How to Install ACT 1 on a Multi-User Server Setup

act1 ACT 1 SYSTEMS INC.

ACT 1 "PC System" Support Document
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These steps are **only** for a "first time" fresh/new installation to a server for use by multiple users (connecting locally on the same LAN as the server or via remote sessions). Please see our other support documents if you need to add a new user to existing installation or move an existing installation from one server to a new server.

Please perform the first 3 steps <u>before</u> running the Install.EXE off our installation files.

1) Choose Destination on Server and Create the **\ACT1\MKTN** Folders

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 for backup purposes). It can be stored in the root of a server drive or within subdirectories. Our software can run on real hardware and virtual or cloud servers. For more details, see our System Requirements doc.

2) Set Full "Modify" Permissions to the **ACT1** ("Parent") Folder for All Users

Configure all users 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 file's date stamps within this ACT1 folder and all subfolders within it. Users should not inherit Deny permissions from ACT1's parent folder.

A note on date stamps: 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. Without proper permissions, the Windows OS will alter file dates to be the date the files were written/modified, which prevents our updates from working correctly.

3) Map a Real Drive Letter *(not UNC Syntax)* to the **ACT1** "Parent" Directory

We <u>strongly</u> encourage you to perform the installation while sitting at a workstation that sits on the same LAN as the server where our software is to be installed (via drive letter mapping, as described above), rather than sitting <u>at</u> the server itself*. If you are sitting <u>at</u> the actual server where our software is to be installed, you may skip this step.

Map a real drive letter to the ACT 1 folder (the parent directory of MKTN). 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.

*Additional notes on install location: Installing while sitting <u>at</u> the actual server where our software is to be installed is possible, but occasionally leads to problems. Additionally, while it is possible to install our software to a remote location (through the WAN or VPN or shared drive), we do not support this install method, as you run the risk of errors in step #4 (installing our software) and step #6 (installing Nielsen Audio's audience data).

4) Run the Installation Program

Run the Install.EXE from the <u>downloadable installation file</u> (or from the installation USB drive). When it prompts you for the location to install our software, type the path from step #1 if sitting at the server (such as C:\ACT1\MKTN) or the path from step #3 above if mapping to the server (such as X:\MKTN). When it prompts you for an installation password, please contact us to obtain this password. When the installation is complete, the Site Manager application will launch for you. Follow the steps below to configure users and install Nielsen Audio audience data.

5) Create Users within Site Manager

Within the Site Manager application, click the USERS tab at the top, and add at least one user that plans to have access to our software (via the "Add New User" button). If you do not know all the users, you can add more at a later time. For User IDs, we recommend using the person's full first name and first initial of their last name. For any user that should <u>not</u> have the ability to edit lineups (stations lists), <u>un</u>check the "Lineup Maintenance" check box. If you do not know this information, it can be changed at a later time. Leave Site Manager running for the next step.

6) Install Nielsen Audio Audience Data

Within the Site Manager application, click the INSTALL/REMOVE tab at the top. Click on all the files in the left column to highlight them all (these are some of the Nielsen Audio data files your company has clearance to use). To quickly select all the files, click the first file in the list, hold down the shift key and click the last file in the list. Click the "Install selected files" button. Then click "Check for Updates" to download and install any other data.

7) 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 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.

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

Note: Do <u>not</u> 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 <u>only</u> information transmitted over the pipe is screen sharing – all application activity and calculations are done <u>at the server</u> 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 #5 above).

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

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 > ACT 1 Systems 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 (used for updates). The only other file installed on the client's workstations (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.

d) Assign Default User ID and Initialize Lineups (All Users – Local & Remote)

Remote Users must perform this step from within their "remote session." Launch the **Lineup Manager** program 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 #5 above and click OK. On the "Welcome" prompt, the User ID should now automatically be entered. Leave the password field empty and click OK. The first time you launch Lineup Manager, it will create a lineup directory for you (behind the scenes), and if your site is authorized, will also prompt you to install new "public" lineups (to which you click OK). Exit the application.

e) 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 [if the User ID is blank, you must set proper permissions to the INI file mentioned in step 8(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.

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

f) 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.

g) 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.

h) 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**.

i) 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.

9) 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 8(i) above so that we still receive an email confirmation.