

Moving Our Software to a New Server



Revised: 9/26/14 | Page 1 of 5

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

These steps are **only** for moving an existing installation of our software from one server to a new server. See our other support docs if you're doing a "first-time" fresh/new installation or adding new users to an existing installation. We ask that you notify us if you add any new users as part of a server move, as it may impact software licensing.

Important Notes:

- Do not use the original installation CD. The software and data on that disc are not current.
- If the new server is not on the same LAN as the old server, it will change how your users must connect (see step 9).
- Do not copy the entire MKTN folder from the old server directly to each of the user's individual workstations (or to each of the 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.
- In most cases, you do not need to uninstall or remove our software access from each user's workstation (or remote session). The following steps will automatically replace the default shortcut target paths from the old server to the new server. The "default" shortcuts are those created by our client-access EXE installers, found on each user's workstation in Start > Programs > ACT 1 Systems and (optionally) within each user's "ACT 1 Systems" desktop folder. Any custom shortcuts you might have created will need to be manually updated.

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 on the old server by going to the Start menu > Programs > ACT 1 Systems > Lineup Manager or running the MKTN\APP\LUMGR.exe directly. 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 Programs > Accessories > Snipping Tool. Cancel and exit the program.

2) Confirm No Active Applications

Run our **Site Manager** application on the old 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, 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.

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 RADATA 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 on the old server, 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 Snipping Tool. Repeat this process for the files within the **MKTN\APP** folder and files in the **MKTN\RADATA** folder.

Moving Our Software to a New Server



Revised: 9/26/14 | Page 2 of 5

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

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.*

6) Set Full “Modify” Permissions to MKTN’s Parent Directory on the New Server

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 new server or add them to an “ACT1” security group that has full “Modify” permissions to the ACT1 folder on the new 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 New 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 new 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 New Server

Run our Lineup Manager application on the new server, by going to `MKTN\APP\LUMGR.exe` directly on the new server (not through the Start menu, which likely still points to the old server). 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 lineups (station lists) from the old server properly moved to the new server.** Cancel out of this window and exit the program.

Moving Our Software to a New Server



Revised: 9/26/14 | Page 3 of 5

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

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

Notes: Do not copy the entire MKTN folder from the server to each user's workstation (or to each user's remote session). If the new server is not on the same LAN as the old server, this will change how your users must connect.

Local Users are defined as being on the same physical Local Area Network (LAN) as the new server where our software moved to. 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 new server where our software moved to. Proper connections are crucial to allow for optimal stability and performance. Improper connections can result in poor performance & potential file corruption, preventing all users from using our software. Repeat the steps below on each user's workstation, depending on what kind of user they are.

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

Remote Users should not be mapping to the new 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 new server where our software moved to or connected to a computer that is on the same physical LAN as the new server where our software moved to. 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 new server where our software moved to 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 (XXX is their ACT 1 UserID in Site Manager).

b) Map a Real Drive Letter to MKTN's Parent Directory on New Server (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 new server hosting our software can skip this step.*

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 the new server 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 to the new server. 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 > ACT 1 Systems menu and (optionally) shortcuts in a desktop "ACT 1 Systems" folder (**this process will overwrite default shortcut's target paths formerly connecting to the old server installation**). The only difference between the two EXE installers is that NEWMGR.EXE installs one extra shortcut to the server's Site Manager application (used for updates). The only other file installed on the client's workstation (or remote session) 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.

Moving Our Software to a New Server



Revised: 9/26/14 | Page 4 of 5

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

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

d) Confirm 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. On the “Welcome” prompt, the User ID should automatically be entered for any users that had been using the old server [if the User ID is blank, you must set proper permissions to the INI file mentioned in step 9(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 Nielsen Audio 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**.

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.

Moving Our Software to a New Server



Revised: 9/26/14 | Page 5 of 5

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

10) 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 9(h) above so that we still receive an email confirmation.**

11) Disable (or Delete) the Old Server's MKTN Installation

When users are satisfied accessing the new server setup, rename the old server's MKTN folder installation to MKTNOLD (or delete it entirely). **IMPORTANT:** If users were accessing the old server locally (via a mapped drive letter to the server from their local workstation) and are now accessing the new server with a "remote session," you will need to manually remove their access to the old server installation by deleting (on their local workstation) both the "ACT 1 Systems" desktop folder and the Start > Programs > ACT 1 Systems folder.

12) Add the New Server MKTN Folder to Your Backup Schedule

Make sure to frequently backup the entire MKTN folder off the new 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 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.