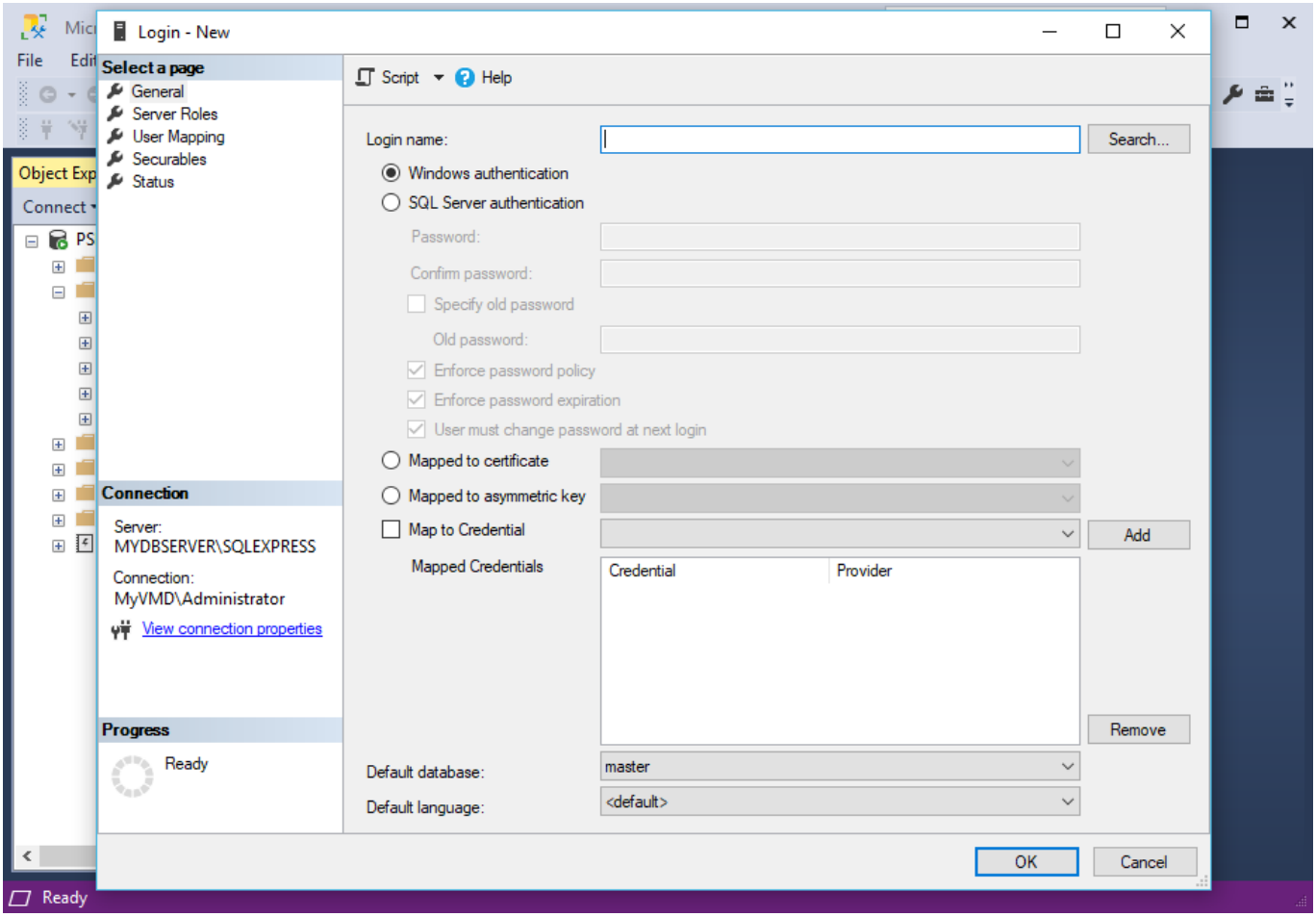
c. Click **Connect**.

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**.



4. The **Login - New** form appears.

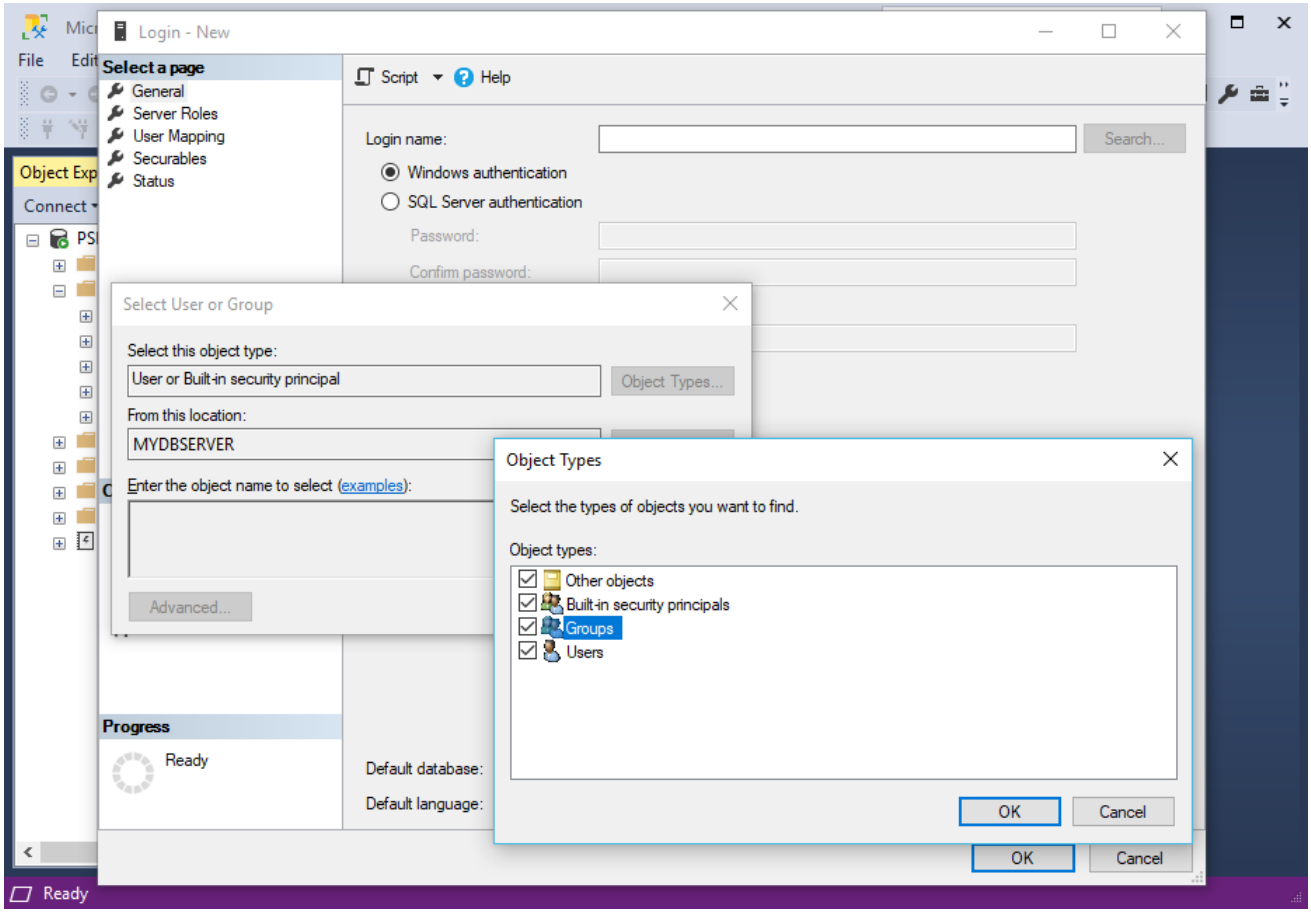


5. Select the radio button next to **Windows Authentication** to indicate that you want **Users** to connect to the SQL Server Instance using **Windows Authentication**.

6. You now need to find the EventPro Security Groups that you created back in **Create Active Directory Groups for Integration** 163.

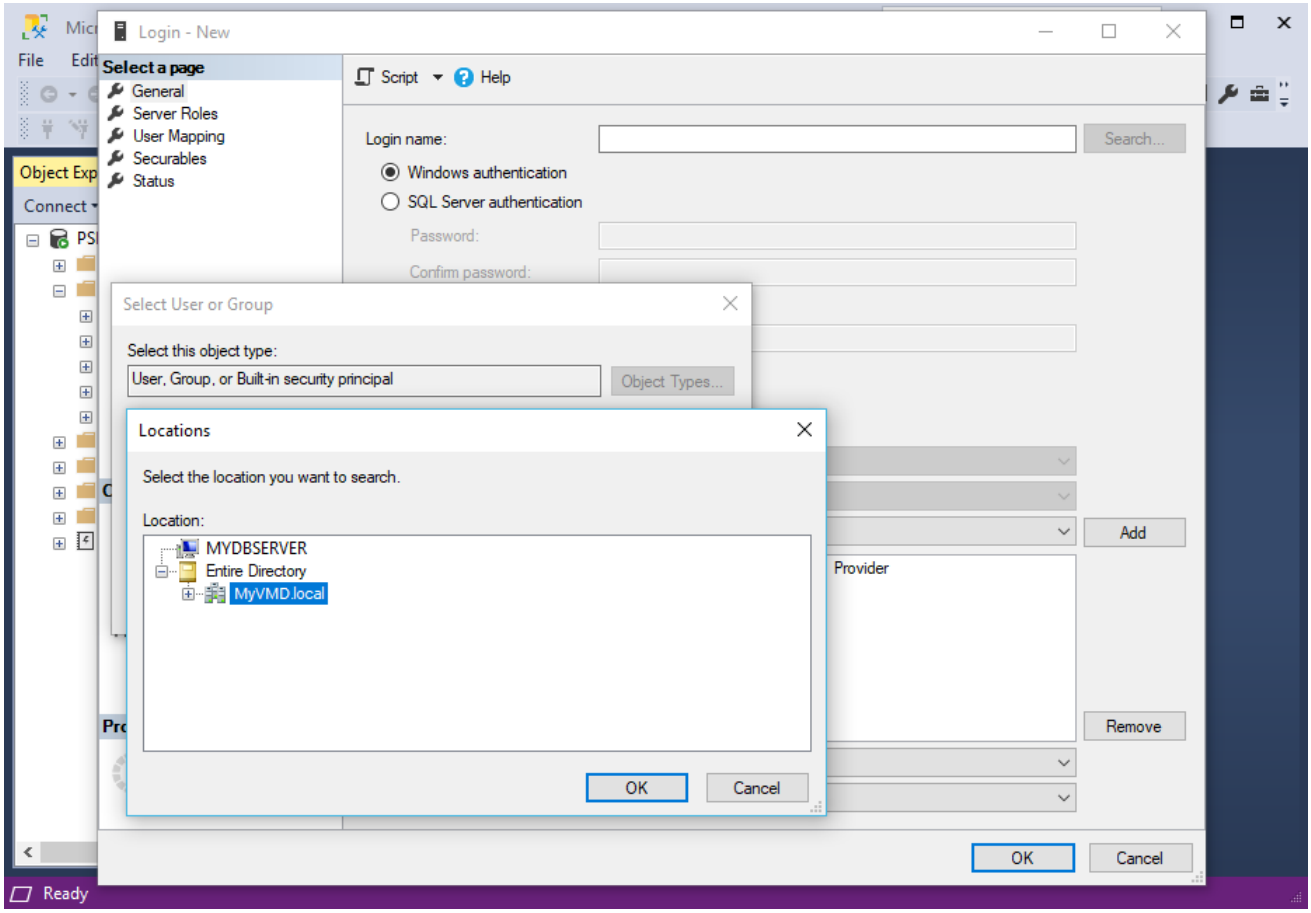
   a. Click the **Search** button next to the **Login Name** field. The **Select User or Group** window appears.

   b. Click the **Object Type** button. In the **Object Types** window, select the **Groups** checkbox and click **OK**.

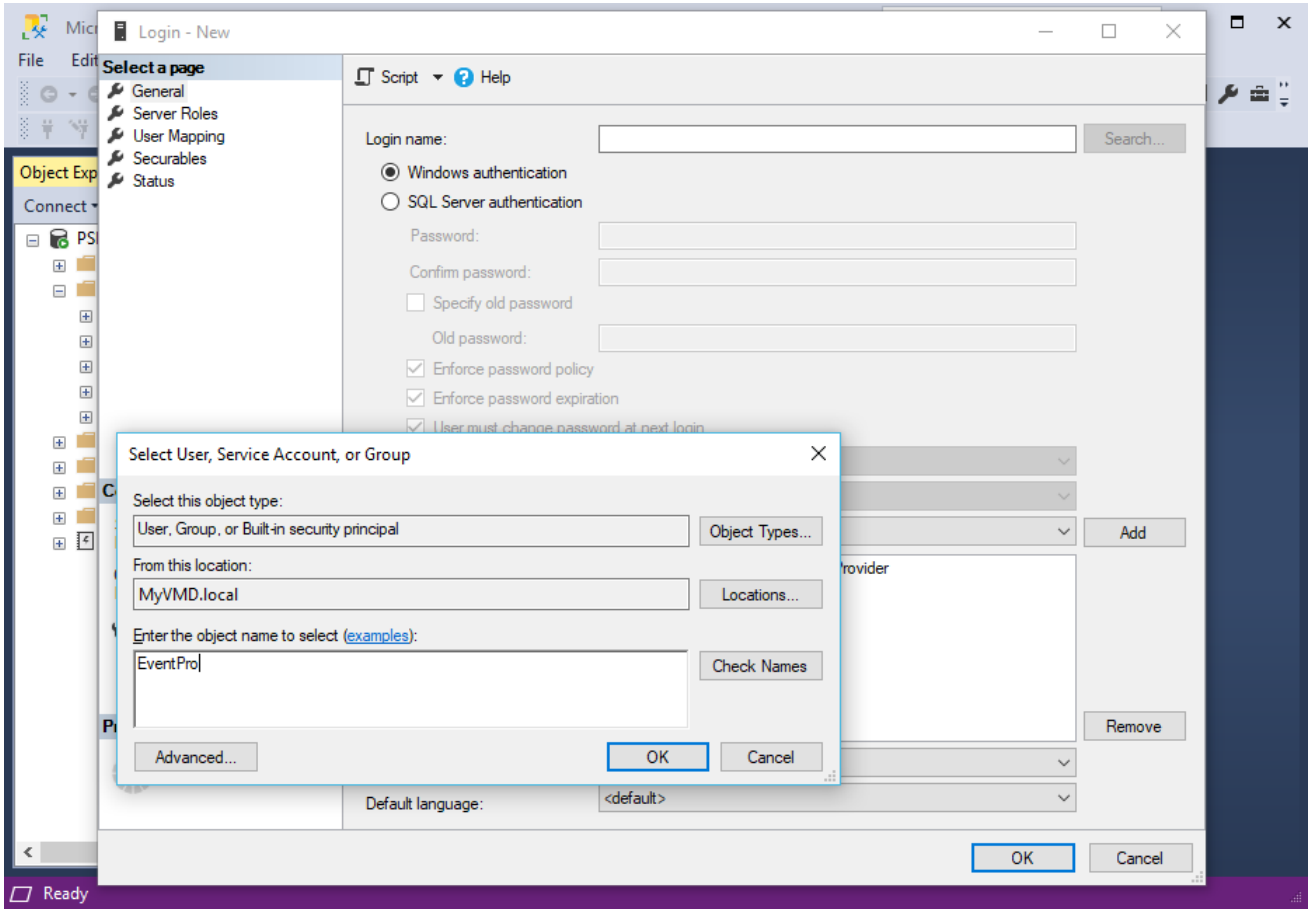


c. Back in the **Select User or Group** window, click the **Locations** button.

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

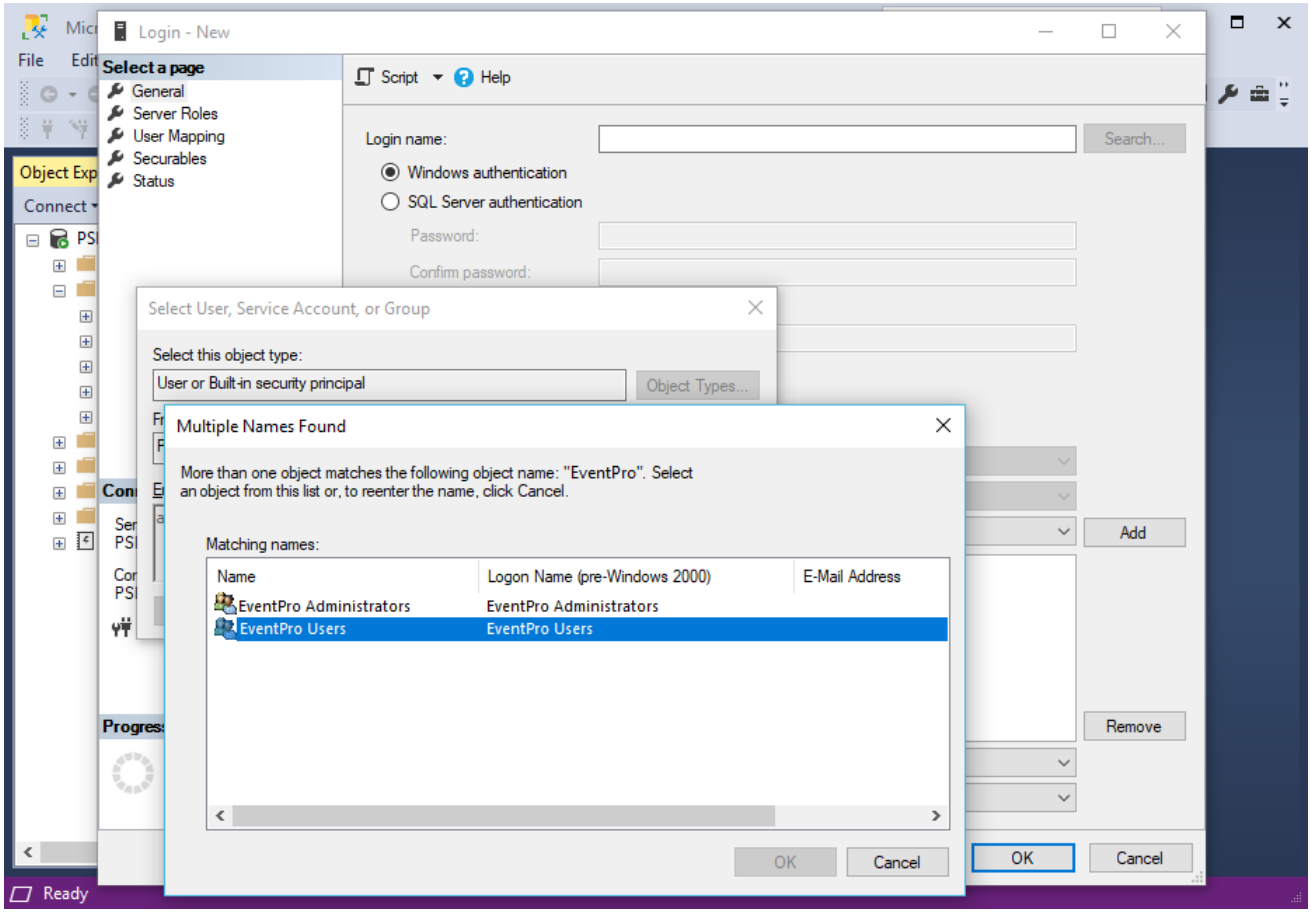


d. Finally, enter a search term in the bottom field of the **Select User or Group** window, *e.g.* **EventPro**, and click the **Check Names** button.



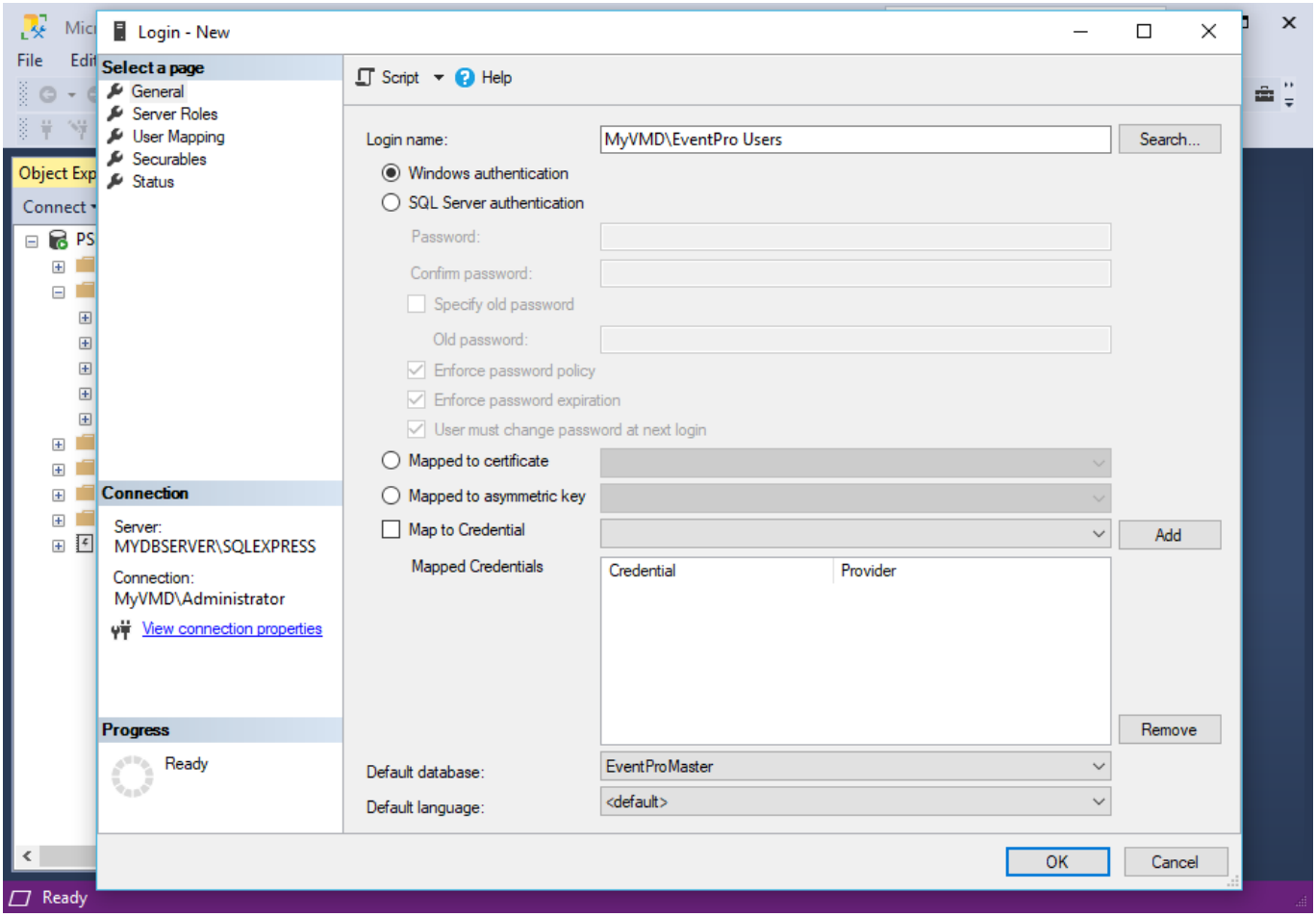
e. If there are multiple matching results in the **Multiple Names Found** window, select the group(s) for which you want to assign database rights, and click **OK**. In this example, we will select the **EventPro Users** security group.

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.



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.

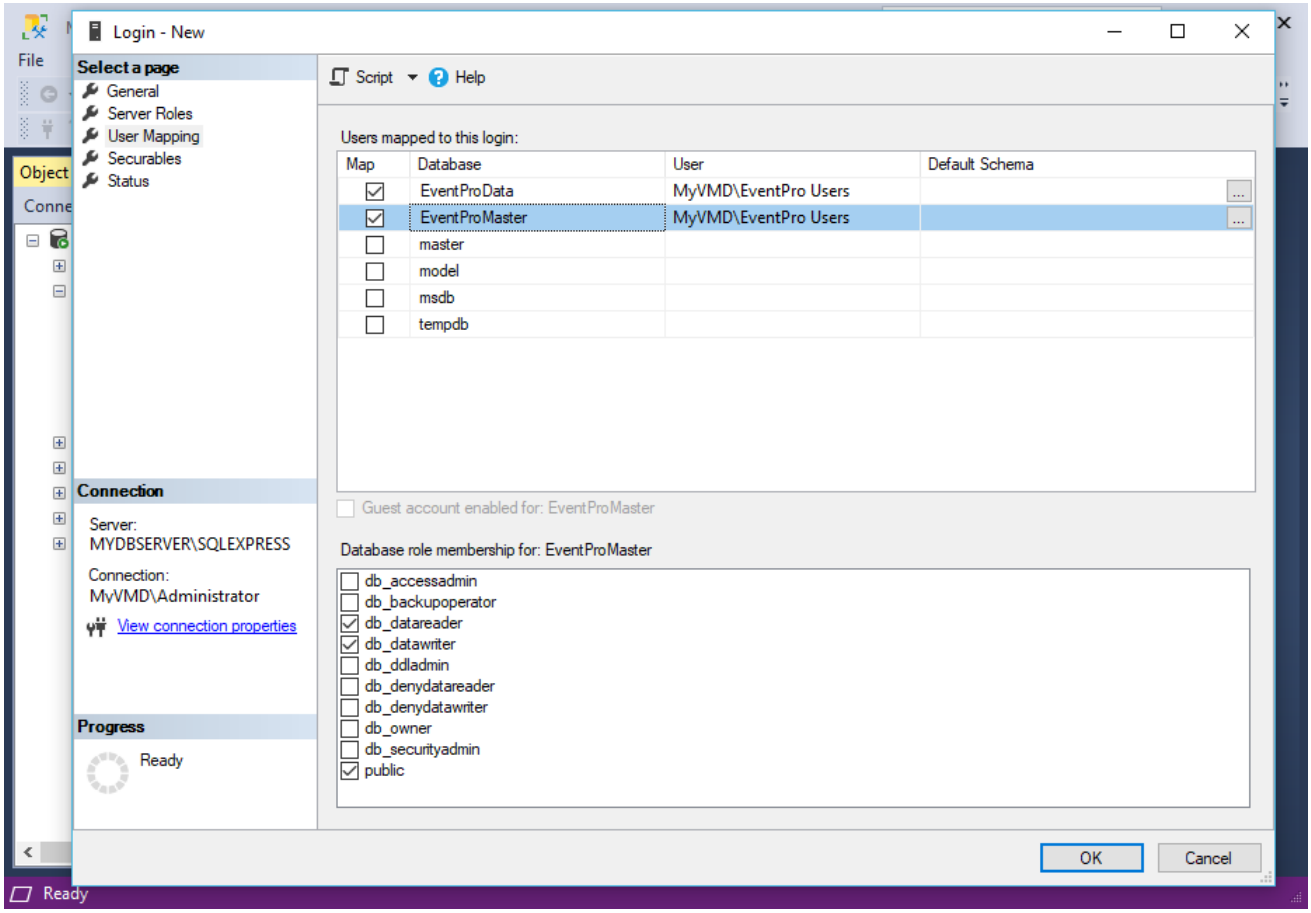


8. Ensure that the **Windows Authentication** radio button is selected, which you would have done earlier.
9. Near the bottom, you can set the **Default Database** to **EventProMaster**.
10. Next, in the **Select a Page** panel of the **Login - New** form, select the **User Mapping** page.

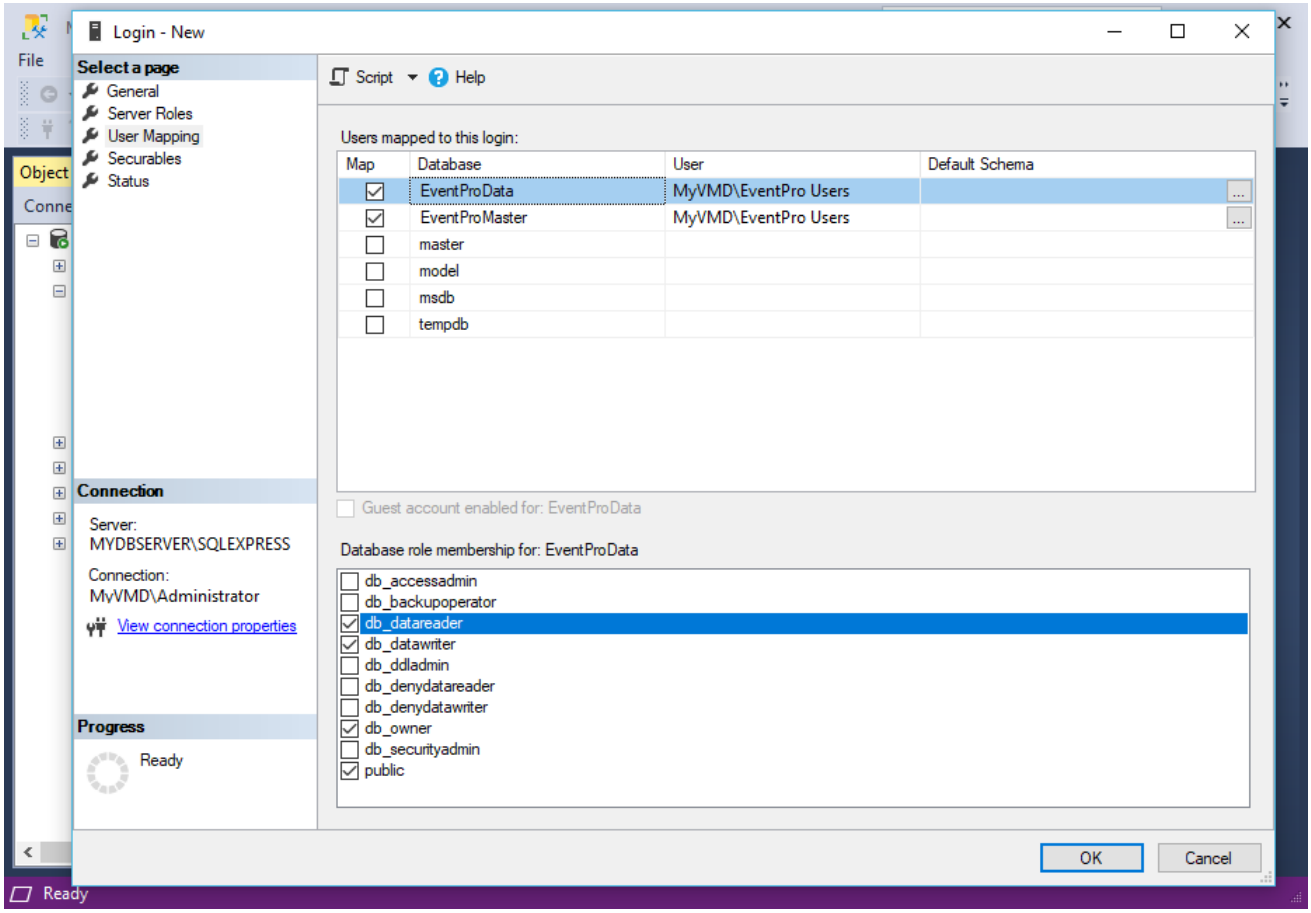
    Select the **Map** checkboxes for the **EventProData** and **EventProMaster** databases.

    You then need to set the **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.



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



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 for Integration** 163.

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** 206.

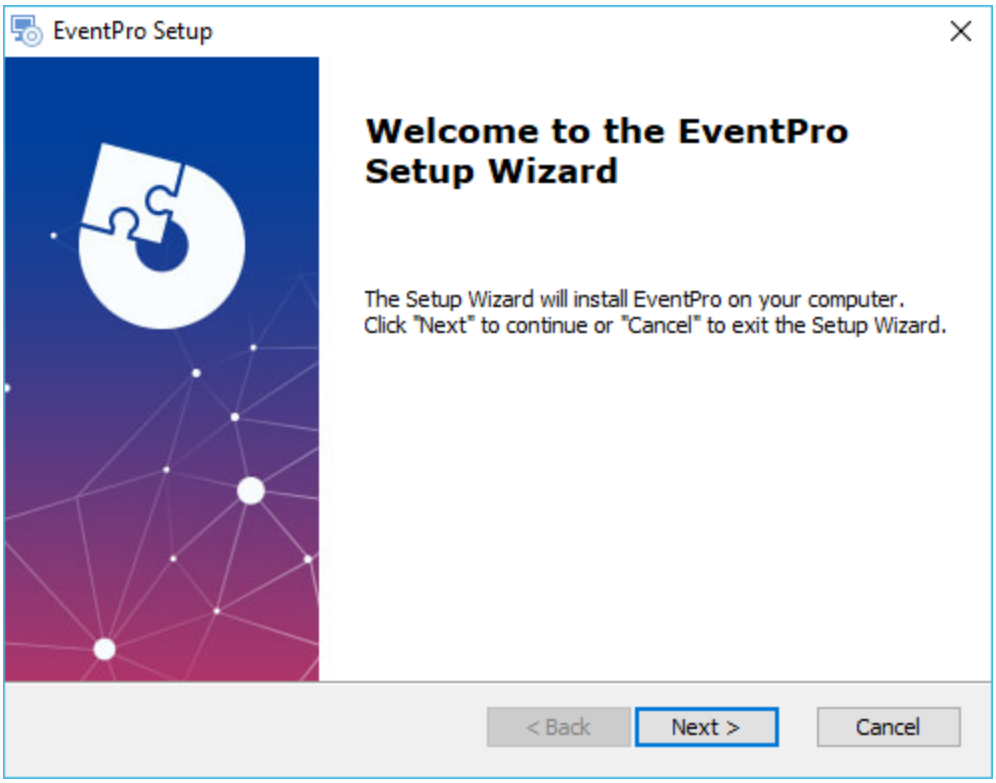
Install EventPro to Server

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.

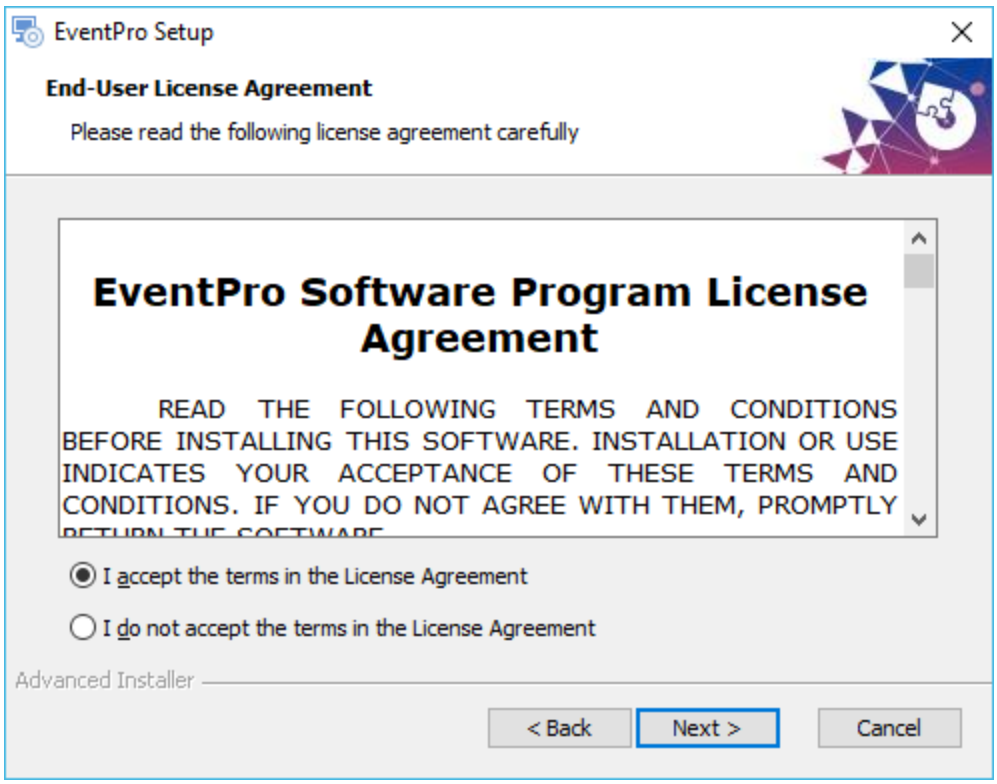


3. **End-User License Agreement**:

   a. Please read the **EventPro Software Program License Agreement**.

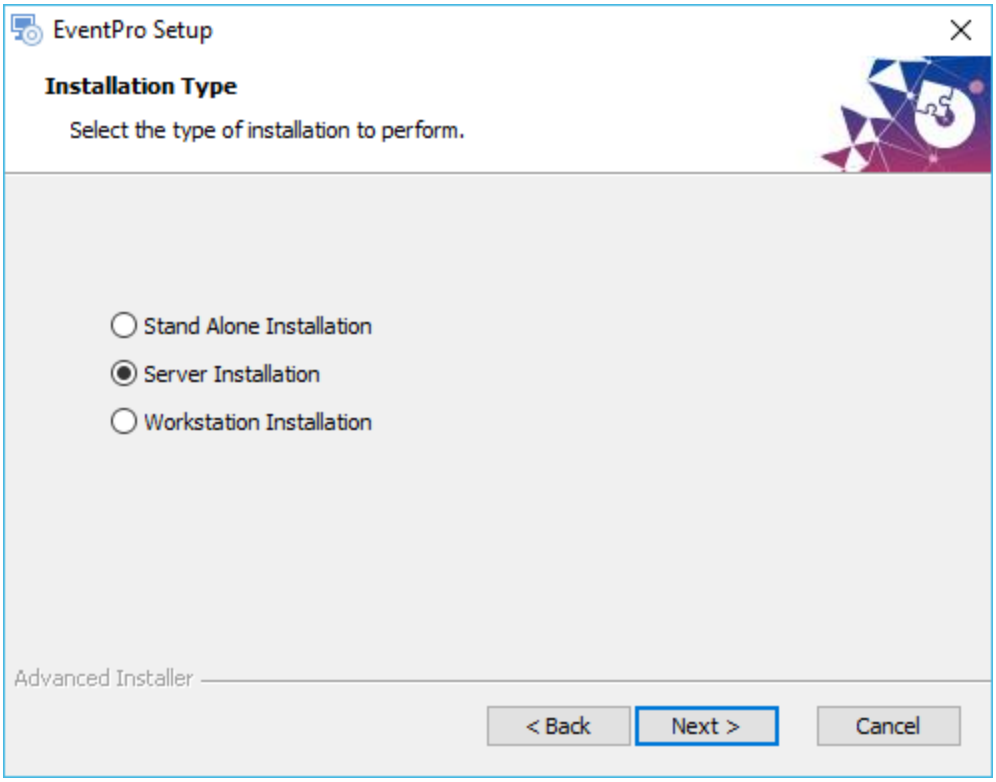
   b. Select **I ACCEPT** or **I DO NOT ACCEPT** below. If you do not accept the license agreement, you cannot continue with the installation process.

   c. Click **Next** to continue.



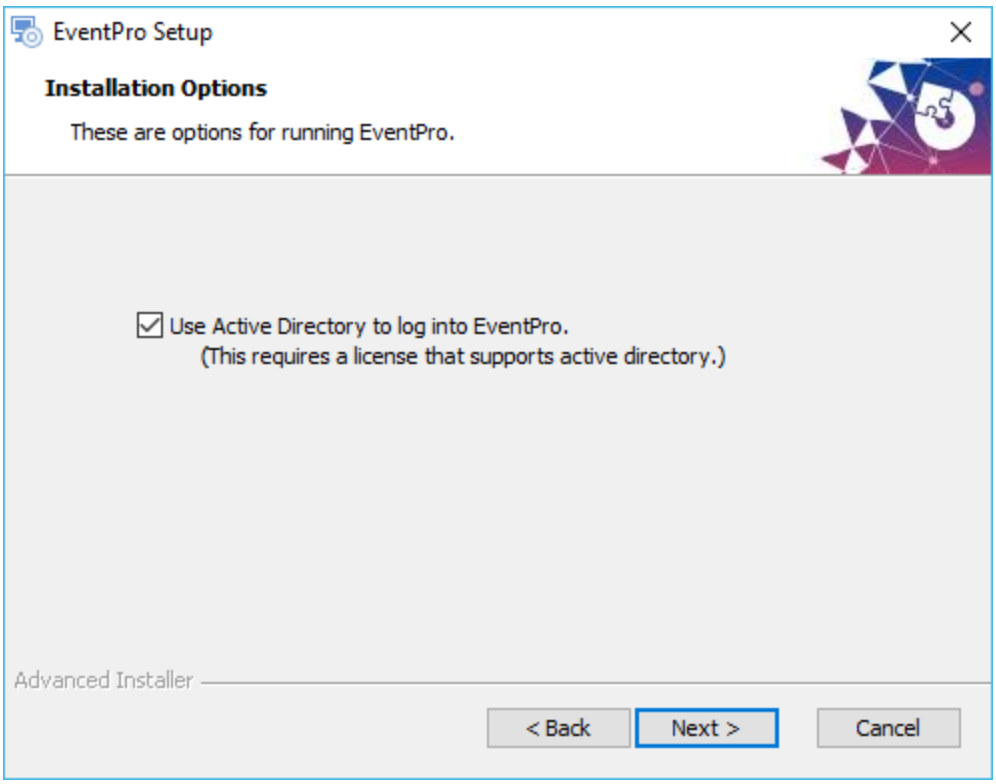
4. **Installation Type**: Choose **Server Installation**, and click **Next**.

   *(Review **Installation Types** 67 above, if necessary.)*

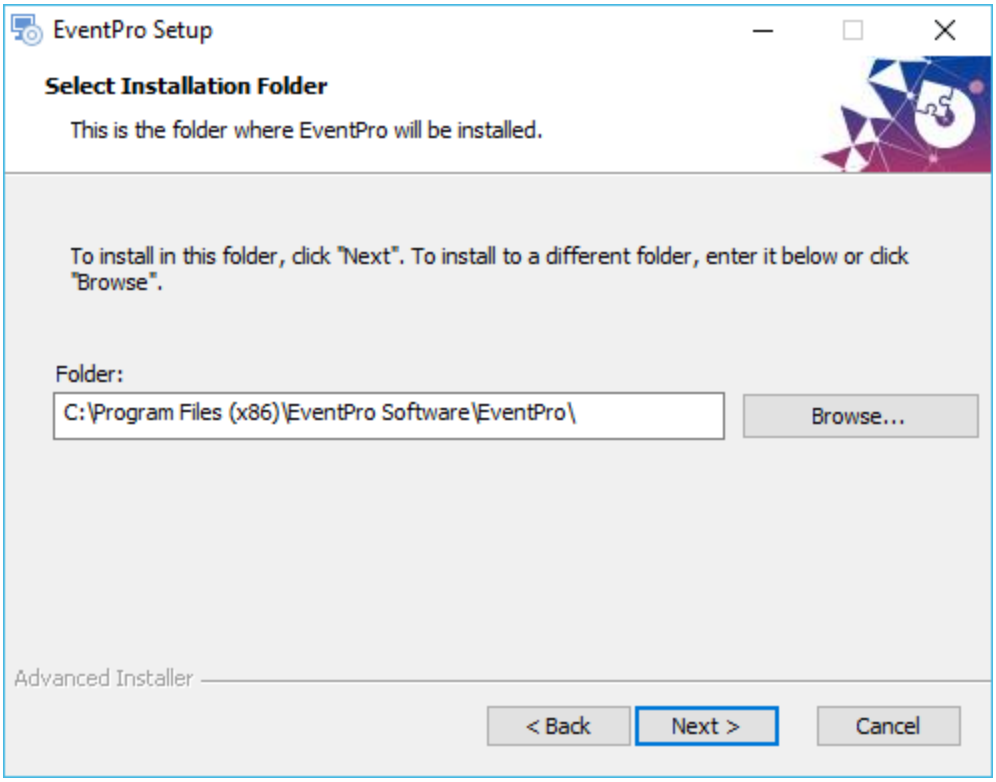


5. **Installation Options**: Select the checkbox next to **Use Active Directory to log into EventPro**.

   Click **Next**.



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**.

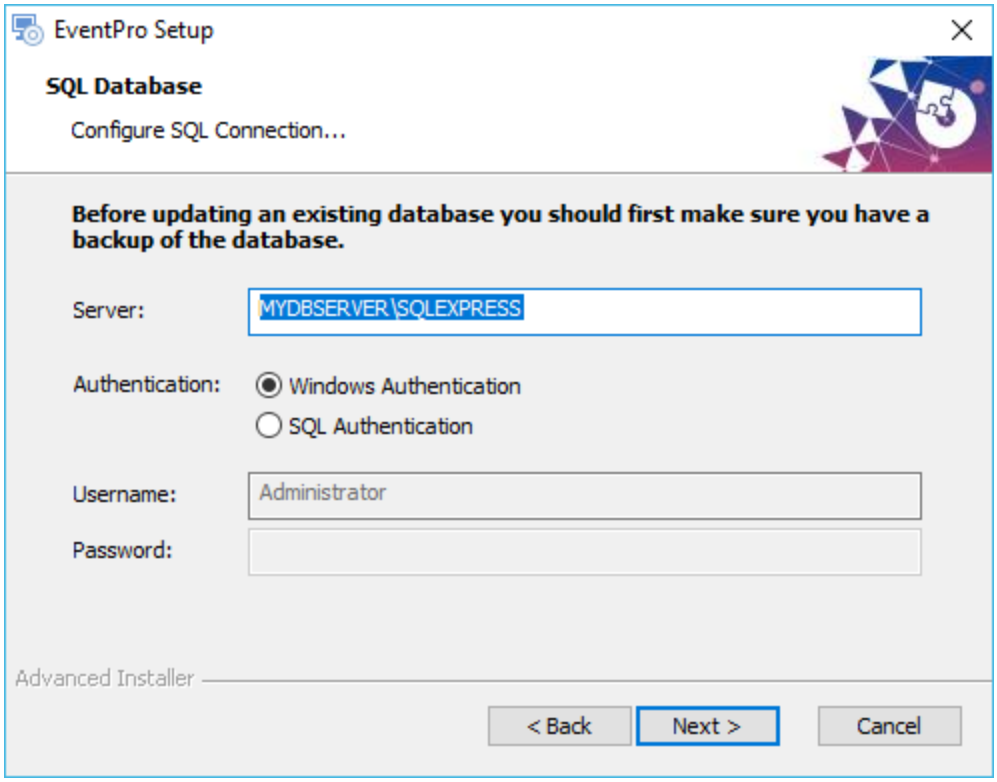


7. **SQL Database**:

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**.

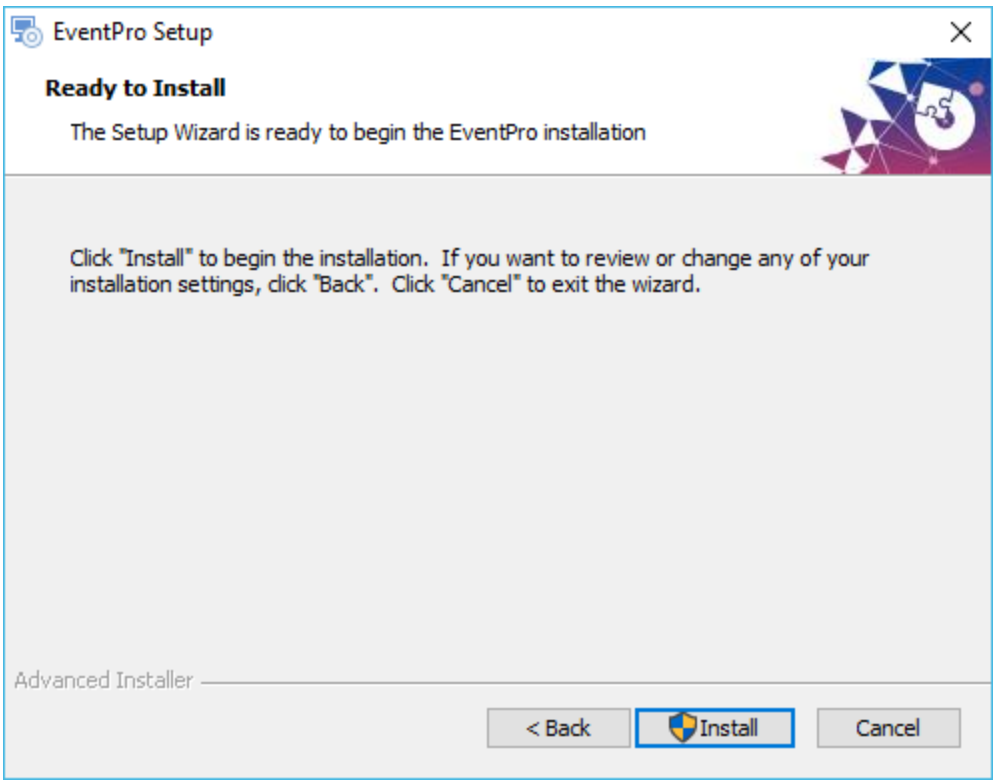
b. Select the radio button next to **Windows Authentication**. (As you will recall from **above** 198, you set up the **SQL Server Logins** to use **Windows Authentication**.)

c. Click **Next**.



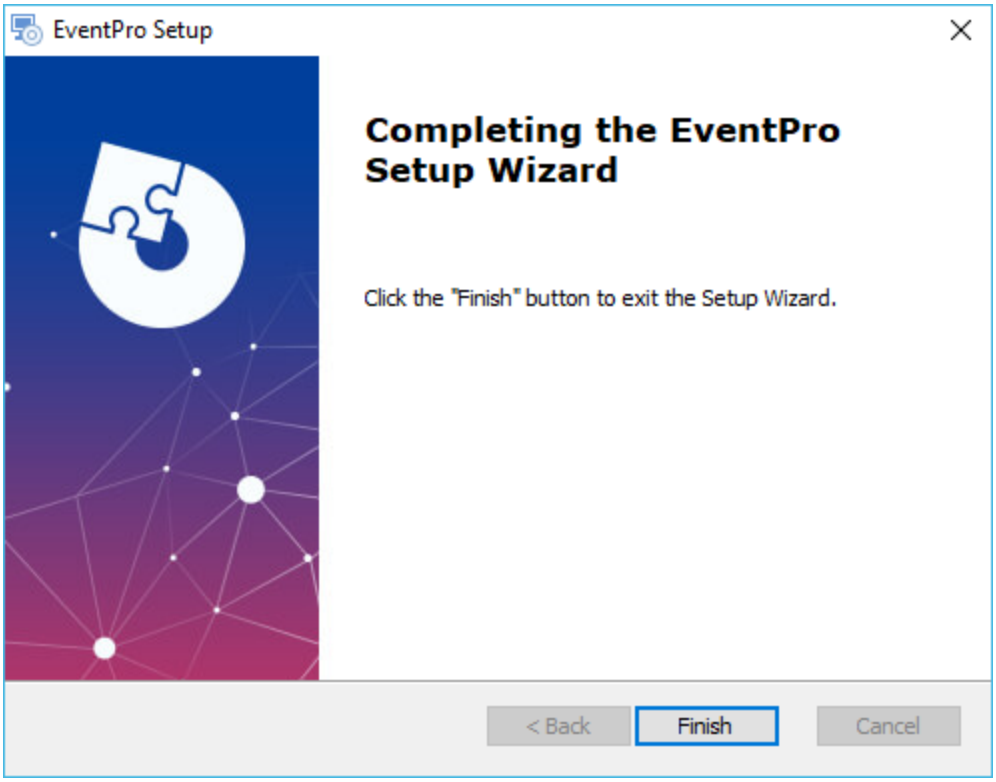
8. The Installer will test the connection to the database before you can proceed with the installation.

9. When the connection test is completed, click **Install**.



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**.



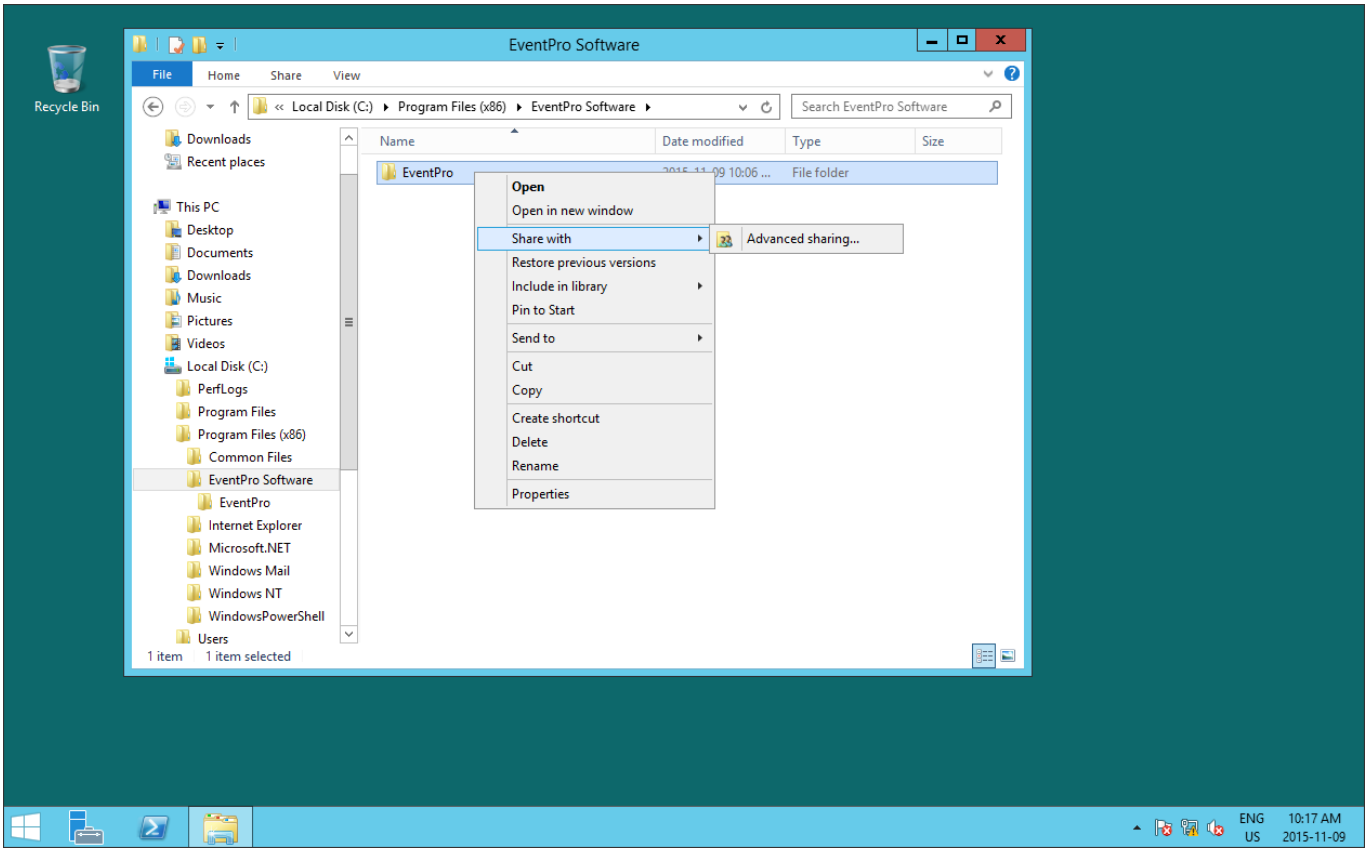
11. Now the Server Installation process is complete. Before moving on to Workstation Installations, you first need to **Share the Installation Folder** 211.

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 **Select Installation Folder** 208 page of the installation wizard.

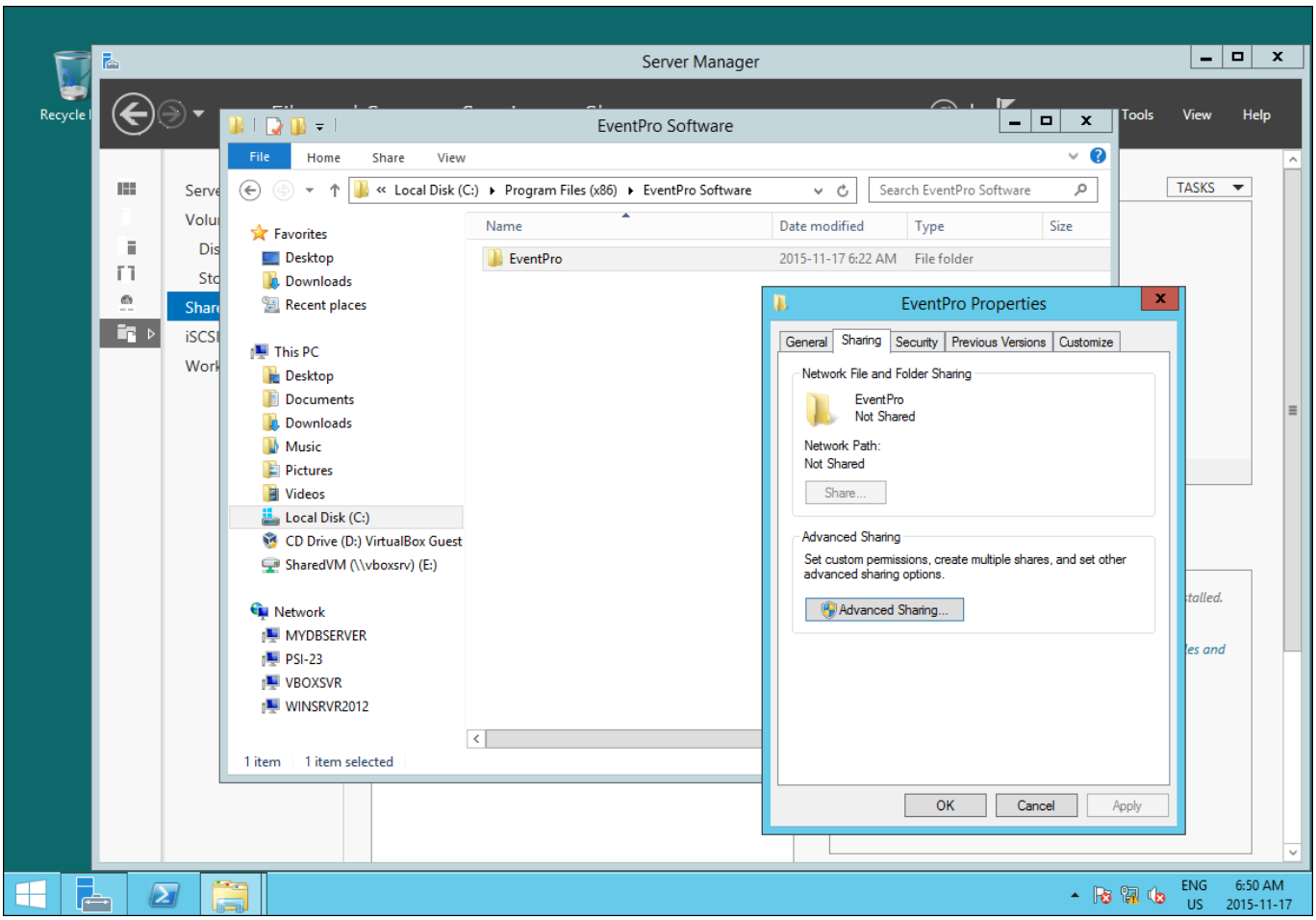
The exact process of sharing the folder will vary, depending on the network environment in which you are working. The instructions below provide an example, but you may have to consult the documentation for your network and operating system to determine how to share the Installation Folder from the Application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

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



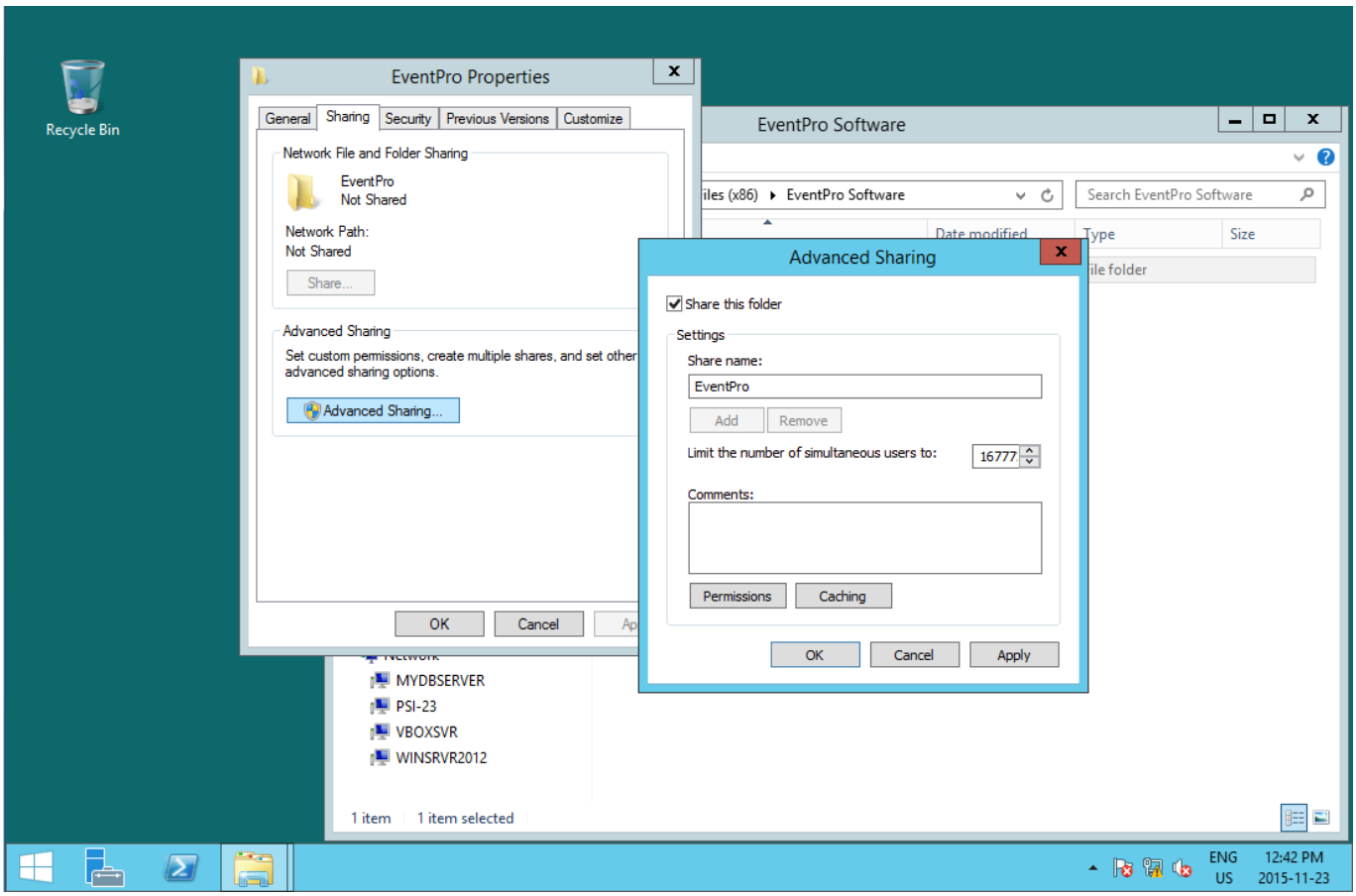
2. The folder's **Properties** will appear. Initially, the **Sharing** tab will indicate that the folder is **Not Shared**.

   Click the **Advanced Sharing** button.



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

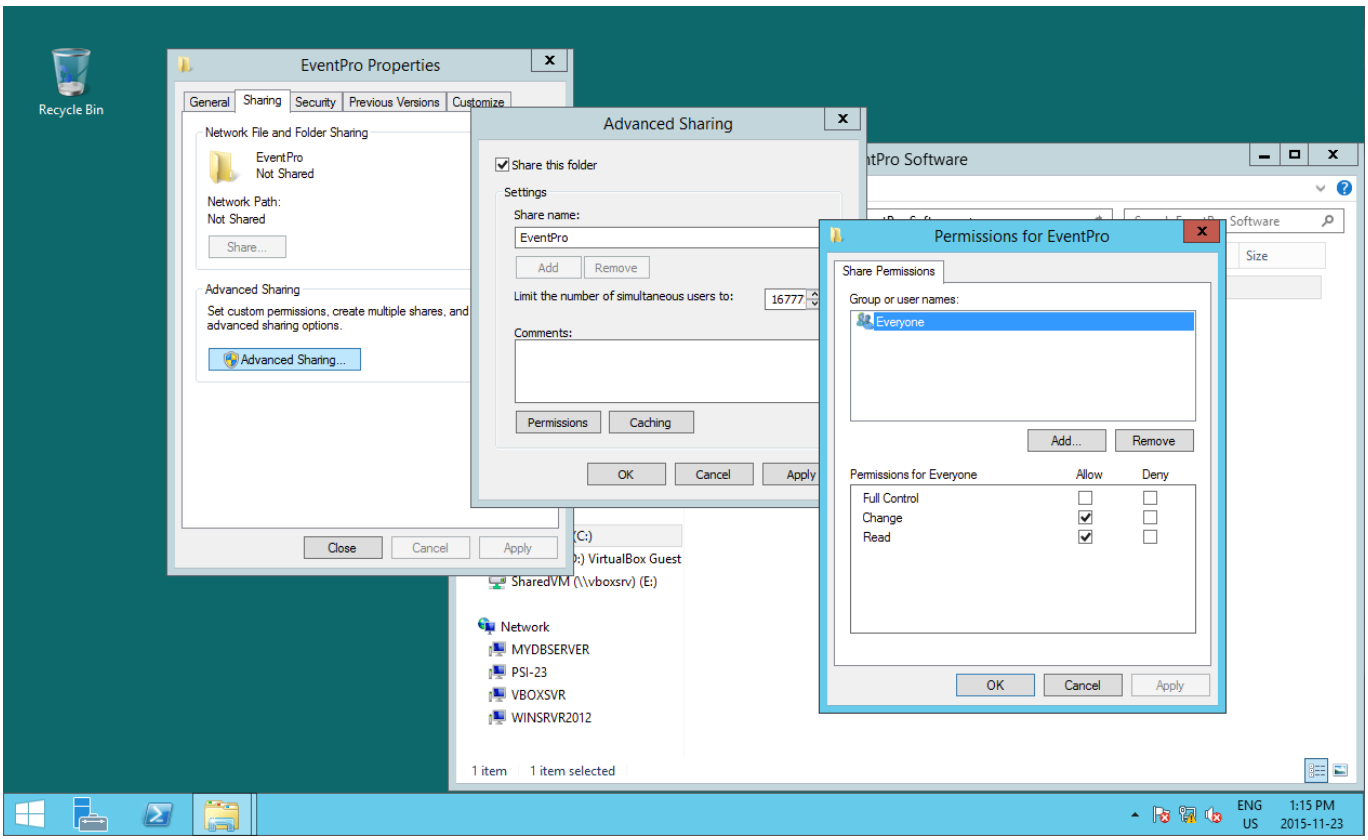
   You can leave the **Share Name** as EventPro.



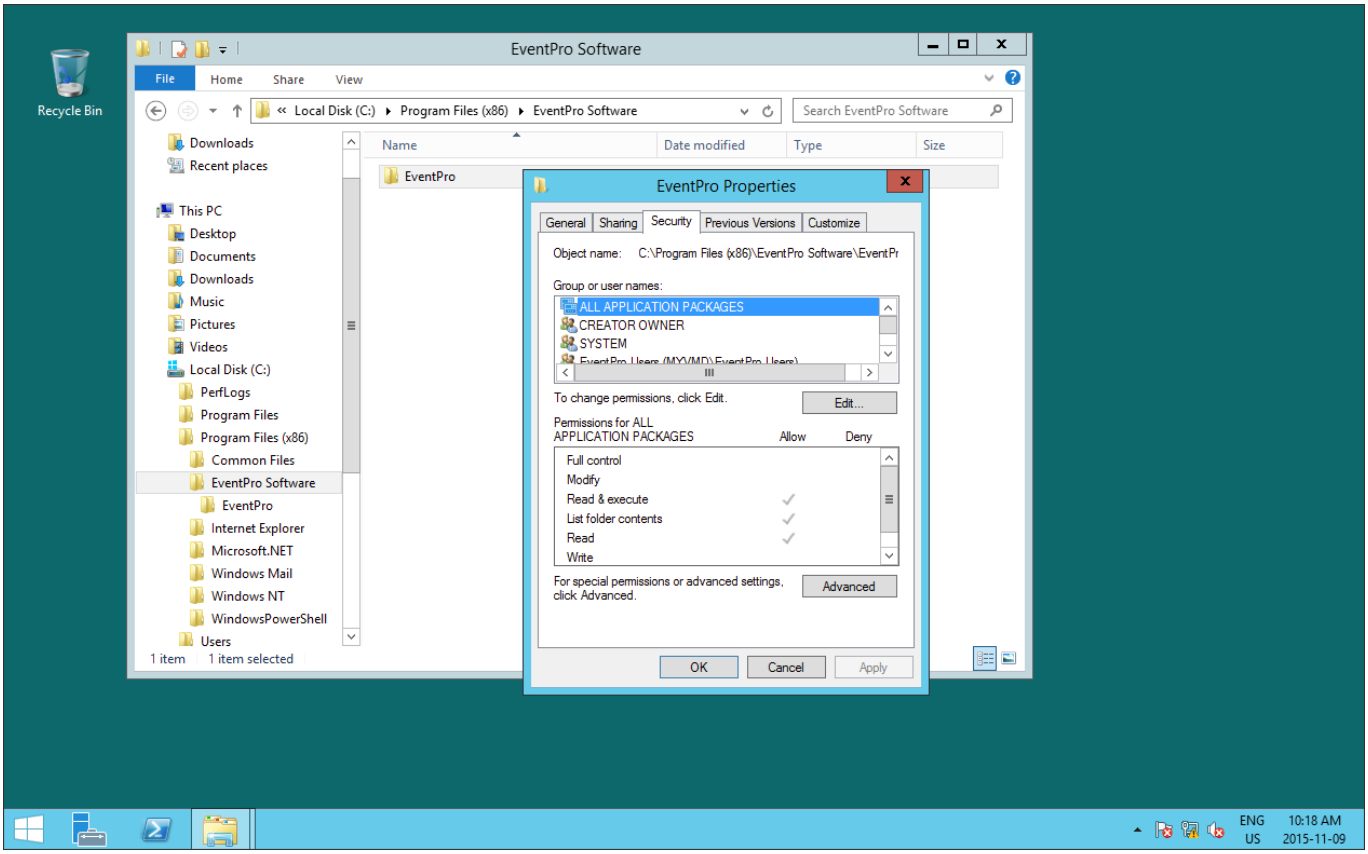
4. Click the **Permissions** button to view the **Share Permissions** for the EventPro folder.

   Users installing EventPro to their workstations require **Read** and **Change** permissions to this folder.

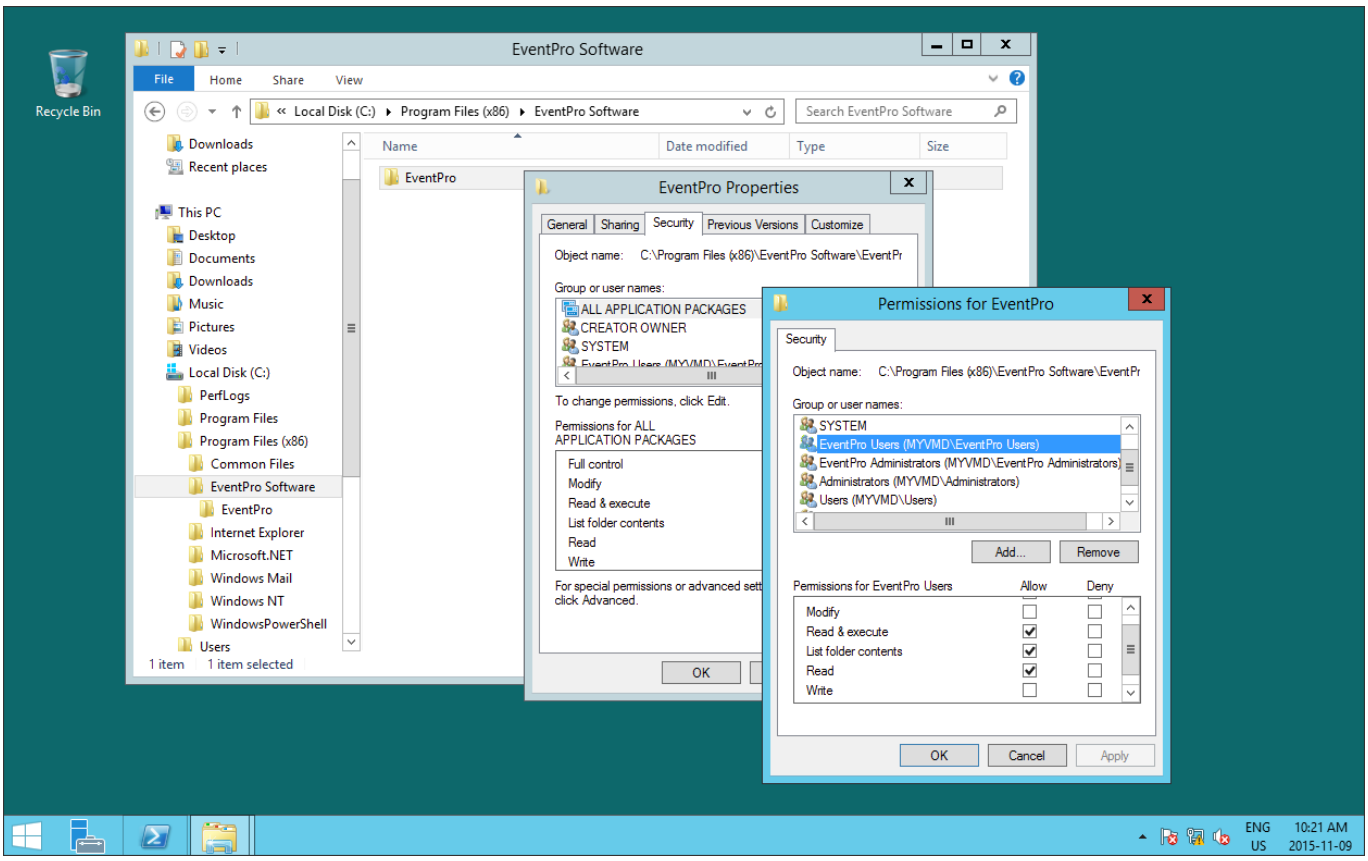
   Click **OK**, and **OK** again to return to the **EventPro folder Properties**.



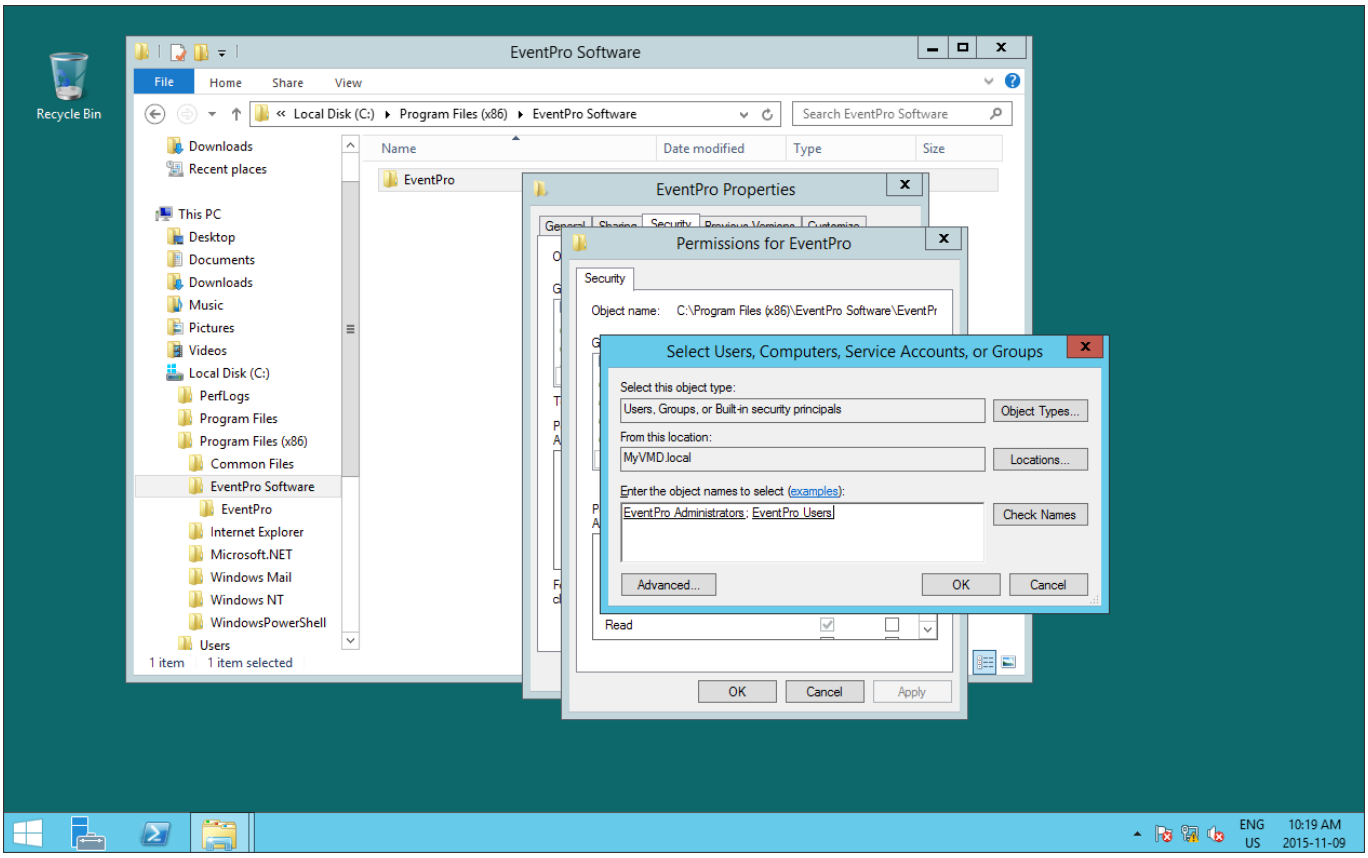
5. Go to the **Security** tab in **EventPro Properties**, and click the **Edit** button to open the **Permissions for EventPro** window.



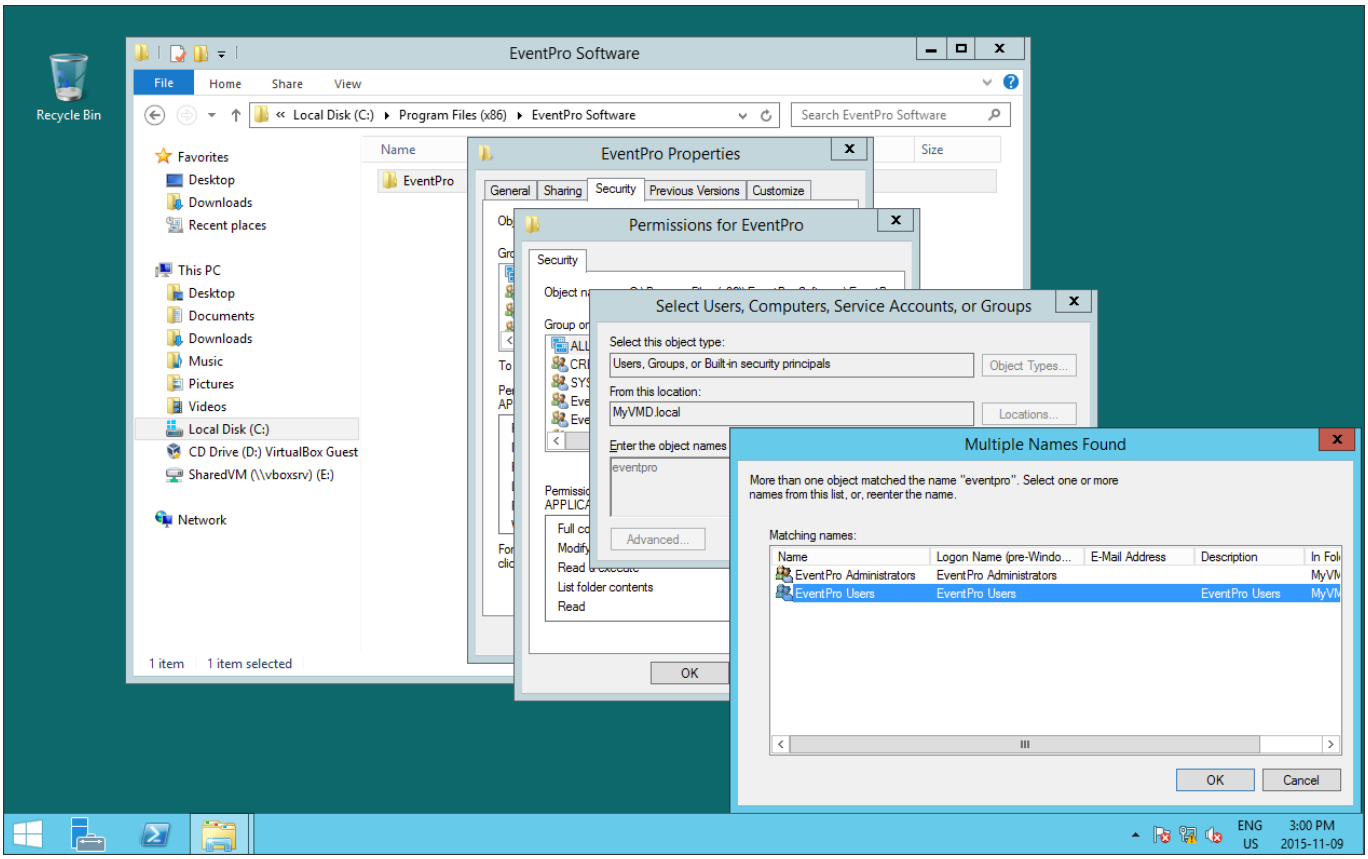
6. In **Permissions for EventPro**, click the **Add** button to open the **Select Users, Computers, Service Accounts, or Groups** window.



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).



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**.

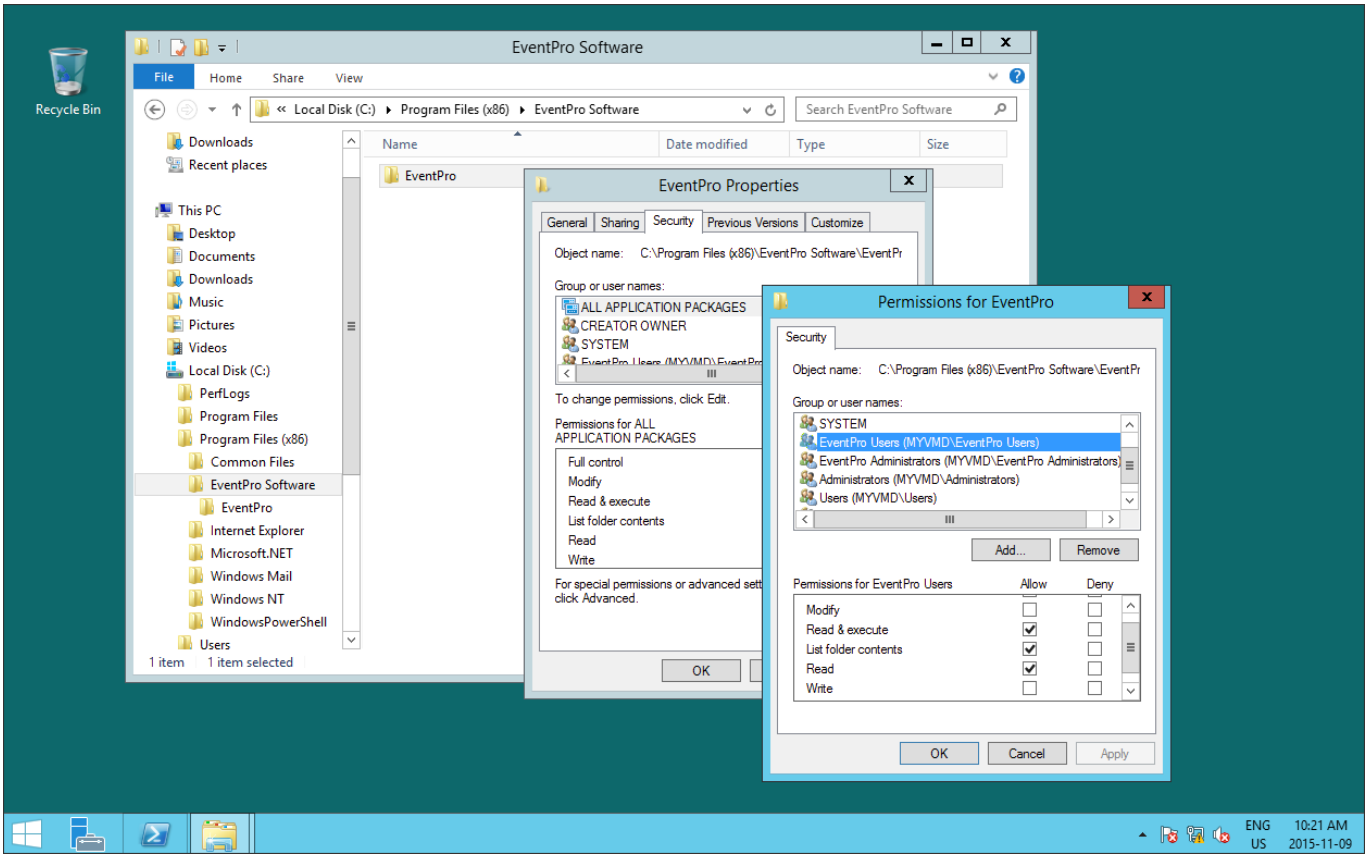
Click **OK** in the **Select Users, Computers, Service Accounts, or Groups** window.

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.

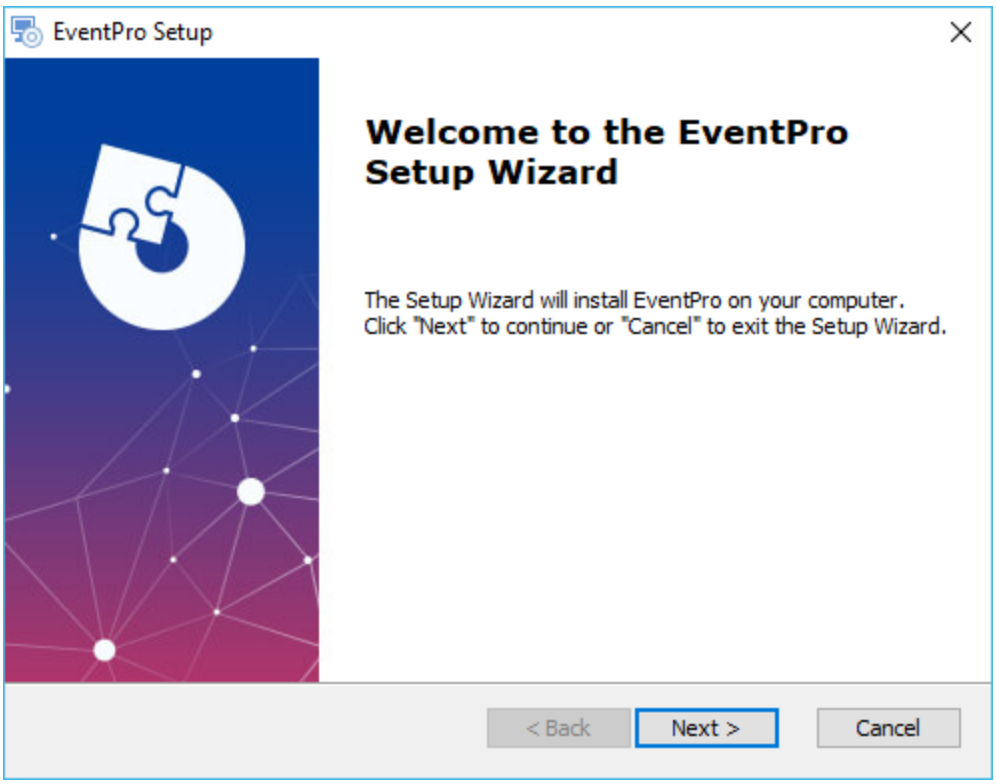


9. Now that you have shared the folder with the EventPro Users, you can proceed to [Install EventPro to Workstations](#) 217.

Install EventPro to Workstations

1. Login to the **Workstation** computer as the Administrator.
2. Navigate to the **EventPro.Win.Setup.exe** you [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.
3. The installation wizard will begin. Click **Next** to continue.

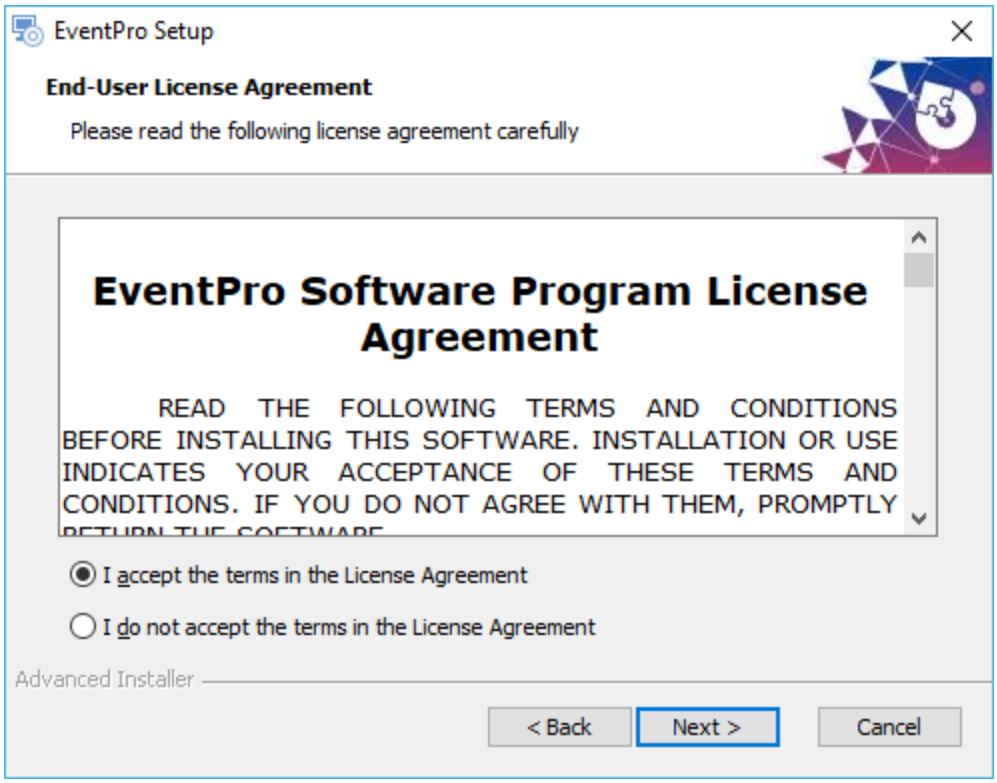


4. **End-User License Agreement**:

   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.

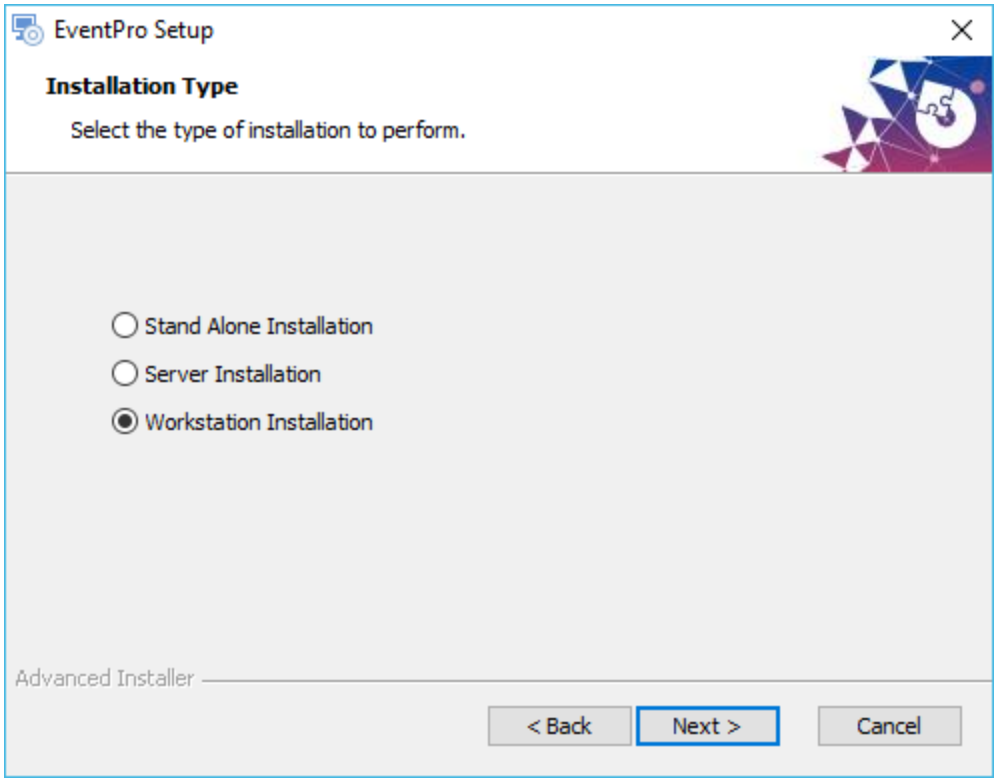
   c. Click **Next** to continue.



5. **Installation Type**:

a. This time, choose **Workstation Installation**.

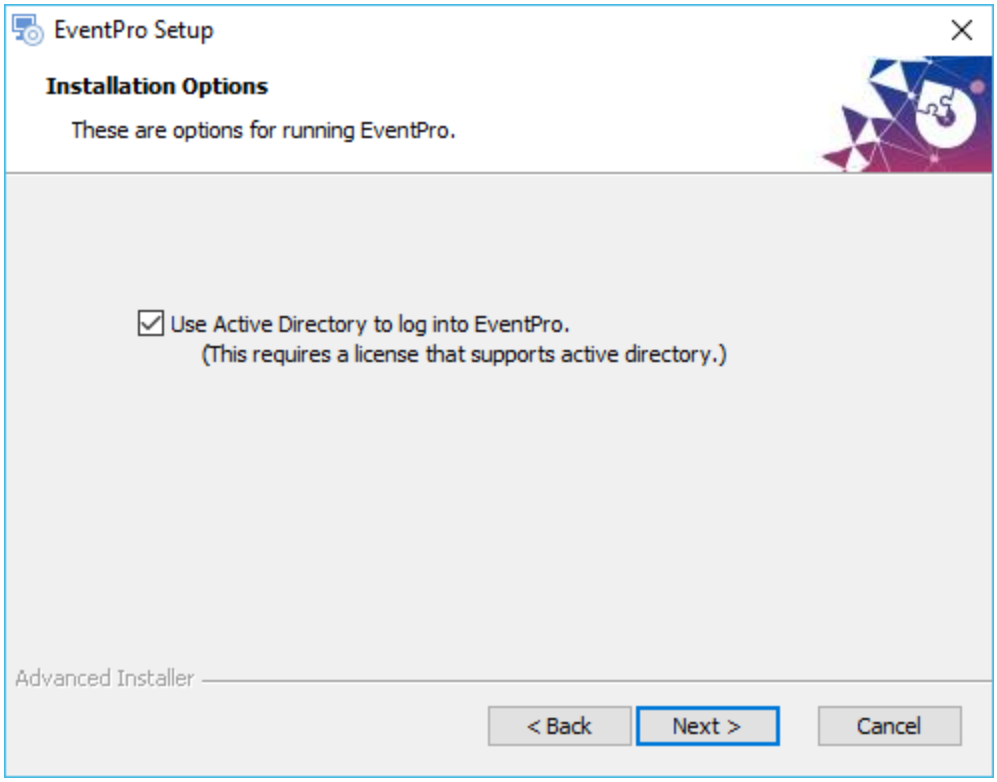
b. Click **Next**.



6. **Installation Options**:

a. Select the checkbox next to **Use Active Directory to log into EventPro**.

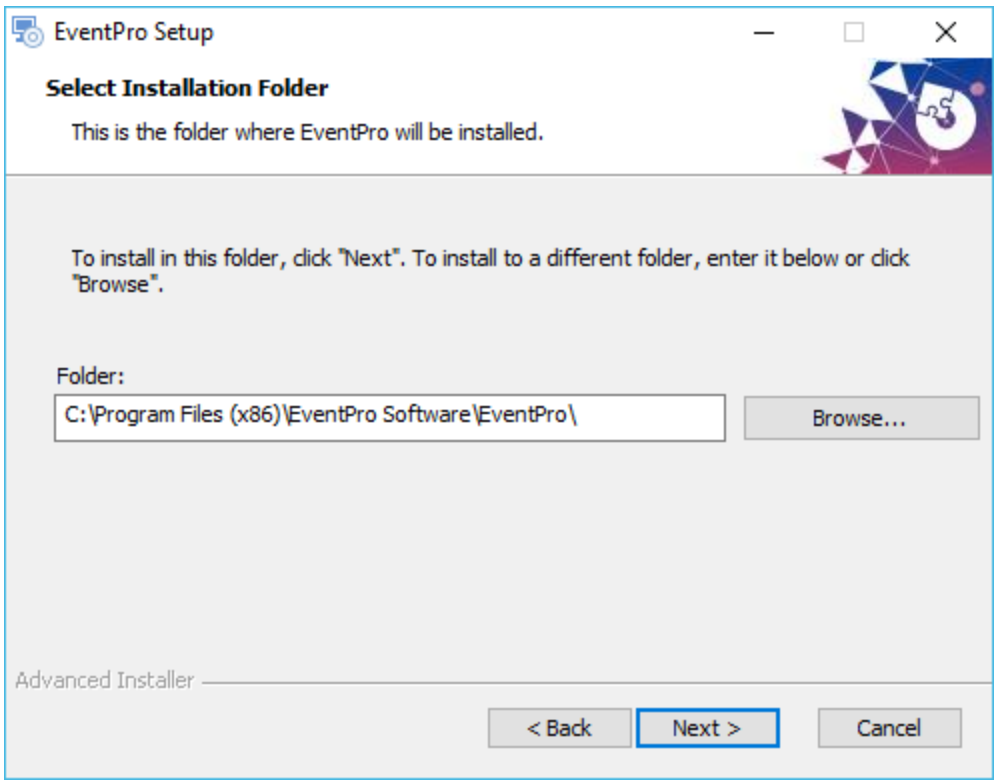
b. Click **Next**.



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**.

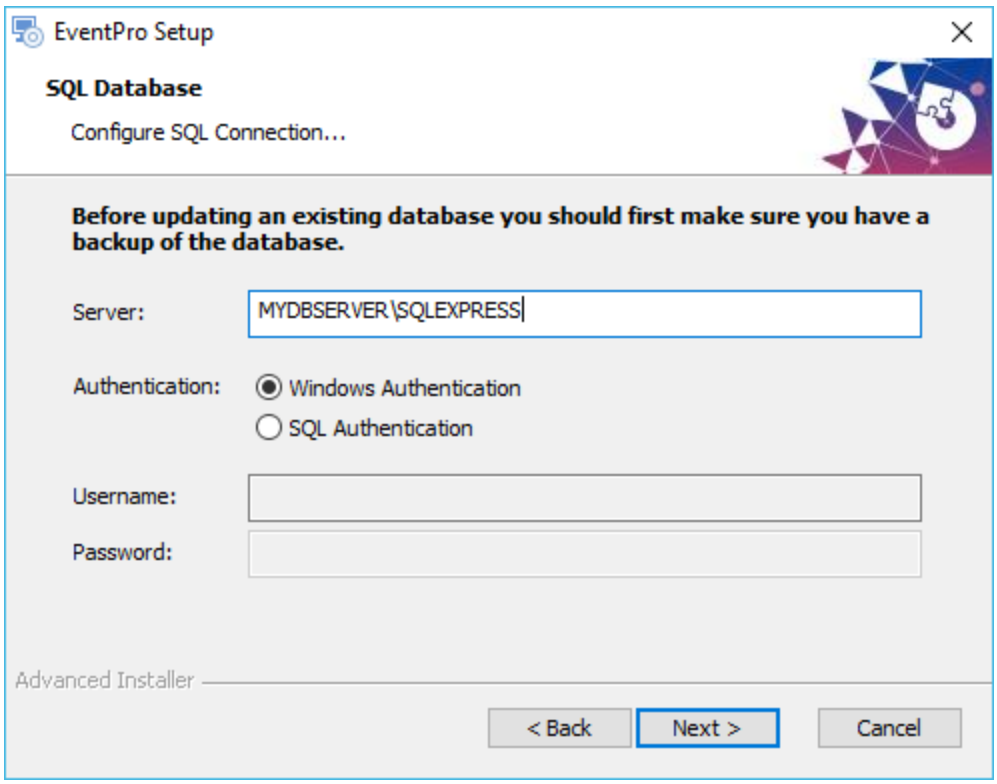


8. **SQL Database**:

   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 **above** 198, you set up the **SQL Server Logins** to use **Windows Authentication**.)

   c. Click **Next**.



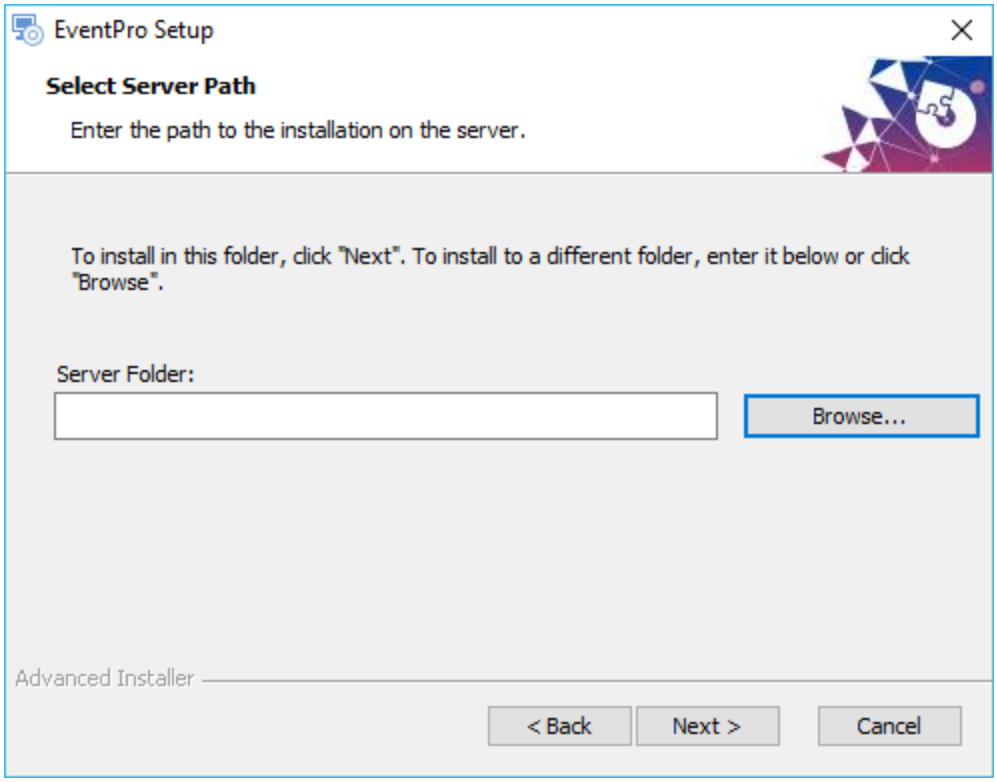
9. The Installer will test the connection to the database before you can proceed with the installation.

10. **Select Server Path**:

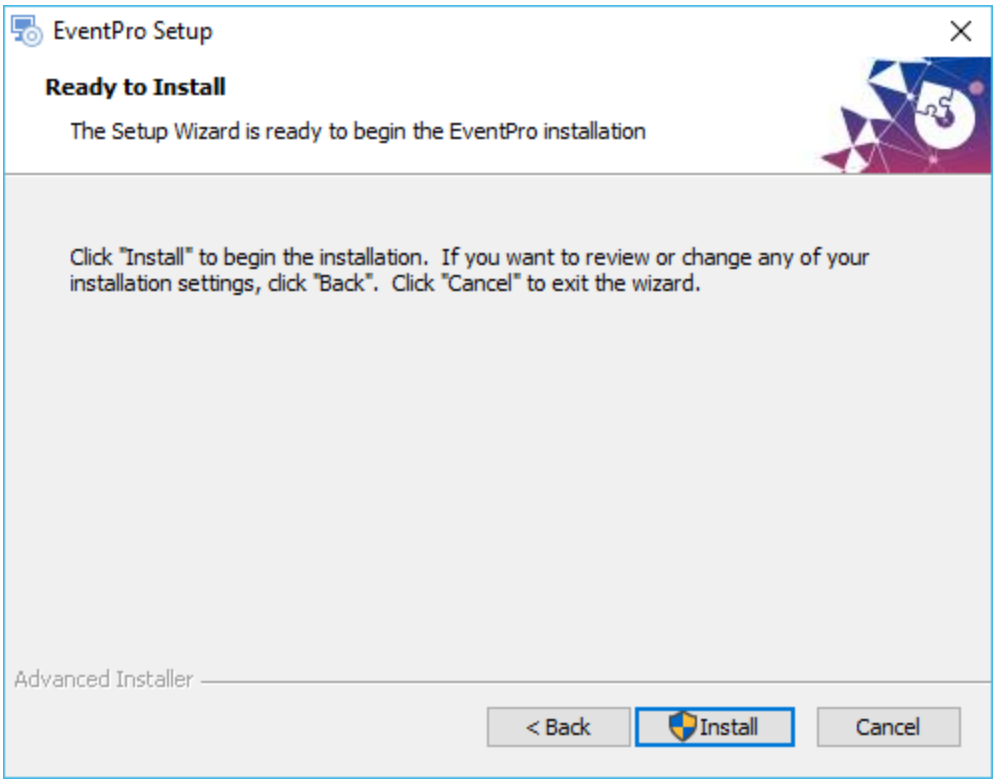
    a. Enter the path to the installation on the server. This is the **Installation Folder** 208 you selected during the Server Installation, and **shared** with the EventPro User Group in the **previous step** 211.

    b. Click the **Browse** button, locate that folder on the Network, and click **Select Folder**.

    c. Click **Next**.

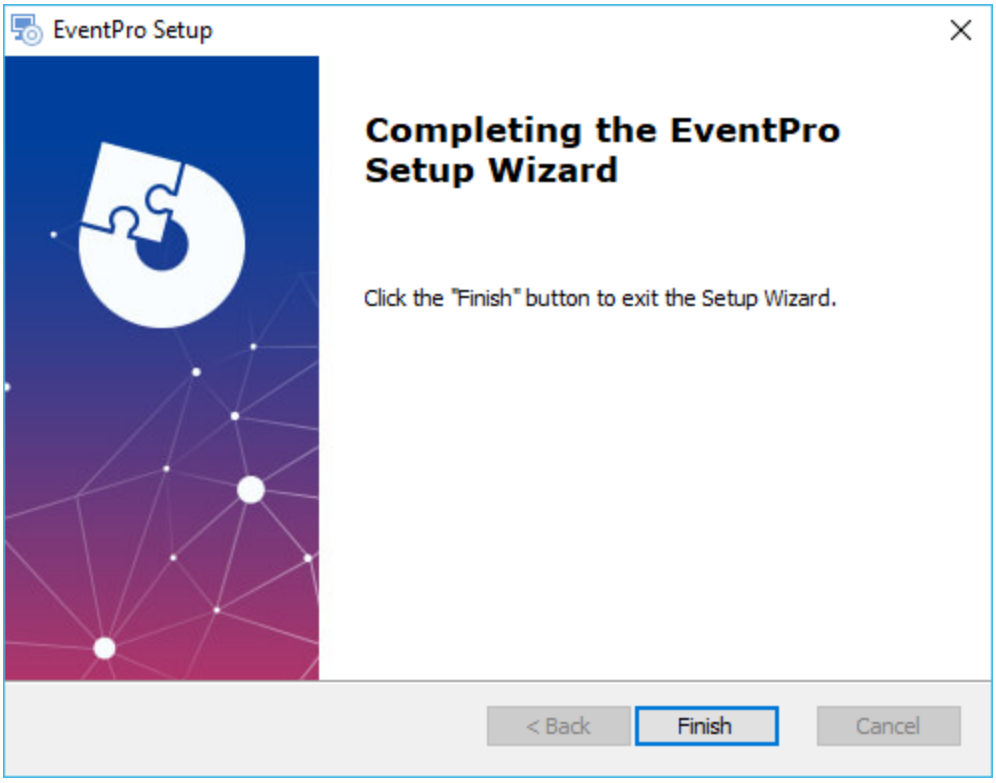


11. **Ready to Install**: Click **Install**.



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 **Admin First Login to EventPro** 223.

Admin First Login to EventPro

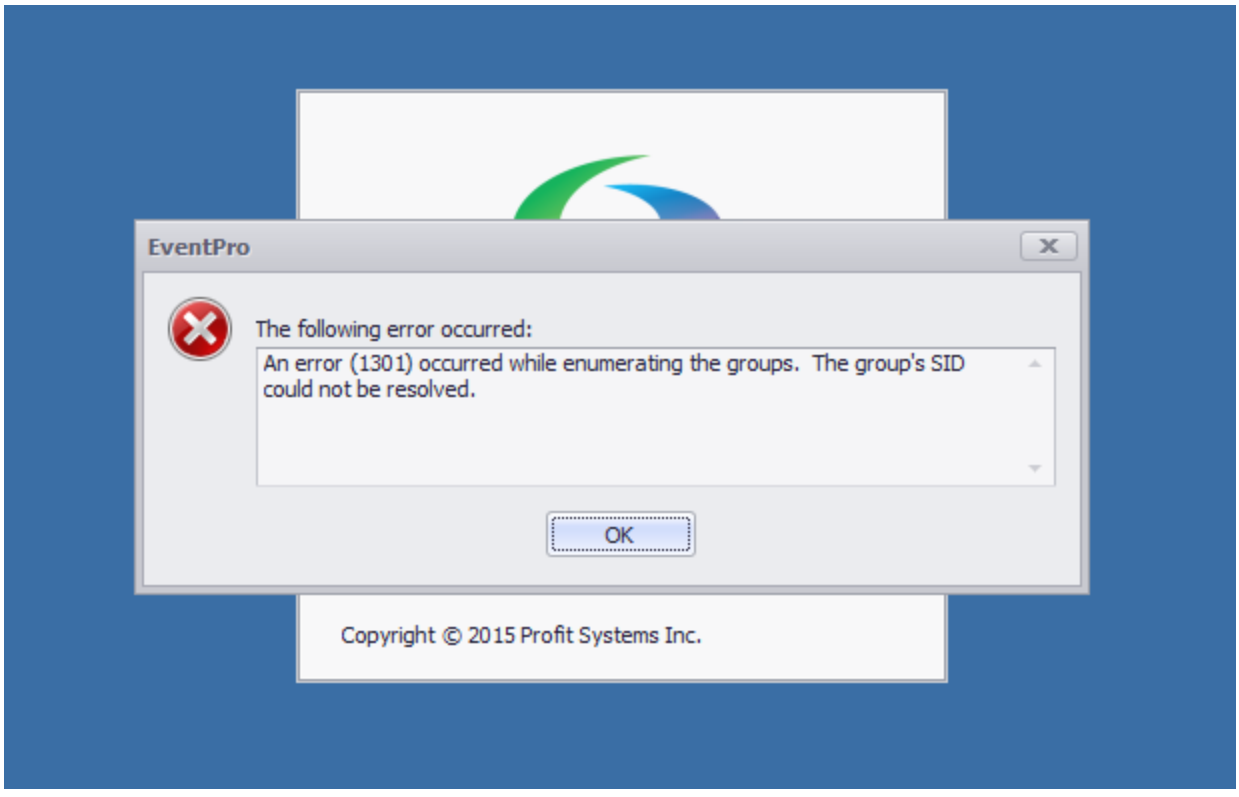
The first User to login to EventPro will become an **Administrator**, as long as that User has sufficient **Rights** to the **SQL Server**.

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.

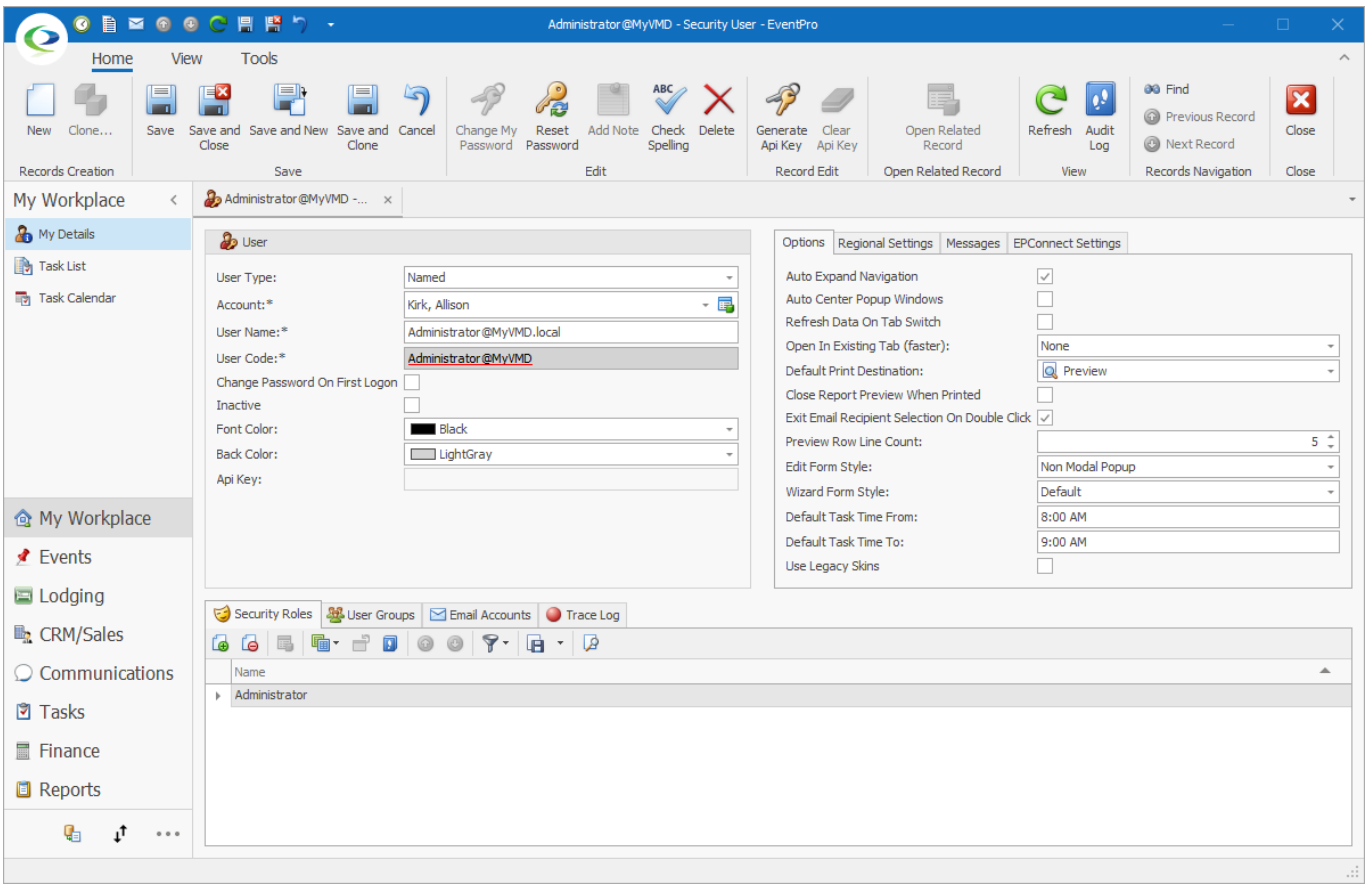
   The hotfix for this bug can be found on the Microsoft Support website, KB2830145. Download and run the hotfix. Note that the hotfix will not run if Windows Update Services are set to disabled.

   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:



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 **Active Directory/EventPro Sync** 230 below.

5. As the Administrator, there are several actions you may want to complete before other Users log into EventPro:

   a. **Create Internal Company** 224: Enter your internal **Company** in EventPro's CRM, and attach your Contact record to the Company (if applicable)

   b. **Set Default Account** 225: Set your Company as the **Default Account** in Events System Settings (if applicable).

   c. **Edit Administrator Security Role** 226: Adjust the **Administrator Security Role** so that it only applies to Administrators.

   d. **Create Security Roles** 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 **User First Login to EventPro** 229.

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 **EventPro User Manual** 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**.
3. 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: **Set Default Account** 225.

Set Default Account

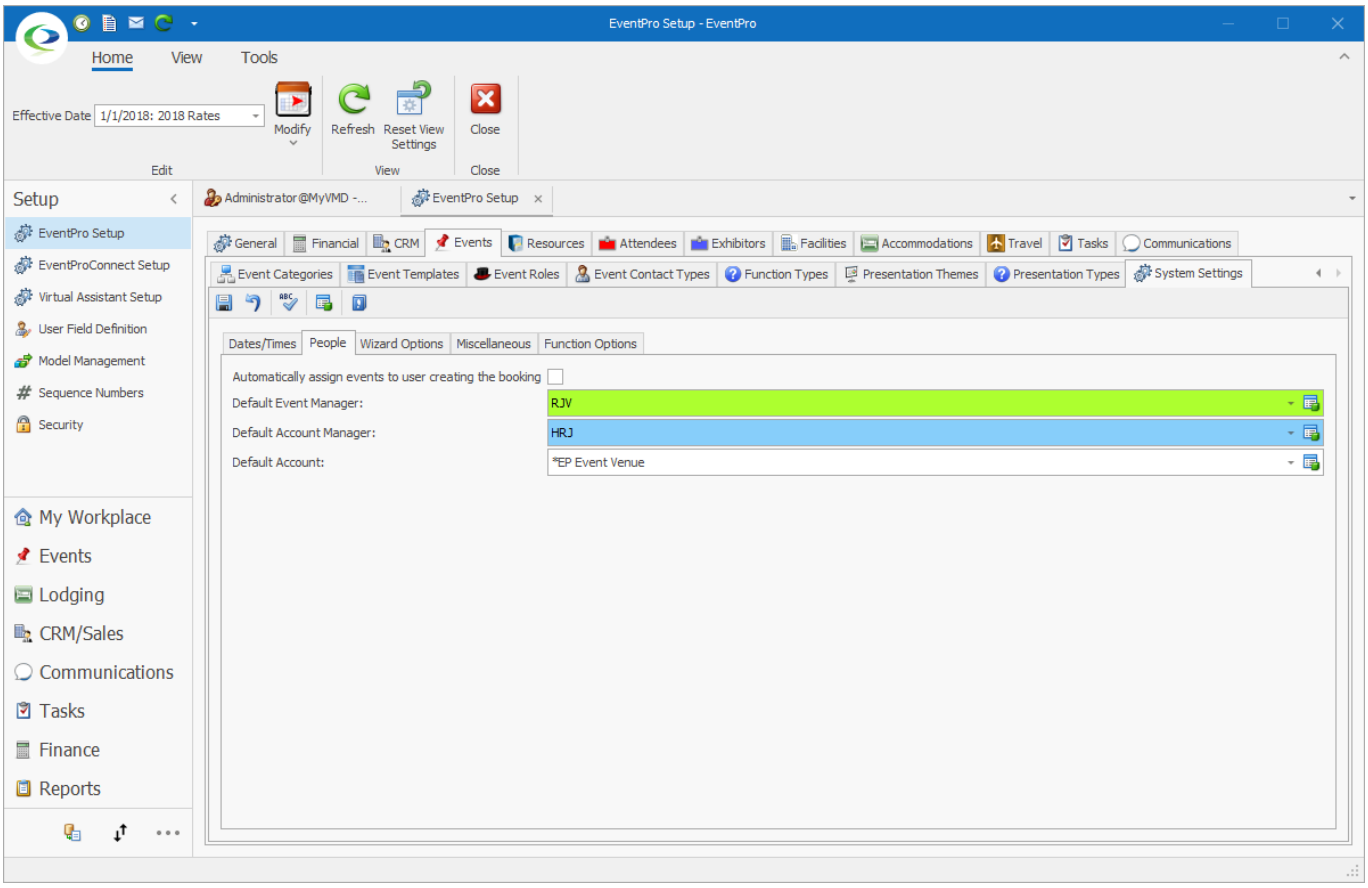
This is an optional step, and may not be applicable to your organization.

If you entered your organization as a **Company** in EventPro's CRM (**see above** 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**.



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

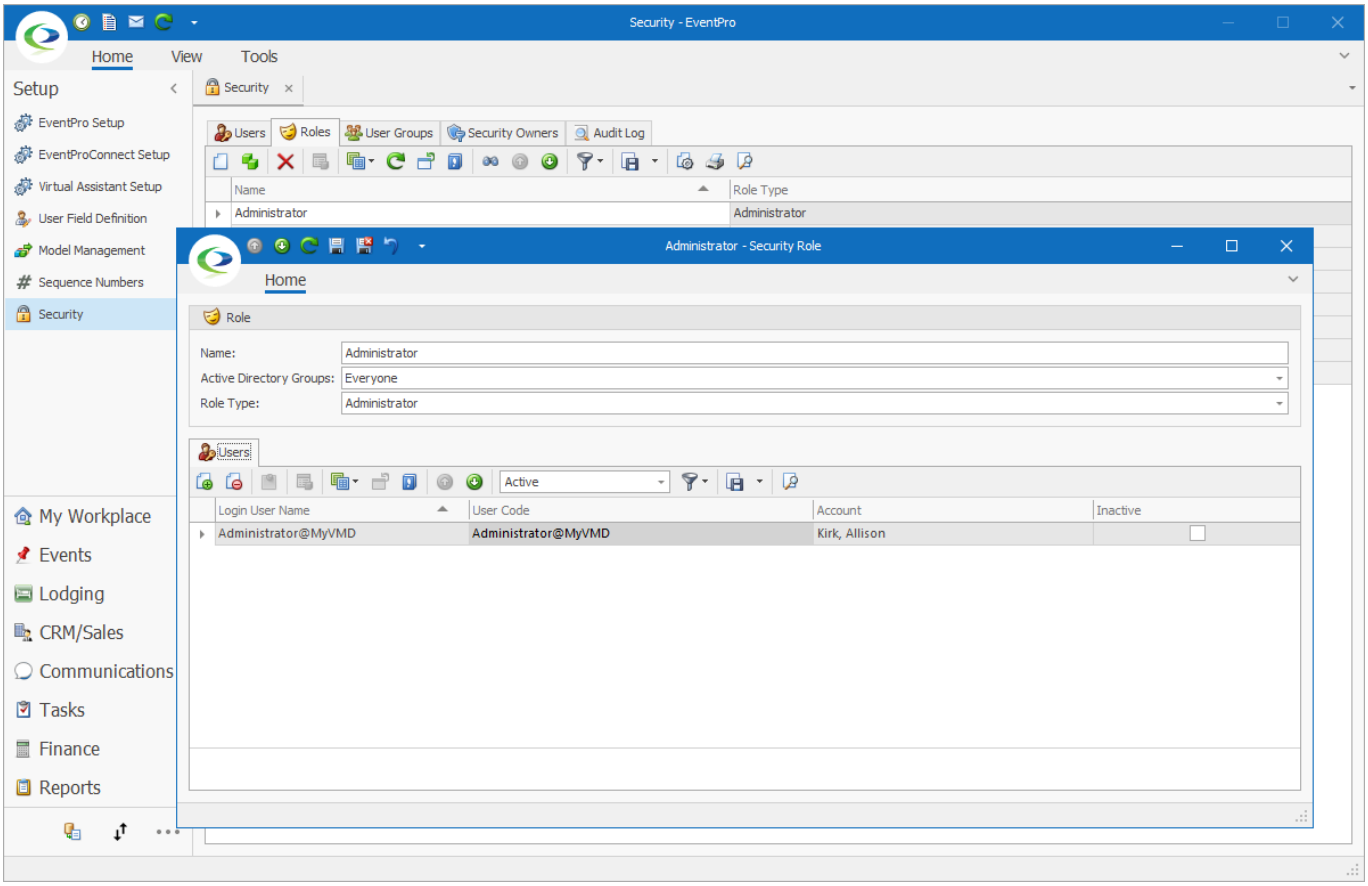
This is an **important step** that is required for most organizations.

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**.



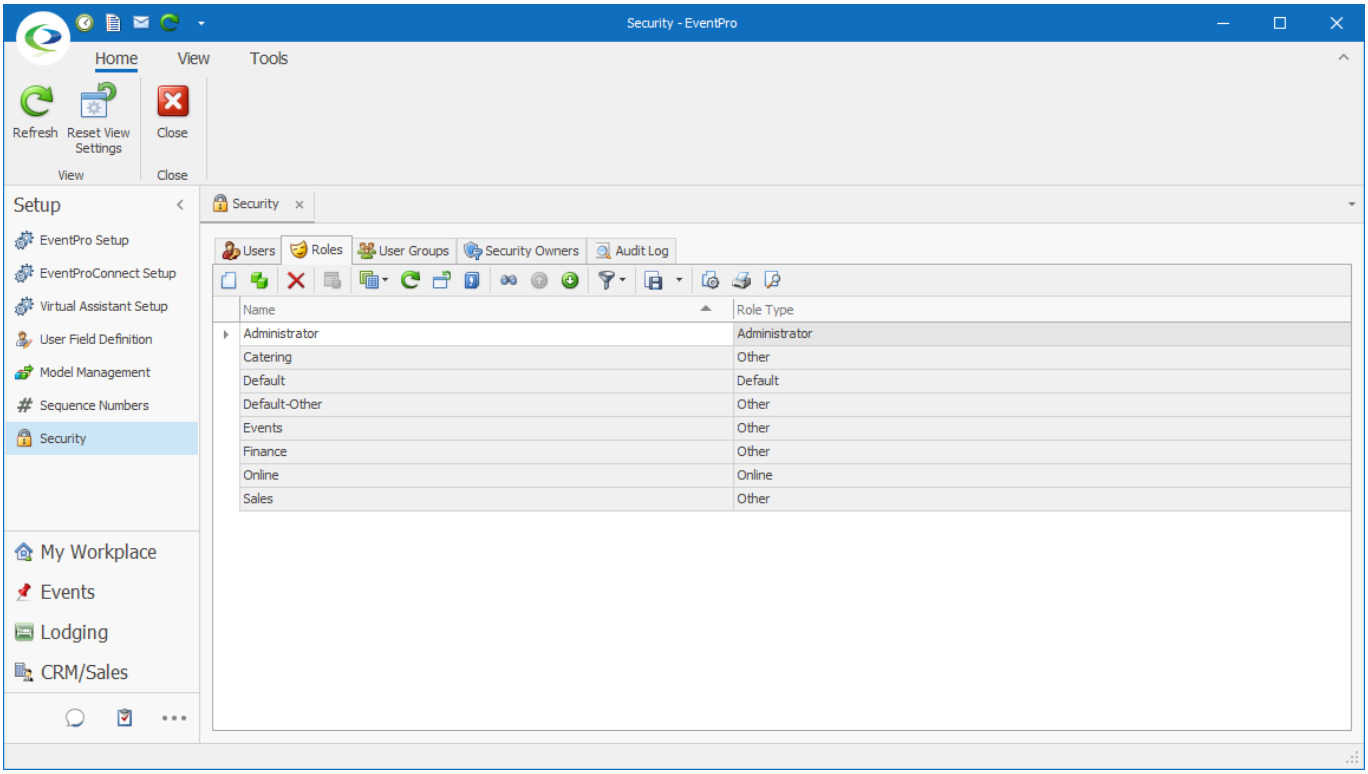
3. Looking at the **Active Directory Groups** field at the top of the edit form, you will see that the **Administrator Security Role** is assigned to "**Everyone**".
4. Use the arrow to open the drop-down.
   a. Unselect the "**Everyone**" checkbox.
   b. Select the checkbox next to the **EventPro Administrators** 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**.

7. 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 **Assign Security Roles to AD Groups** 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**.



2. There are several different Role Types: **Administrator**, **Default**, **Other**, and **Online**.

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

3. The **Administrator Security Role** should be assigned to the EventPro Administrators Active Directory Group only, as noted **above** 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.

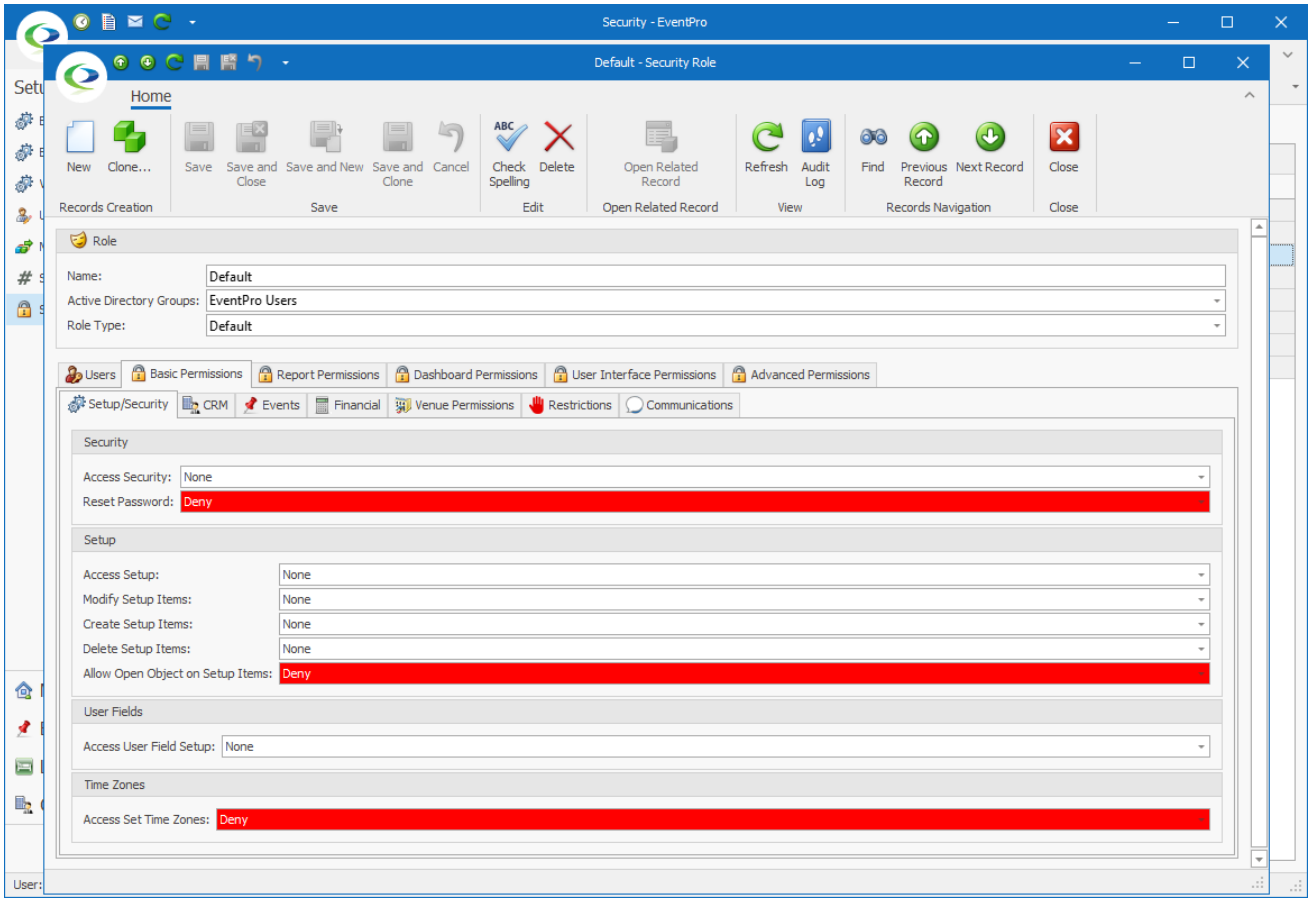
   a. Double-click the **Default Security Role record** to open its **edit form**.

   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**.



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 drop-down.

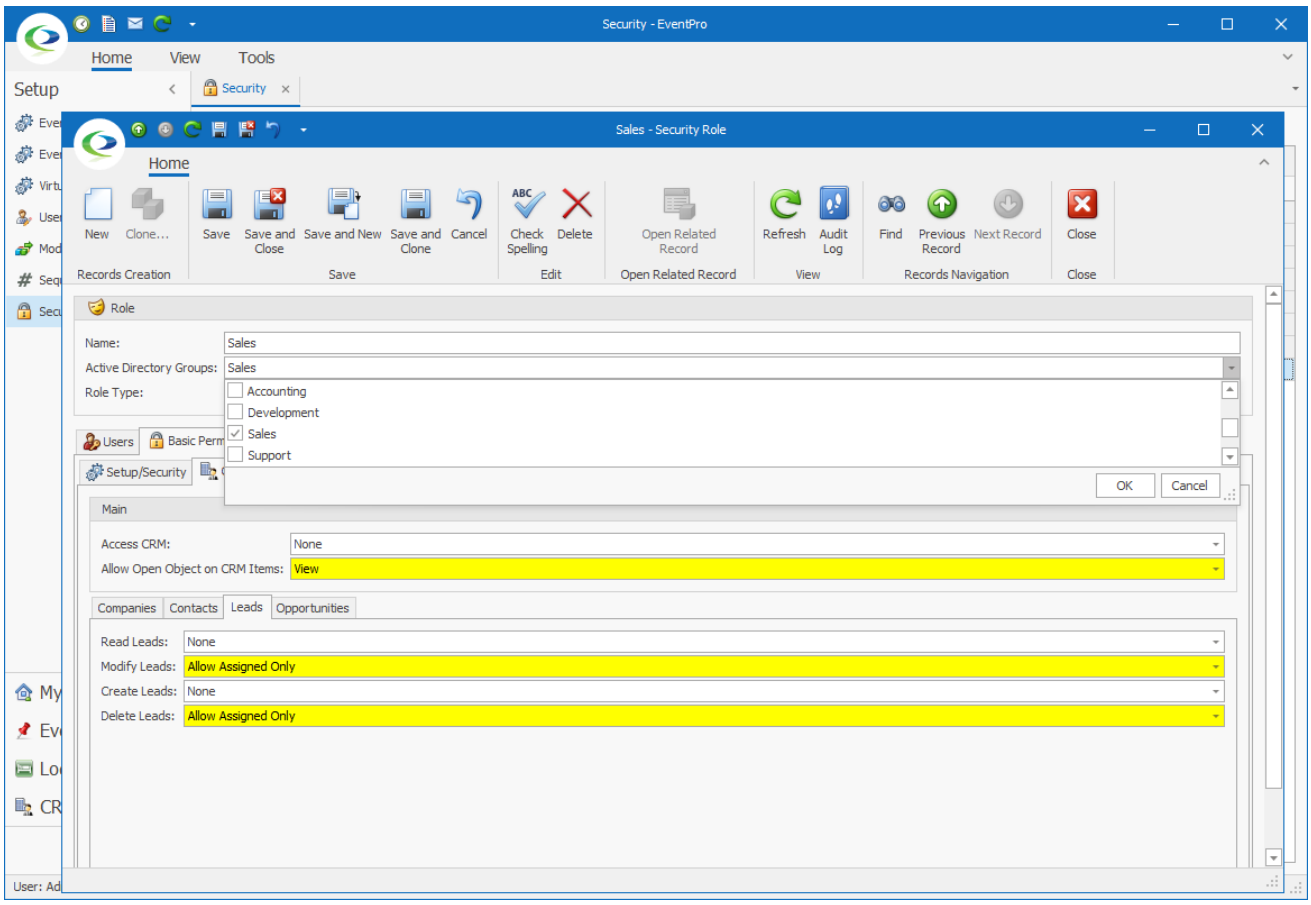
      The **Active Directory Groups** field in the **Security Role edit form** is only visible if you are working with Active Directory Integration, *i.e.* you own the EventPro Active Directory Integration module.

      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.



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 **First User Login to EventPro** 229.

User First Login to EventPro

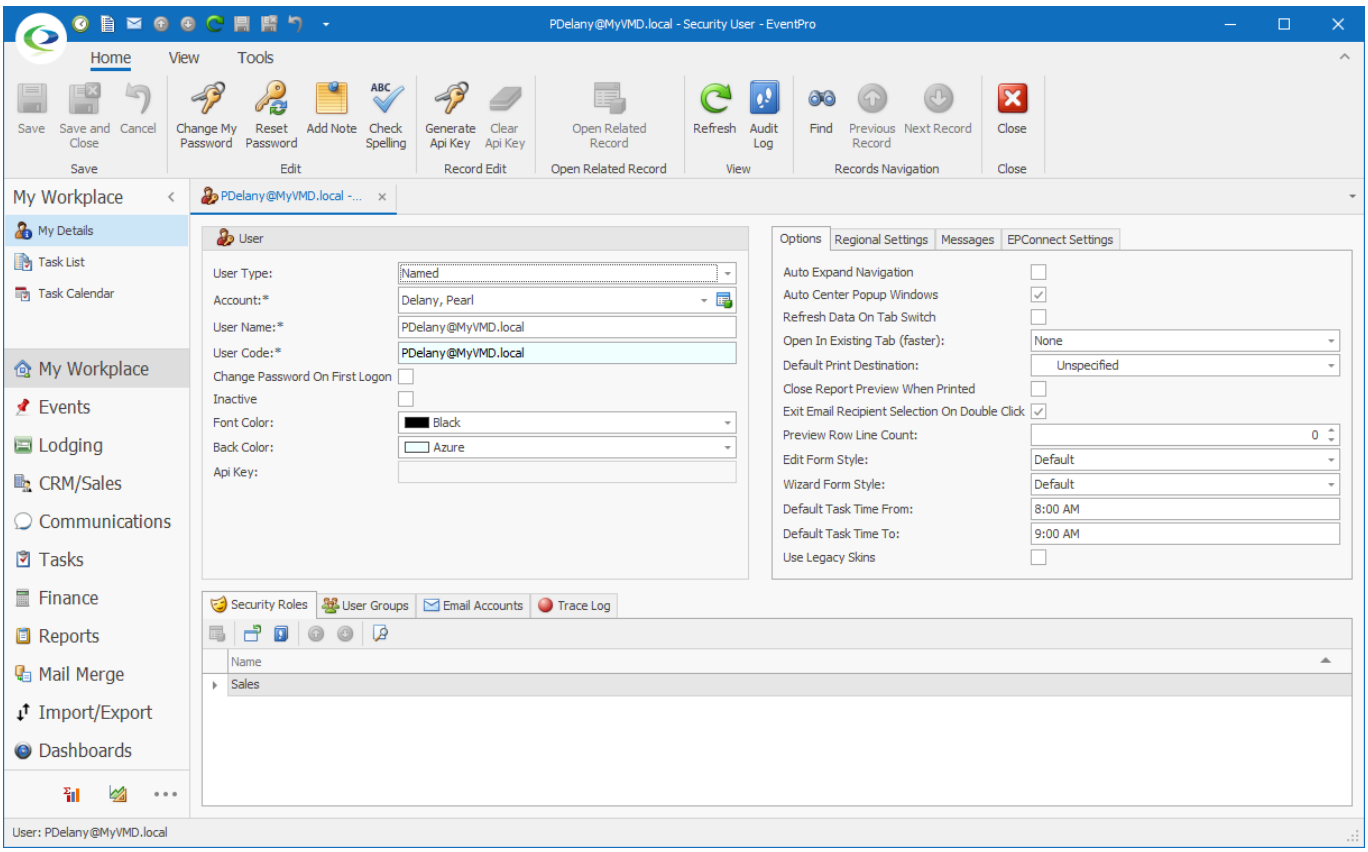
After you have configured Active Directory and EventPro as described above, your organization's Users should simply need to log into their workstations with their Windows accounts, and run EventPro.

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.



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 (see above 225), 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 Active Directory/EventPro Sync 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 Create Active Directory Groups for Integration 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

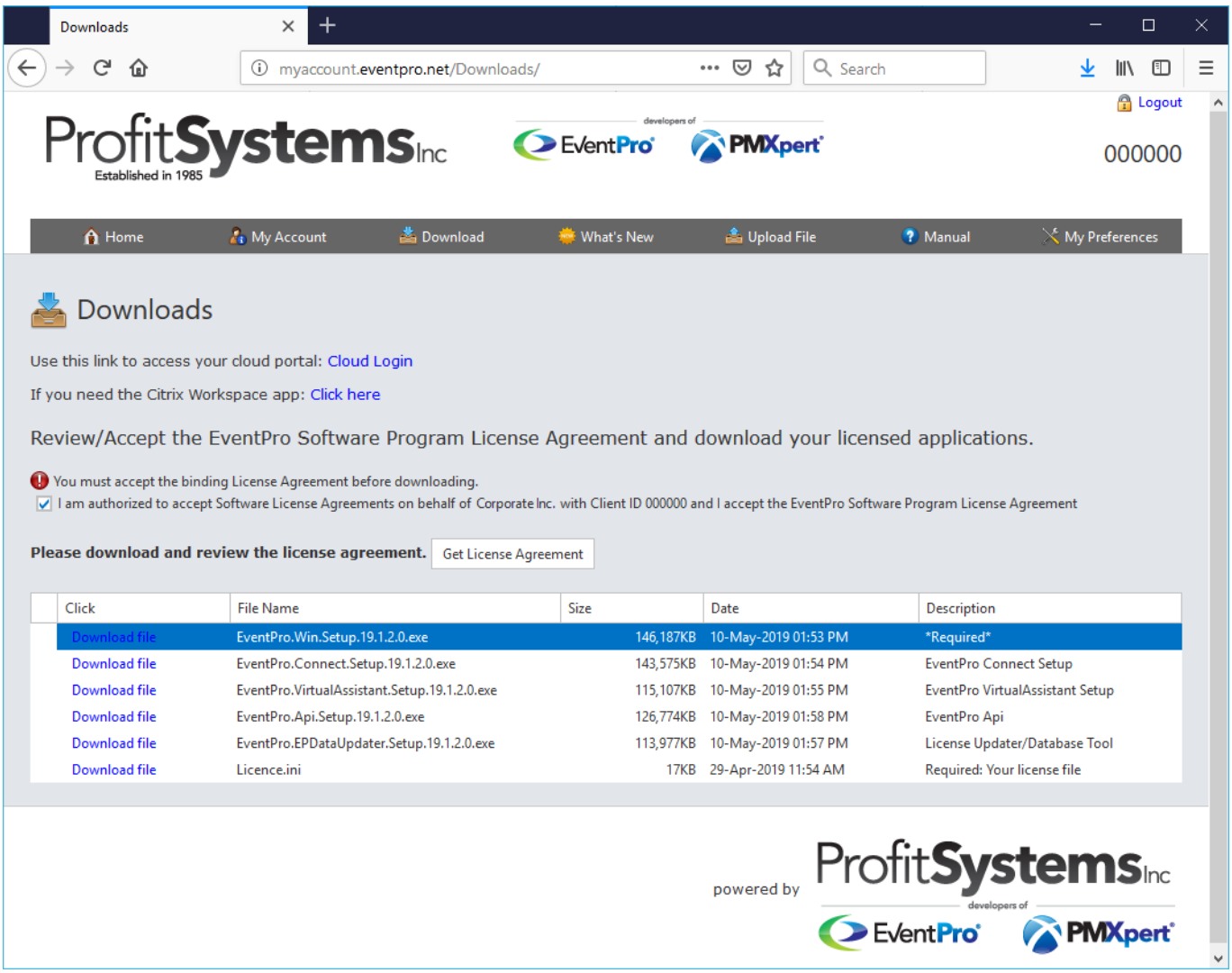
- This type of EventPro network installation requires knowledge of **SQL Server**. Your organization's EventPro installation should be done by an **IT Specialist** who has sufficient **technical knowledge** and is familiar with your organization's computer network. If you do not have in-house IT to assist 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. **Create New Client Database** 248
    7. **Restore Existing Database over New** 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 **Alternate Database Restore Process** 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.



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.

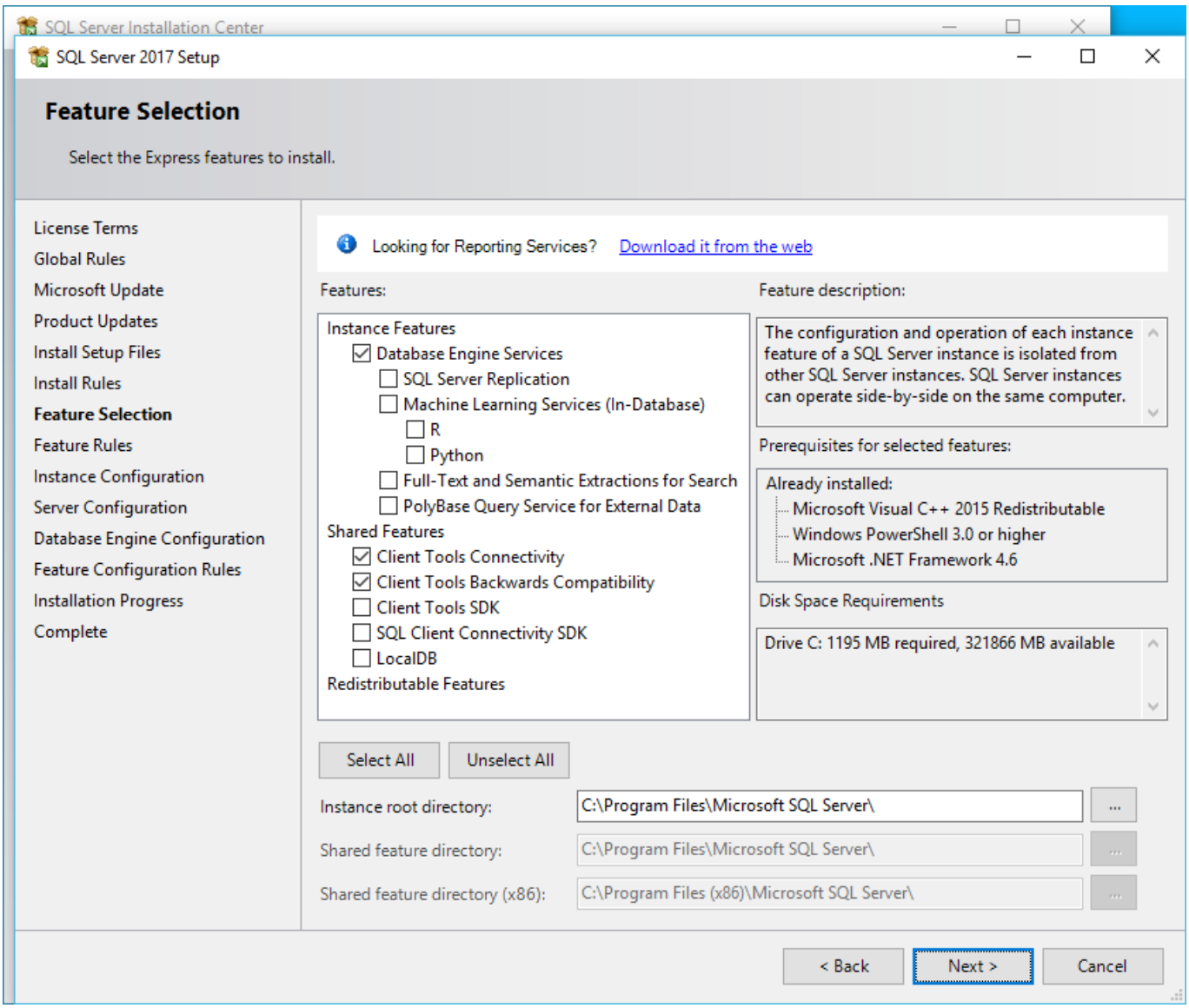
Install SQL Server

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.

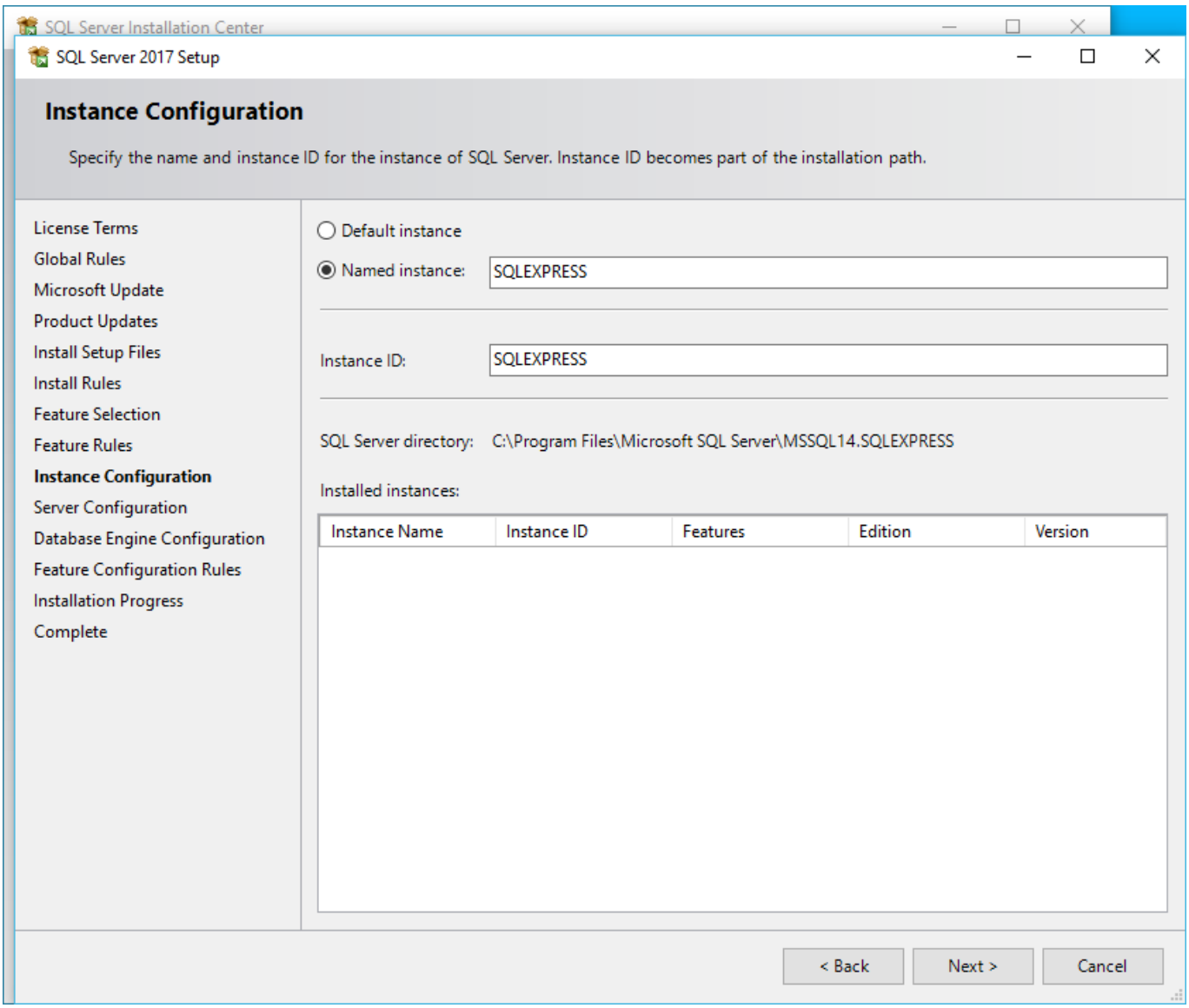


4. **Instance Configuration**:

   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.

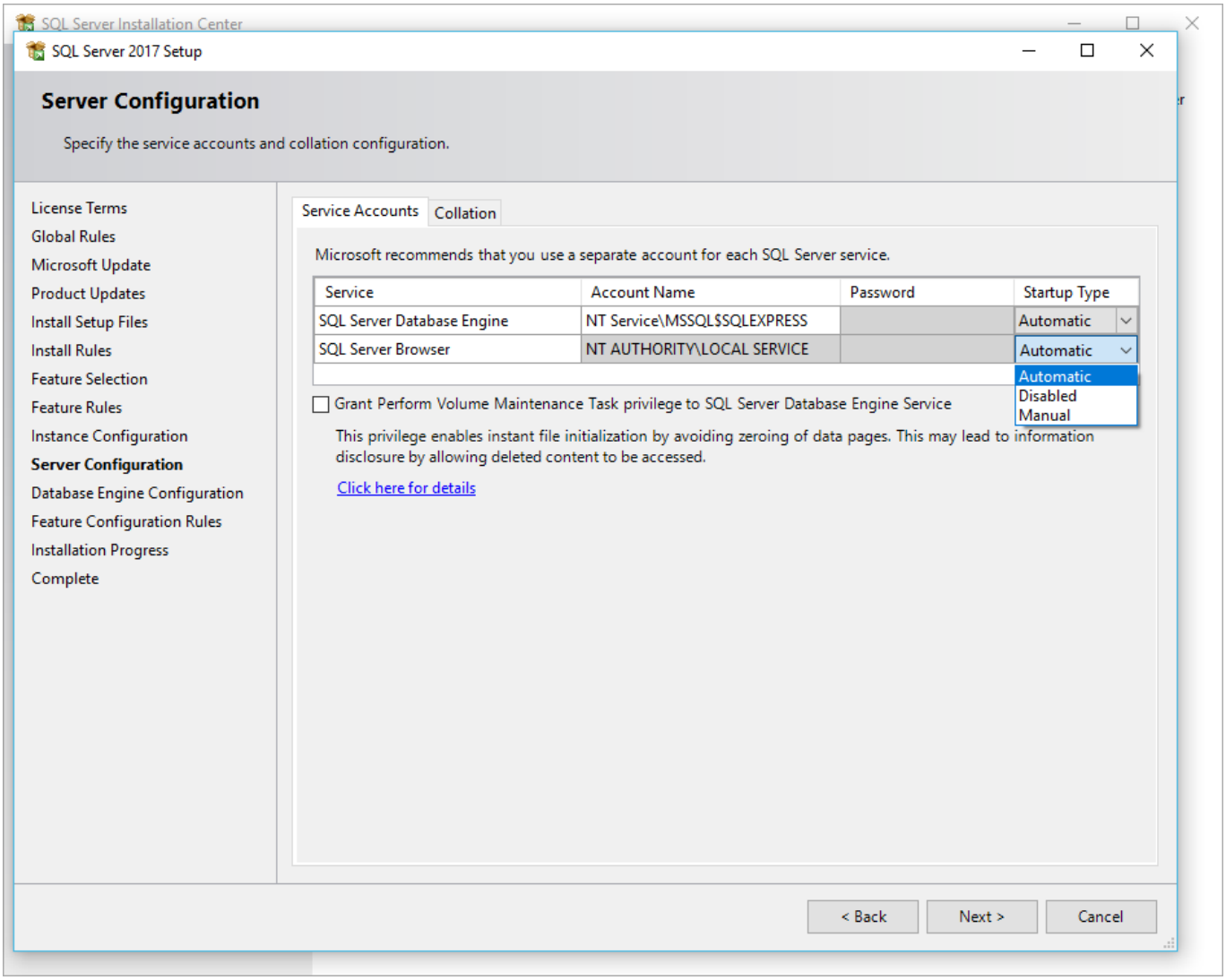
   c. The **Installed Instances** grid at the bottom of this page would display any instances already installed. If there is already an installed instance, check with your IT Department whether you should use that instance.



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**.



6. **Database Engine Configuration**:

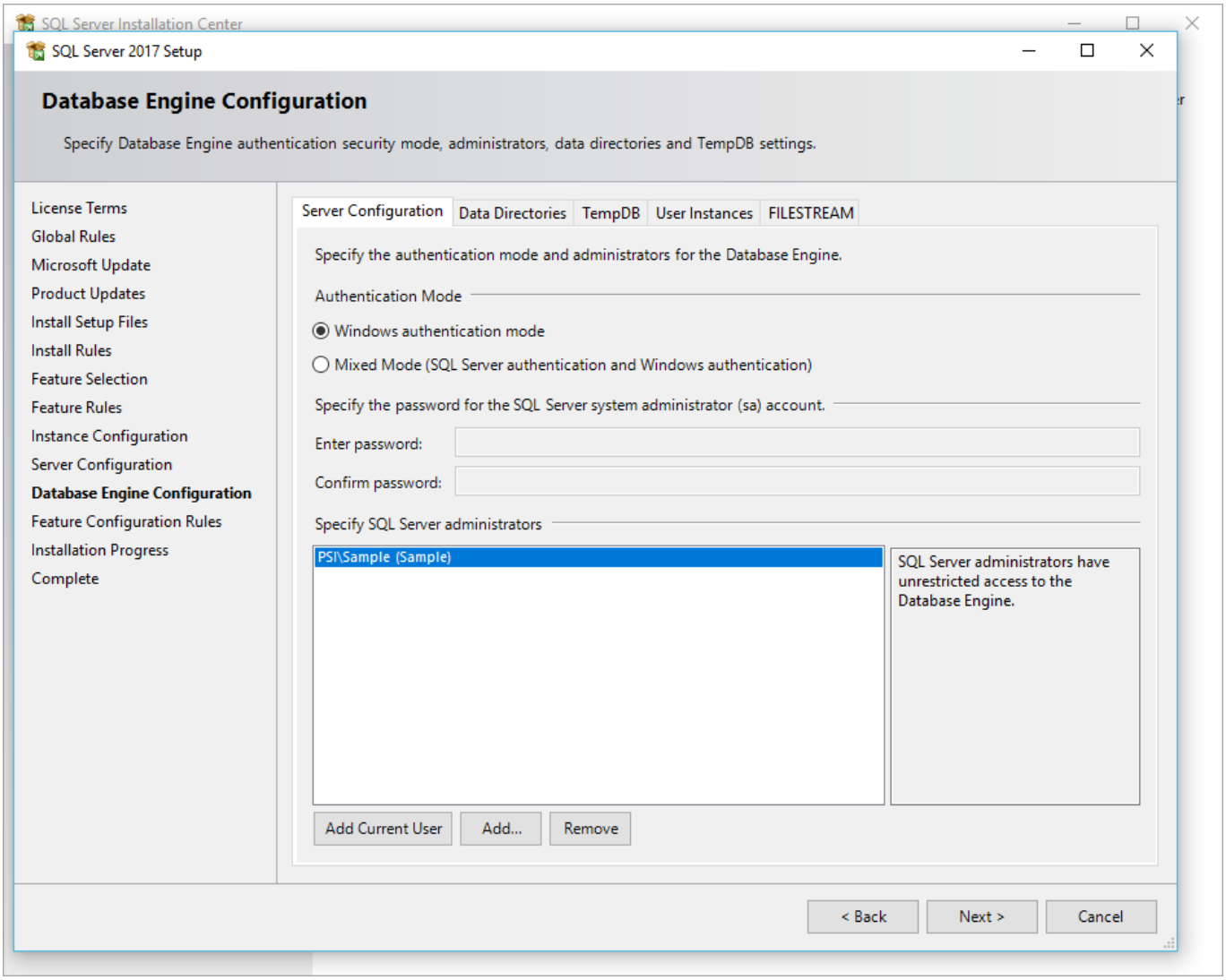
   a. Under the **Account Provisioning** tab, indicate which **Authentication Mode** the administrator will use to access the Database Engine: **Windows Authentication** or **Mixed Mode** (SQL Server Authentication and Windows Authentication).

      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.

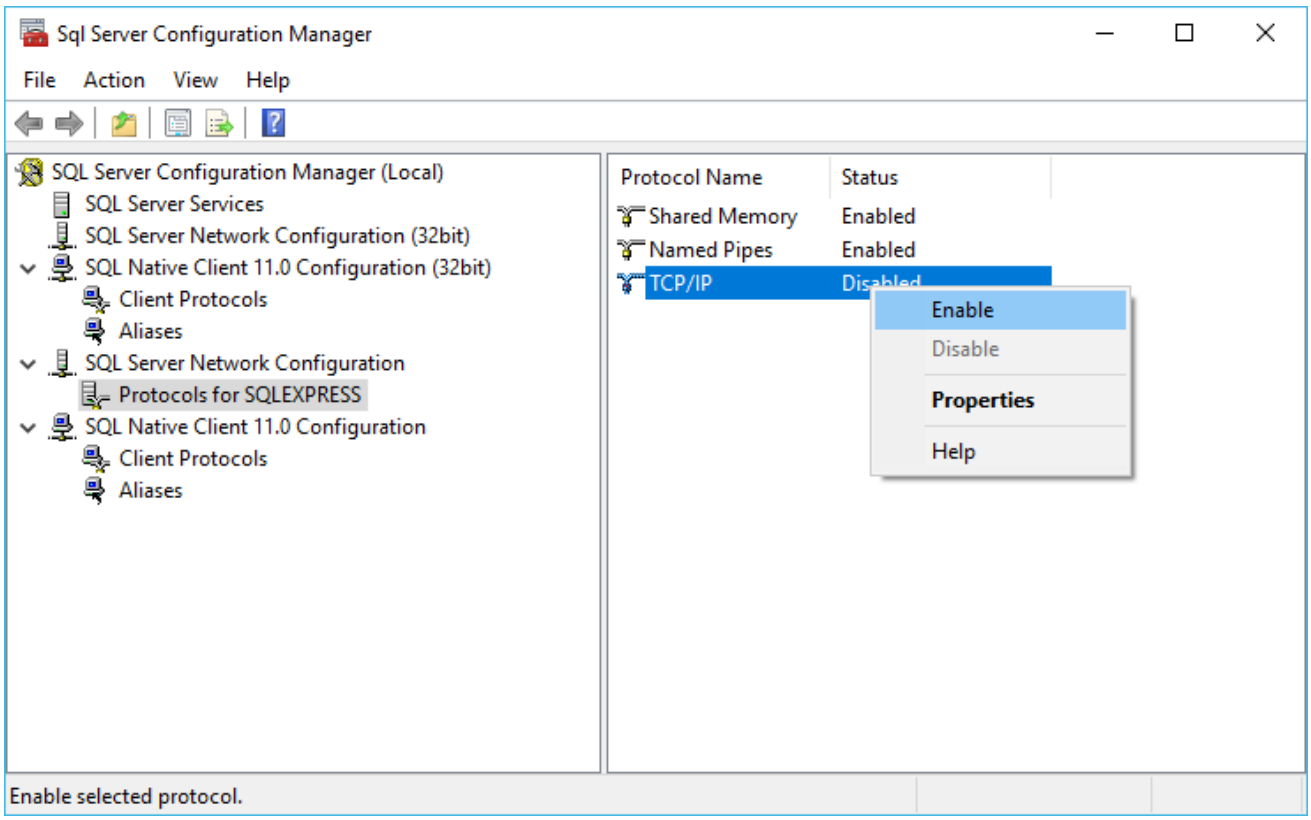
   b. Also, under the **Specify SQL Sever Administrators** grid, click the **Add Current User** button.



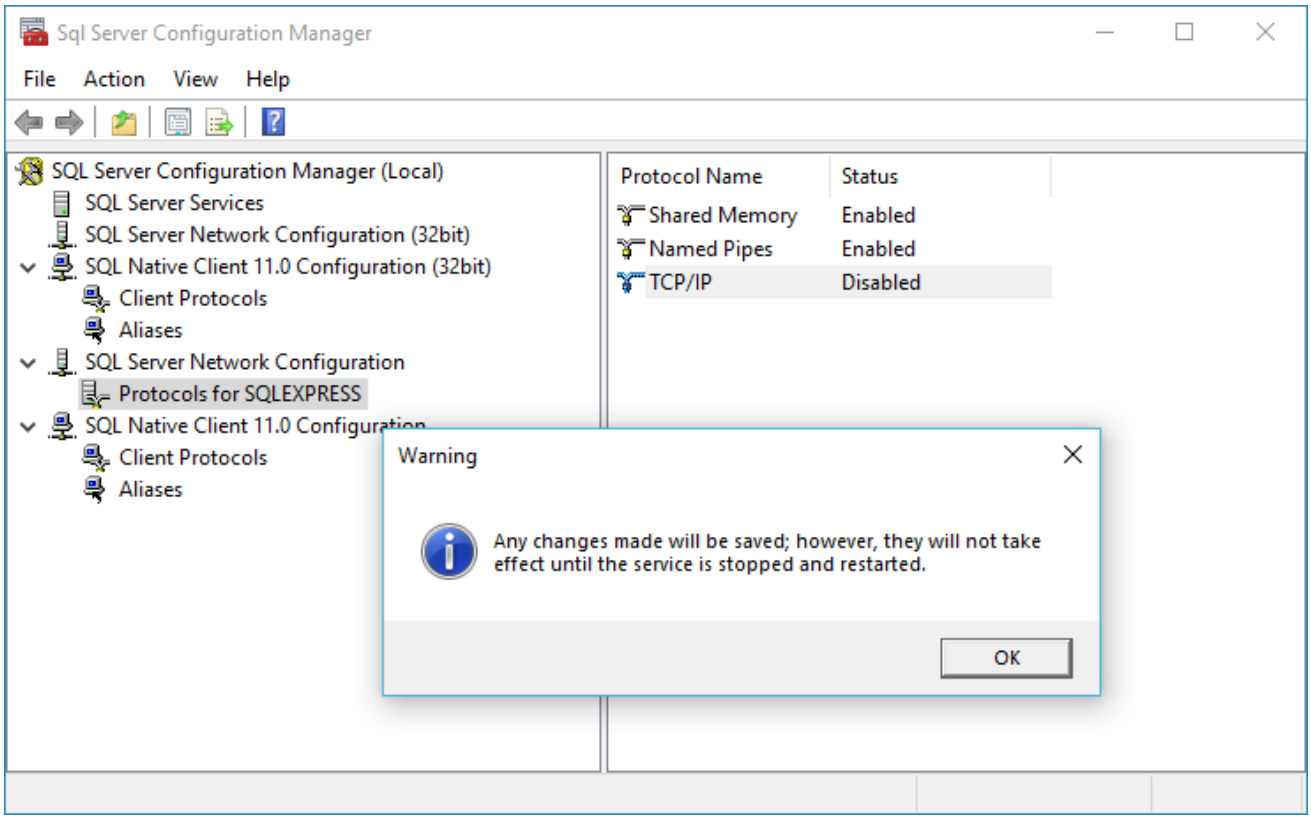
7. Complete the rest of the installation process as recommended by your IT Department.
8. As noted above, if there isn't a **Management Tools** option in the edition you are installing, you can download and install **SQL Server Management Studio (SSMS)** after installing SQL Server. There may be a prompt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

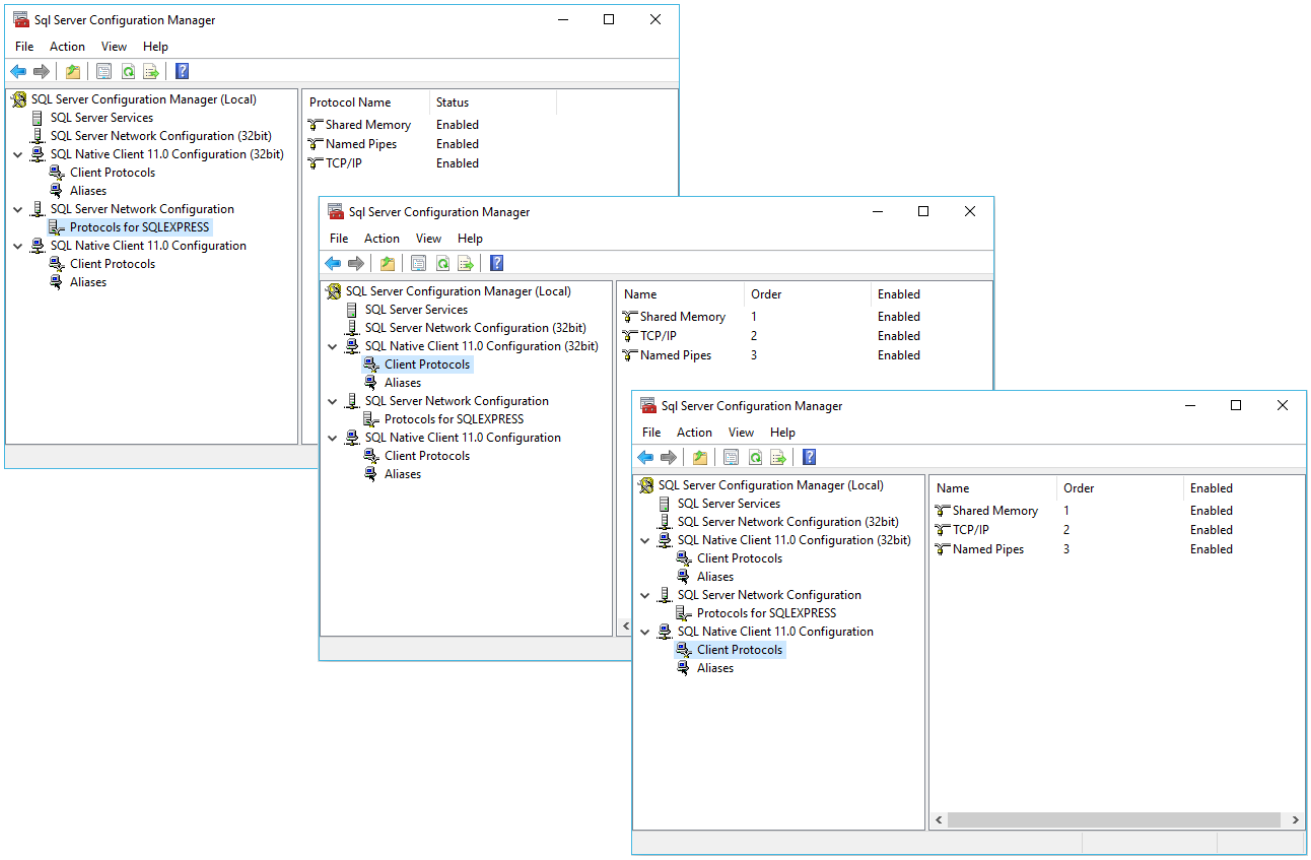


e. Click **OK**, and you will see that **TCP/IP** is now **Enabled**.

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.

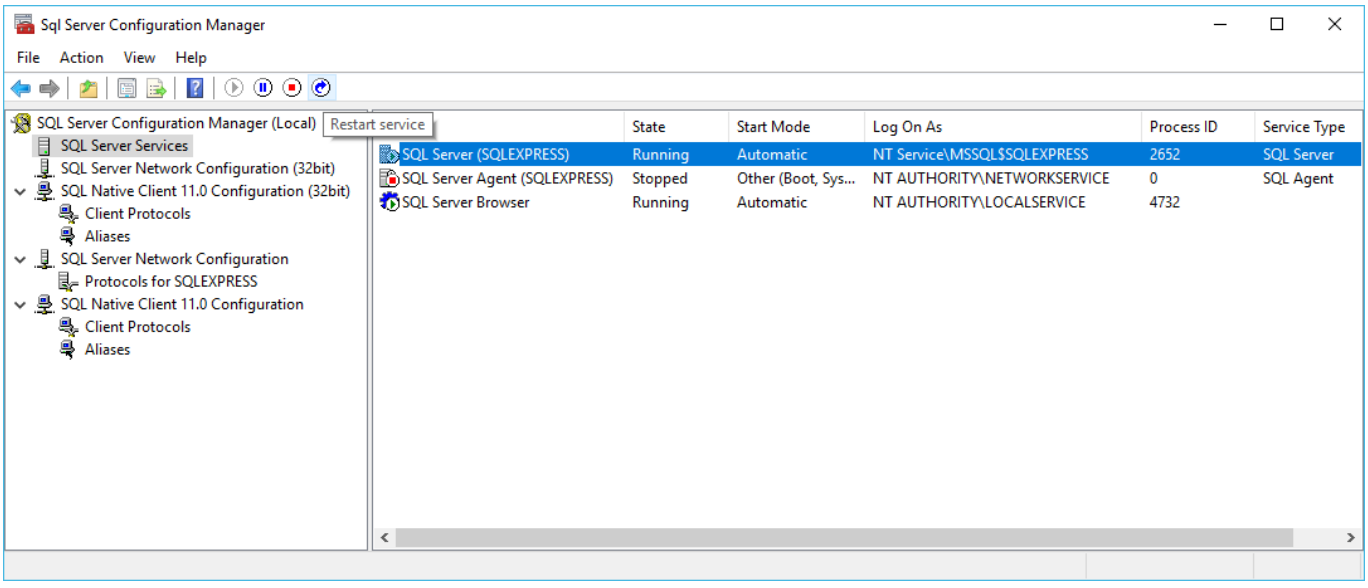
g. Both **TCP/IP** and **Named Pipes** should now be **Enabled**.

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 above. The service will stop and restart.



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

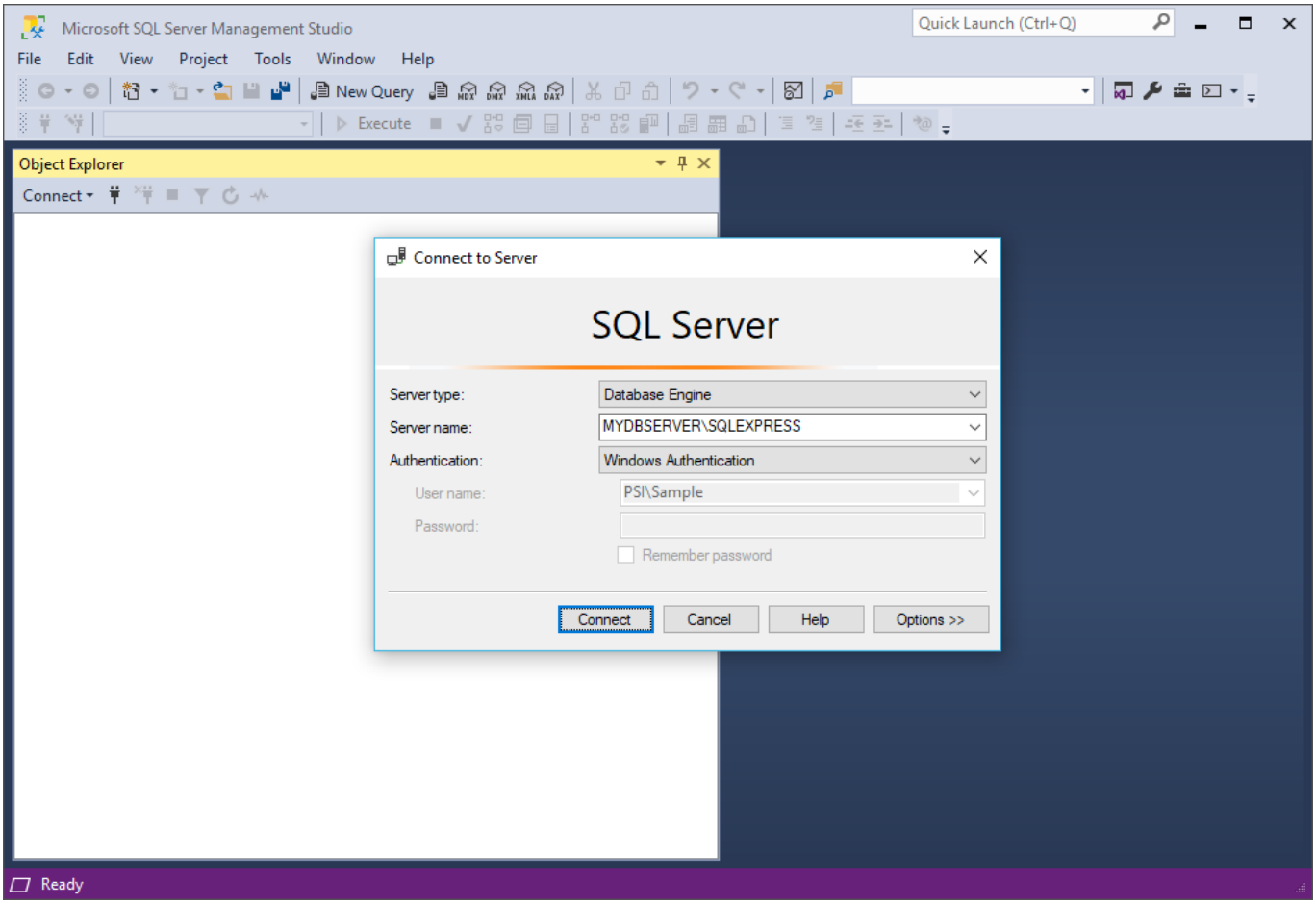
As a security best practice in an SQL environment, we recommend that the User who performs EventPro installation should have the minimum security rights possible.

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.

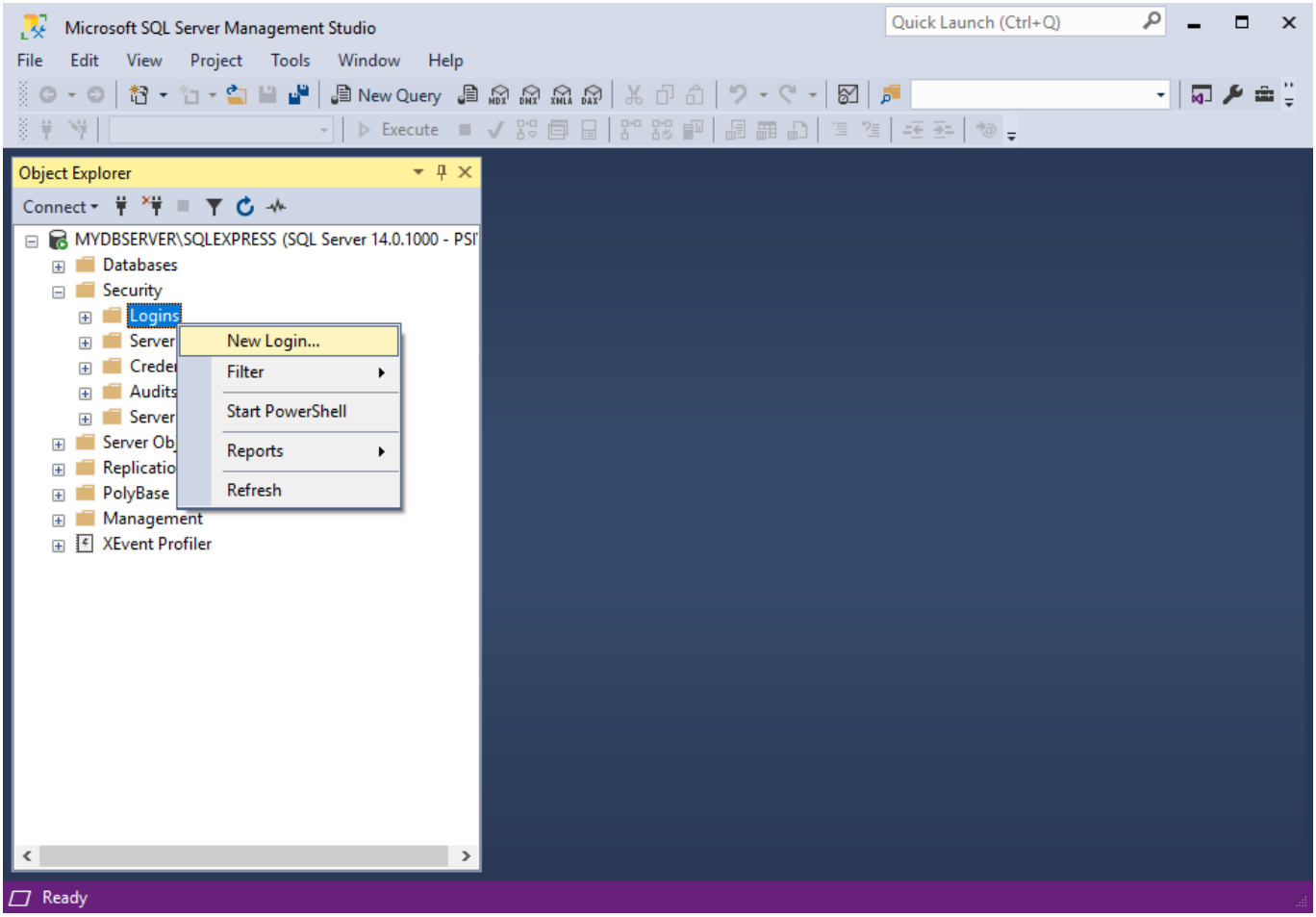
Therefore, we recommend creating a new SQL User for the purposes of creating EventPro databases and installing EventPro to the server and workstations.

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).

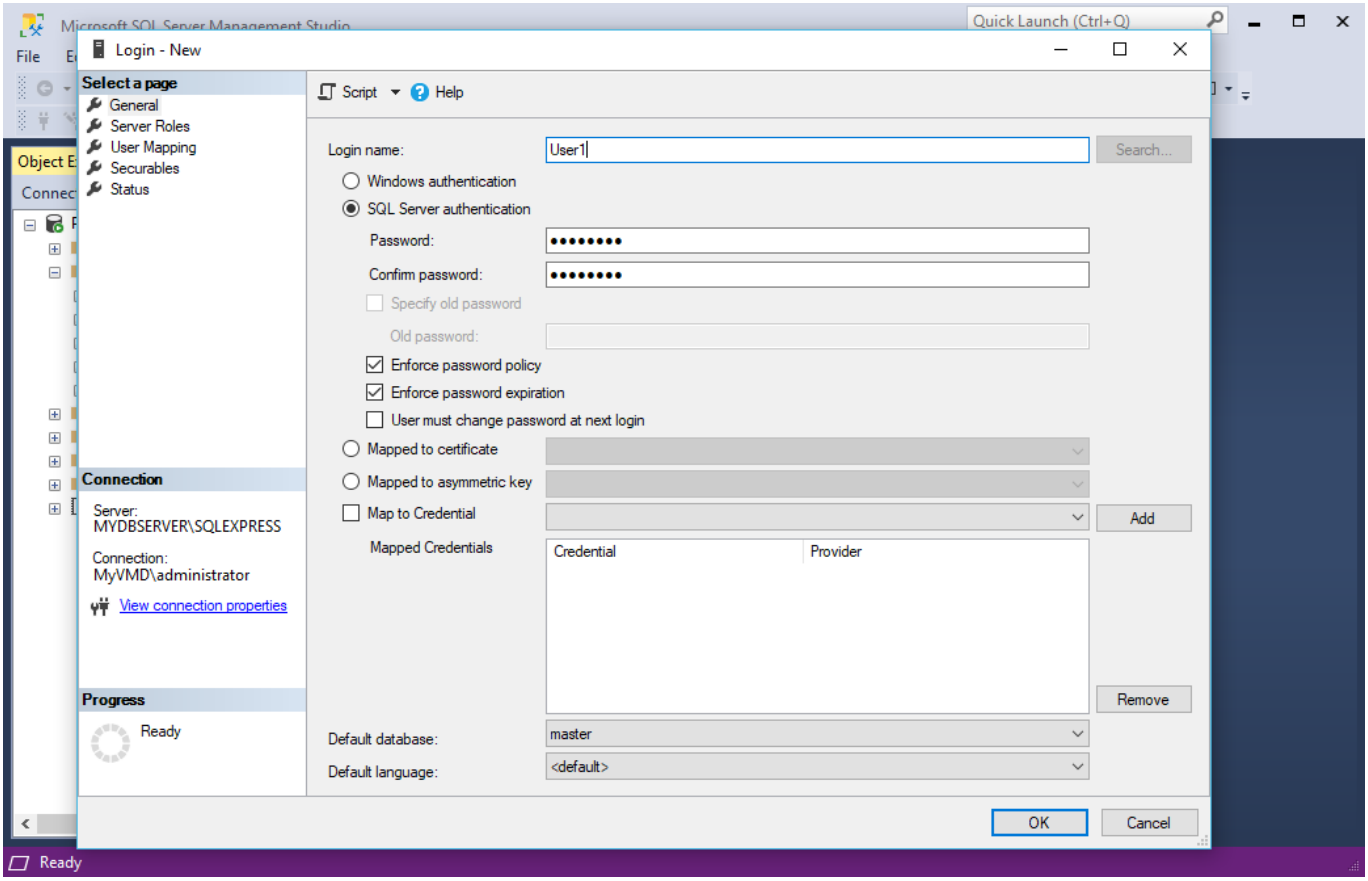
      *(Remember that earlier, when **installing SQL Server** 237, you chose between **Windows Authentication** and **Mixed Mode (Windows Authentication and SQL Server Authentication)**, and set the password for the **sa** account.)*
   d. Click **Connect**.



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**.

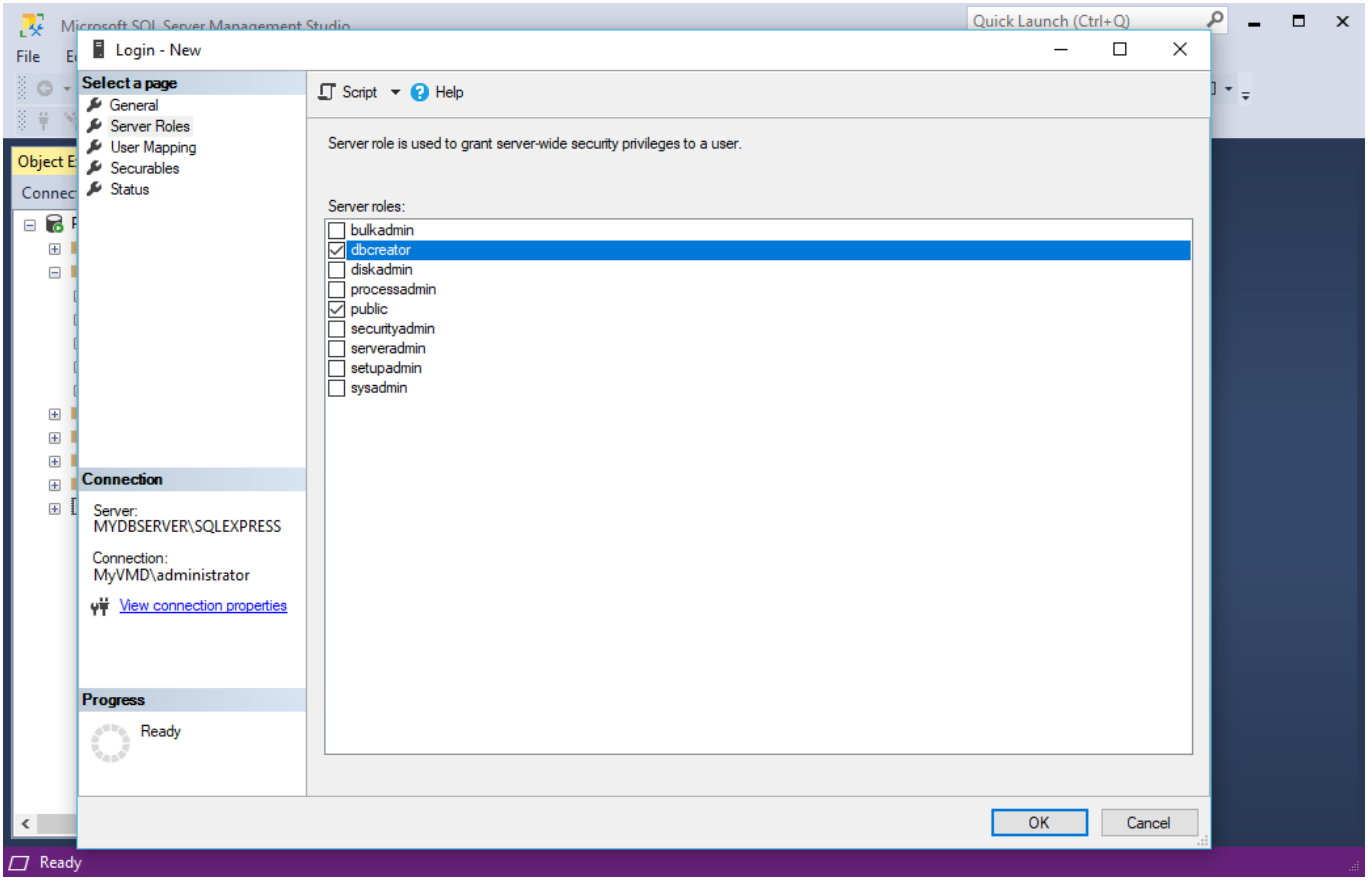


5. The **Login - New** form appears.
6. Select the radio button next to **SQL Server Authentication**, since you want **Users** to connect to the SQL Server Instance using **SQL Server Authentication**
7. Enter a **Login** name. In the example, we have used the name "**User1**".
8. Enter a **Password** and **Confirm** the password for User1.
9. **Unselect** the checkbox next to **User Must Change Password at Next Login**.



10. In the left-hand **Select a Page** panel, click **Server Roles**.

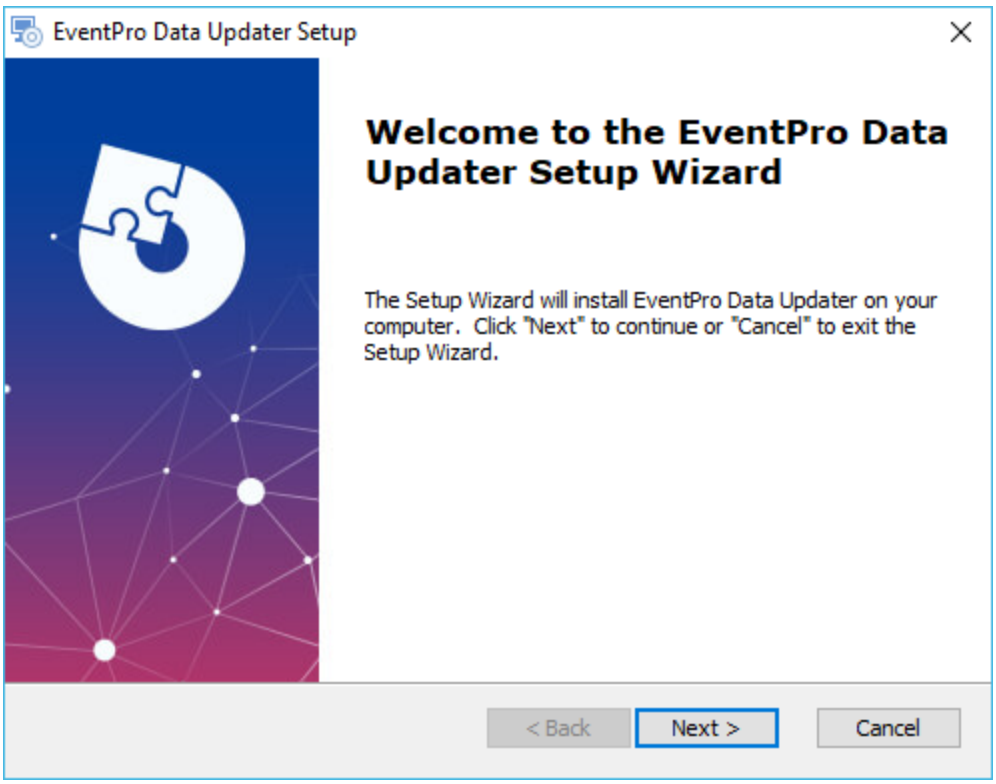
11. In the **Server Roles** page, select the checkbox next to **dbcreator**. This gives User1 the security privileges to create the EventPro databases.



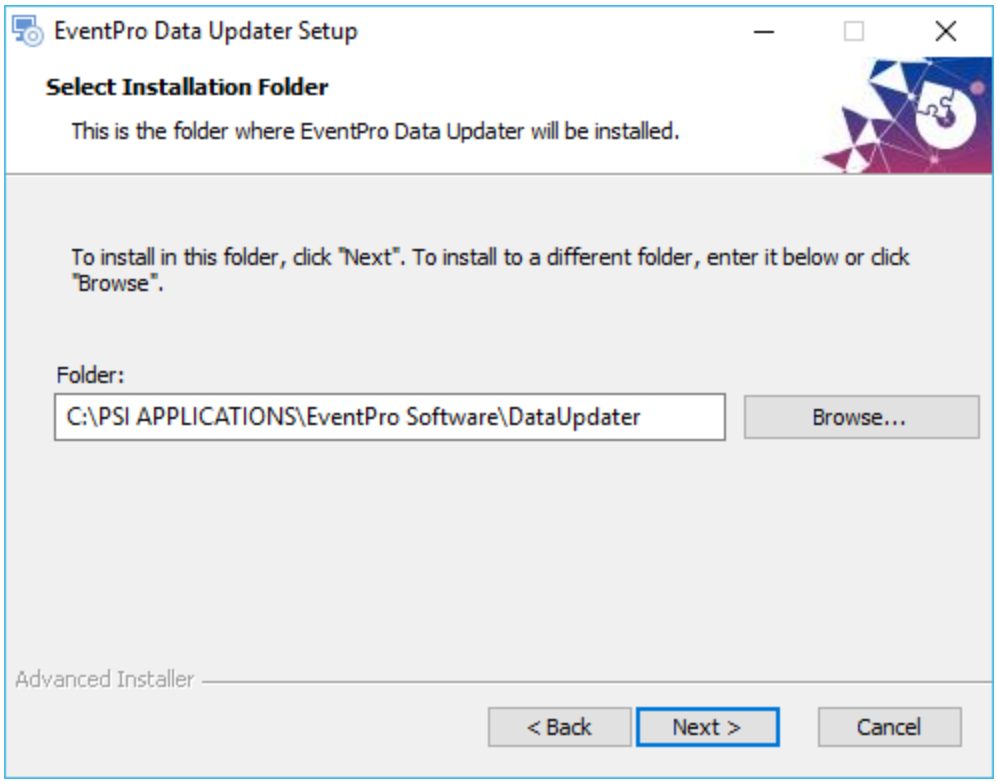
12. Click **OK** to save the User1 login.
13. Close SQL Server Management Studio.
14. You can now proceed to **Install Data Updater** 245.

Install Data Updater

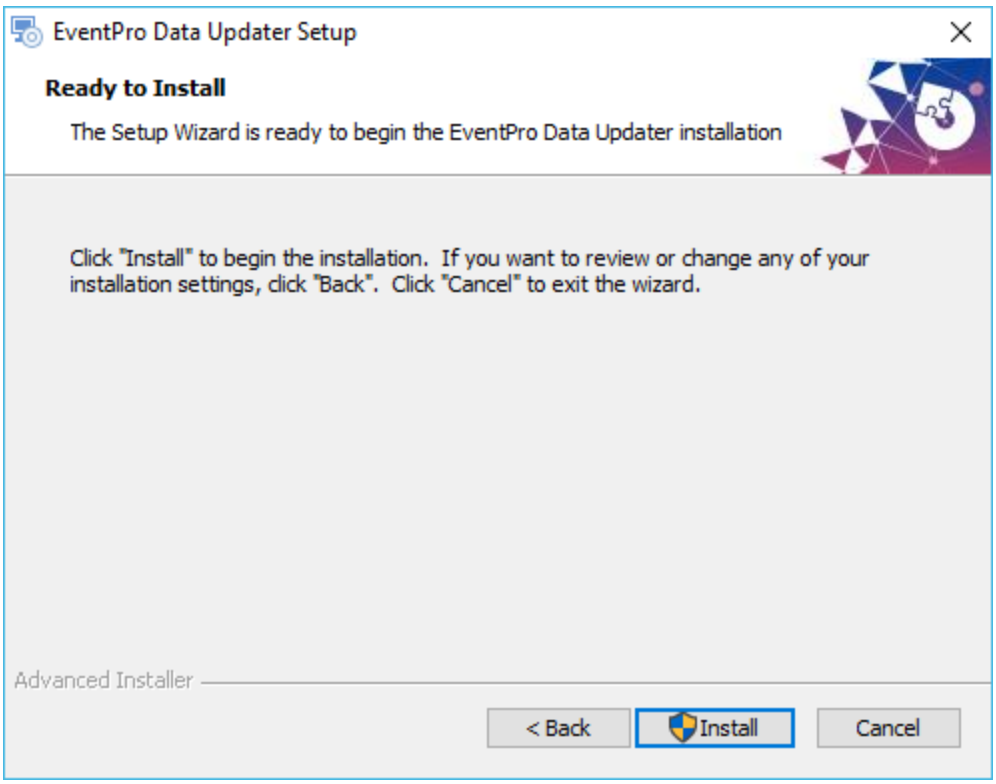
1. Navigate to the downloaded **EventPro.EPDataUpdater.Setup.exe** and double-click to run it.
2. The installation wizard will begin. Click **Next** to continue.



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**.

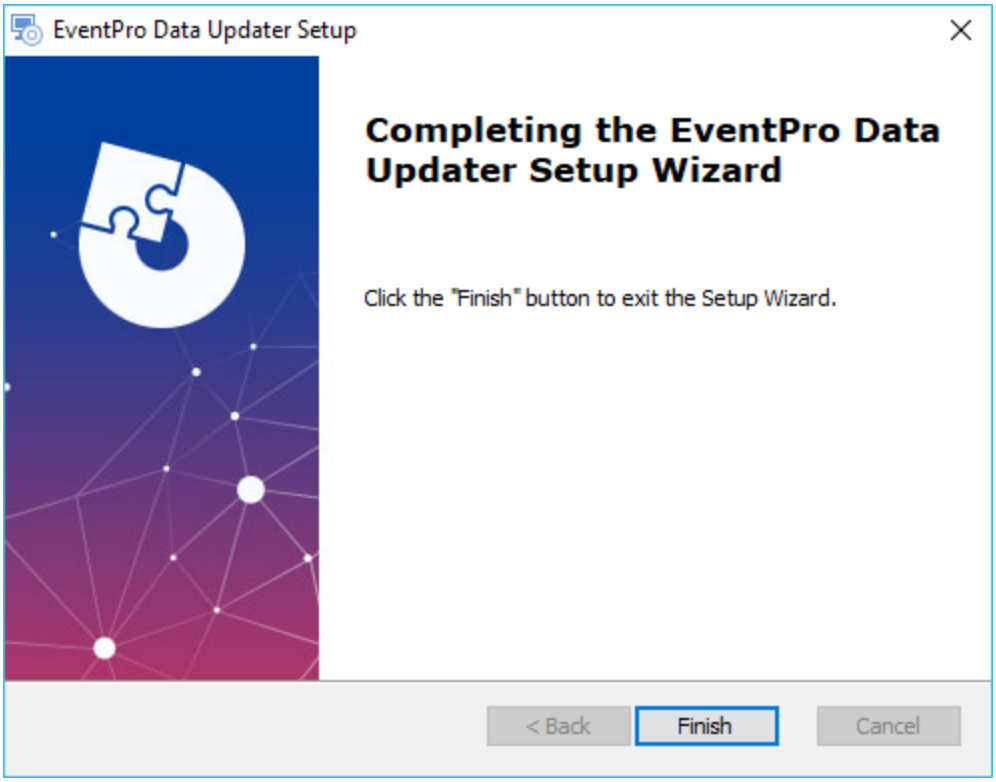


4. In the next window, click **Install**.



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.



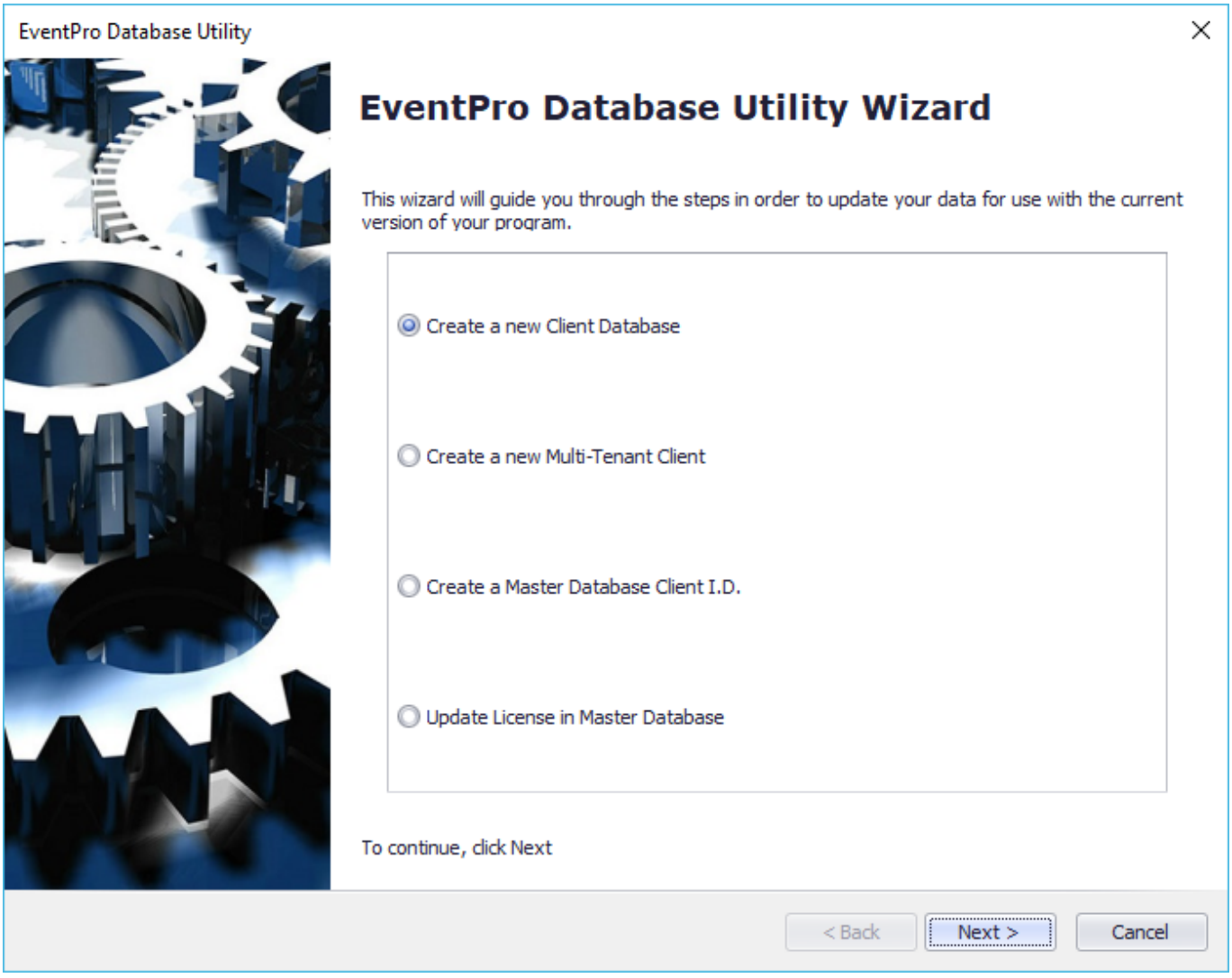
6. Next, go to Create New Client Database 248.

Create New Client Database

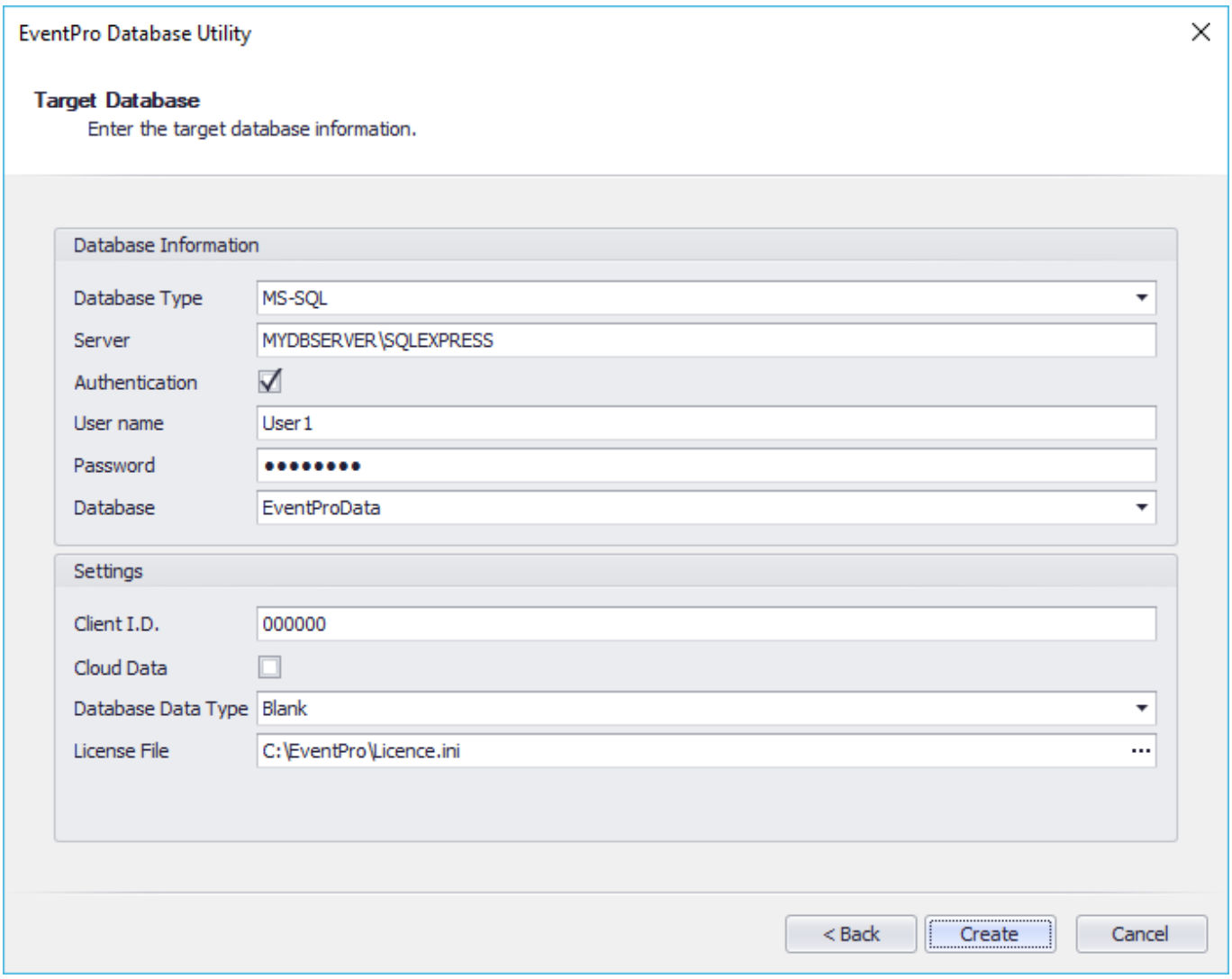
In most cases, an existing database will be prepared for you, containing information that has been converted from a previous database or added under the guidance of your EventPro Training & Implementation Specialist. That database will be sent to you so that you can restore it.

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 double-clicking 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.



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 **installing SQL Server** 235 (*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 **above** 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 **Restore Existing Database over New** 250.

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**:

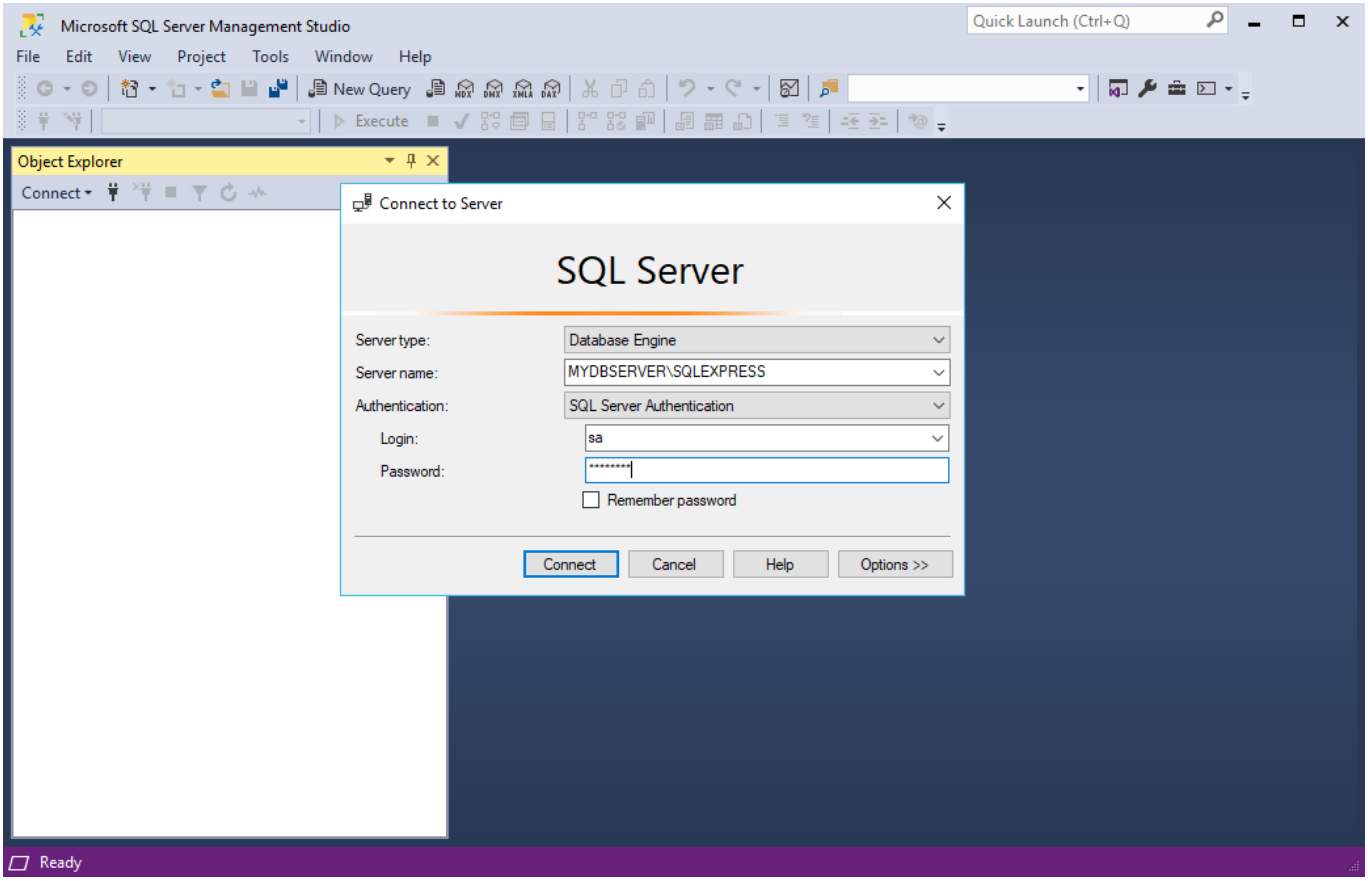
   Although you created the database as User1, you can restore the database as the Windows Administrator User or the sa user.

   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**.

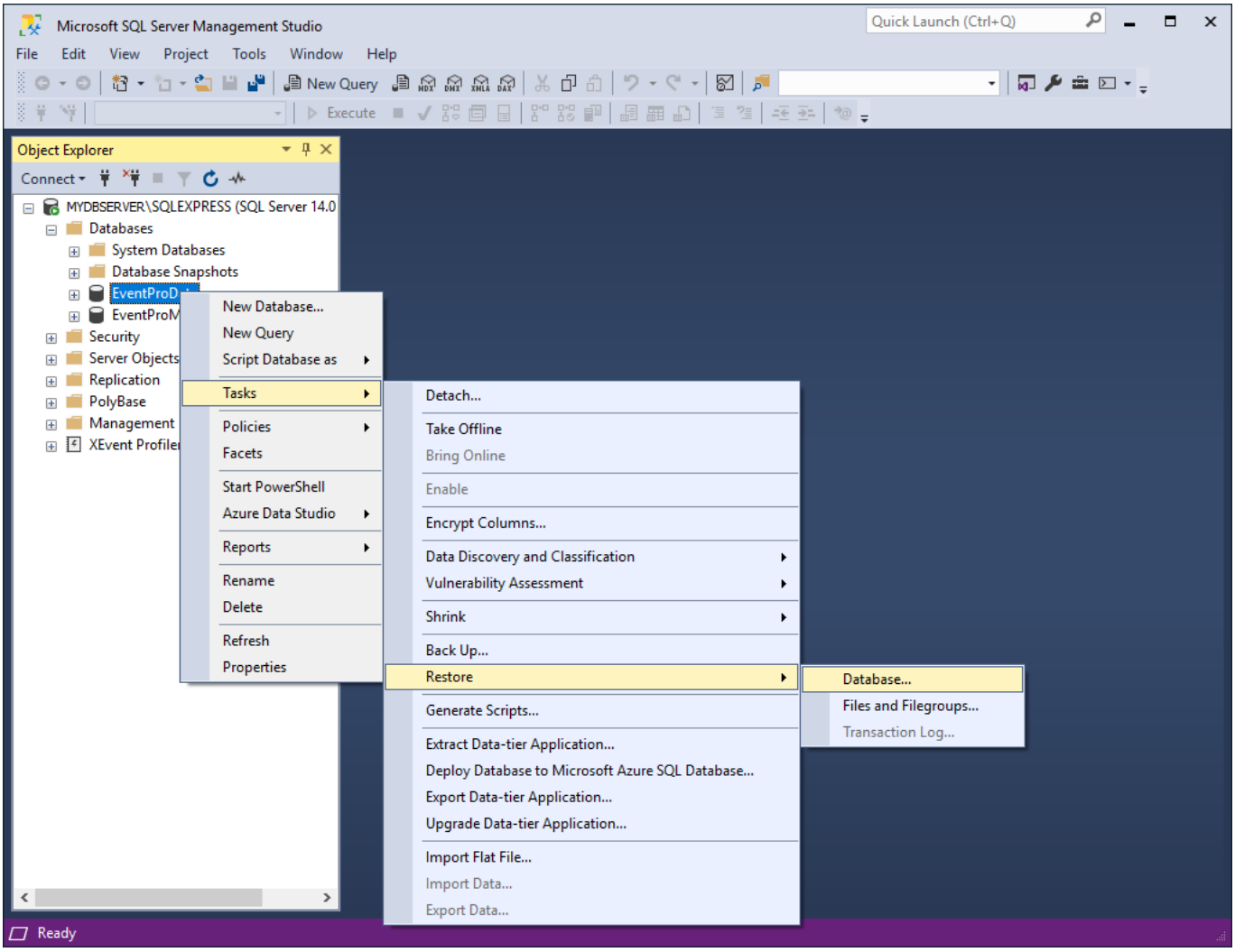
      *(Remember that you specified the Authentication Mode when **Installing SQL Server** 237 earlier.)*

   c. Click **Connect**.

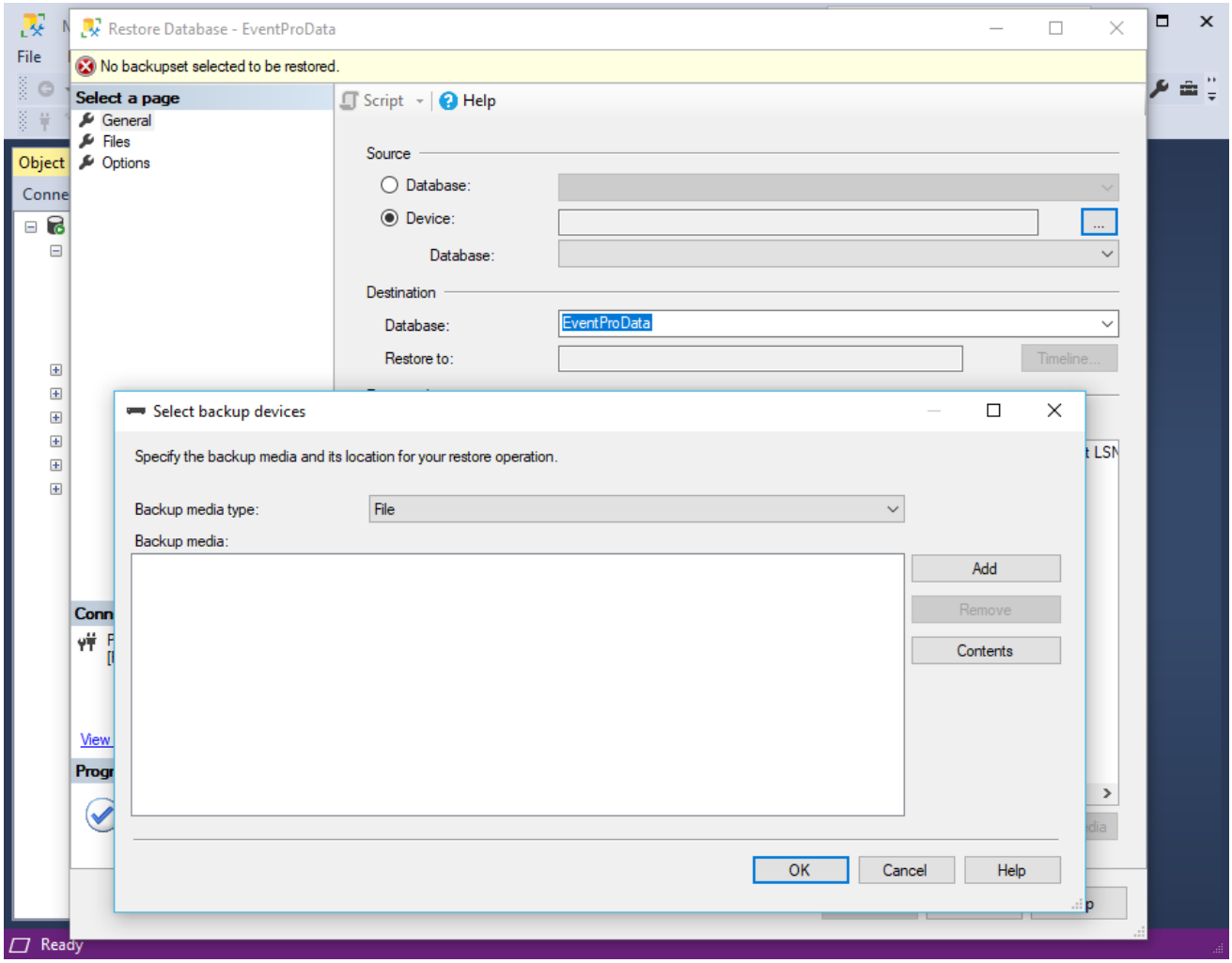


3. In the **Object Explorer** panel of **Microsoft SQL Server Management Studio**, expand the Databases so that you can see **EventProData**.

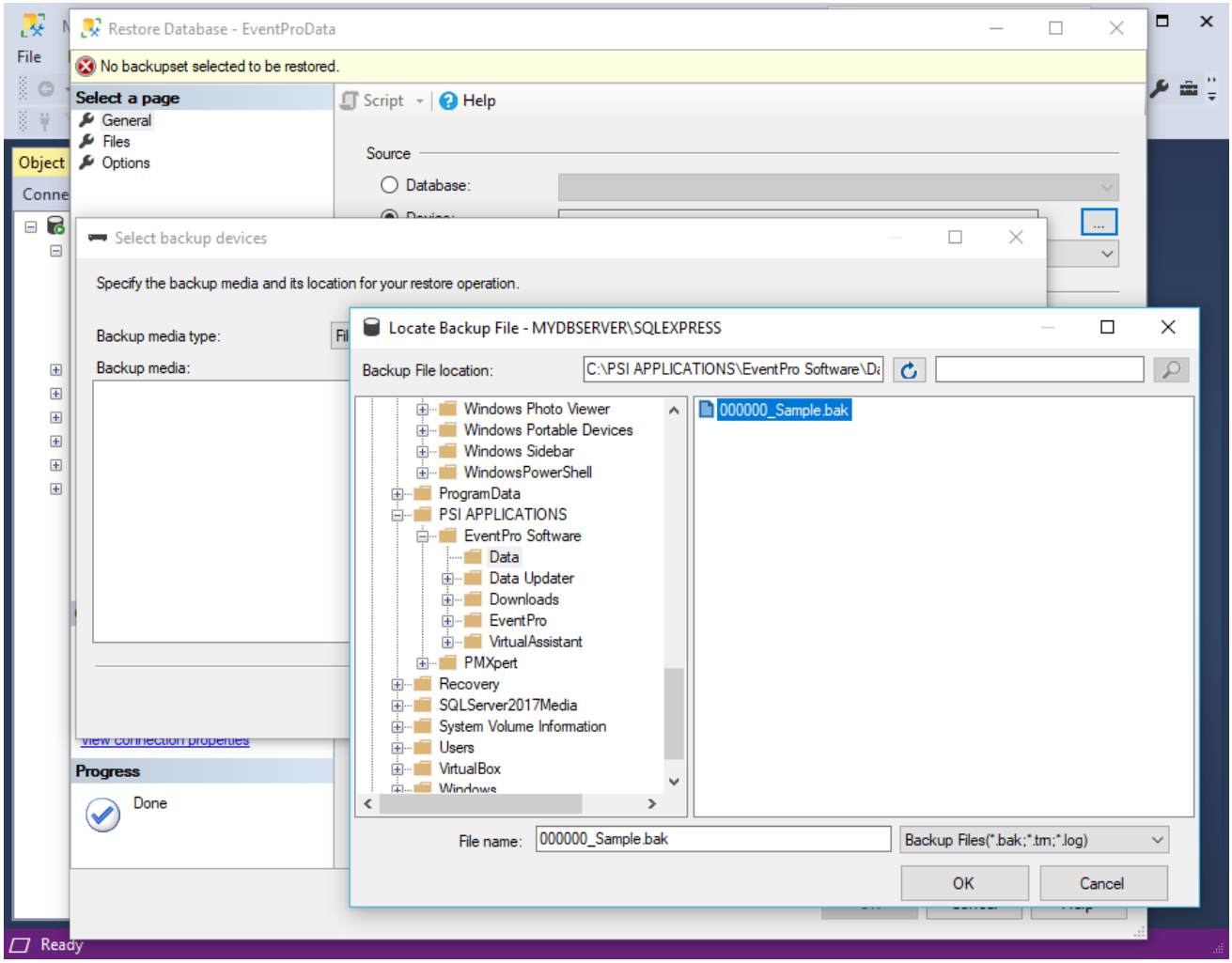
   Right-click on **EventProData**, and select **Tasks > Restore > Database**.



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.



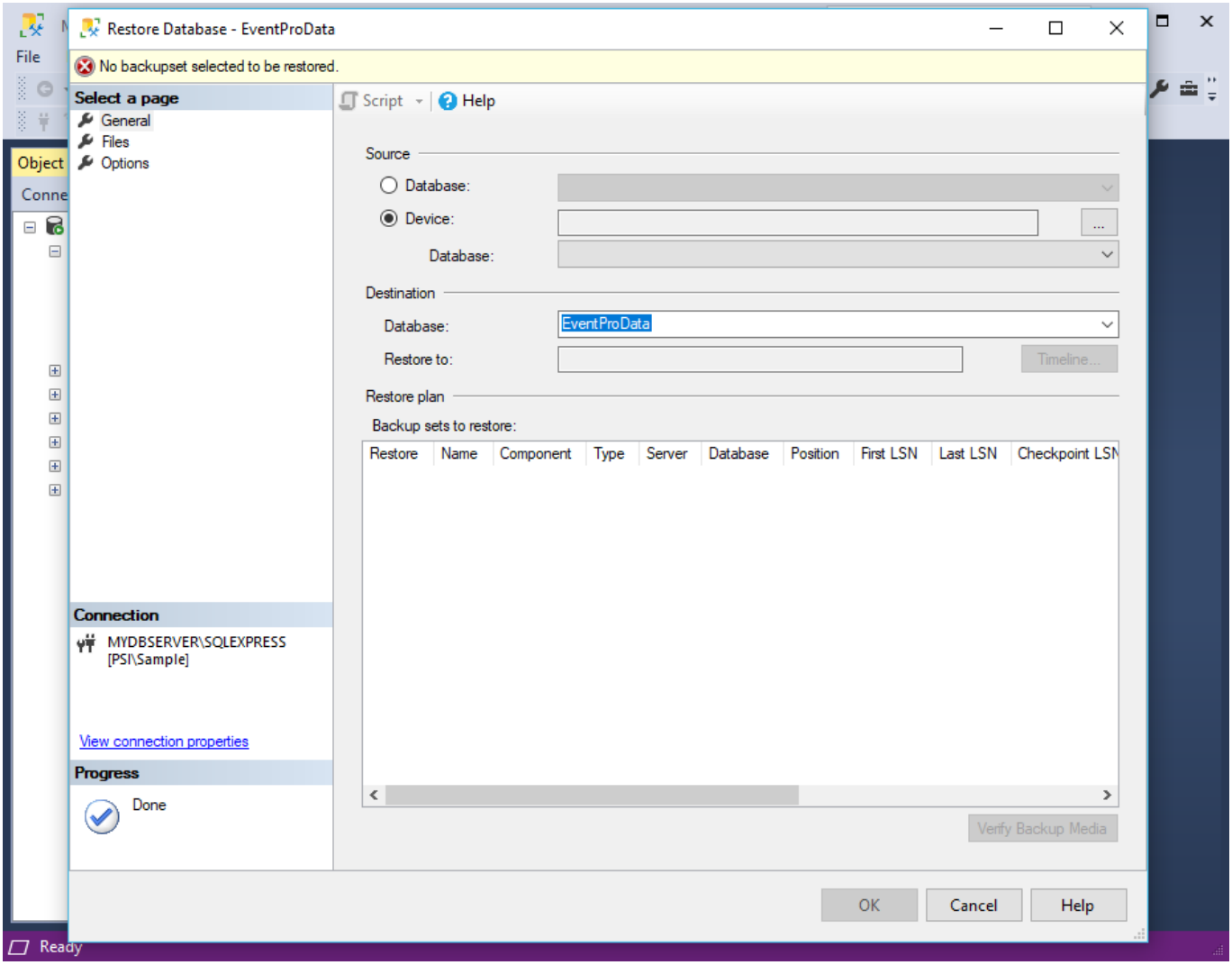
b. Click the **Add** button. The **Locate Backup File** window appears.



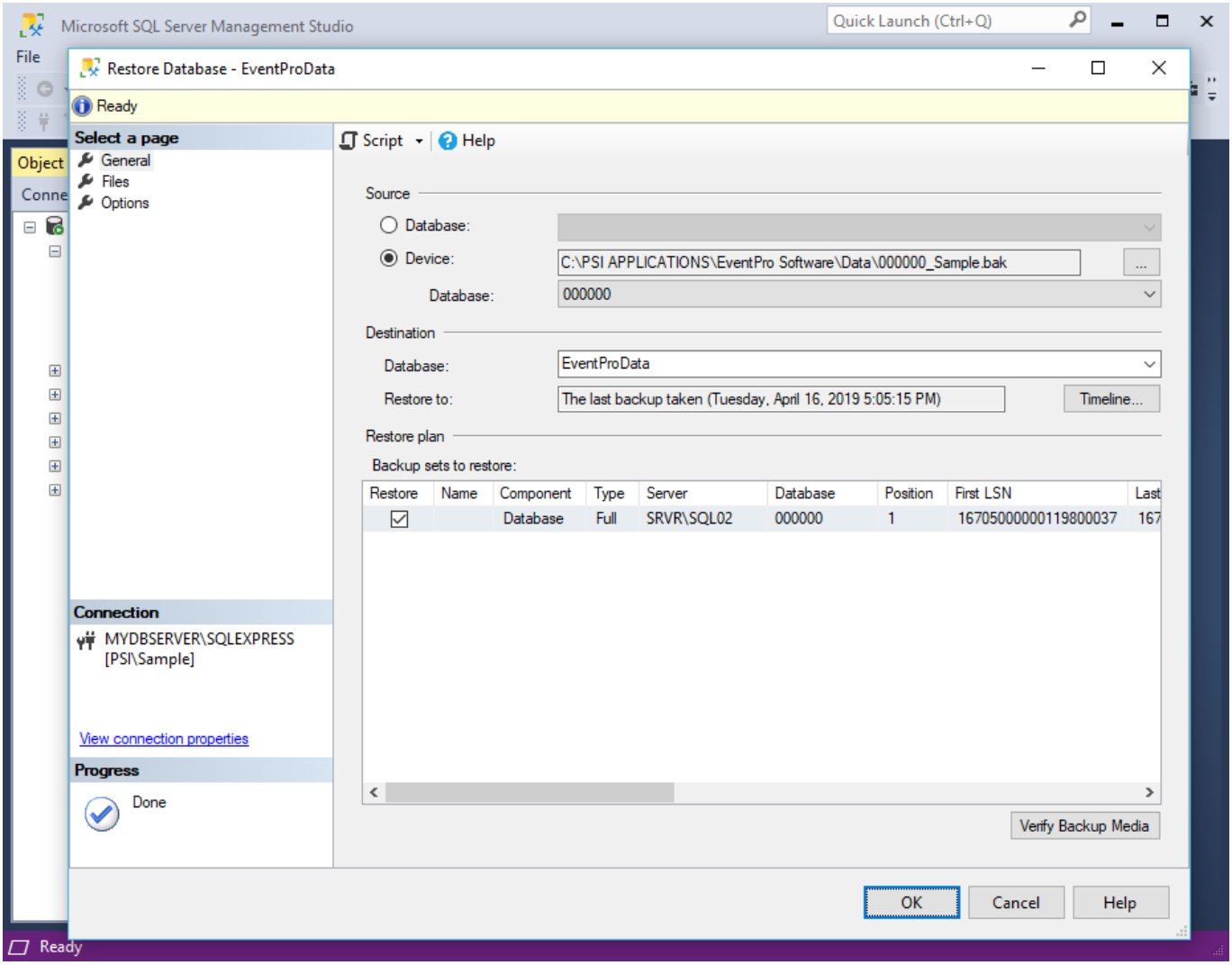
c. In the **Locate Backup File** window, locate the existing database that your EventPro Trainer sent to you, which should have been saved on the same machine as SQL Server, as noted above.

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**.

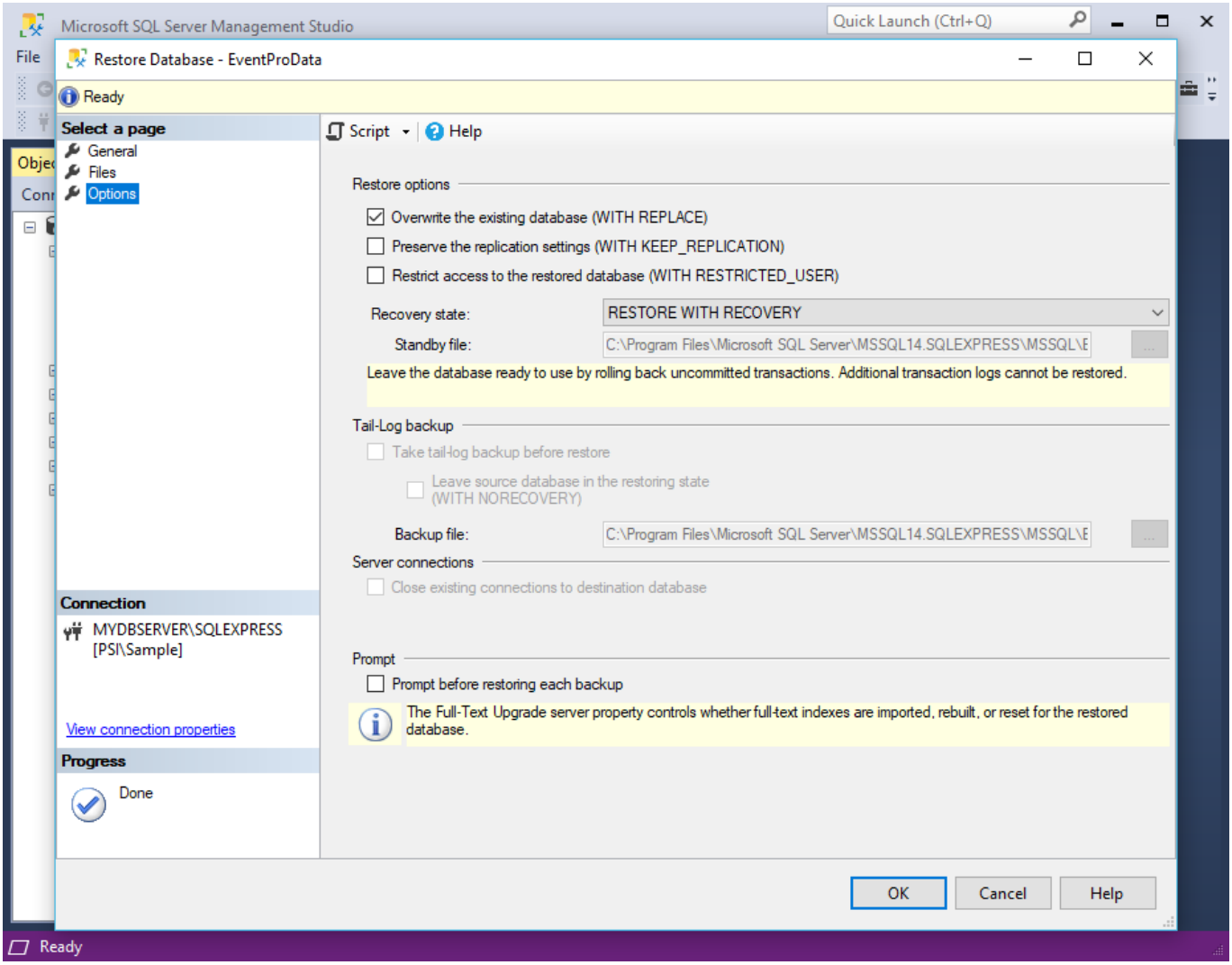


7. Ensure that you have selected the correct Source and Destination.



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.)

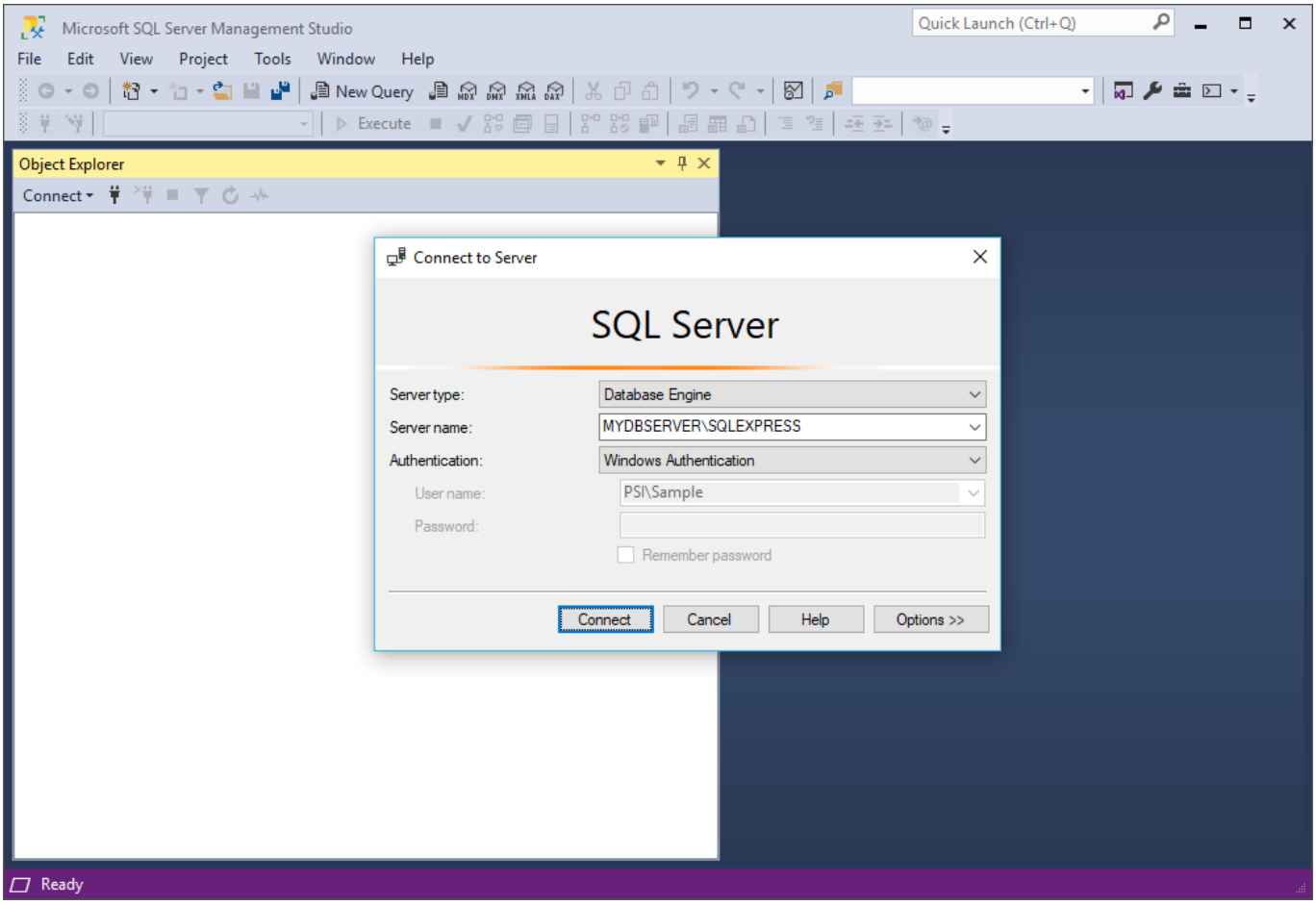


9. Click **OK** at the bottom of the **Restore Database** dialog to begin the restore process.
10. When the restore is complete, you should receive a success dialog. Click **OK**.
11. You can now proceed to **Change SQL User** 257.

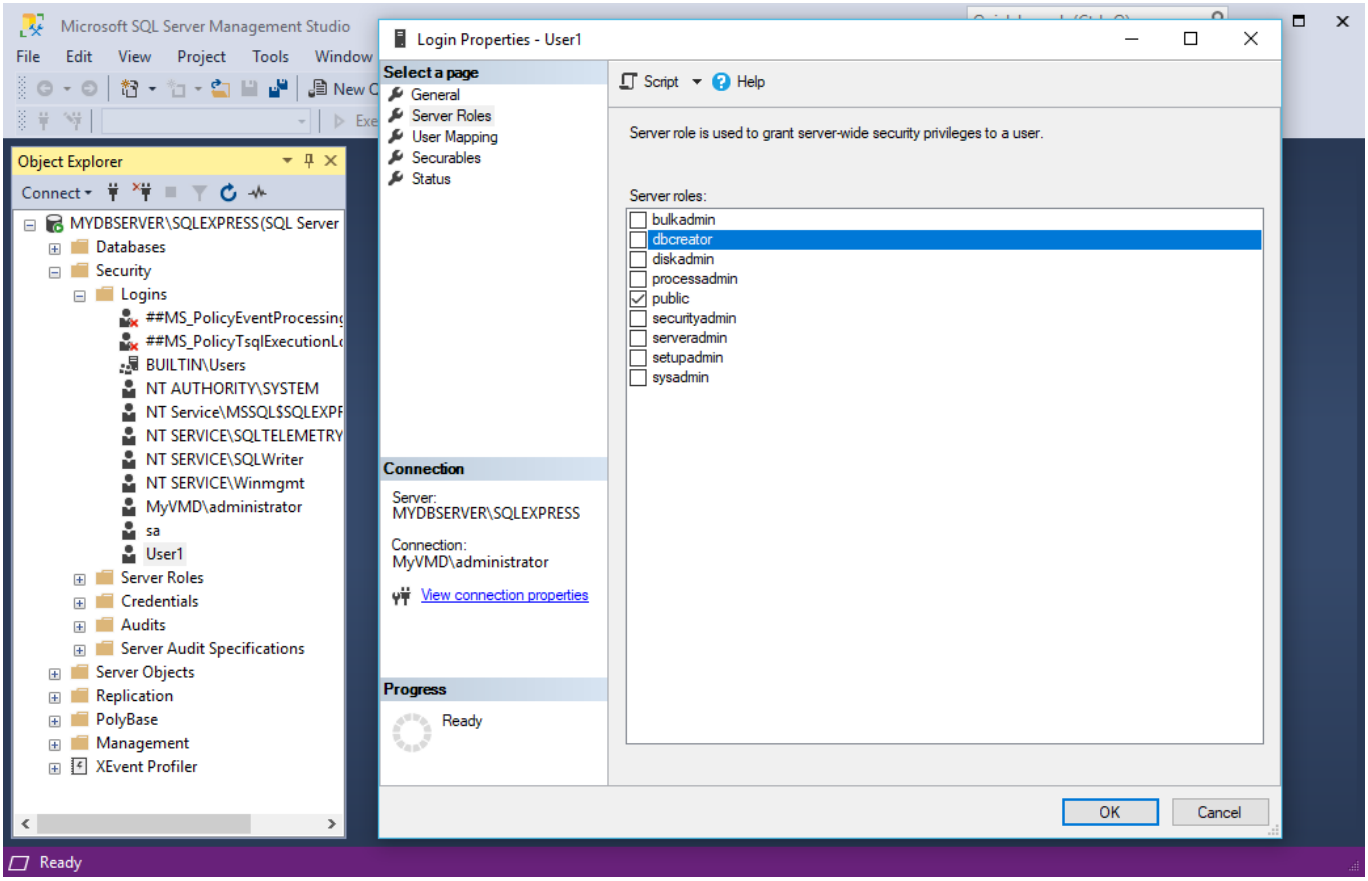
Change SQL User

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**.

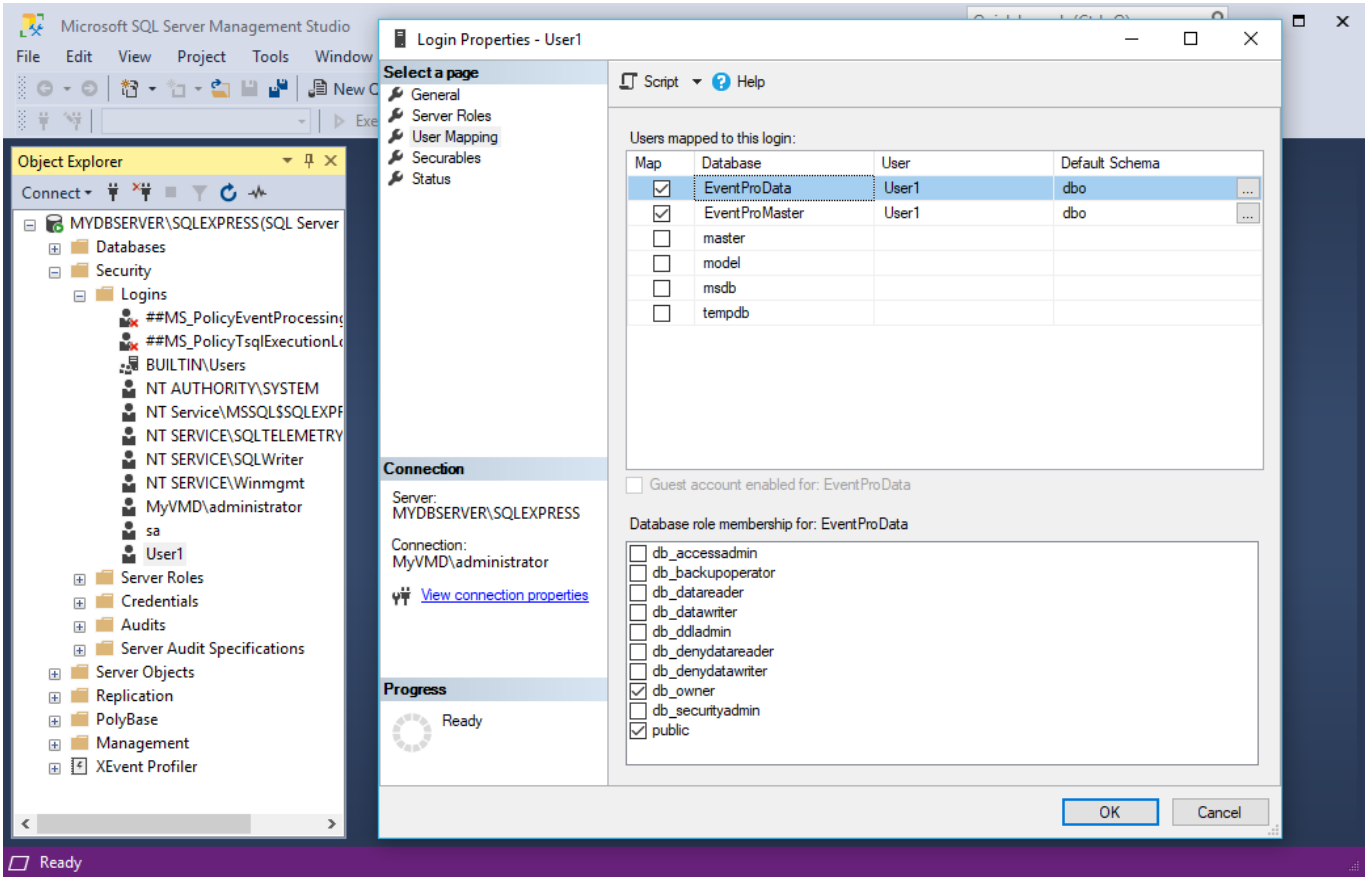


2. In the **Object Explorer** panel, expand the **Logins** folder.
3. Double-click **User1** to open its **Login Properties**.
4. Under **Server Roles**, unselect the **dbcreator** checkbox.



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.



6. Click **OK**.
7. You can now proceed to **Install EventPro to Server** 260.

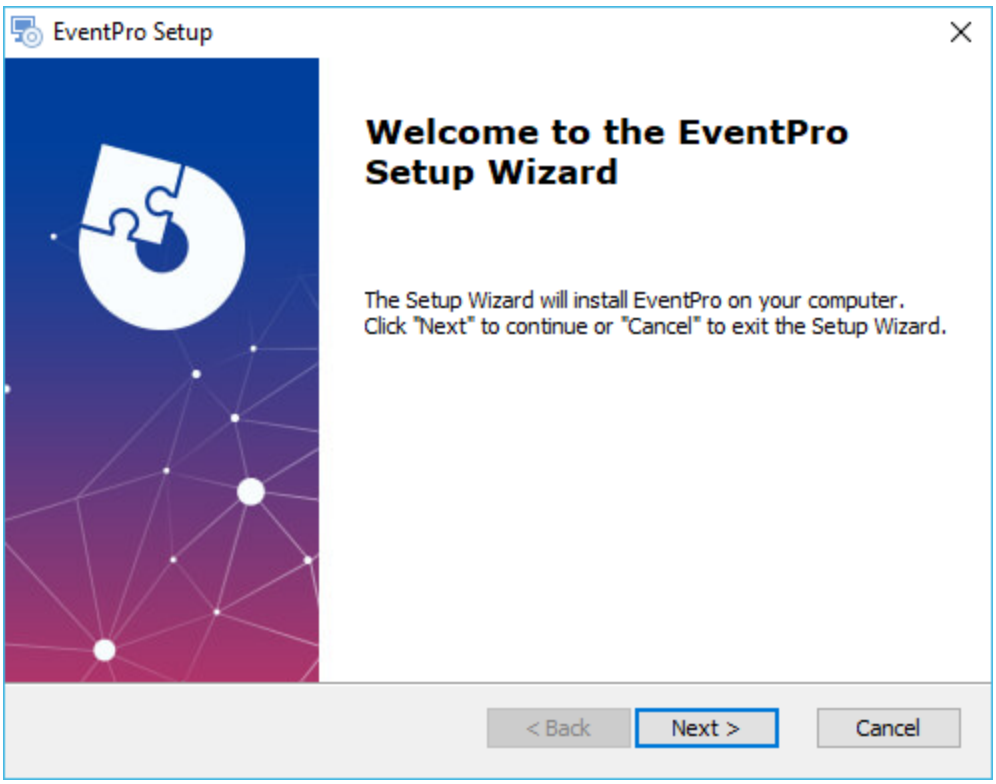
Install EventPro to Server

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** 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.

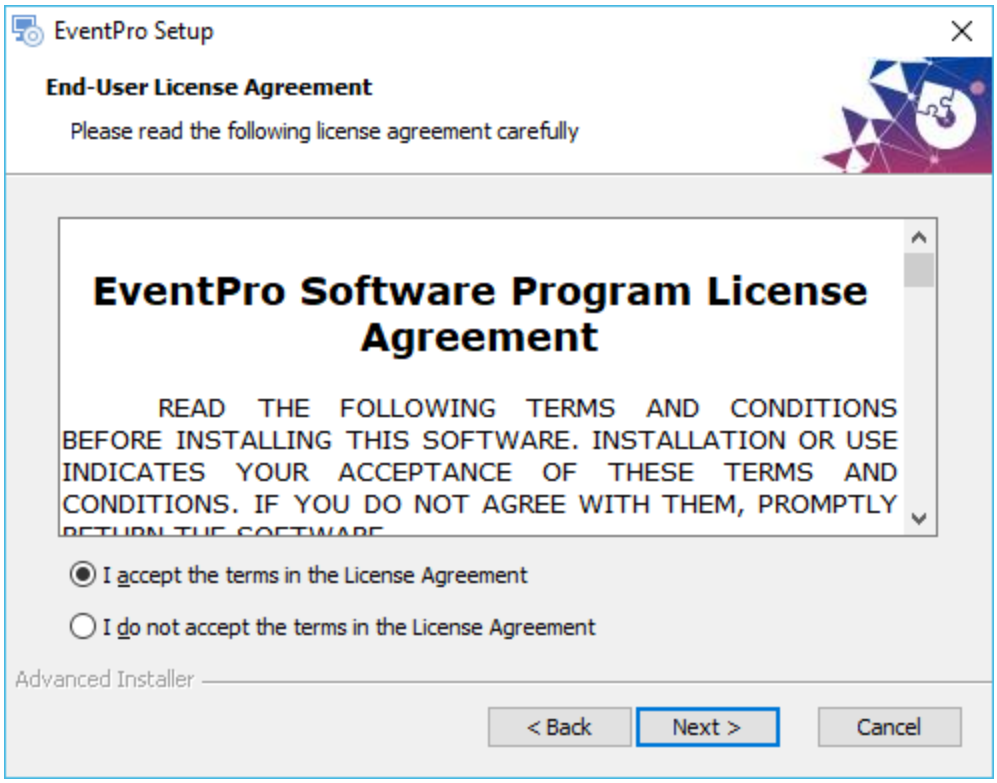


3. **End-User License Agreement**:

   a. Please read the **EventPro Software Program License Agreement**.

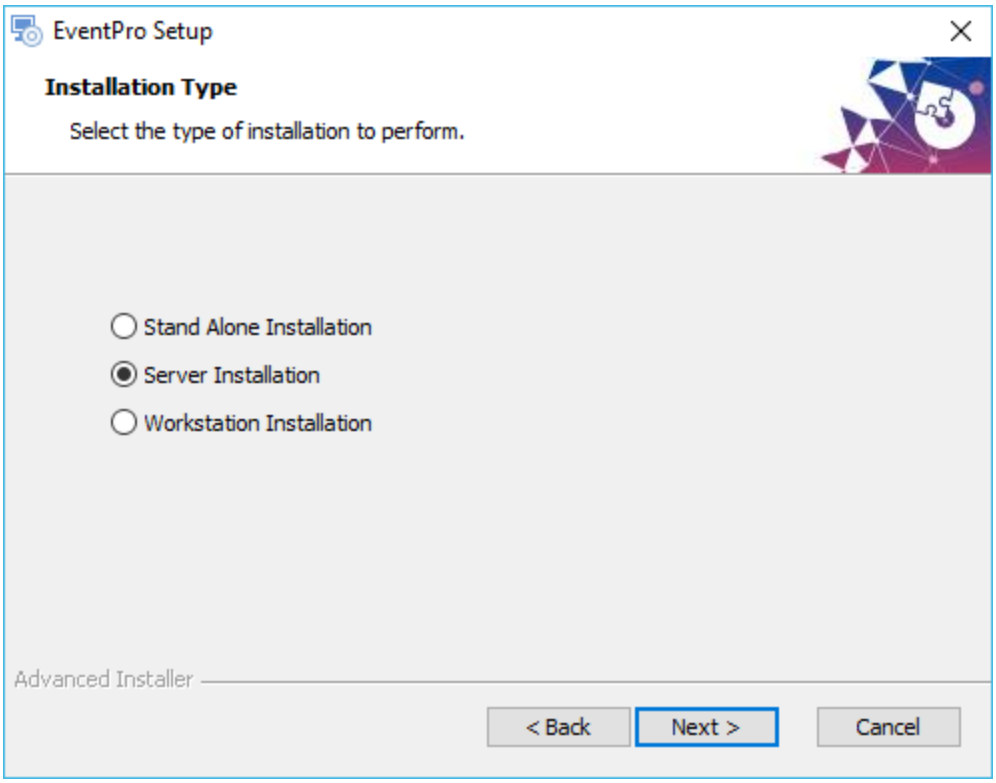
   b. Select **I ACCEPT** or **I DO NOT ACCEPT** below. If you do not accept the license agreement, you cannot continue with the installation process.

   c. Click **Next** to continue.



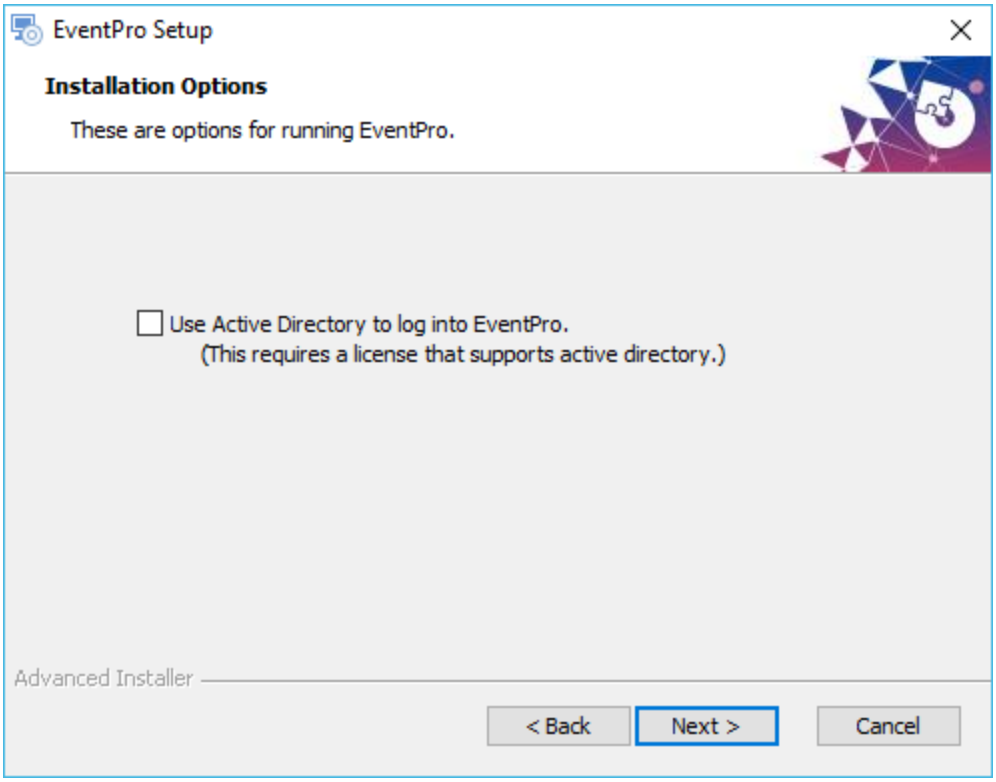
4. **Installation Type**: Choose **Server Installation**, and click **Next**.

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



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 **Network Install: Active Directory Integration** 162 .)*

   Click **Next**.

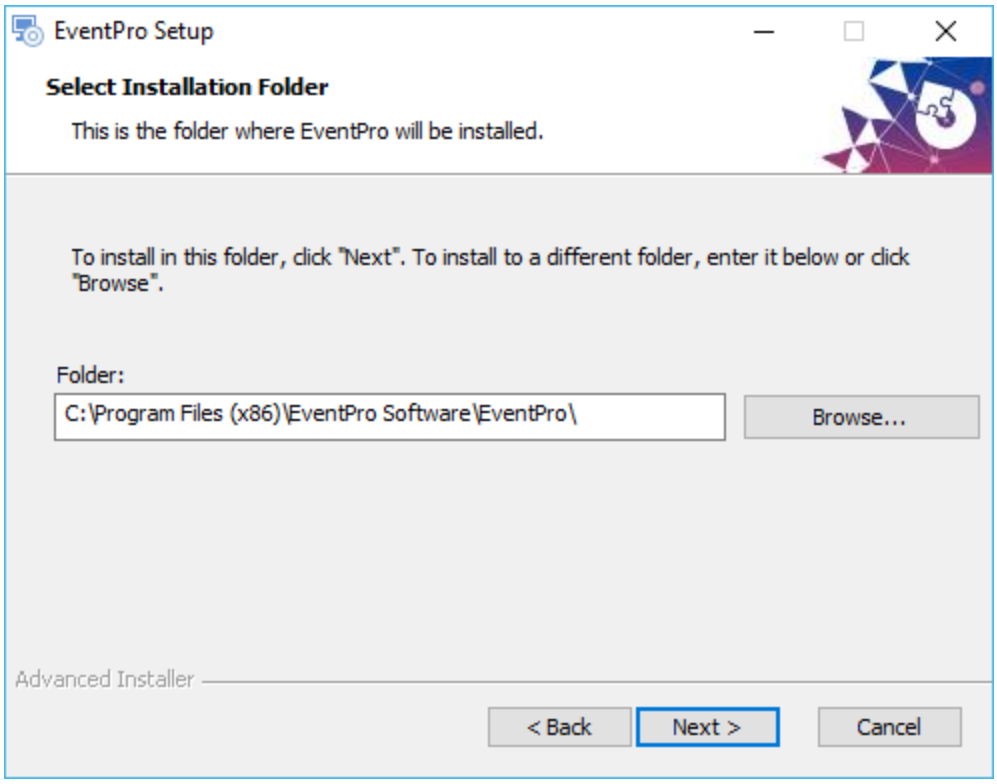


6. **Select Installation Folder**:

a. You can use the default **Program Files** path or enter a different path for the **Installation Folder**.

b. 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**.

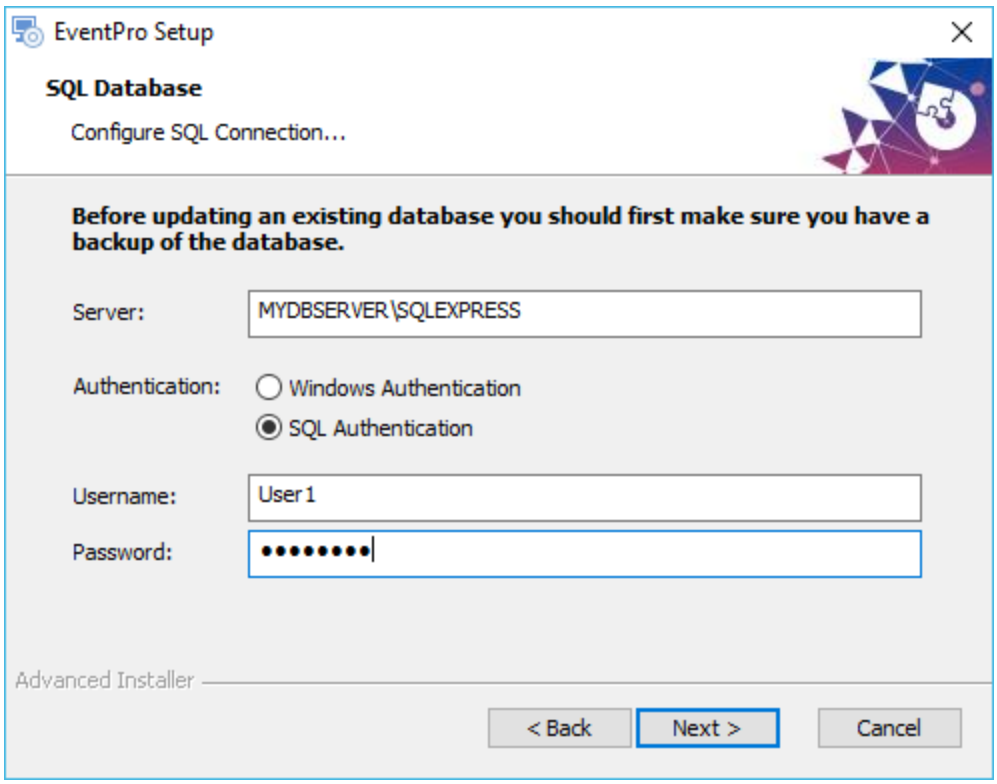


7. **SQL Database**:

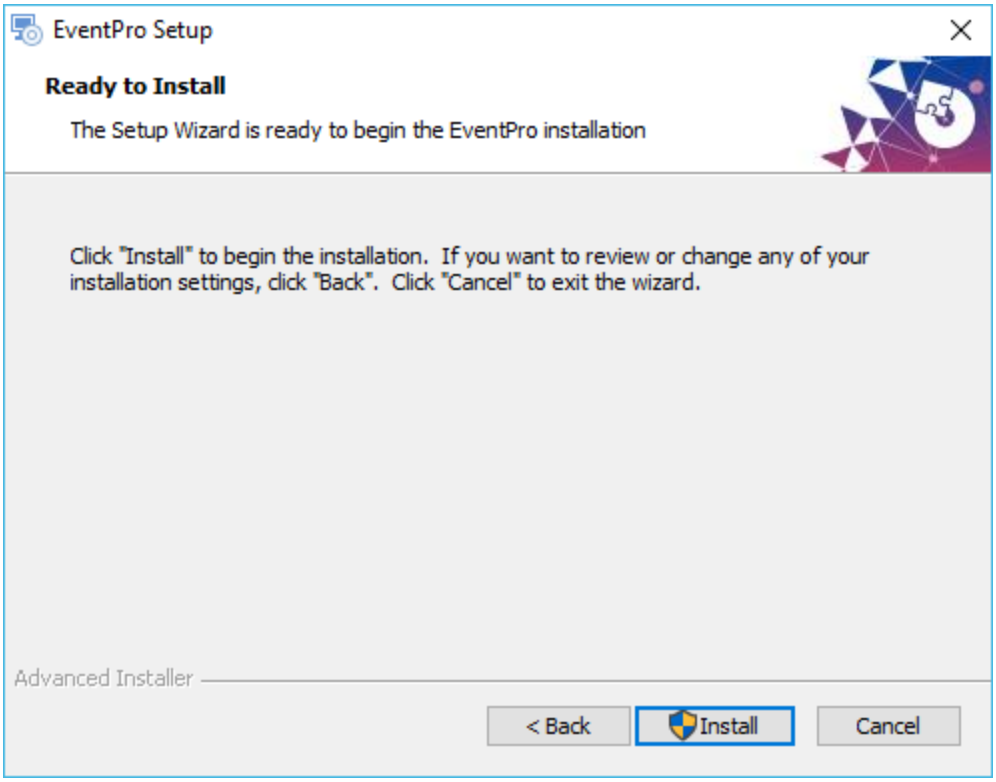
a. **Server**: Enter the **SQL Server Named Instance**, identifying the network name of the computer plus the instance name you specified earlier when installing SQL Server (*i.e.* "SQLEXPRESS"). It will look something like this: **MYDBSERVER\SQLEXPRESS**.

b. **Authentication**: Select the radio button next to **SQL Authentication**. Enter the **Username** and **Password** of the SQL User login you **created earlier** 241.

c. Click **Next**.

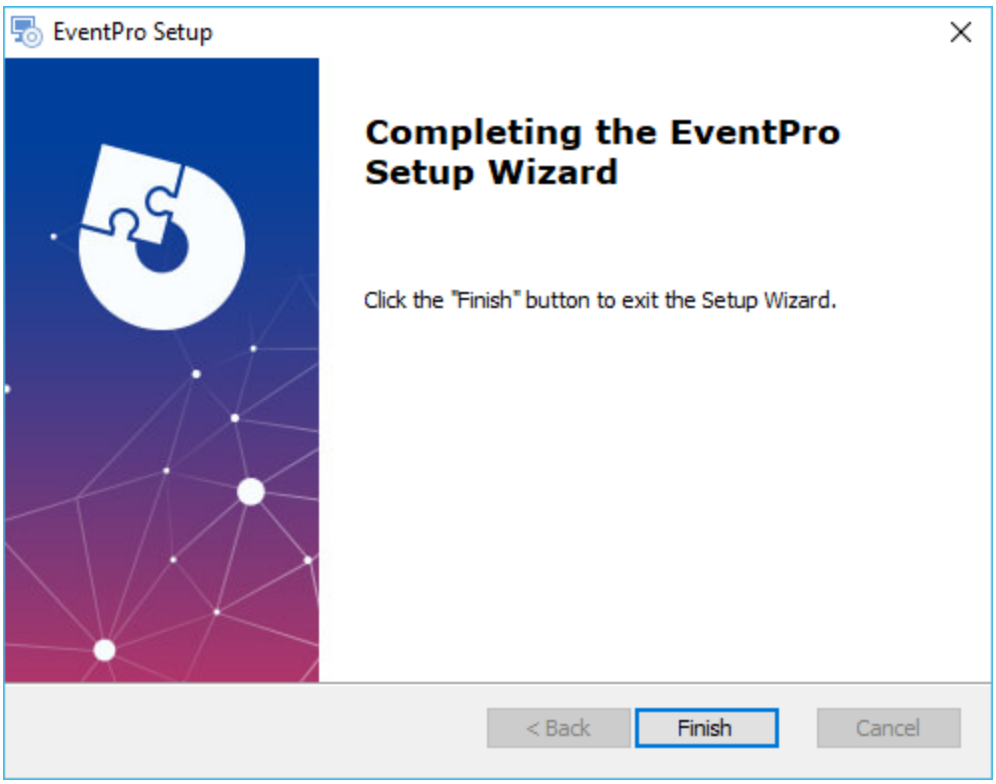


8. The Installer will test the connection to the database before you can proceed with the installation.
9. When the connection test is completed, click **Install**.



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 **Share the Installation Folder** 265.

Share Installation Folder

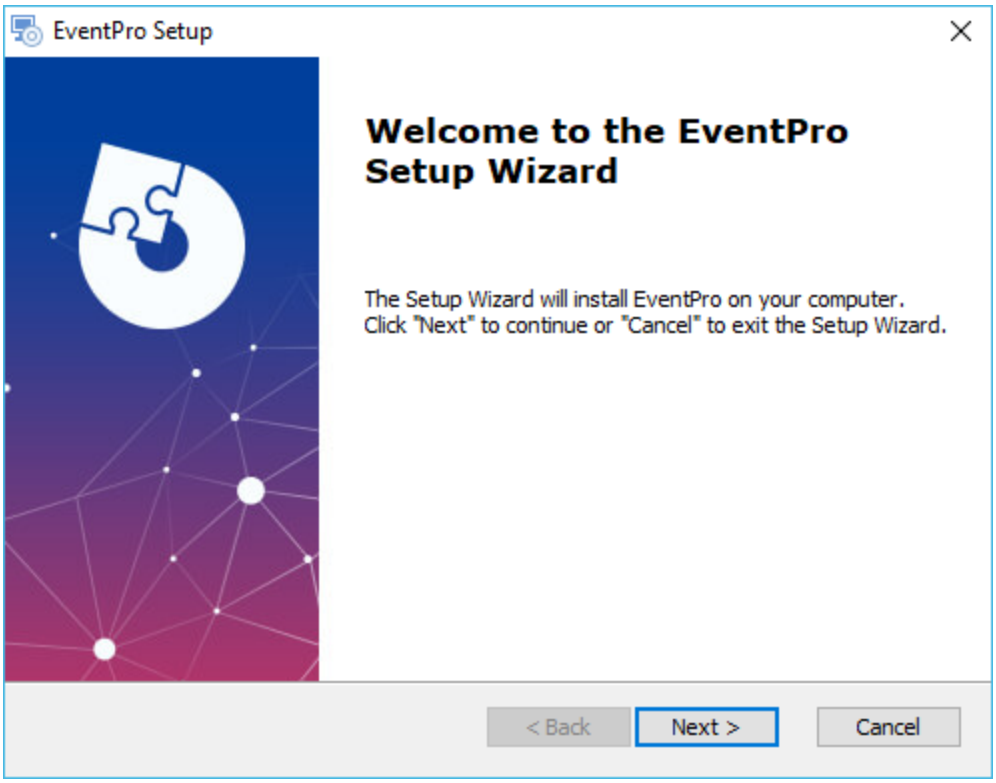
- On the server to which you just installed EventPro, **locate the folder** in which EventPro was installed. By default, it would be **C:\ProgramFiles (x86)\EventPro Software\EventPro**, but you may have selected a different folder path in the **Select Installation Folder** 262 page of the installation 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** 265.

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.

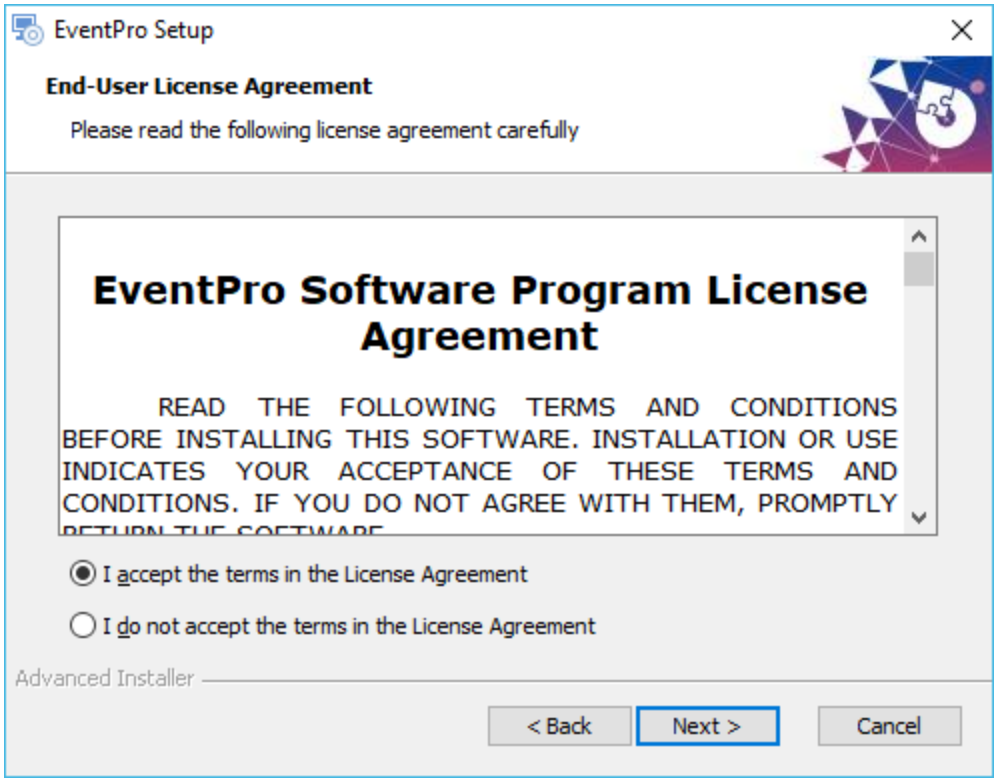


4. **End-User License Agreement**:

   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.

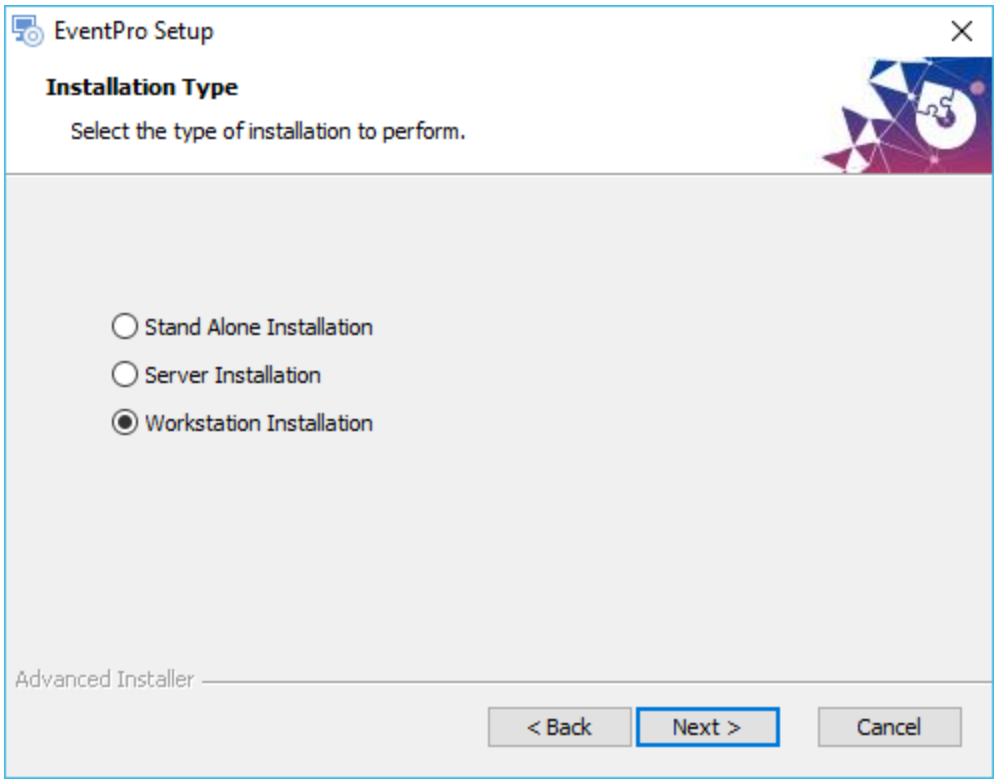
   c. Click **Next** to continue.



5. **Installation Type**:

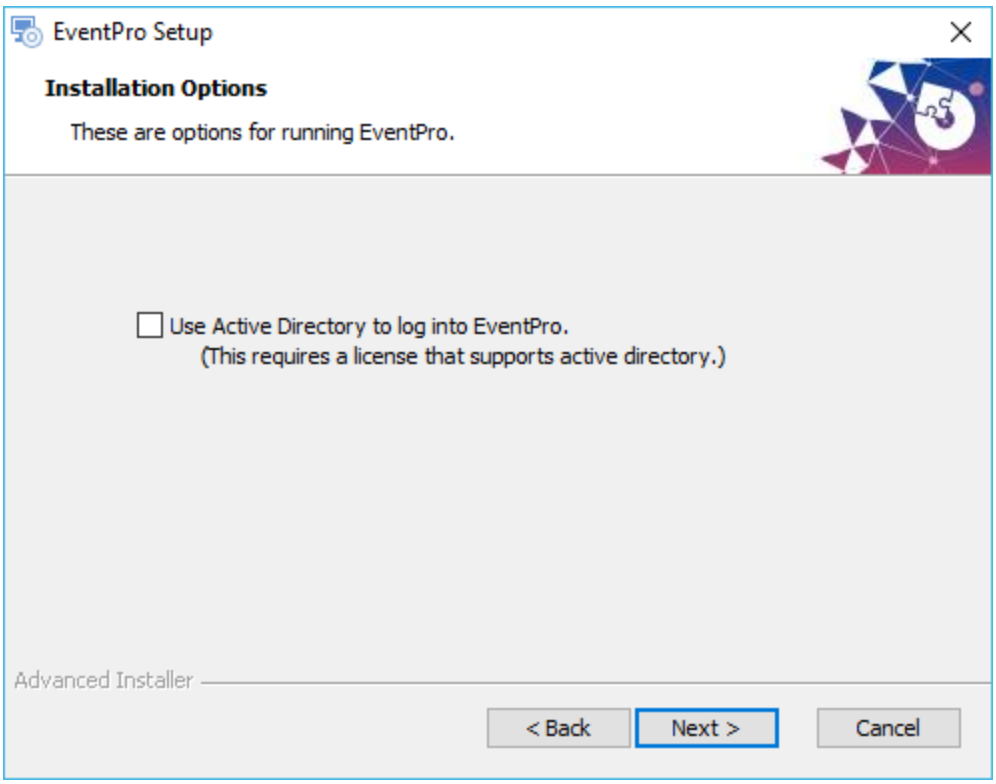
   a. This time, choose **Workstation Installation**.

   b. Click **Next**.



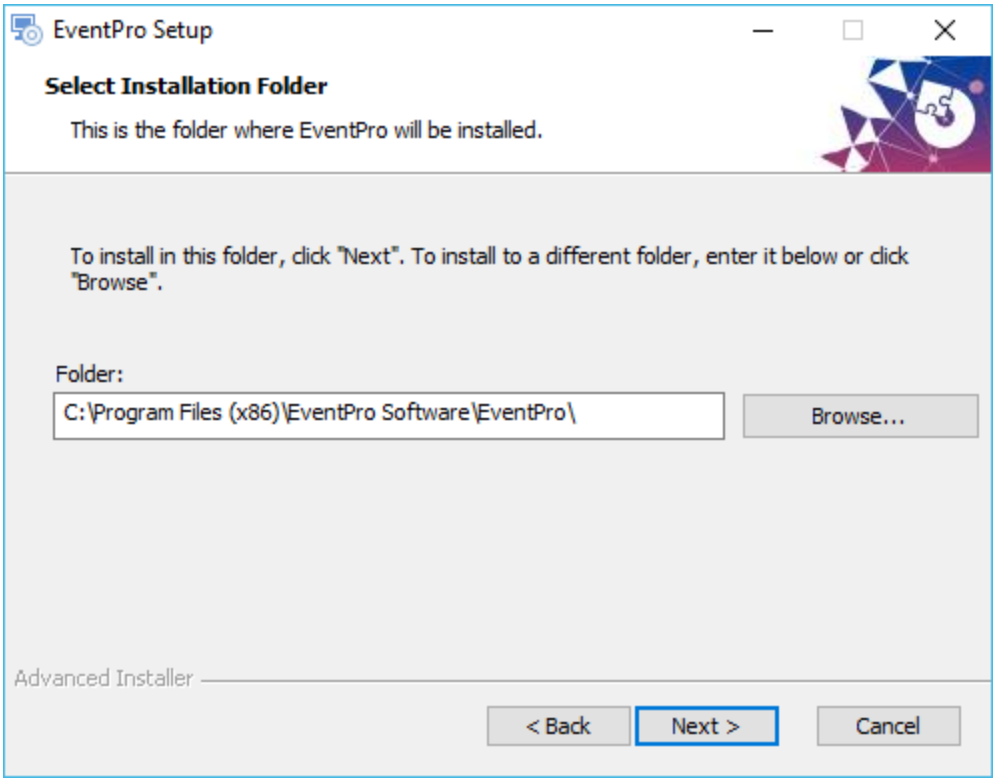
6. **Installation Options**: **Do not select** the checkbox for **Use Active Directory to log into EventPro**. *(That option requires the EventPro Active Directory Module, and is covered under* ***Network Install: Active Directory Integration*** 162 *.)*

   Click **Next**.



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**.



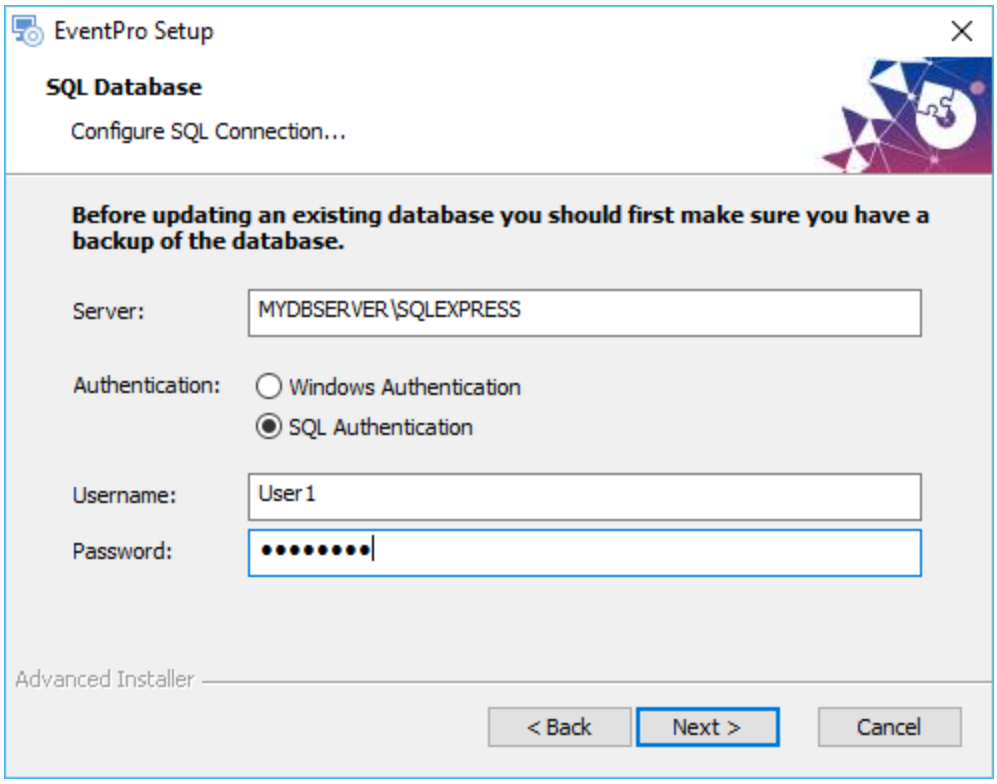
8. **SQL Database**:

   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**.



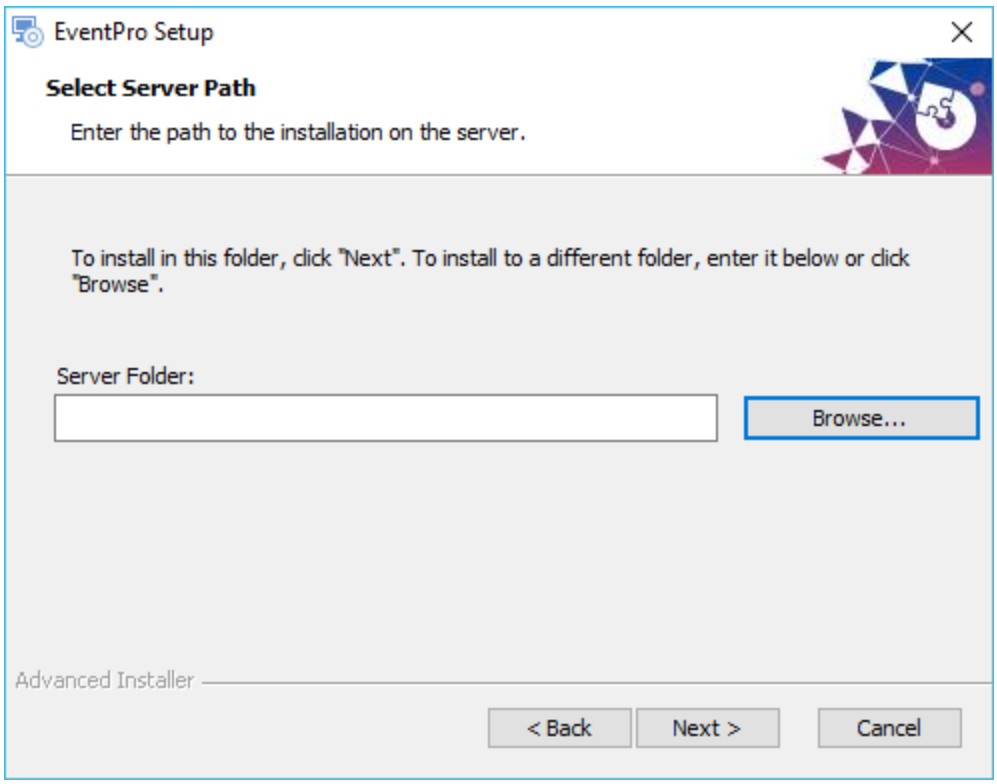
9. The Installer will test the connection to the database before you can proceed with the installation.

10. **Select Server Path**:

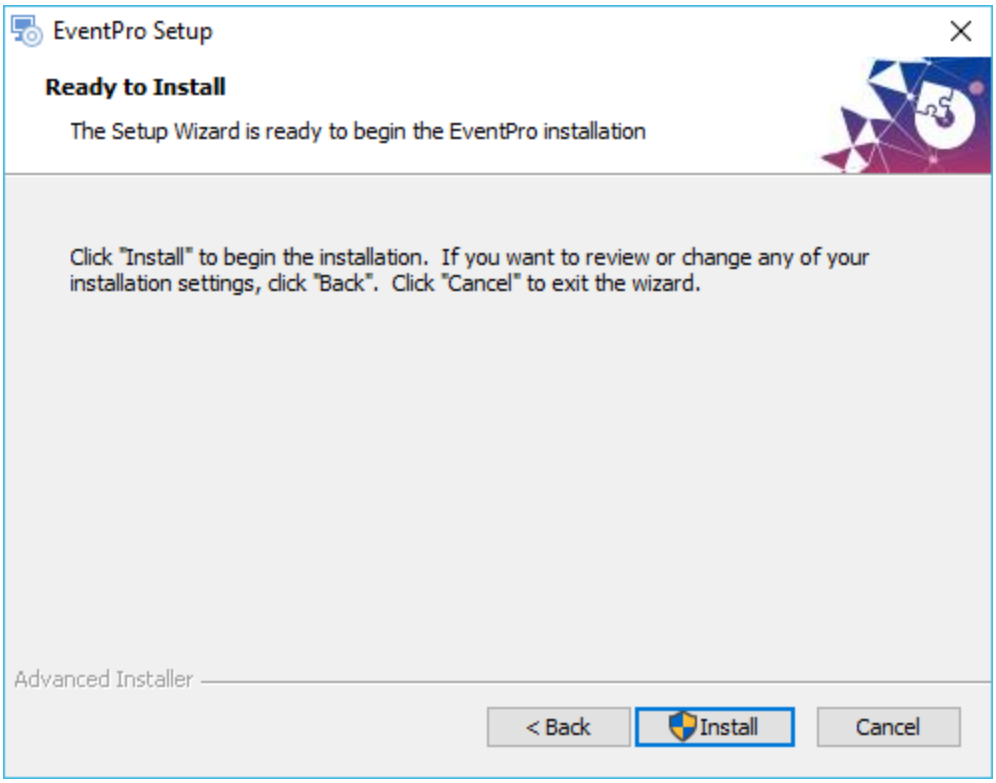
    a. Enter the path to the installation on the server. This is the **Installation Folder** 262 you selected during the Server Installation, and **shared** with the network users in the **previous step** 265.

    b. Click the **Browse** button, locate that folder on the Network, and click **Select Folder**.

    c. Click **Next**.

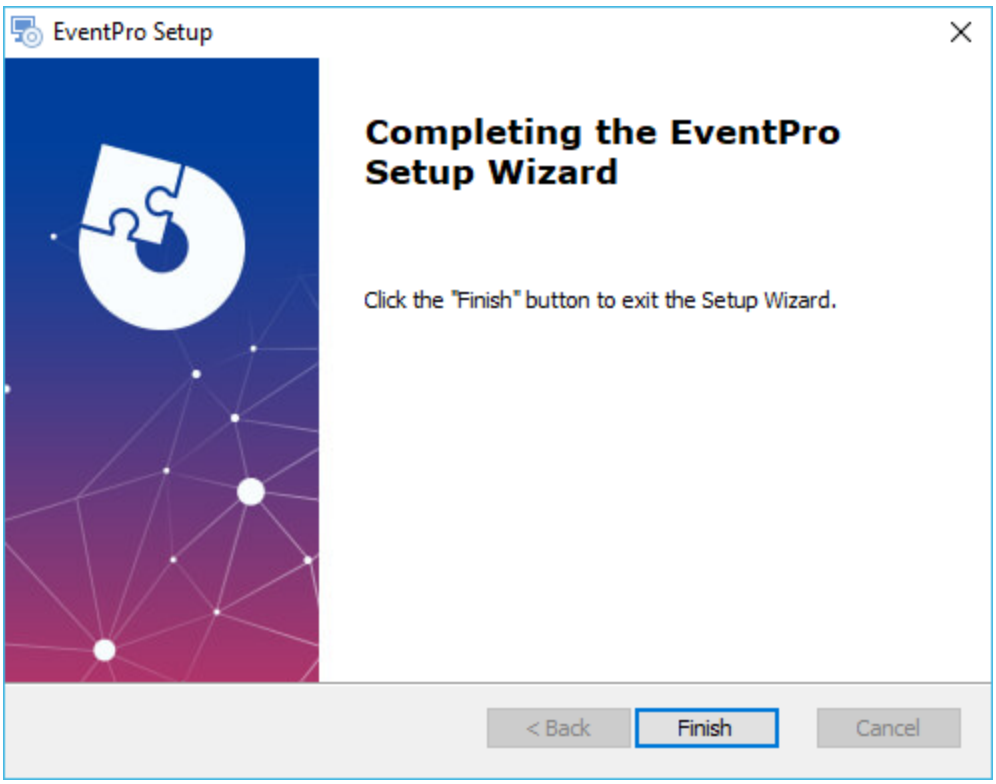


11. **Ready to Install**: Click **Install**.



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 **Admin First Login to EventPro** 271.

Admin First Login to EventPro

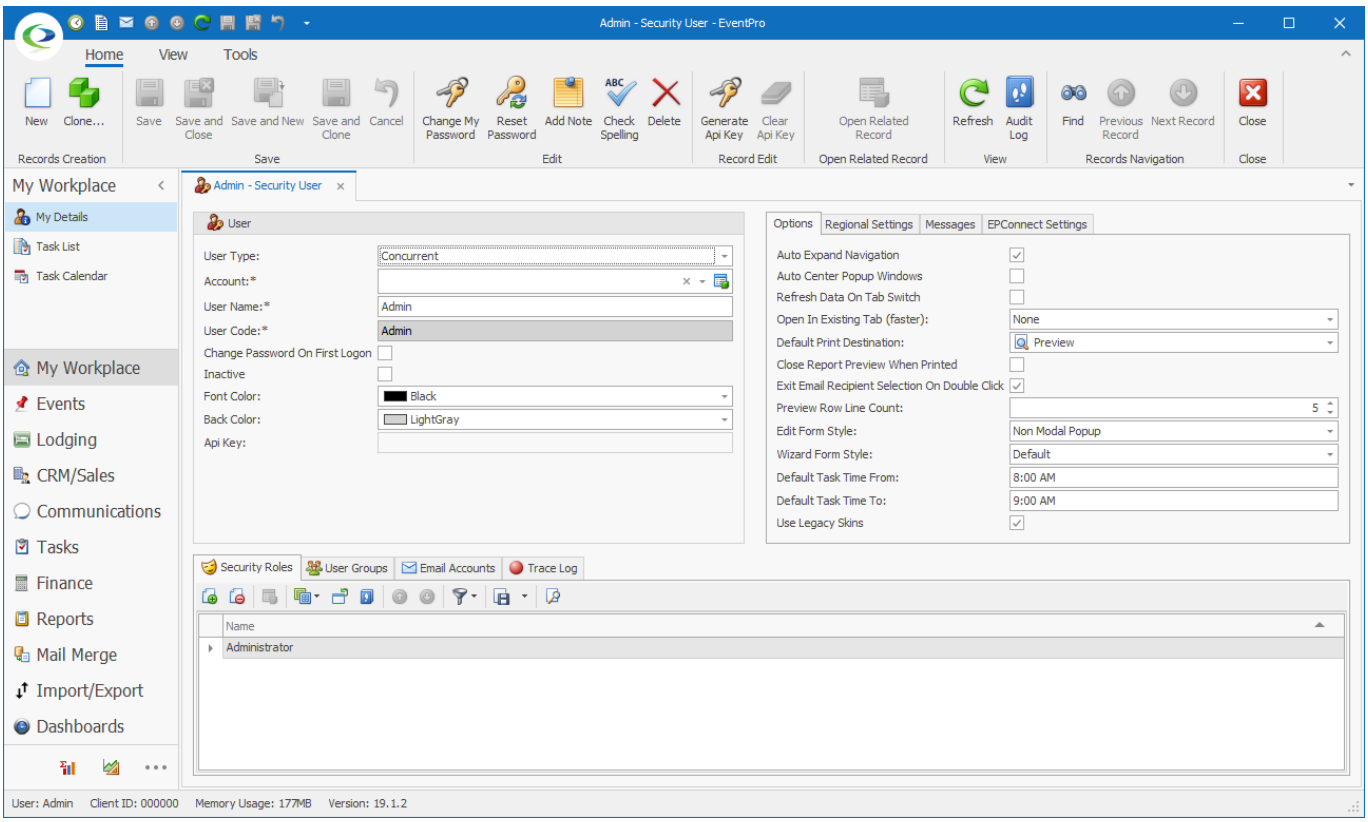
You can log in to EventPro for the first time using the **default Administrator account** that has been pre-set in EventPro.

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.

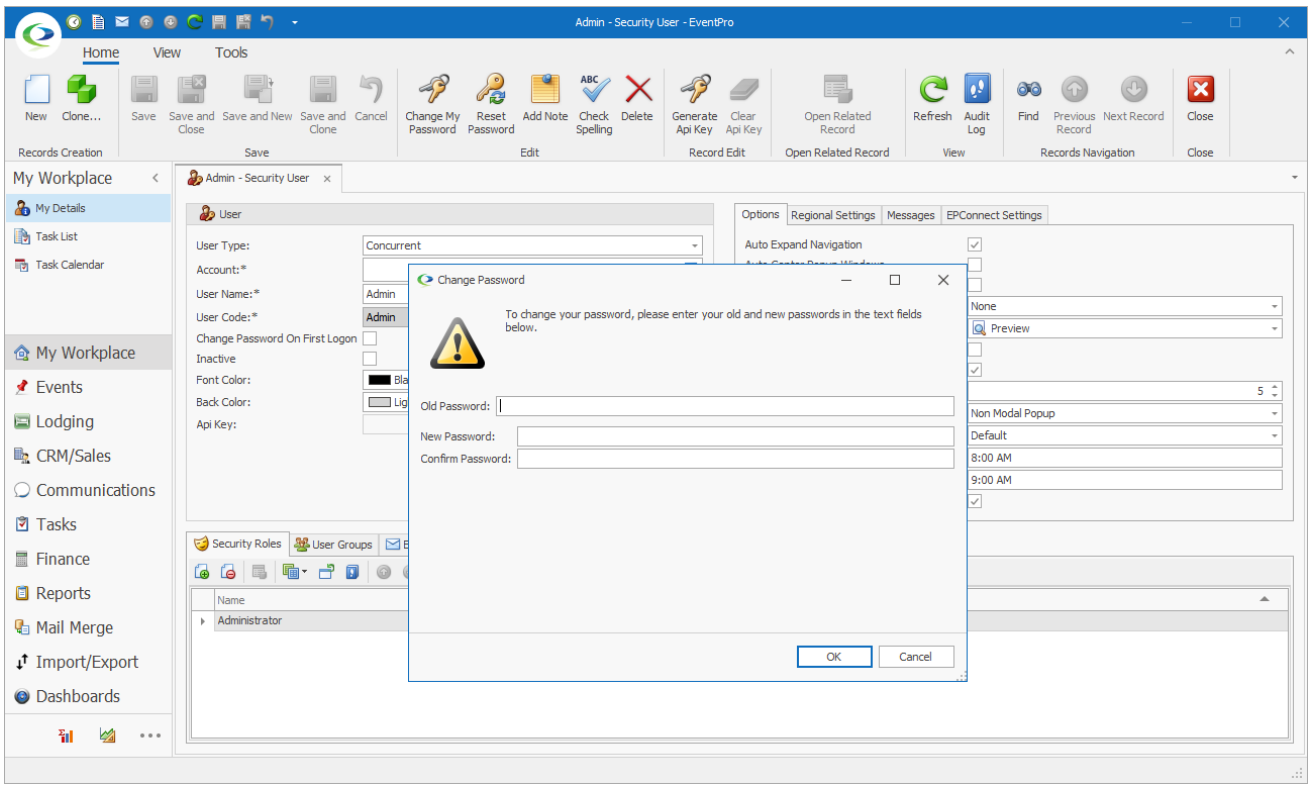


4. One of the first things you will want to do is change the **Password** for the Admin User, since it is the EventPro default that many people will know.

   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!



c. Click **OK**.

5. You can make other changes to your Admin account as required.

   (Review **Security Setup > Users > Create New User** in the **EventPro User Manual**.)

6. As the Administrator, there are several actions you will probably need to complete before other Users log into EventPro:

   a. **Create Security Roles** 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 **User First Login to EventPro** 278.

Create Security Roles

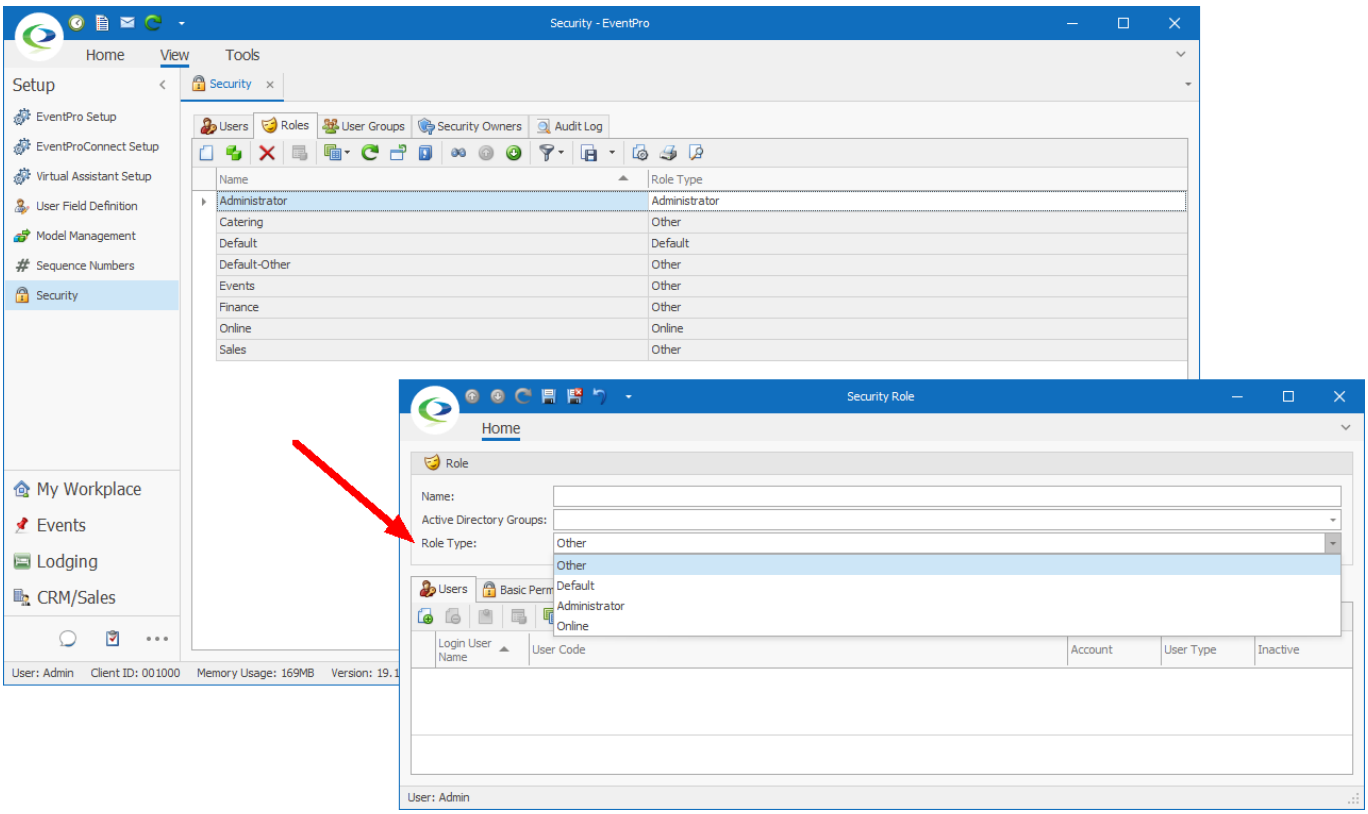
A **Security Role** allows you to define a standard set of permissions for each category of Users according to their ability to access data in EventPro.

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 **EventPro User Manual**.)

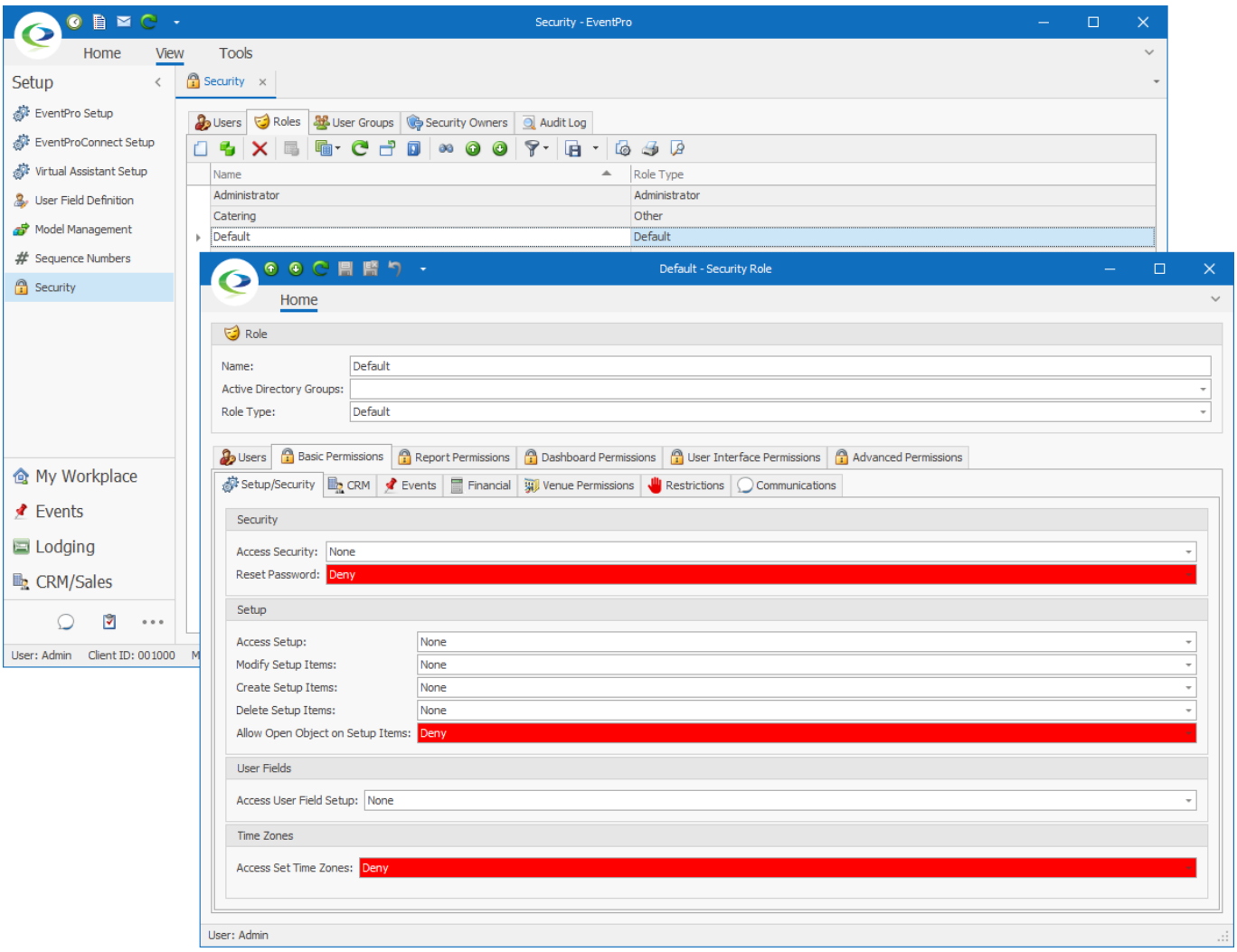


3. The **Administrator Security Role** is assigned to the default EventPro Admin User. Typically, very few Users should get this Security Role, as it allows full access to the program.

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**.)

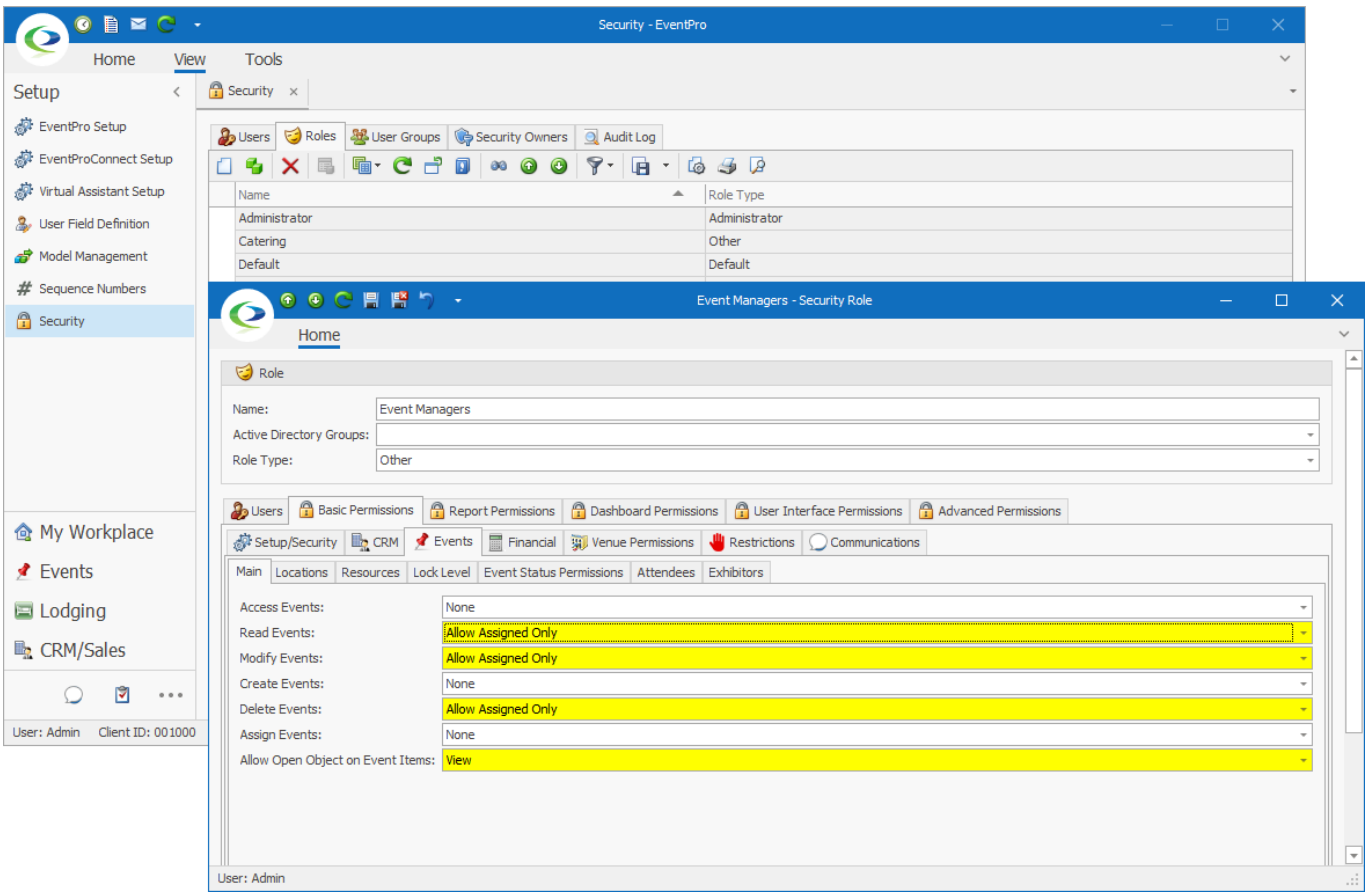


5. If one Default Security Role for all Users is not sufficient, and you want to further compartmentalize User security permissions in EventPro - for example, differentiating rights based on department or management hierarchy - you need to create **additional EventPro Security Roles** of the "**Other**"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

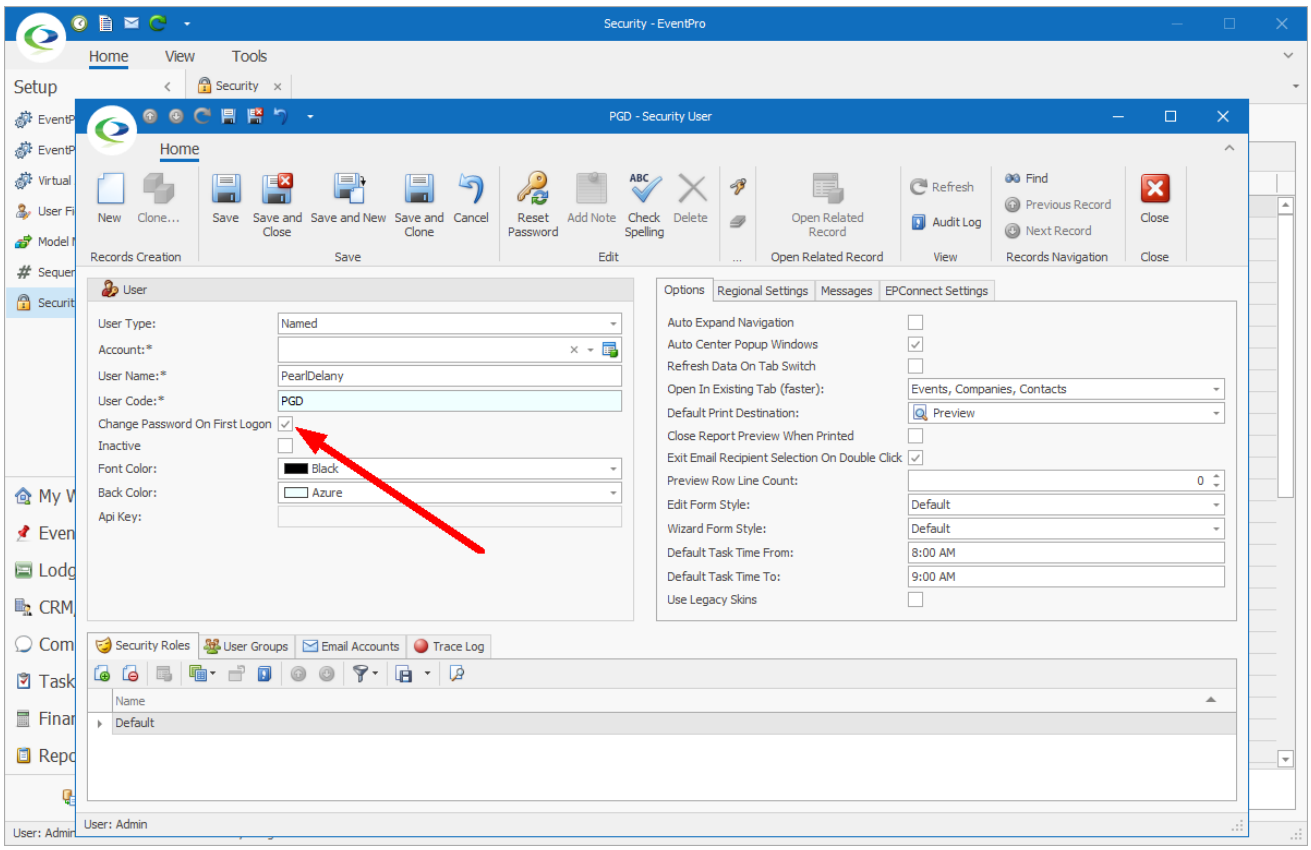
   (Review **Security Setup > Roles (Security Permissions) > Create Security Roles** in the **EventPro User Manual**.)



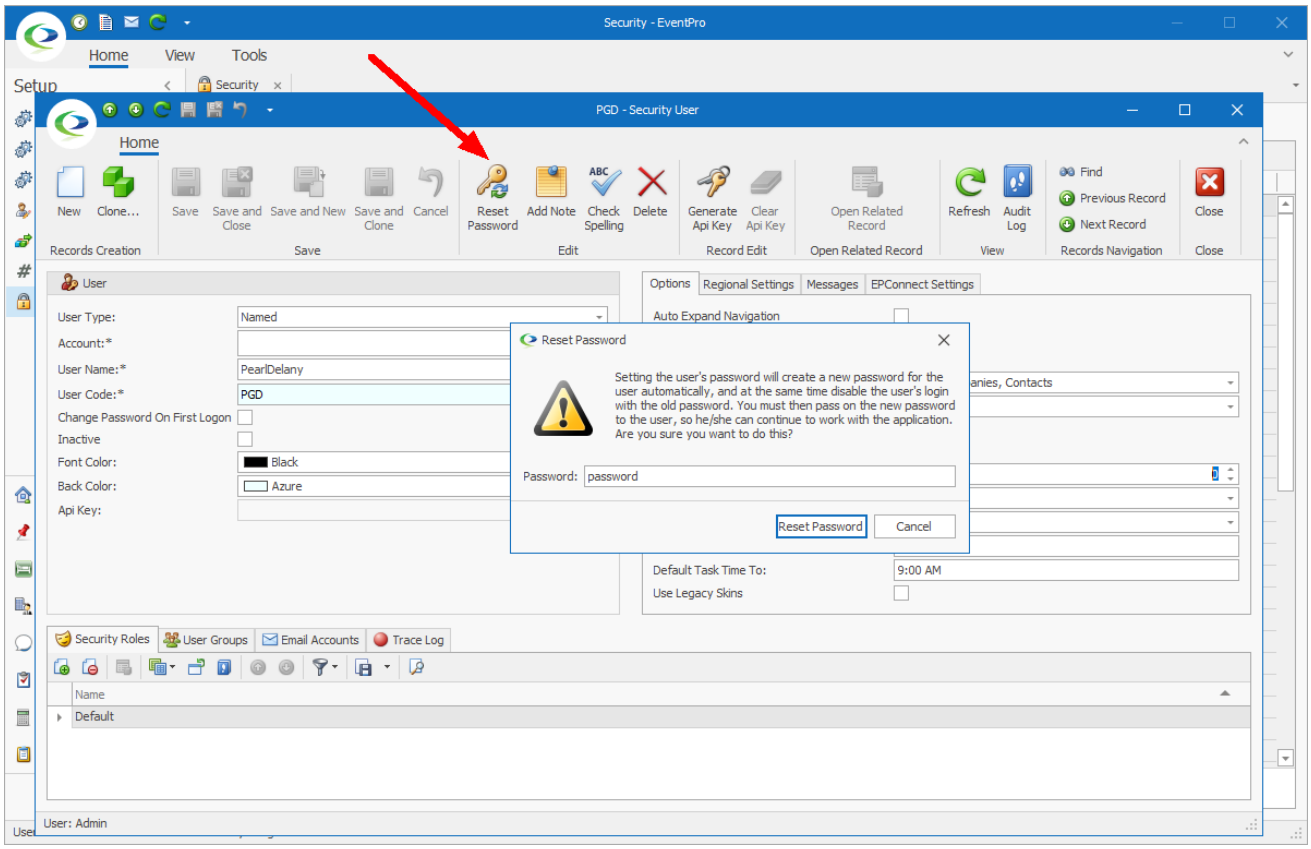
6. When you are done editing and/or creating Security Roles, you can proceed to **Create Users** 276.

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 **EventPro User Manual**.
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.



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.



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 **Create Internal Company & Contacts** 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.

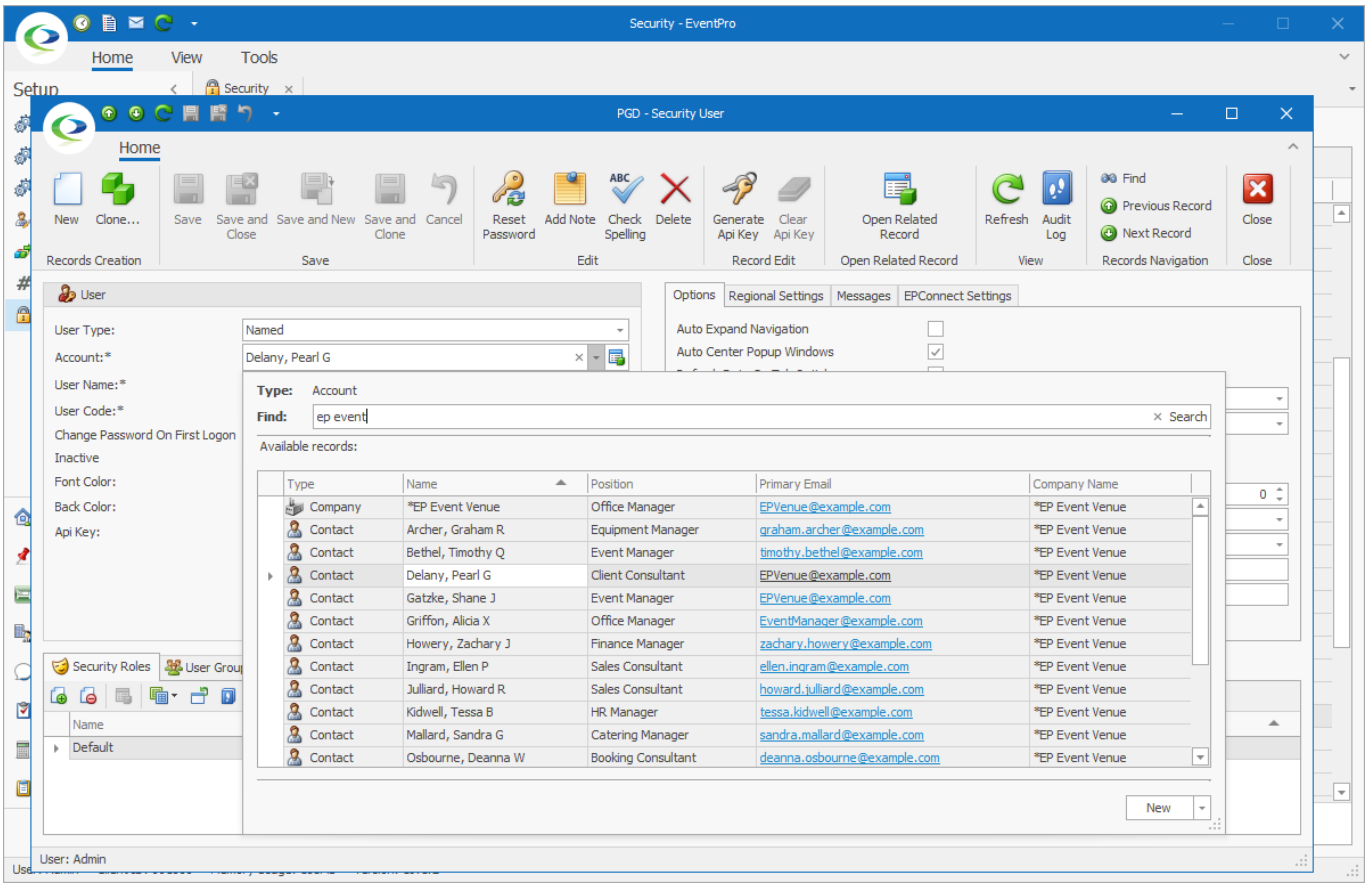
2. You can create your internal Contacts and Company, if applicable, by following these instructions:

   a. **Company/Contact Management (CRM) > Add New Company (Company Edit Form)** in the **EventPro User Manual**.

   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.



5. When you are done linking Accounts to Users, you can proceed to **User First Login to EventPro** 278.

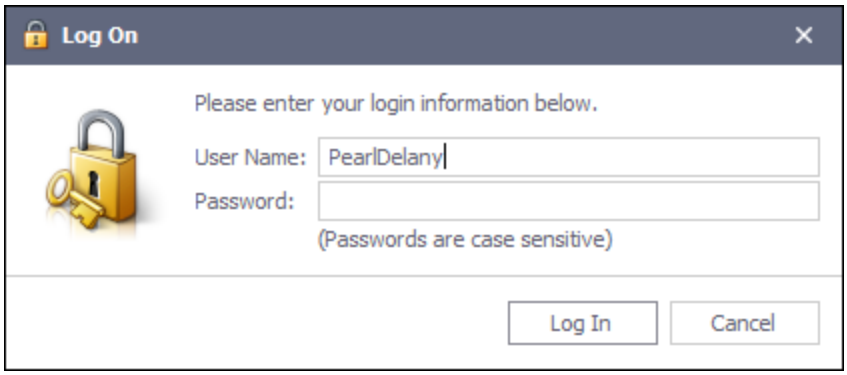
User First Login to EventPro

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**.

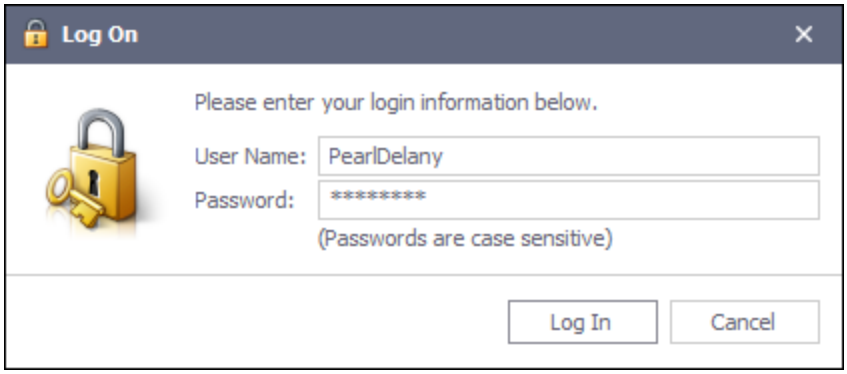
2. The **Log On** dialog appears. The User will enter his/her **User Name**.

   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**.

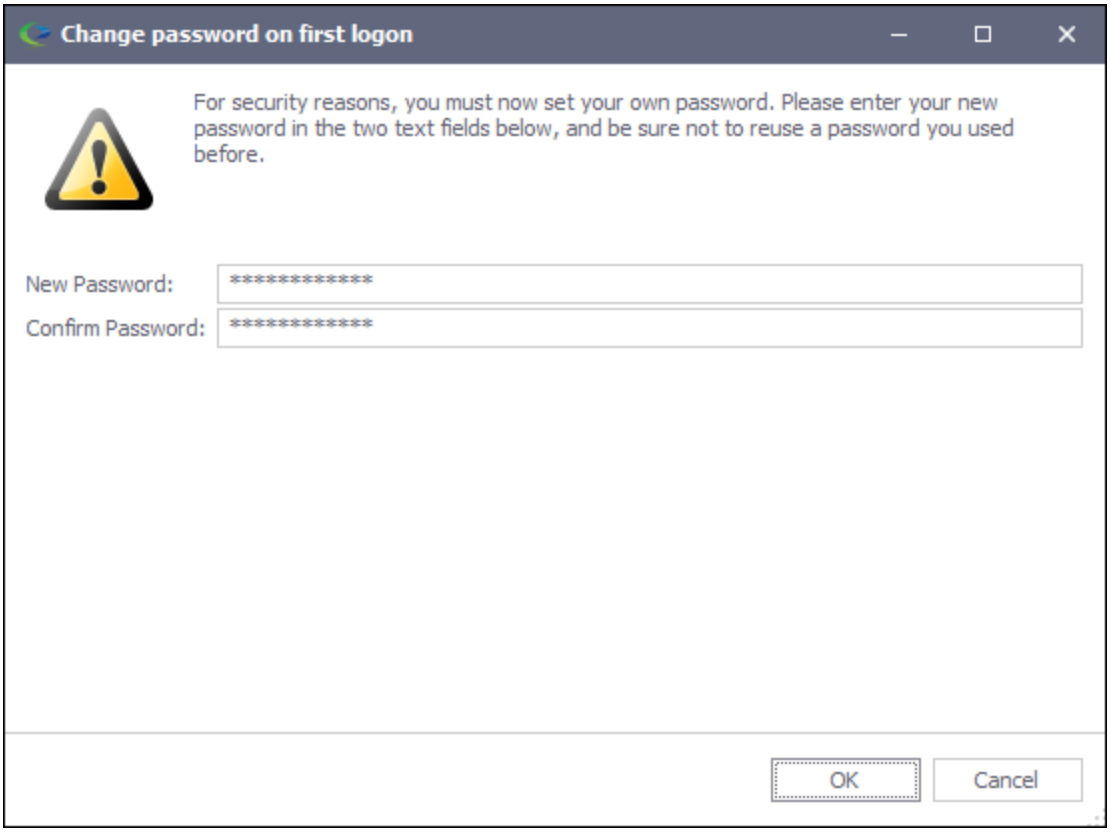


b. If you **Reset** the Password on the User's profile, the User can enter the temporary password that you set on the profile, and click **OK**.



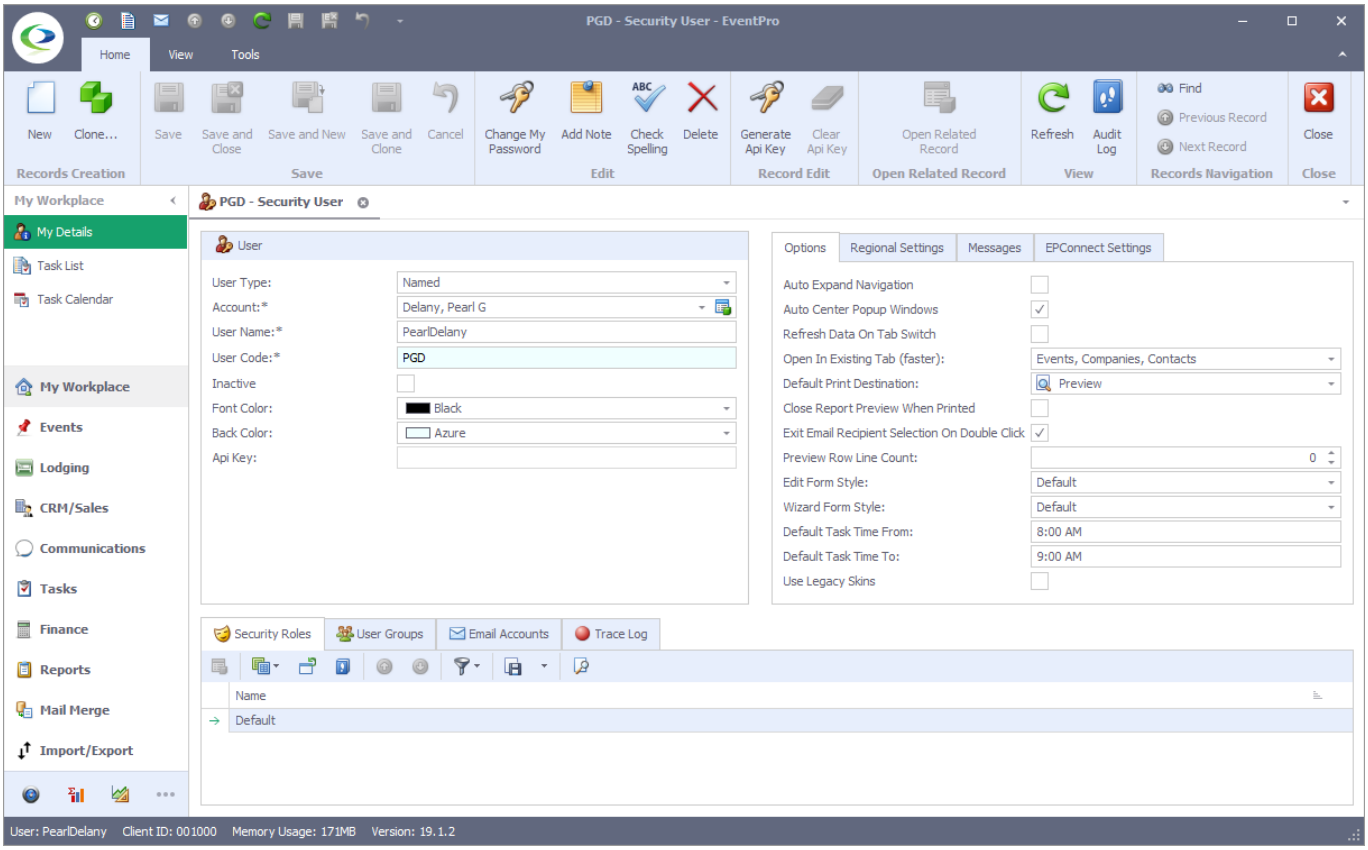
3. Either way, the **Change Password on First Logon** dialog appears.

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



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.



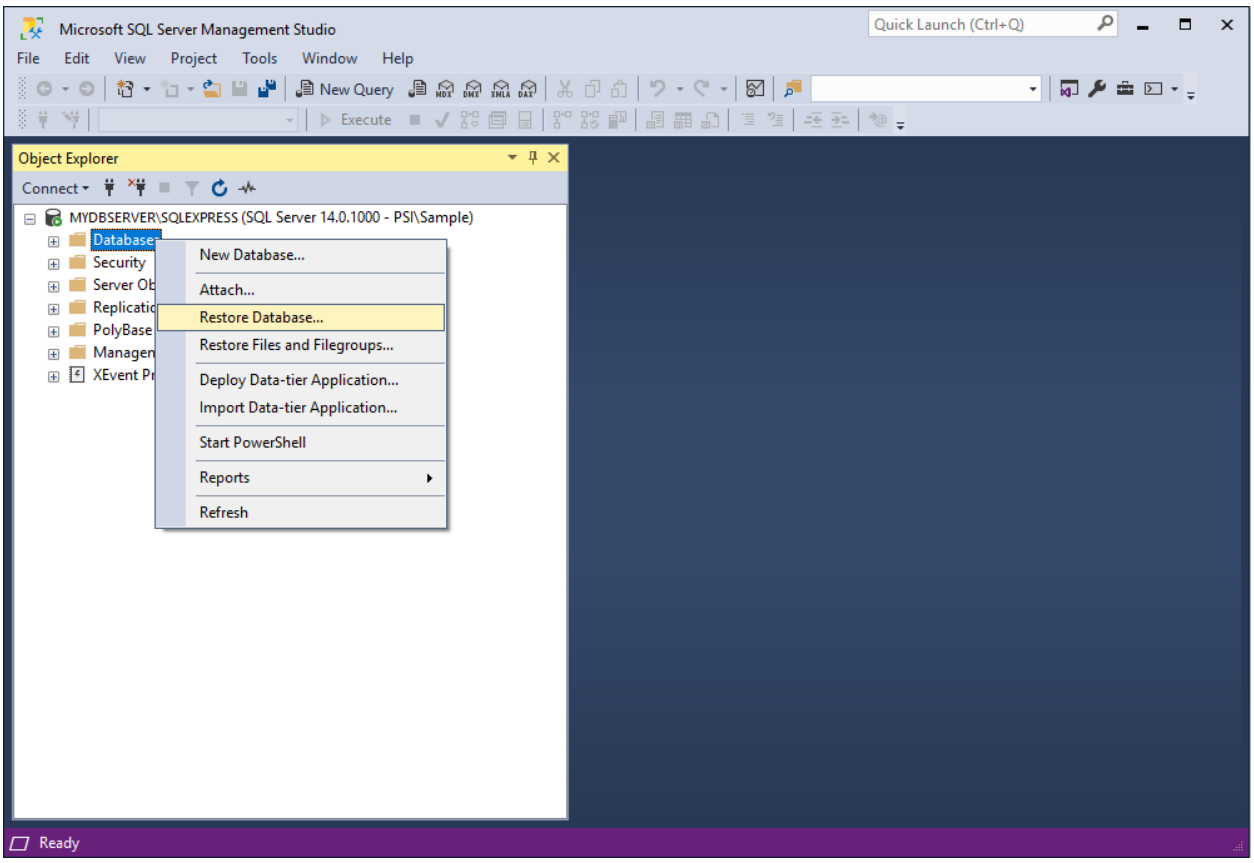
Alternate Database Restore Process

- 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.)

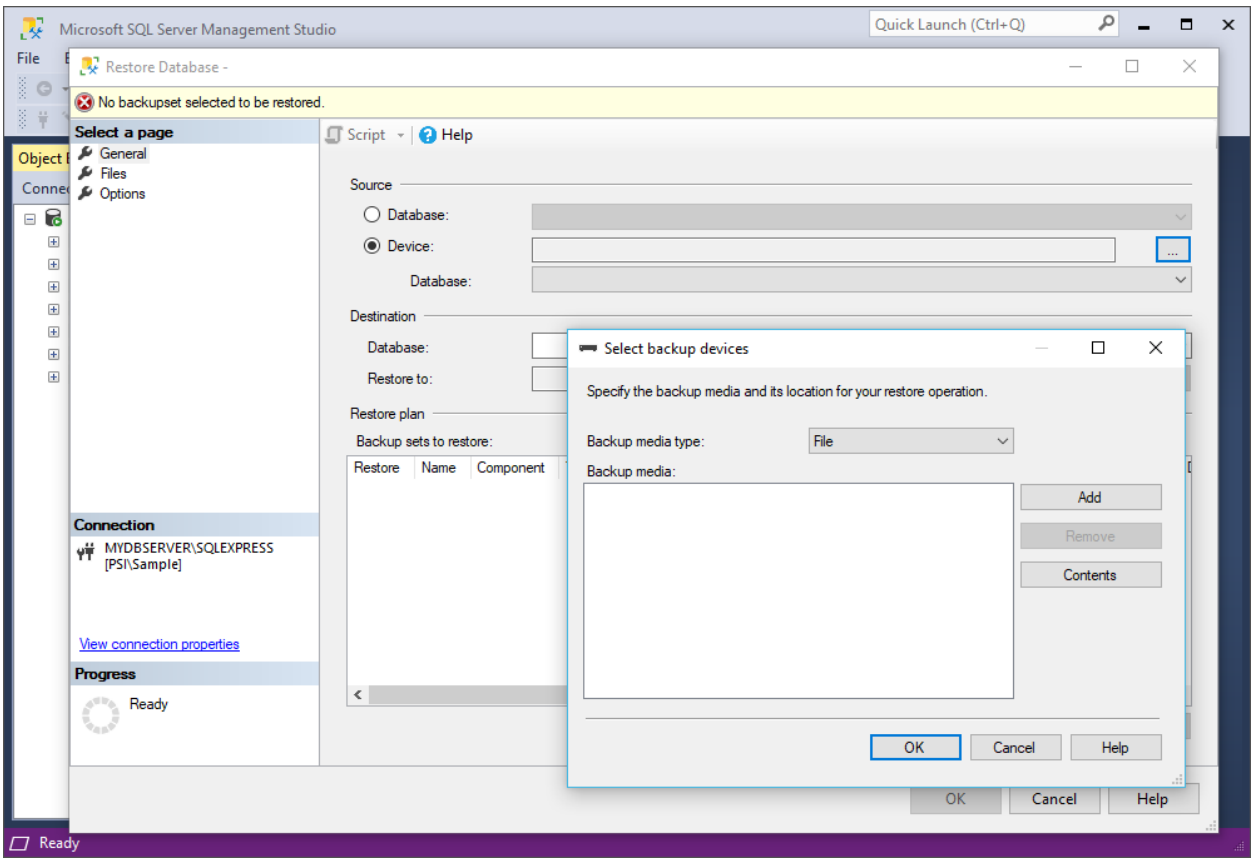
     b. In **SQL Server Management Studio**, right-click the **Databases** folder and select **Restore Database**.



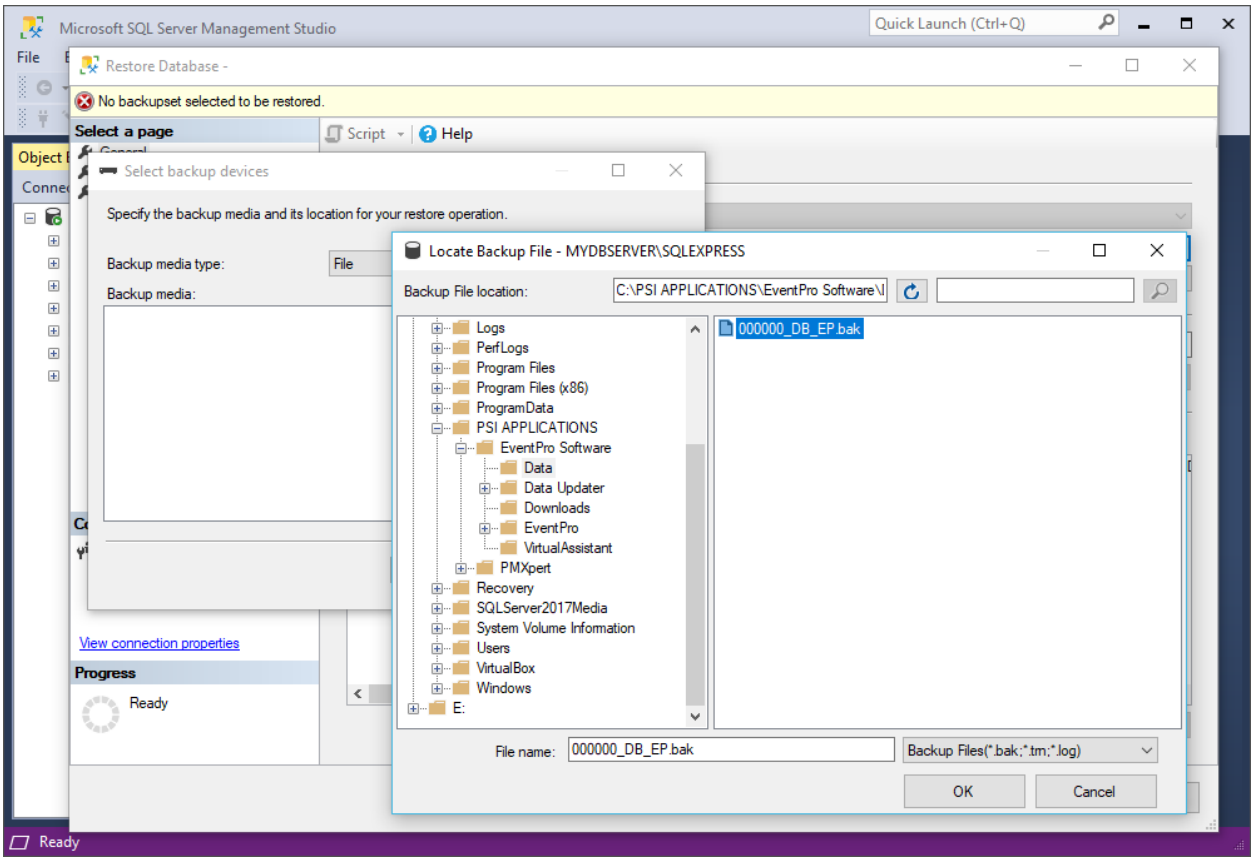
c. In the **Restore Database** window, under **Source**, select the radio button next to **Device**, and click the ellipsis.

   The **Select Backup Device** window appears.

d. In the **Select Backup Device** window, click **Add**.

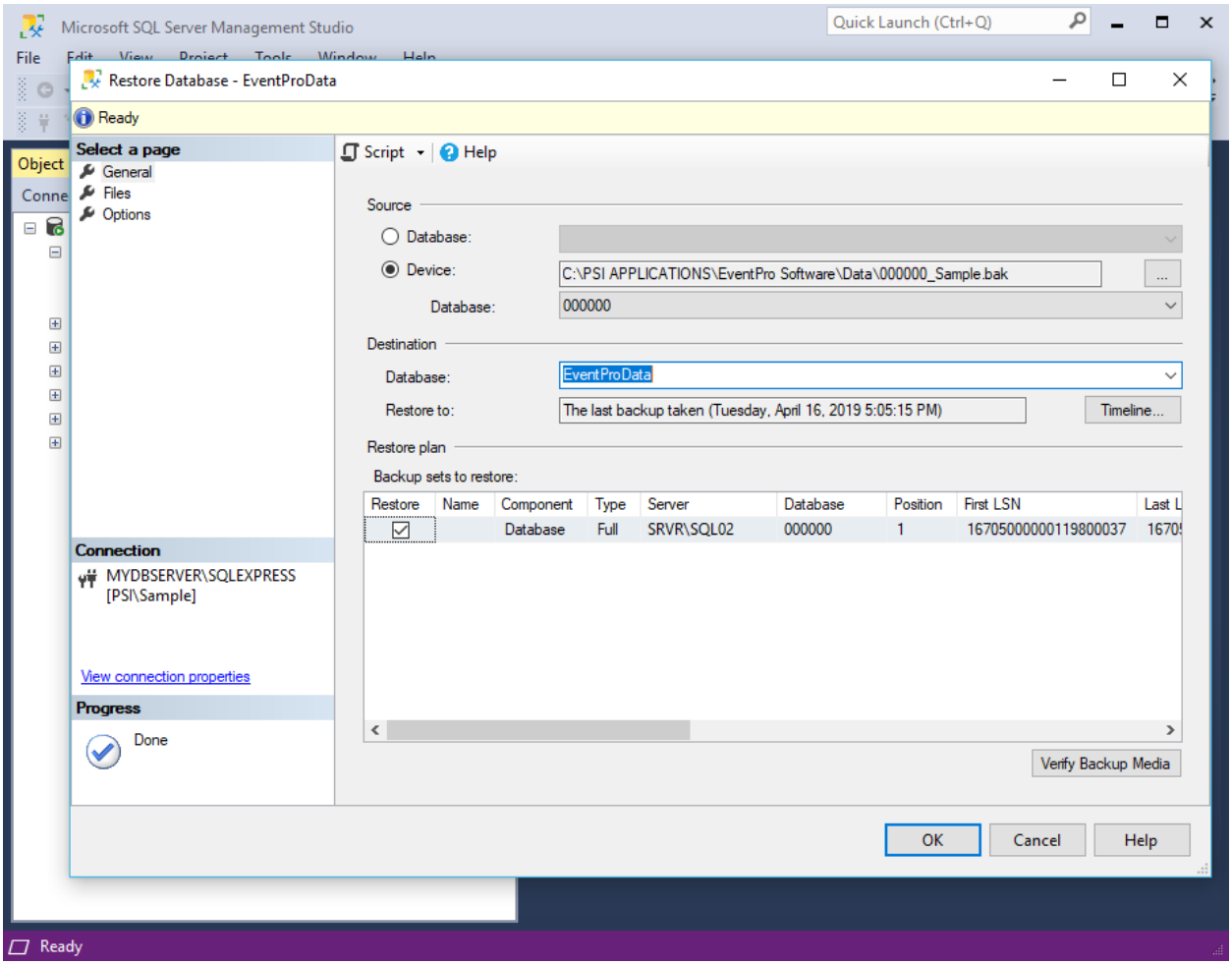


e. The **Locate Backup File** dialog appears. Find and select the **backup file** of the **EventPro database** that your Training or Support Specialist sent you, and click **OK**. Click **OK** in the **Select Backup Devices** window to return to the **Restore Database** window.

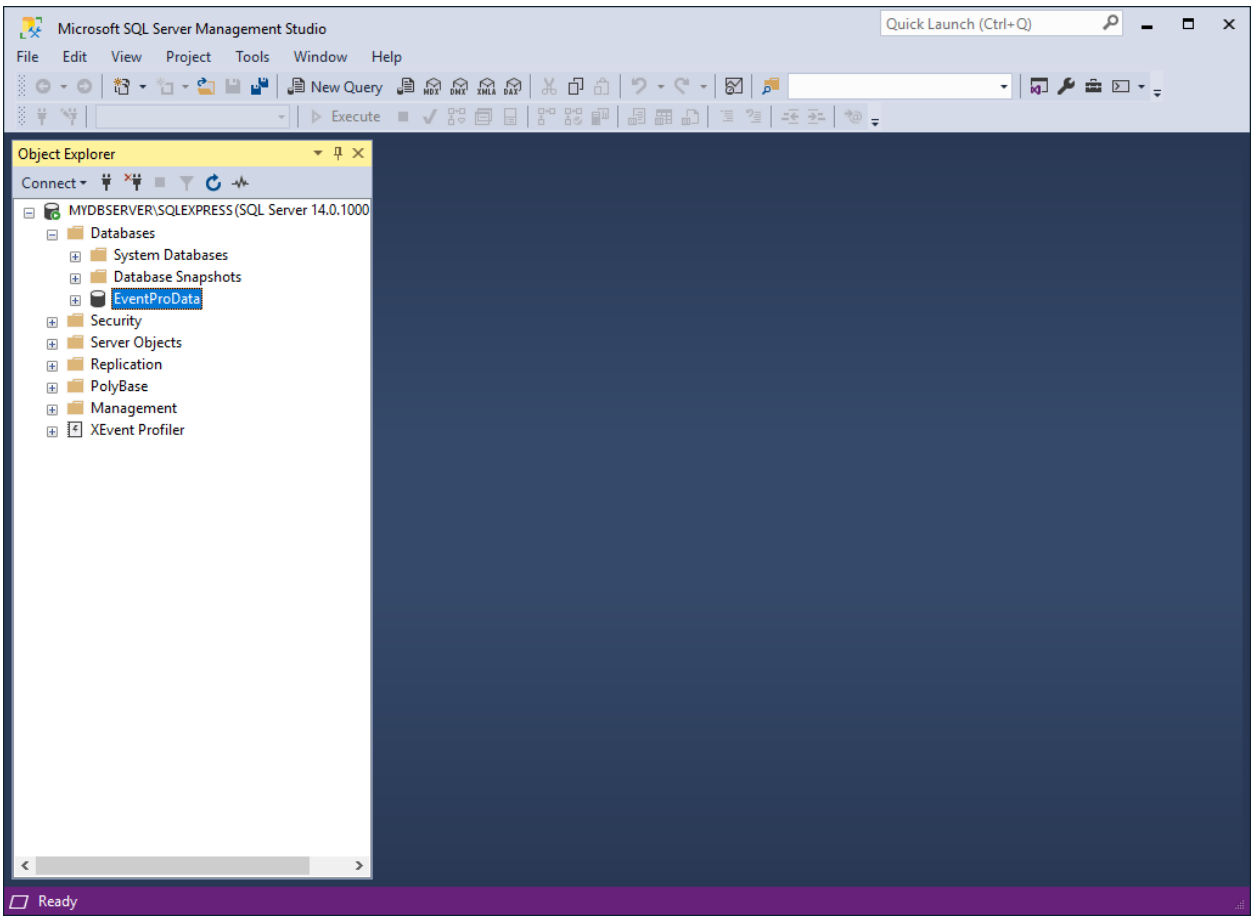


f. Back in the **Restore Database** window, check that the **Destination Database** is correct. If you prefer, you can change the name of the database to the commonly used **EventProData**.

g. Click **OK**. The database restore will begin.



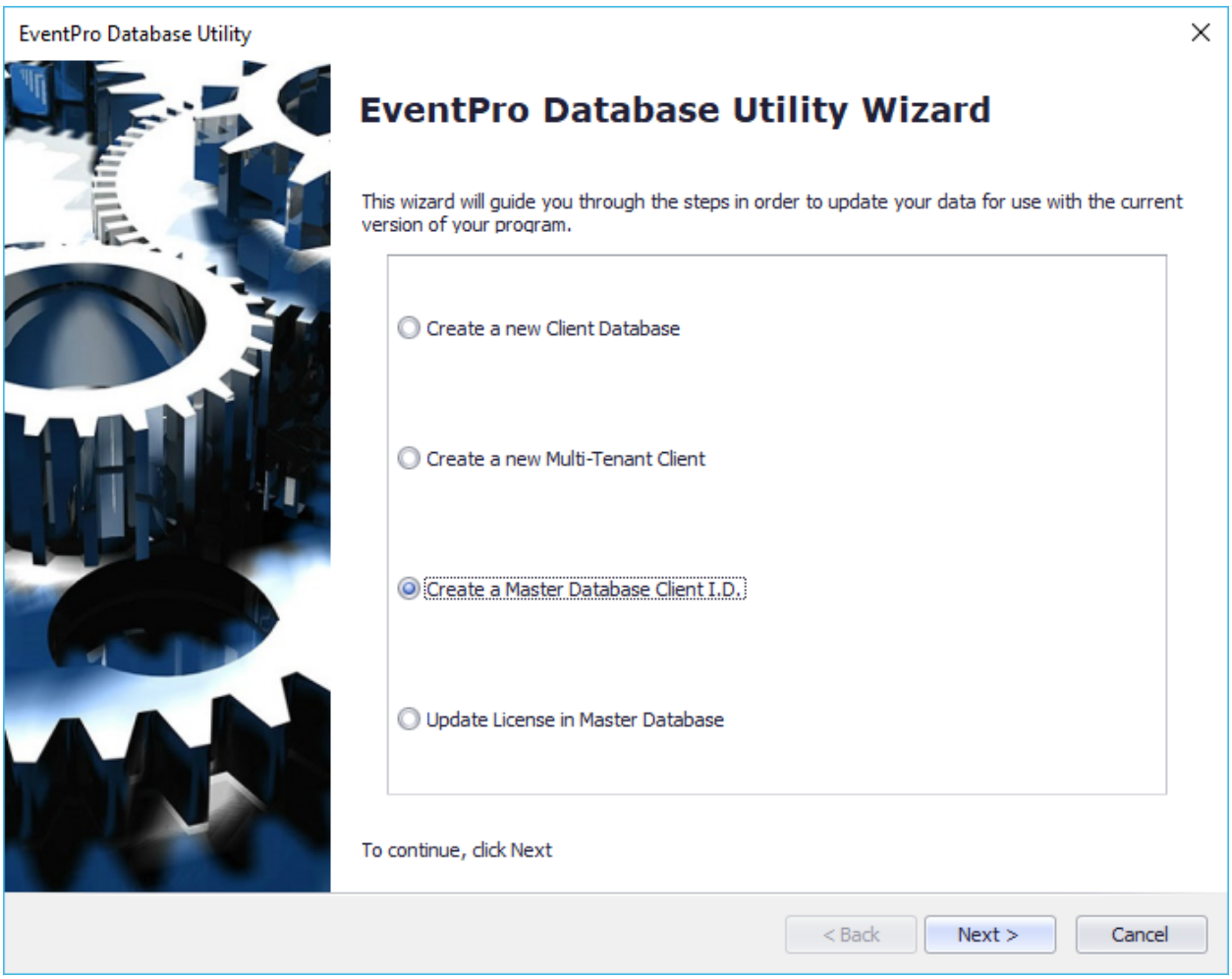
h. When the database restoration is complete, you will see that your EventPro database has been added under **Databases** in the **Object Explorer** panel of **SQL Server Management Studio**.



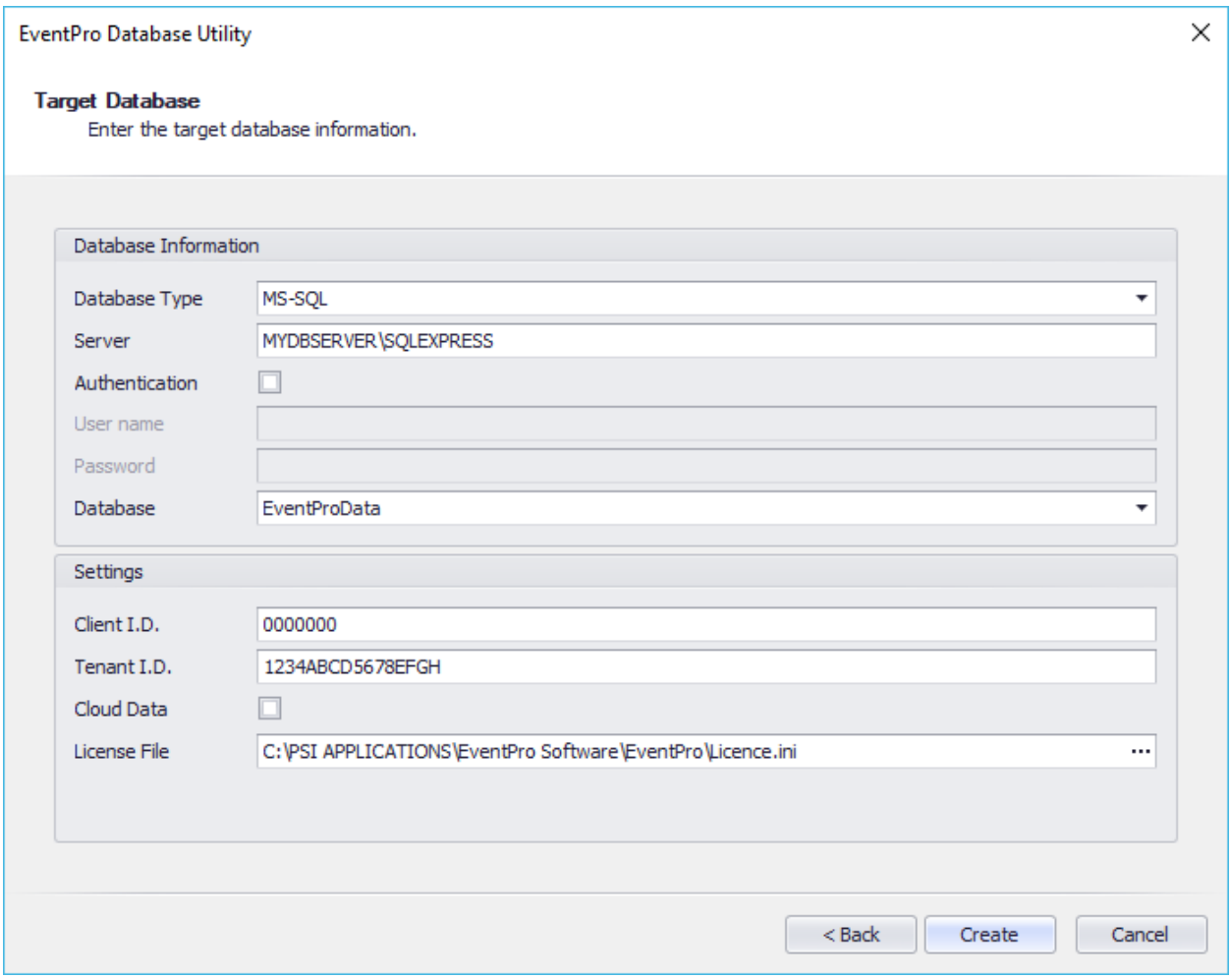
2. The next step is to **install EventPro Software**. Follow the process as described for the particular installation type, but do not run the EventPro program yet. This step will add the **EventProMaster** database.

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**".



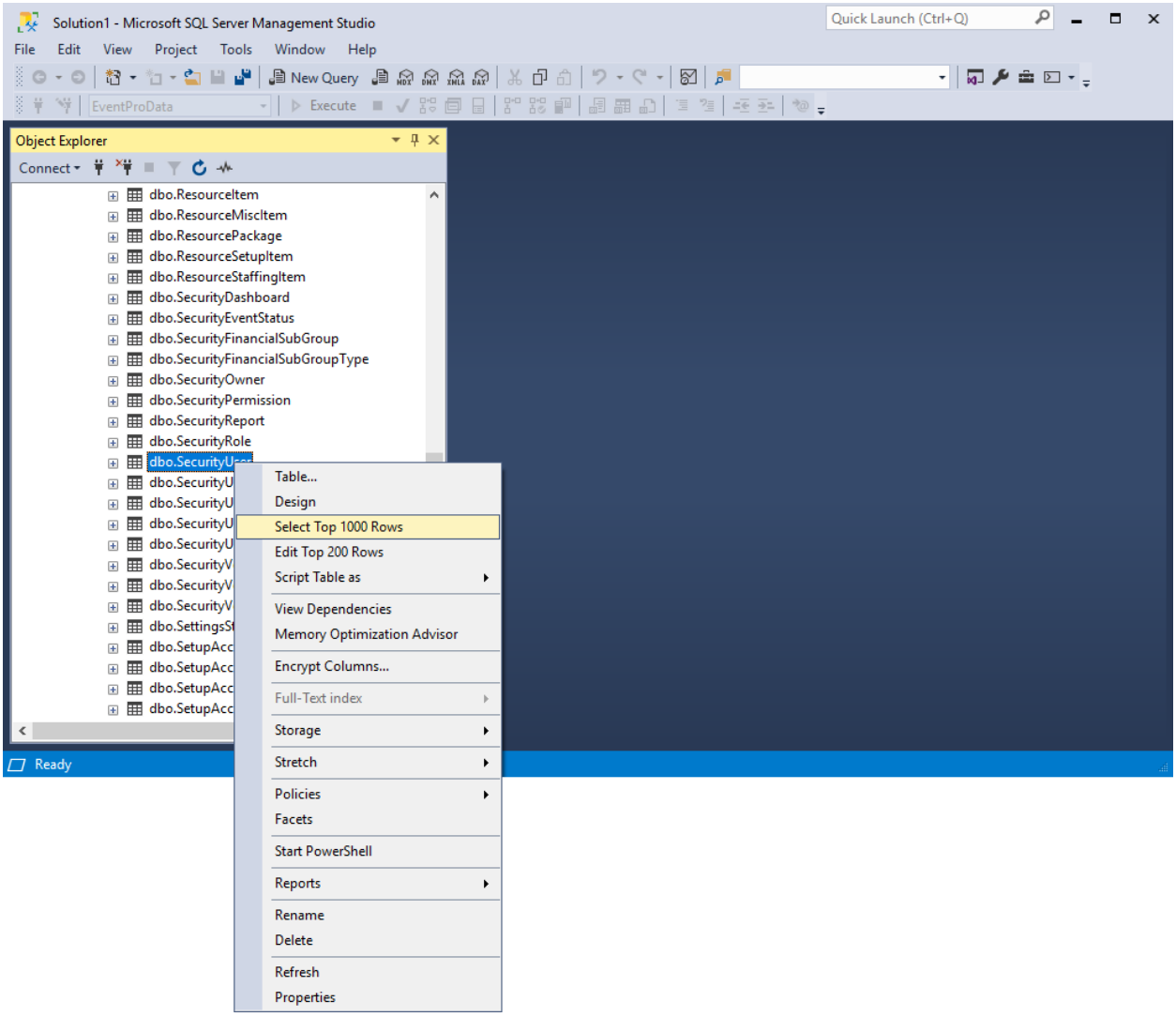
b. In the **Target Database** page of the wizard, enter the required information. Most of these fields are described in the installation instructions above, except for **Tenant I.D.**, which is a field required specifically for linking the client and Master databases.



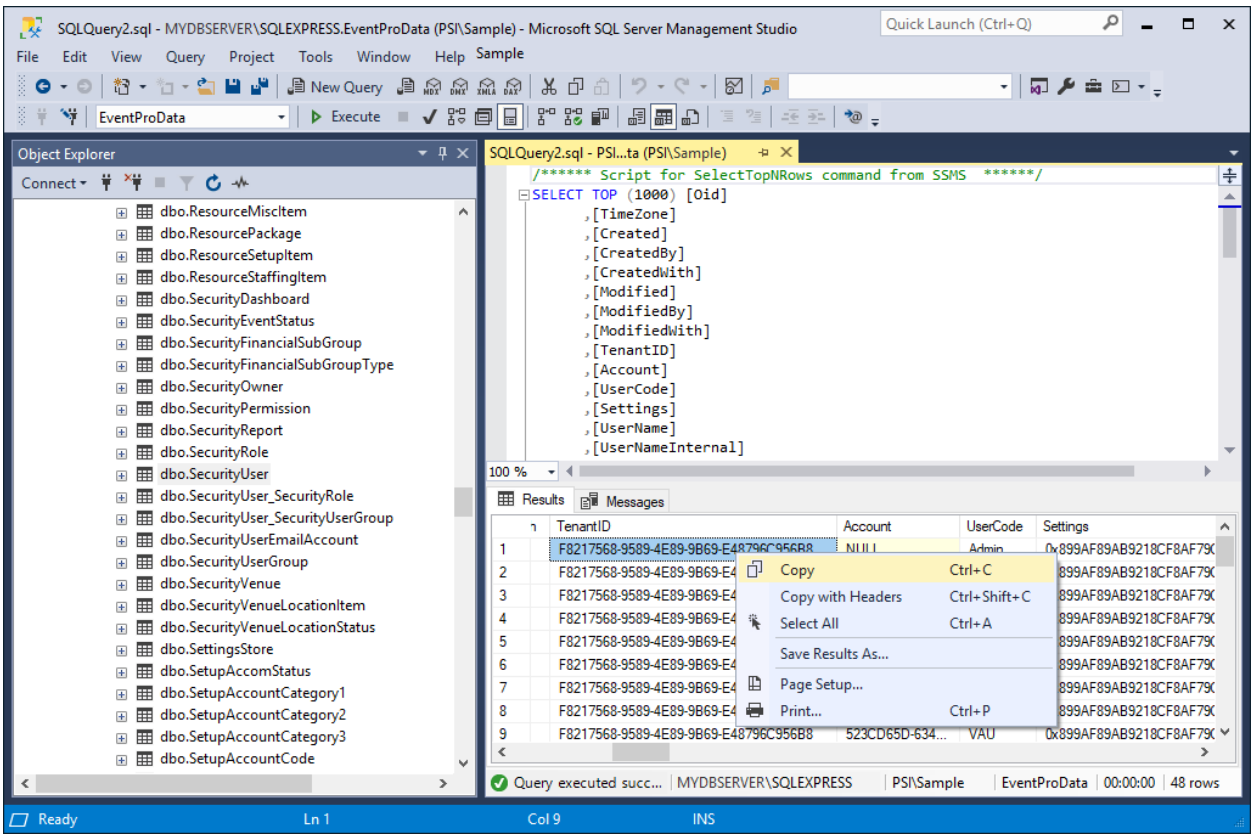
c. To find the **Tenant I.D.**, return to **SQL Server Management Studio**. (Remember that your version of SQL Server Management Studio may be slightly different, but you should be able to find the same or similar functions.)

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**.



f. In the **Results** tab to the bottom right, locate the **Tenant I.D.** column, and copy any one of the values.



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

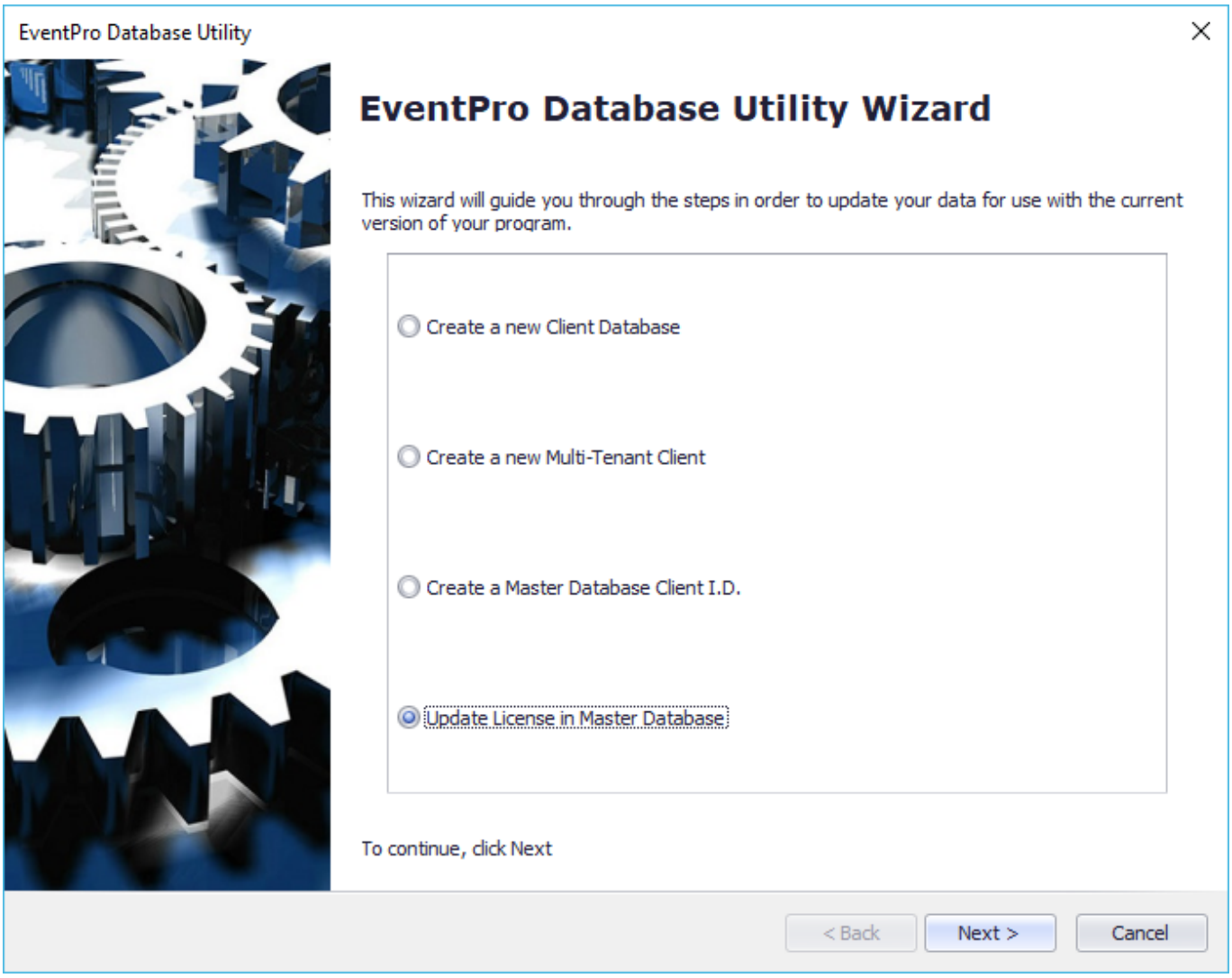
When you install EventPro Software, the installer will automatically create an **desktop icon** that points to the **32-bit** version of EventPro.

- 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 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.

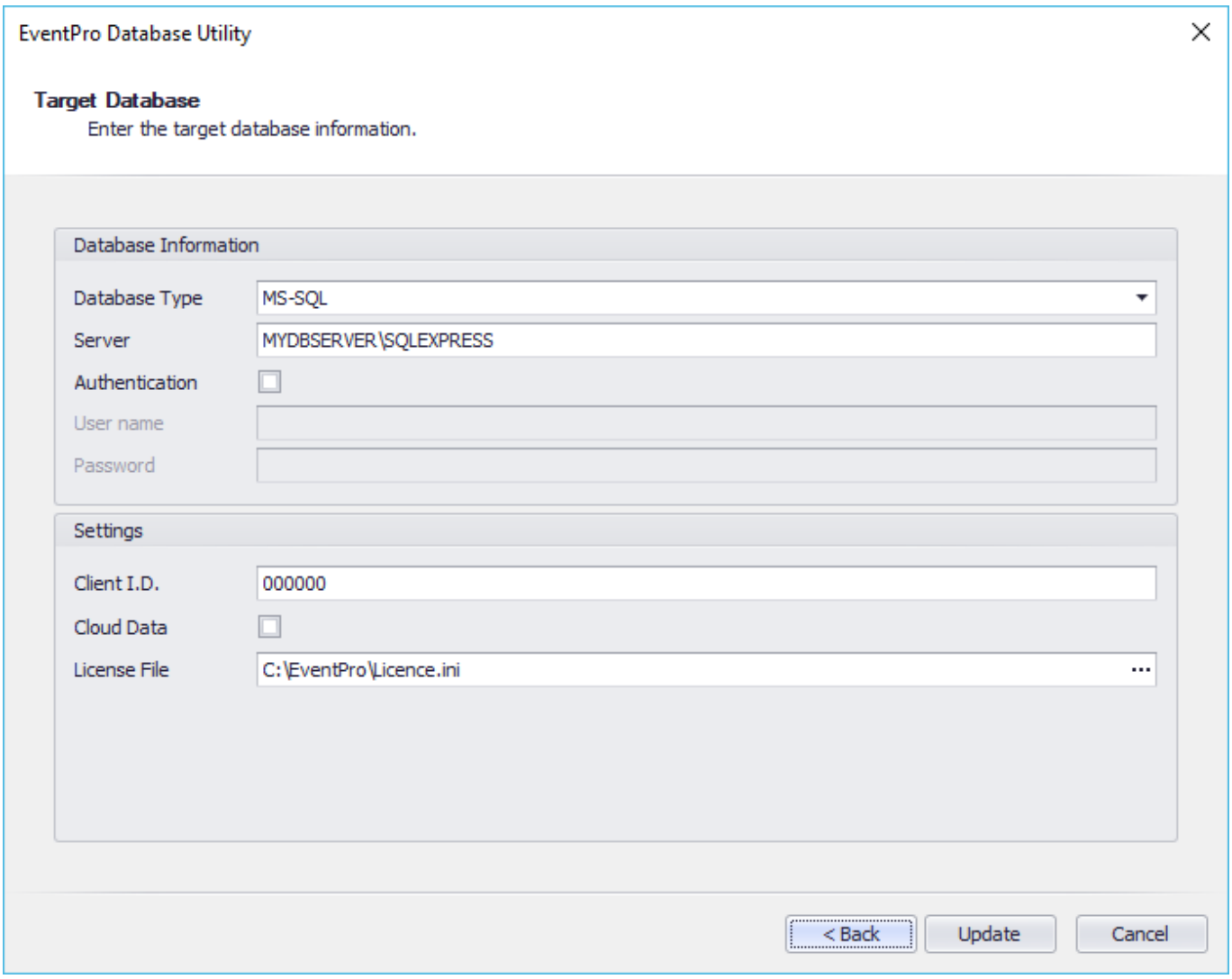
Update Software License

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.



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 > Update Cloud Software** 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 **extra step** 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 **step 6** 291 earlier (*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** 291.

       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: **https://www.eventpro.net/contact-us.html**
  - 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: **https://www.eventpro.net/contact-us.html**

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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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