

Convert Single-User Setup to Multi-User Server Setup



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ACT 1 "PC System" Support Document
(818) 347-6400 | www.act1systems.com

These steps are **only** for converting a single-user setup to a multi-user network server setup (we ask that you notify us of this, as it may impact software licensing). See our other support docs if you need to do a "first-time" fresh/new installation, add new users to an existing installation or move an existing installation from one server to a new server.

Note: Do not use the original installation CD. The software and data on that disc are not current.

Note: Do not copy the entire MKTN folder from the original single-user's workstation to each of the new user's workstations (or user's remote sessions). This will prevent users from sharing resources with one another, create potential confusion and cause problems when trying to update software and data. The correct steps are below.

1) Take Screenshot of Custom Lineups (User-Created Station Lists)

This step will be compared later on to ensure the user's custom station lists are not lost during the move. Run our **Lineup Manager** application by going to the Start menu > Programs > ACT 1 Systems > Lineup Manager or running the MKTN\APP\LUMGR.exe directly. Once Lineup Manager is open, click the OPEN button at the top, uncheck the "Public" type on the right side (only Normal and Composite should be checked), and sort by "Date" on the right side. If lineups exist, take a screenshot using PrintScreen or the Programs > Accessories > Snipping Tool. Cancel and exit.

2) Confirm No Active Applications

Run our **Site Manager** application by going to the Start menu > Programs > ACT 1 Systems > Site Manager or running the MKTN\APP\Manager.exe directly. Click the USERS tab at the top, click the "User Report" button and choose the "Active Users" option. Make absolutely certain that no other applications are currently running (you should only see your one "SiteMgr" session). If there are other active applications, exit those programs normally or via Task Manager.

3) View Hidden Files within MKTN Folder

Make all files/folders visible within the MKTN folder so the (potentially) hidden file called **CLIENT.ID** is visible.

4) Take Screenshots of Date Stamps within MKTN, APP, and RADDATA Folders

We date our files based on when they were released. Our software updates depend on these dates being accurate to know whether or not to replace files. This step will be compared later on to ensure no date stamps have changed. Navigate to within the **MKTN** folder, change the folder's view to "Details," sort the contents by the "Date modified" column (with the most recent at the top) and take a screenshot using PrintScreen or the Programs > Accessories > Snipping Tool. Repeat this process for the files within the **MKTN\APP** folder and files in the **MKTN\RADDATA** folder.

5) Preserve the Date Stamps (ZIP the MKTN Folder)

To preserve the date stamps of our files, you may need to ZIP our MKTN folder before moving/copying it. *Certain methods of copying/moving our MKTN folder will alter file dates to be the date the files were copied, which prevents our updates from working correctly. If you are positive your method of copying/moving the MKTN folder will not change the date stamps of our files/applications (such as using Robocopy with proper settings), you can skip this step.*

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6) Set Full “Modify” Permissions to MKTN’s Parent Directory for All New Users

*The example presumes you have a server directory structure of **\ACT1\MKTN** where **ACT1** is the parent directory for the **MKTN** folder, and users will be mapping real drive letters to the **ACT1** parent directory (don’t map to **MKTN**).*

Before you perform the copy, configure all users (including yourself) to have full “Modify” permissions to the **ACT1** folder on the server or add them to an “ACT1” security group that has full “Modify” permissions to the **ACT1** folder on the server. Our software requires all users to be able to read, write, execute, delete and the ability to (during updates) write over files date stamps within this **ACT1** folder and subfolders. Users should not inherit Deny permissions from **ACT1**’s parent folder.

7) Copy to Server and Verify Date Stamps Have Not Changed

Create two “system directories” (folders), one inside of the other, as follows: a “parent” folder named **ACT1** and within it, a “child” folder named **MKTN**. The end result should be a directory structure of: **\ACT1\MKTN** which should be placed on the server where you plan to store our software (our software is self-contained here).

If you did step #5, copy the zipped **MKTN** file to your server. Once the copy is complete, unzip the contents of the **MKTN** folder into your server’s new **\ACT1\MKTN** folder destination. You should not end up with a **\ACT1\MKTN\MKTN** folder structure. You may now trash the zipped file or keep it as a backup.

If you did not do step #5, simply copy the contents of the **MKTN** folder into your server’s new **\ACT1\MKTN** folder destination. You should not end up with a **\ACT1\MKTN\MKTN** folder structure. Once the **MKTN** folder contents is on the server, compare the server’s **MKTN** folder contents, **MKTN\APP** folder contents and **MKTN\RADATA** folder contents to the screenshots you took in step #4. **Make sure the copy process did not change any of the date stamps of our files or applications!**

8) Verify Custom Lineups Moved Properly to Server

Run our Lineup Manager application on the server, by going to **MKTN\APP\LUMGR.exe** directly (not through the Start menu, which likely still points to the original single-user setup). Once Lineup Manager is open, click the OPEN button at the top, uncheck the “Public” type on the right side (only Normal and Composite should be checked), and sort by “Date” on the right side. Compare this list to the screenshot you took in step #1. **Make sure the user’s original lineups (station lists) properly moved to the server setup.** Cancel out of this window and exit the application.

9) Create Users within Site Manager

Run our Site Manager application on the server, by going to the Start menu > Programs > ACT 1 Systems > Site Manager or running the **MKTN\APP\Manager.exe** directly. Click the USERS tab at the top and add all the users that plan to have access to our software (via the “Add New User” button). You can add more at a later time. For User IDs, we recommend using full first name and first initial of last name. For any user that should not have the ability to edit lineups (stations lists), uncheck the “Lineup Maintenance” check box. If unknown, this can be changed at a later time.

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10) Install Client Access on Each User Workstation (or Remote Session)

Note: Do not copy the entire MKTN folder from the server to each user's workstation (or to each user's remote session). This will prevent users from sharing resources with one another, create potential confusion and cause problems when trying to update software and data. The correct steps are below.

Repeat the steps below on each user's workstation, depending on what kind of user they are.

Local Users are defined as being on the same physical Local Area Network (LAN) as the server where our software is installed. Everyone else is defined as a **Remote User**. *Even users connecting through a Virtual Private Network (VPN) are considered Remote Users if they are not on the same physical LAN as the server where our software is installed.* Proper connections are crucial to allow for optimal stability and performance. Improper connections can result in poor performance and potential file corruption, preventing all users from using our software.

a) Configure Remote Session and Connect (Remote Users only)

Remote Users should not be mapping to the server through the WAN or VPN or shared drive. **Remote Users must access our software by a “remote session”** (using a service such as Citrix, Terminal Server, or Remote Desktop) connected directly to the server where our software is installed or connected to a computer that is on the same physical LAN as the server where our software is installed. Ideally, each user should have a **unique remote user** connecting to a unique session with a unique desktop (mimicking a LAN setup of one workstation per user). By using a remote session, the only information transmitted over the pipe is screen sharing – all application activity and calculations are done at the server where our software is installed and not at each user's workstation. Note: Make sure each session has full “modify” permissions to their respective `\UserName\AppData\Local\Act 1 Systems\MKTSTART.INI` file, and the user's **roaming** and **local profiles** have the correct entry for “**DefaultUserID=XXX**” within the INI file (where XXX is their ACT 1 UserID from step #9 above).

b) Map a Real Drive Letter to MKTN's Parent Directory (All Users – Local & Remote)

Remote Users must perform this step from within their “remote session.” Map a real drive letter (the same drive letter for all users) to the drive or folder that contains the MKTN folder (the “parent” directory). Do not map directly to the MKTN folder itself. **Do not use UNC syntax; you must use a real drive letter.** Depending on your setup, it might be easiest to use the “Browse” option while mapping the network drive to get the proper path. *Remote sessions connecting directly to the server hosting our software can skip this step if they already have direct access to the MKTN folder.*

c) Run NEWUSER.EXE or NEWMGR.EXE to Install Shortcuts (All Users – Local & Remote)

Remote Users must perform this step from within their “remote session.” Click on the mapped drive letter to refresh how you are accessing it (you want to make sure your Windows Explorer Address Bar is showing the mapped drive path and not UNC syntax). Navigate to within our MKTN folder on the mapped drive. For normal users, run **NEWUSER.EXE**. For manager-users (those responsible for future ongoing updates), run **NEWMGR.EXE**. This will create shortcuts to the 3 (or 4) server applications and 4 PDF guides in the client's Start > Programs menu and (optionally) a duplicate set of shortcuts in a desktop “ACT 1 Systems” folder. The only difference between the two EXE installers is that NEWMGR.EXE installs one extra shortcut to the server's Site Manager application (the program used for updates). The only other file installed on the client's workstations (or remote sessions) is an INI file used to store their default user name and custom settings. Users should have full “modify” permissions to write to their respective `\UserName\AppData\Local\Act 1 Systems\MKTSTART.INI` files.

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10) Install Client Access on Each User Workstation (or Remote Session) *[continued]*

d) Assign Default User ID and Run a Test Report (All Users – Local & Remote)

Remote Users must perform this step from within their "remote session." Launch **Affiliate System** from within the ACT 1 Systems desktop folder or from Start > Programs > ACT 1 Systems. The first time you log in from a user's workstation, you will be prompted to assign a default User ID to this computer. Enter the User ID based on the User List you created in step #9 above and click OK. On the "Welcome" prompt, the User ID should automatically be entered [if the User ID is blank during subsequent logins, you must set proper permissions to the INI file mentioned in step 10(a)]. Leave the password field empty and click OK. Click the "Demo Summary" report. In order to run a test report, we must set some minimal input choices. In the Lineups tab, enter **/PUR** in the "lineup code" box (should have a blue border) and enter **MSu6a12m** in the "Global override exact time" box at the top. Click **OK** at the bottom. "Page Down" and confirm you see audience data for different ages/demos.

e) Printing to PDF Format (All Users – Local & Remote)

Our software is primarily used to generate printed reports, so it is important that all users have the ability to print to PDF format (via Acrobat Pro, the free PrimoPDF or other utility). Remote User's either need to print to PDF using their local workstation's PDF print driver (via the session sharing local printers) or within the remote session itself (PDF driver installed within the session), as well as the ability to print to their other local paper printers.

f) Working with CSV Format (All Users – Local & Remote)

Users may make use of CSV format files between our software and spreadsheet programs, so it is important that users have a spreadsheet application (Excel, Google Docs, Open Office, etc.) on their local workstation. For ease, Remote Users may benefit from having the spreadsheet application within their remote session.

g) File Transfer and Sharing (Remote Users)

Our software is often used to export and import CSV files and print PDF reports. It is important for Remote Users to have the ability to share and/or transfer files between their remote session and their local workstation (via a shared network drive, the session sharing a local folder, DropBox, etc.). If you are seamlessly publishing our applications (rather than giving each user a whole remote desktop), please make sure users have access to the remote server's MKTN subdirectories, especially to **MKTN\USER** and **MKTN\IMPORT** and **MKTN\EXPORT**.

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10) Install Client Access on Each User Workstation (or Remote Session) [continued]

h) Email Confirmations / Default Email Client (Manager-users)

Manager-users (those responsible for future ongoing updates) can be either Local Users or Remote Users and do not need to be IT staff. **They are required to send an email confirmation after doing updates, as email confirmations are important for us to verify you have everything installed correctly.** This requires a default email client configured with outgoing settings. For Remote Users, this can be either having the remote session utilize their local workstation's email client, or configuring an email client within the remote session.

Servers or remote sessions without default email clients: If you are unable (or don't want) to assign a default client, please use this work-around so we still receive an email confirmation. On Site Manager's SYSTEM tab, set the "Email client (mailto) supported" option to **No**. This will allow you to still perform the next step by saving the confirmation as a text file at `\MKTN\CONFIRM.TXT` rather than opening an email client. Using a browser-based email client, or by moving this file to a shared drive, you can now email this file to us (either as an attachment to an email or copy/pasted into the body of an email) to act1support@act1systems.com.

11) Send an Email Confirmation

Launch our **Site Manager** application by going to the Start menu > Programs > ACT 1 Systems > Site Manager or `MKTN\APP\Manager.exe` directly. Click the INSTALL/REMOVE tab and click the "Email confirmation" button. This will launch your default email program (such as Outlook) and pre-populate the TO email address, the subject and the content/body of the email. Just click SEND. When you're done, close Site Manager. If you encounter an error, it usually means that you don't have a default email client. **If you are unable (or don't want) to assign a default email client, see the work-around in 10(h) above so that we still receive an email confirmation.**

12) Disable (or Delete) the Original MKTN Single-User Installation

When the original single-user is satisfied accessing the new server setup, rename the original MKTN folder on the single-user installation to MKTNOLD (or delete it entirely). Note that the original user might end up with a desktop folder and Start > Programs folders to both "ACT 1 Systems" (which accesses the new multi-user installation) and "ACT 1 Systems – LOCAL" (which accesses the original single-user installation). In this case, remove LOCAL access by deleting both the "ACT 1 Systems – LOCAL" desktop folder and the Start > Programs > ACT 1 Systems – Local folder.

13) Add the MKTN Folder to Your Backup Schedule

Make sure to frequently backup the entire MKTN folder off the server as it contains all your users saved worked (saved reports), your users saved lineups (affiliate/station lists), and all our software and current Nielsen Audio audience data. We recommend backing up the MKTN folder at least once per week, or a bare minimum of at least once per month. If your users do a lot of work with lineups (station lists), you might consider backing up the MKTN folder daily.