



EventPro[®]
Event Management Software

**EventPro User Manual:
Download and Install Application**

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Get Your Software

Let's get started with your EventPro Software!

This topic describes the process of installing, updating and logging into the EventPro application you purchased.

- [Local/Network Install](#)^[2]
- [Cloud \(Citrix\) Install](#)^[15]
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Local/Network Install

This topic describes the process of installing EventPro **locally** or on a **network** with workstations.

- [Step 1: Pre-Installation Housekeeping](#) ^[2]
- [Step 2: Download Installation File](#) ^[2]
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- [Step 4: Install EventPro Data Updater](#) ^[5]
- [Step 5: Create or Convert Database](#) ^[6]
- [Step 6: Set SQL Server Security Rights](#) ^[13]
- [Step 7: Login to EventPro as Admin](#) ^[13]
- [Step 8: Install EventPro to Workstations](#) ^[14]

Note that during the installation process, you will choose from two options:

- **Stand Alone Installation:** A single-user environment where the application is installed on one machine.
- **Network Installation:** The EventPro application and server will reside on separate machines. You will first install to the Server, and then go through a separate installation process for each Workstation that will run EventPro.

You will also be able to choose whether you want to create a **new database**, or **convert your data** from a previous version of EventPro.

Step 1: Pre-Installation Housekeeping

1. **SQL Server:**
 - a. EventPro Software uses SQL Databases, meaning you require an **SQL Server**.
 - b. Before installing EventPro Software, ensure that you have **System Admin (sa) access to the SQL server**.
2. **Users in Active Directory:**
 - a. If you do not already, you need to have **EventPro Users** in your **Active Directory**, preferably in an **EventPro Group**.
 - b. This doesn't necessarily have to be done as the first step, but you will need to give the group - or users - access to the EventPro databases before installation is completed, so it makes sense to have them in your Active Directory before you start.

Step 2: Download Installation File

1. If it doesn't exist already, create the folder **C:\PSI Applications\EventPro\Installs**. This will be a convenient place to store all of your EventPro-related installation files so that you can easily find and access them later.
2. Login to the EventPro **Support Website** with your 6-digit User ID and 4-digit Password.
3. Click on the **Downloads** tab. There are 3 components you need to download to your **C:\PSI Applications \EventPro\Installs** folder. Click on the most recent link to get the most current of each:

- a. **EventPro Windows Install (EventPro.Win.Setup.exe)**
- b. **EventPro Data Updater Install (EventPro.EPDataUpdater.Setup.exe)**
- c. **EventPro Licence (.ini) file**

Step 3: Install EventPro Application

If you are performing a **Network Installation**, this step must first be done from the **Server**.

1. Navigate to the **C:\PSI Applications\EventPro\Installs** folder, and double-click the saved **EventPro.Win.Setup.exe** file 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. The next screen contains the license information. Please read the agreement and select **I ACCEPT** if you accept the terms and conditions or **I DO NOT ACCEPT** if you cannot accept them. If you disagree with the license agreement, you cannot continue.

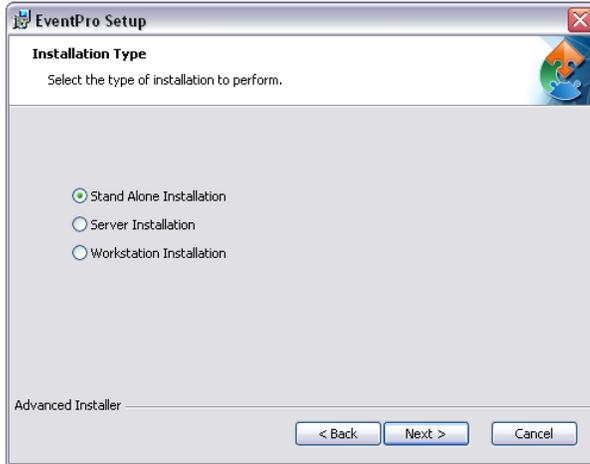
Click **Next** to continue.



4. The next screen, **Installation Type**, displays installation options. Choose the type that is applicable to your

installation:

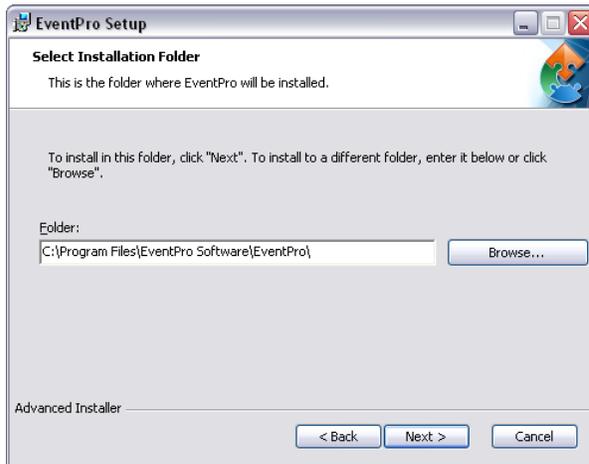
- a. **Stand Alone Installation:** A single-user environment where the application is installed on one machine.
- b. **Server Installation:** The EventPro application and server will reside on separate machines, and you will be installing EventPro to separate workstations. You will not choose Workstation Installation on this first round of installation, however.



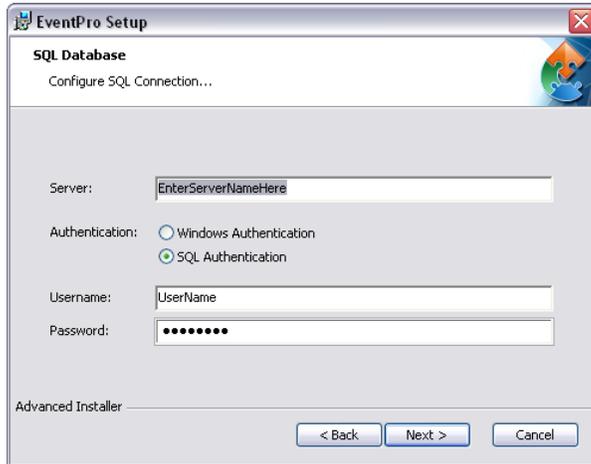
- 5. The next dialog asks you to select the **Installation Folder**.

The default is Program Files, **BUT** you may find it more convenient to set the installation folder to **C:\PSI Applications\EventPro**, which is part of the folder path you created [earlier](#)². This way, you have one convenient area for storing all current and future EventPro components you need to install.

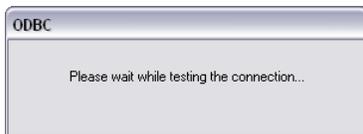
Click **Next**.



- 6. In the **SQL Database** window, you are defining the SQL Server on which the database will eventually be stored.
 - a. **Server:** Be sure to use the full qualified domain name of the SQL server and its instance for the server.



- b. Choose which type of **Authentication** you want to use. This determines how all EventPro Users will connect to EventProMaster database, which controls licensing. There will be further explanation about EventPro databases under [Create or Convert Database with EventPro Utility](#)⁶ below.
 - i. **Windows Authentication:** This is typically the recommended option.
 - ii. **SQL Authentication:** If you choose **SQL Authentication**, enter your **Username** and **Password** in the fields below.
 - c. Click **Next**.
7. The Installer will test the connection to the database before you can proceed with the installation.



8. 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.
9. In the final window, click **Finish**.

NOTE: If you are performing a Network Installation, and there will be other users who need to install EventPro on their workstations, ensure that those network users have **Read** access to the executable folder.

Step 4: Install EventPro Data Updater

Whether you are converting old data from a previous version of EventPro, or creating an entirely new database, you need to install this Data Updater.

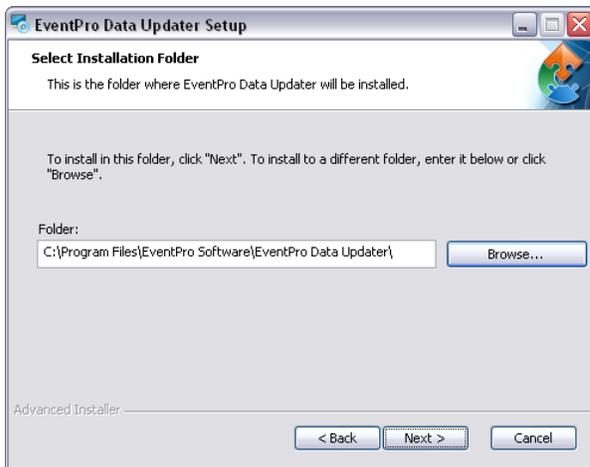
If you performed a **Network Installation** in the previous step, this step must also be performed from the **Server**.

1. Navigate to the **C:\PSI Applications\EventPro\Installs** folder, and double-click the **EventPro.EPDataUpdater.Setup.exe** file to run it.
2. The installation wizard will begin. Click **Next** to continue.



3. In the next screen, select the **Installation Folder**. The default is Program Files, **BUT** this needs to be the **same folder** where the EventPro application resides.

So if you selected **C:\PSI Applications\EventPro** [earlier](#) ⁴ when installing the EventPro application, you need to also select that specific folder now.



4. In the next window, click **Install**.
Depending on your computer or network security, you may encounter a warning, for which you may need to click **Yes** or **OK**.
5. When the installation completes, click **Finish** in the final window.

Step 5: Create or Convert Database

With the EventPro Database Utility, you can create a **new database** for your EventPro application, or **convert data** from a previous version of EventPro.

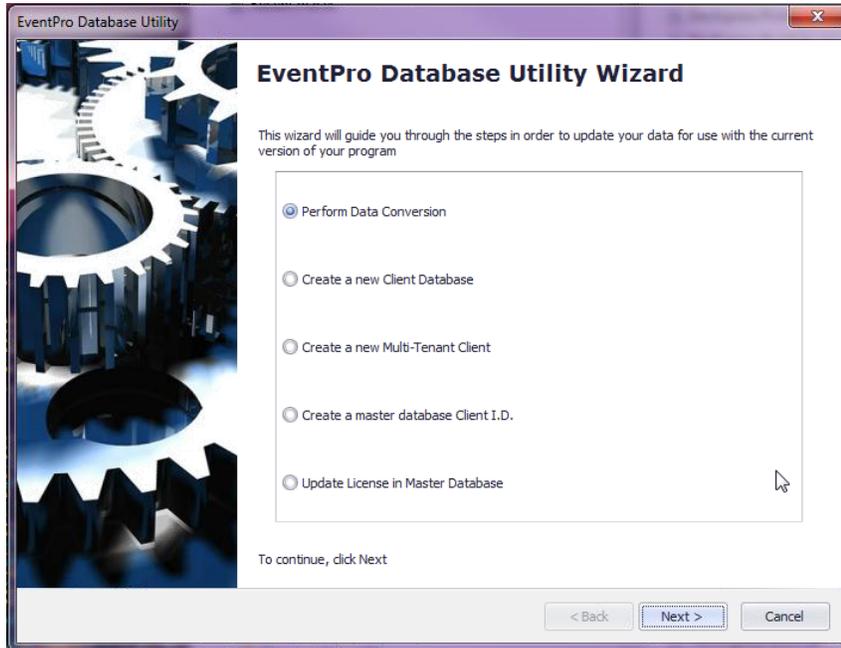
As noted above, in order to complete this process, you require System Admin (sa) access to the SQL server.

1. Navigate to the folder in which you installed the **EventPro Data Updater**, which you selected earlier [during installation](#) ⁵.

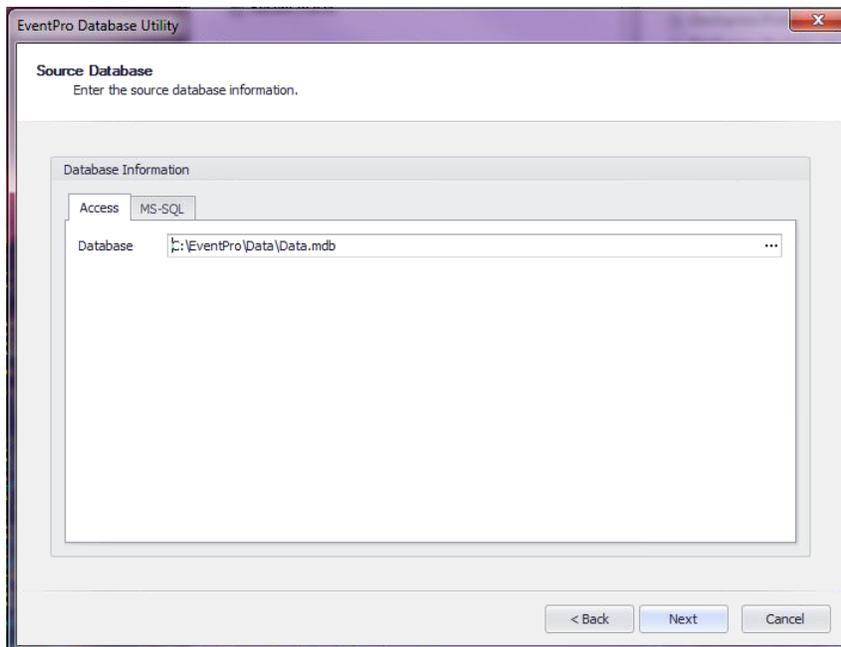
2. Double-click the **EventPro.EPDataUploader** application file to run the **EventPro Database Utility Wizard**.
3. In the first page of the **EventPro Database Utility Wizard**, you will choose whether you want to **Create a New Database** or **Perform Data Conversion** (i.e. convert a database from a previous version of EventPro). Follow the instructions under the heading relevant to your selection:

▶ **Perform Data Conversion**

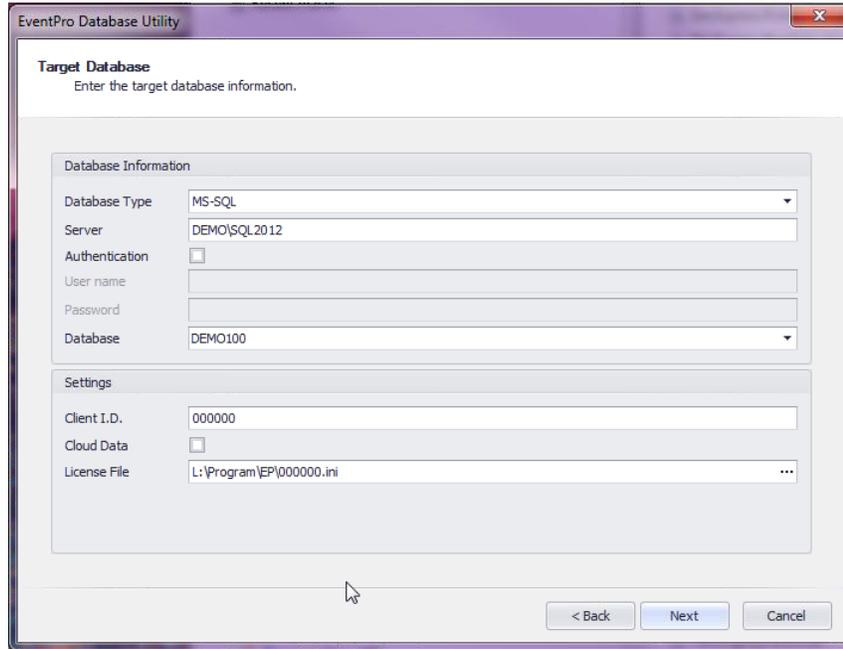
4. Choose **Perform Data Conversion**, which will convert your old database. Click **Next**.



5. **Select Source Database**. Choose the tab for the type of your old EventPro database: **Access** or **MS-SQL database**. Enter the relevant database information and click **Next**.



6. **Target Database:** Enter the target database information.



- a. **Database Type:** Select **MS-SQL**.
- b. **Server:** Enter the full qualified domain name of the SQL server and its instance.
- c. **Authentication:** Select this checkbox if you want to use **SQL Authentication** to log onto your SQL Server. Leave it unchecked if you want to (and are able to) use Windows Authentication to log onto the SQL Server.
- d. **User Name** and **Password:** If you selected the Authentication checkbox, enter your SQL Authentication **User Name** and **Password**.
- e. **Database:** Once authenticated, your existing databases will populate this drop-down list. However, you need to **type in a new name** for the database with your converted data.

EventProData is the typical choice for database name. The data updater will actually be creating 2 SQL databases for EventPro: an **EventProMaster** database to control licensing, and the database that you are naming here.

- f. **Client I.D.:** Enter your 6-digit User ID number.
 - g. **Cloud Data:** Leave this unchecked.
 - h. **License File:** Click the ellipsis (...) next to the field to browse for and select your license file (an .ini file). This is the license file you [downloaded](#) ² earlier.
 - i. Click **Next**.
7. **Conversion Options:** Enter the database conversion options.

EventPro Database Utility

Conversion Options
Enter the database conversion options.

Time Zone
Time Zone (UTC-06:00) Saskatchewan

Phone Types

Primary Phone Office

Mobile Phone Cellular

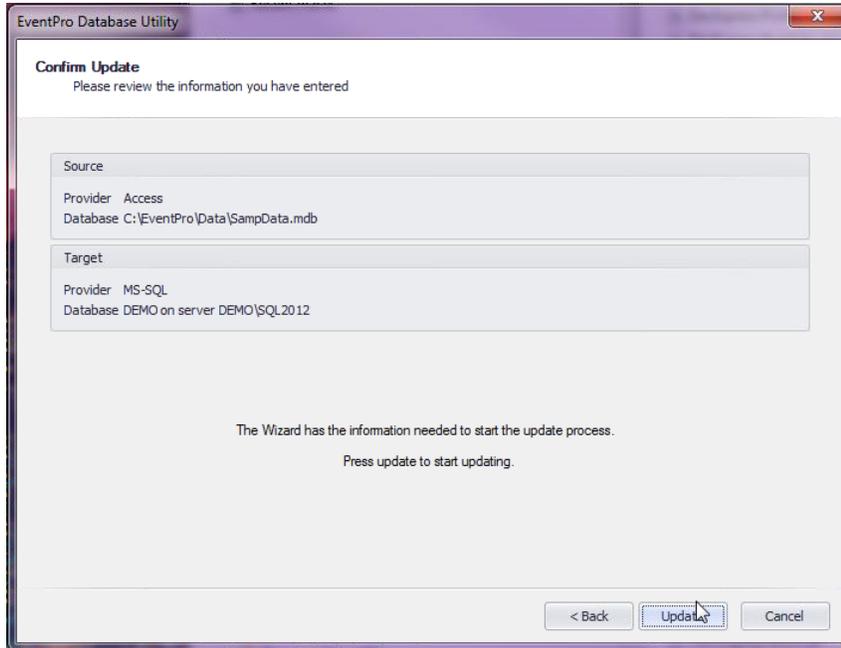
Home Phone Direct

Other Phone

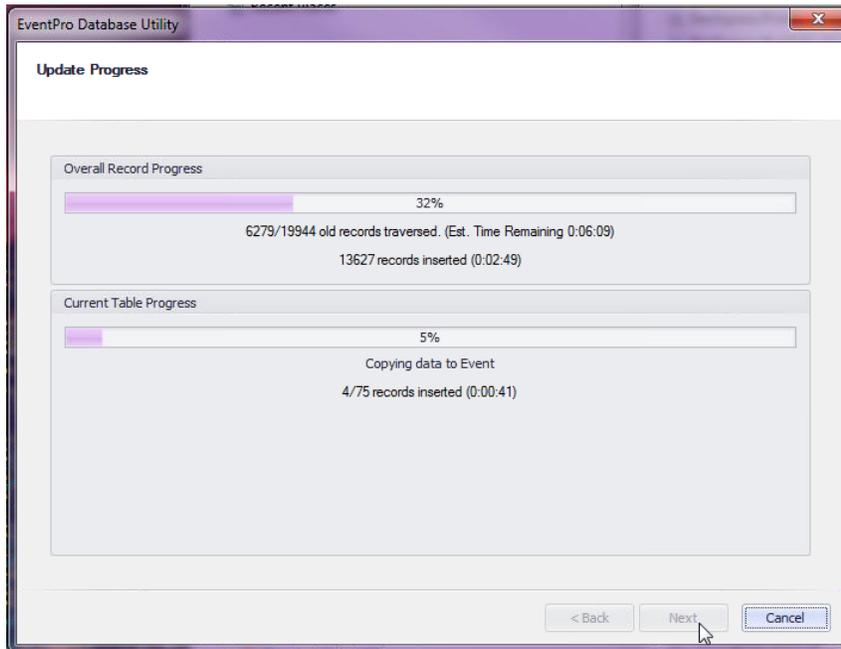
Fax Fax

< Back Next Cancel

- a. **Time Zone:** Select a time zone from the drop-down list.
 - b. **Phone Types:** Here, you will match up the phone types from your old database to the phone types in the new database.
 - i. In the new database, the phone types will be called Primary Phone, Mobile Phone, Home Phone, Other Phone and Fax.
 - ii. The drop-down lists display the phone types of your **old** database, which will vary, depending on what you called them in the previous software.
 - iii. Using the drop-down lists, assign each old phone type to a new phone type. Note that you may have fewer old types than new, meaning some of the new phone types won't have an assigned old phone type, which is fine.
 - c. Click **Next**.
8. **Confirm Update:** Please review the information you have entered. If it all looks correct, click **Update**.



- 9. **Update Progress:** The utility will convert the data to your new database, displaying the time remaining in the progress bars.



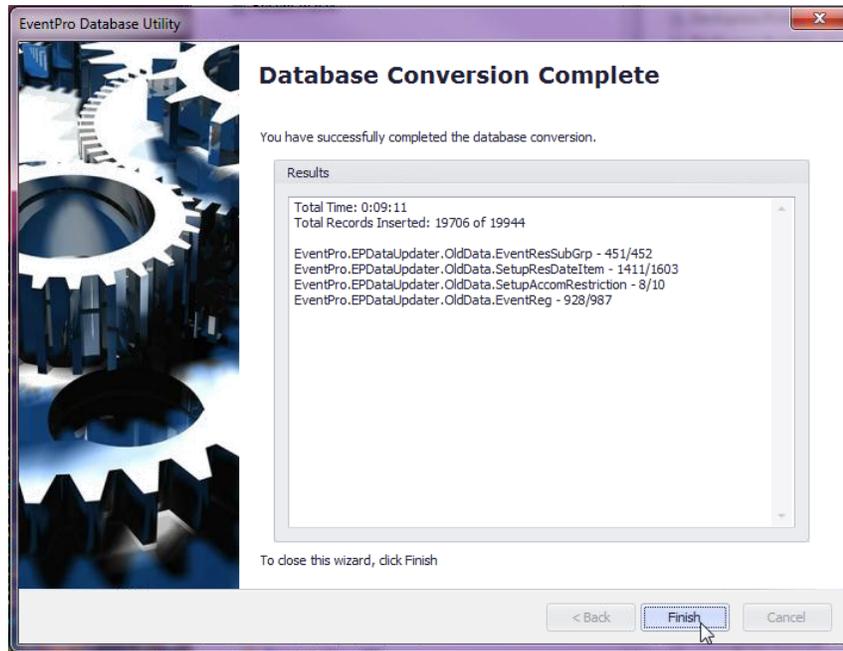
- 10. **Database Conversion Complete:** This window will inform you that the database conversion is successfully complete, displaying the total time and total records inserted.

If there is any data that was not converted, it will be displayed after the conversion completes in the **Results** window.

Please contact [Support](#) if you have issues with data not converting correctly.

To provide additional information for the Support department's assistance, you can find a log file

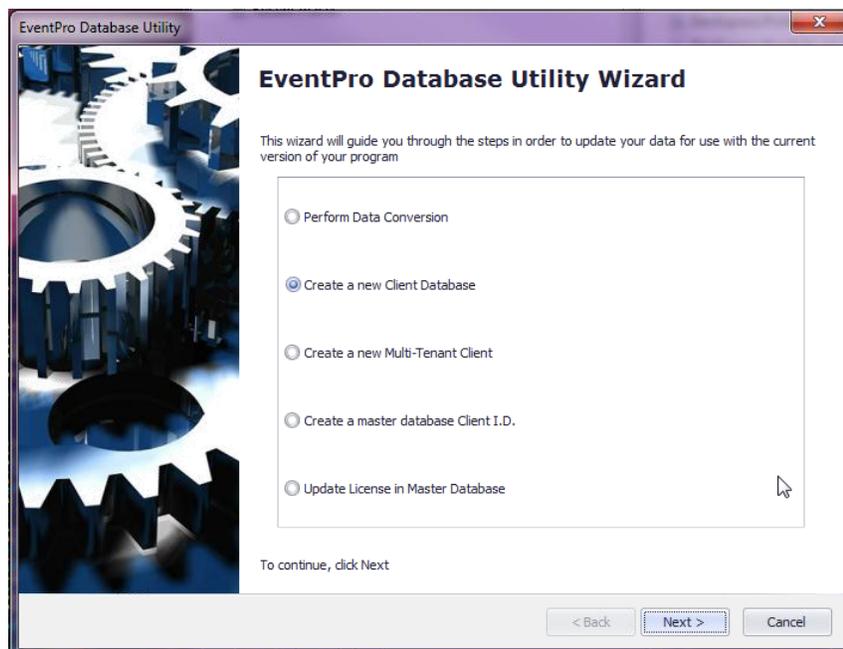
(called **LogFile**) that is created in the folder in which the [data updater is installed](#)⁵. You can rename that file with your 6-digit User ID, compress it, and attach it to the email that you send to Support.



11. To close the wizard, click **Finish**.

▶ Create a New Client Database

4. Choose **Create a New Client Database** and click **Next**.



5. **Target Database:** Enter the target database information, i.e. for the new database you are creating.

- a. **Database Type:** Select **MS-SQL**.
- b. **Server:** Enter the full qualified domain name of the SQL server and its instance.
- c. **Authentication:** Select this checkbox if you want to use **SQL Authentication** to log onto your SQL Server. Leave it unchecked if you want to (and are able to) use Windows Authentication to log onto the SQL Server.
- d. **User Name** and **Password:** If you selected the Authentication checkbox, enter your SQL Authentication **User Name** and **Password**.
- e. **Database:** Once authenticated, your existing databases will populate this drop-down list. However, you need to **type in a new name** for the new database you are creating.

EventProData is the typical choice for database name. The data updater will actually be creating two SQL databases for EventPro: an **EventProMaster** database to control licensing, and the database that you are naming here

- f. **Client I.D.:** Enter your 6-digit User ID number.
- g. **Cloud Data:** Leave this unchecked.
- h. **Database Data Type:** From the drop-down list, choose **Blank** or **Standard**.
 - i. **Standard** 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.
- i. **License File:** Click the ellipsis (...) next to the field to browse for and select your license file (an

.ini file). This is the license file you [downloaded](#) ²⁾ earlier.

- j. Click **Next**.
6. The wizard will inform you when the database creation is complete. To close the wizard, click **Finish**.

Step 6: Set SQL Server Security Rights

EventPro's Database Utility created two SQL Databases:

- An **EventProMaster** database to control licensing
- A database that you named, most likely **EventProData**

Your EventPro users now need to have access to those databases. This is the process of creating the logins for users to grant them the required rights to the EventPro databases.

As noted above, you should already have the **EventPro Users** in your **Active Directory**, preferably in an **EventPro Group**.

1. Open **SQL Server Management Studio**.
2. Connect to the SQL server instance that houses the EventPro Databases.
3. Click the + beside **Security**.
4. Click the + beside **Logins**.
5. If the User or User Group is already listed, double click on it to edit its properties.
Otherwise, you will need to add each User or the User Group by right-clicking and selecting New Login.
6. After selecting the Windows user or group, set the following for the login account:
(Please note that if a field is not mentioned, the default information is sufficient.)
 - a. **General** page
 - i. Default Database = **EventProMaster**
 - b. **User Mappings** page
 - i. Check **EventProData**. At minimum, the User requires **db_datareader** and **db_datawriter**, so you can check those. If you are comfortable with giving the user **db_owner** rights, you can.
 - ii. Check **EventProMaster**. Again, at minimum, the User requires **db_datareader** and **db_datawriter**, so you can check those. If you are comfortable with giving the user **db_owner** rights, you can.
7. Click **OK**.

Step 7: Login to EventPro as Admin

Run the EventPro Software application.

The installer created a default admin user. In the **Log On** dialog, enter these default credentials:

- **User Name:** admin

- **Password: EventPro1234** (you will want to change this password once you get into EventPro).



If a dialog asks you to **Update Now**, click **Yes**.

Once you are in the program, remember to **CHANGE YOUR ADMIN PASSWORD**, which you can do under **My Details**. Please do not leave it as the default, as all admin users created by the installer have the same default password, making it very easy for unscrupulous types to guess what your default admin password would be.

Now, if applicable, you can add other users to the program and set their user rights so that they can begin using EventPro as well.

Step 8: Install EventPro to Workstations

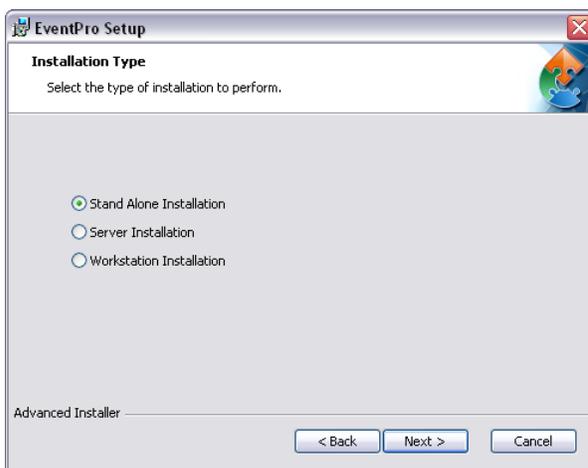
After you have installed EventPro on the server, this process will be done for each workstation that will be running EventPro Software.

Ensure that the network users installing EventPro to their workstations have **Read** access to the executable folder.

1. On the workstation computer, navigate to [the folder](#)^[2] in which you saved **EventPro.Win.Setup.exe** file, 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. You will now follow the process described above in [Install EventPro Application](#)^[3], except that in the [Installation Type](#)^[3] window, you will choose the **Workstation Installation** option.



IMPORTANT: Choose the **Workstation Installation** option when installing to workstations.

4. Complete the installation process as described above.

Cloud (Citrix) Install

If you are moving from a previous version of EventPro to the cloud application of EventPro, you will need to first send your data to EventPro Support for conversion.

If you are using the EventPro cloud application with a brand new database, you can skip down to [Login First Time as Admin](#)^[28].

- [Step 1: Send Data for Conversion](#)^[15]
- [Step 2: Login First Time as Admin](#)^[28]

Step 1: Send Data for Conversion

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](#)^[15]
- [From EventPro Enterprise Edition](#)^[18]

From EventPro Standard Edition

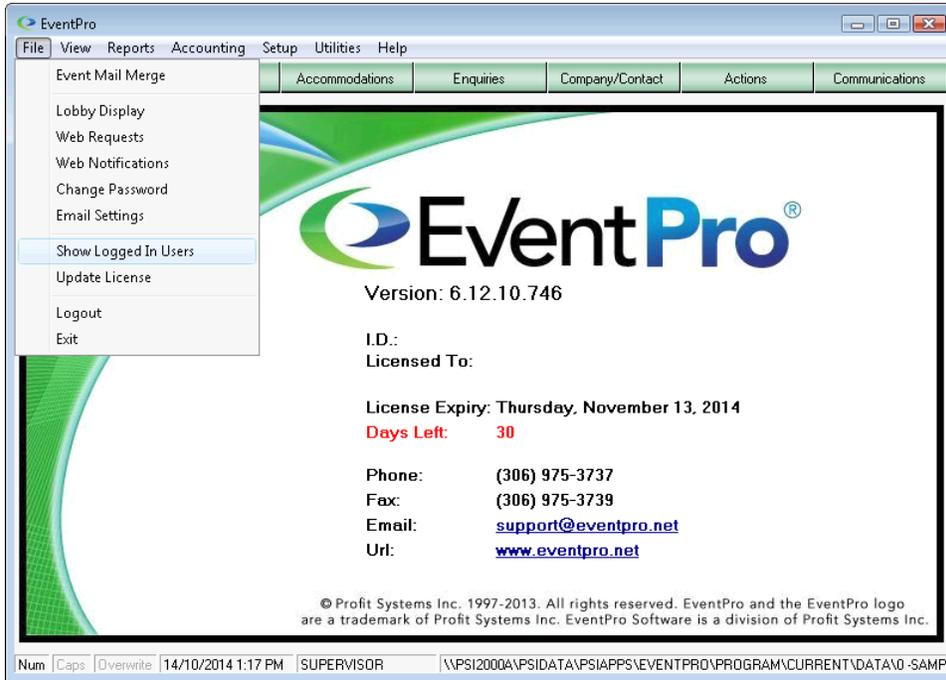
There are a few different methods of getting your EventPro Standard data to Support.

Start with the first method described, and if it doesn't work for you, try out the next two. If none of those methods work, please contact [Support](#)^[40] for further assistance.

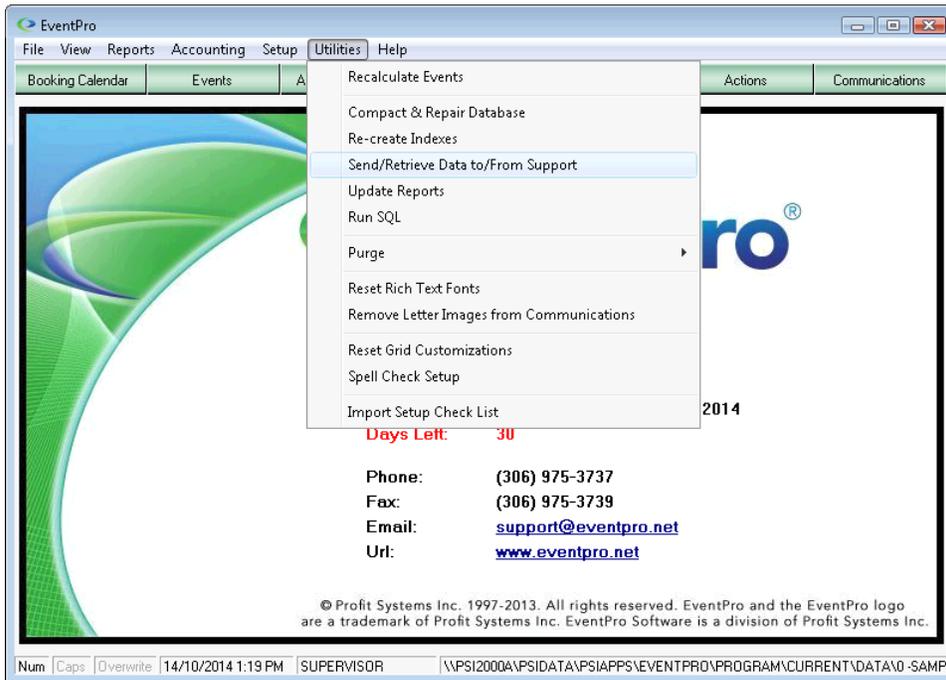
- [Method 1](#)^[15]
- [Method 2](#)^[17]
- [Method 3](#)^[18]

Method 1

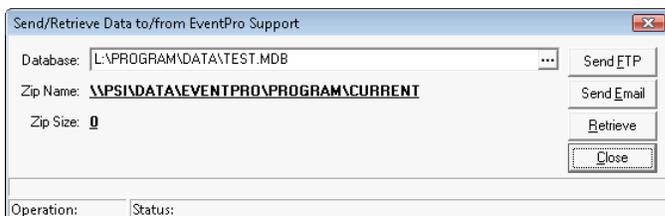
1. Make sure you are the only user logged into the database. You can do this by selecting **Show Logged In Users** from the **File** menu.



- From the **Utilities** menu, select **Send/Retrieve Data To/From Support**.



- Click the **Send FTP** button.



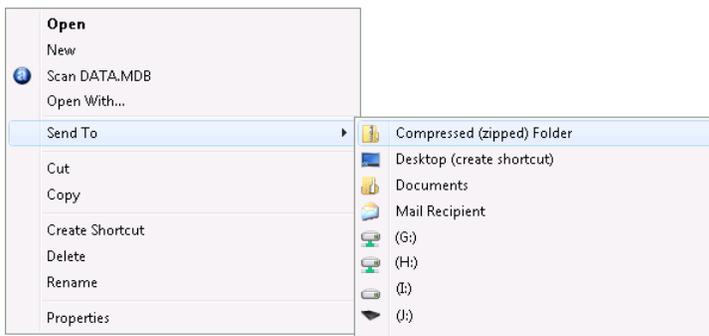
4. When finished, click **OK**, and **Close**. This will bring you back to the EventPro log in screen where you and the other users can now log back in.
5. Email Support@eventpro.net, letting us know that the data has been sent.

If this process does not work for you, try [Method 2](#) next.

Method 2

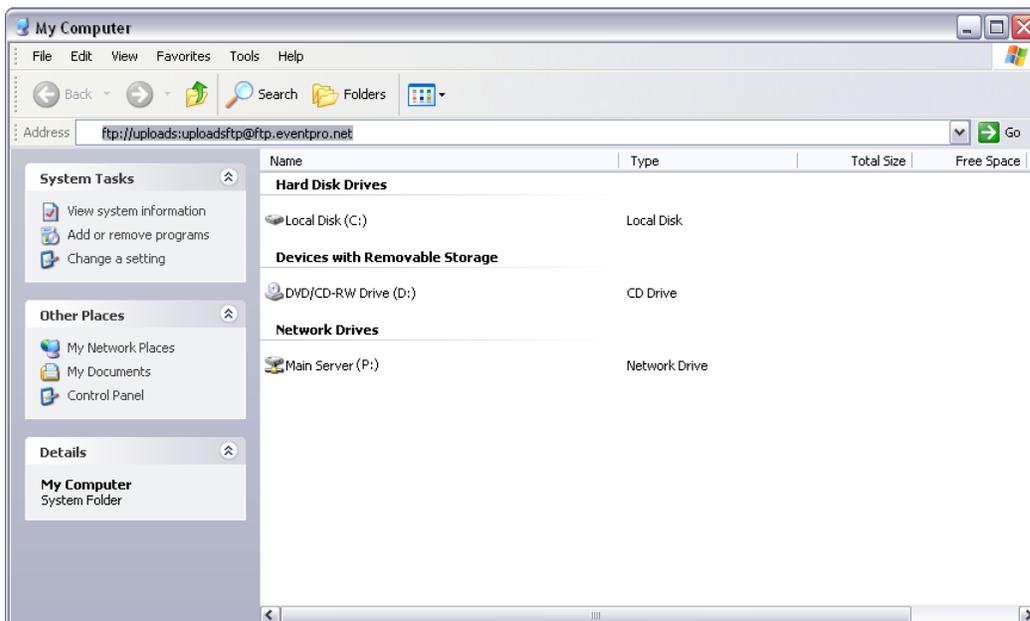
If you are unable to send in your data using [Method 1](#), described above, try the following:

1. Go into the data directory that stores your EventPro **Databases**. In a multi-user environment, this will be the server, and in a single-user environment, 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.
4. Open a Windows Explorer window, e.g. your "My Computer" folder. Paste this address into the address bar and press Enter:

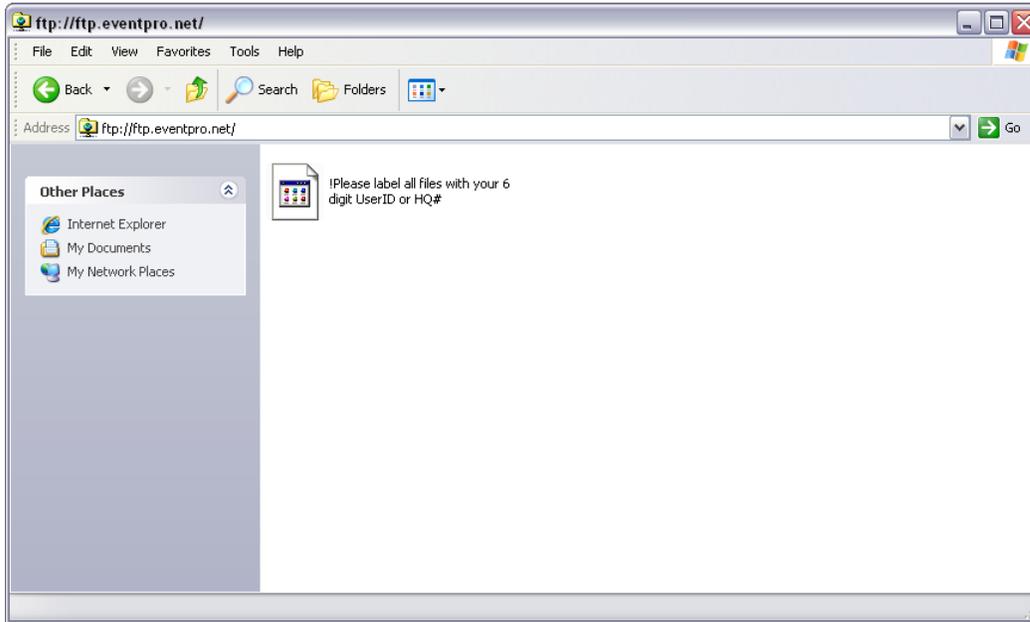
`ftp://uploads:uploadsftp@ftp.eventpro.net`



This opens an FTP site.

5. Copy and paste the ZIP file containing the database into the FTP site you just navigated to in the Windows Explorer window.

If you cannot paste the ZIP file into the directory, see [Method 3](#)^[18].



6. Wait until the transfer is completed
7. Email Support@eventpro.net, letting us know that the data has been sent.

Method 3

If the [second method](#)^[17] still does not work for you because you **cannot paste the zip file**^[18] into the directory, there is one other method you can try.

1. As with [Method 2](#)^[17], compress your database into a zip file and rename it to your User ID or company name.
2. In an internet browser, go to <http://www.eventpro.net/usersupport/uploadfileform.cfm>
3. Login with your 6-digit User ID and 4-digit password.
 - a. If you do not know your company's User ID and Password, please consult with the program administrator.
 - b. If you originally received an email from us with these numbers, but have since lost it, please let us know and we'll be happy to resend it to an authorized user.
4. After logging in, click the **Browse** button, find your zipped database file and select it to begin uploading the file.
5. Once it finishes, email Support@eventpro.net to let us know that the data has been sent.

From EventPro Enterprise Edition

To get your EventPro Enterprise data to Support, you first need to:

- [Create Database Backup](#)^[19]

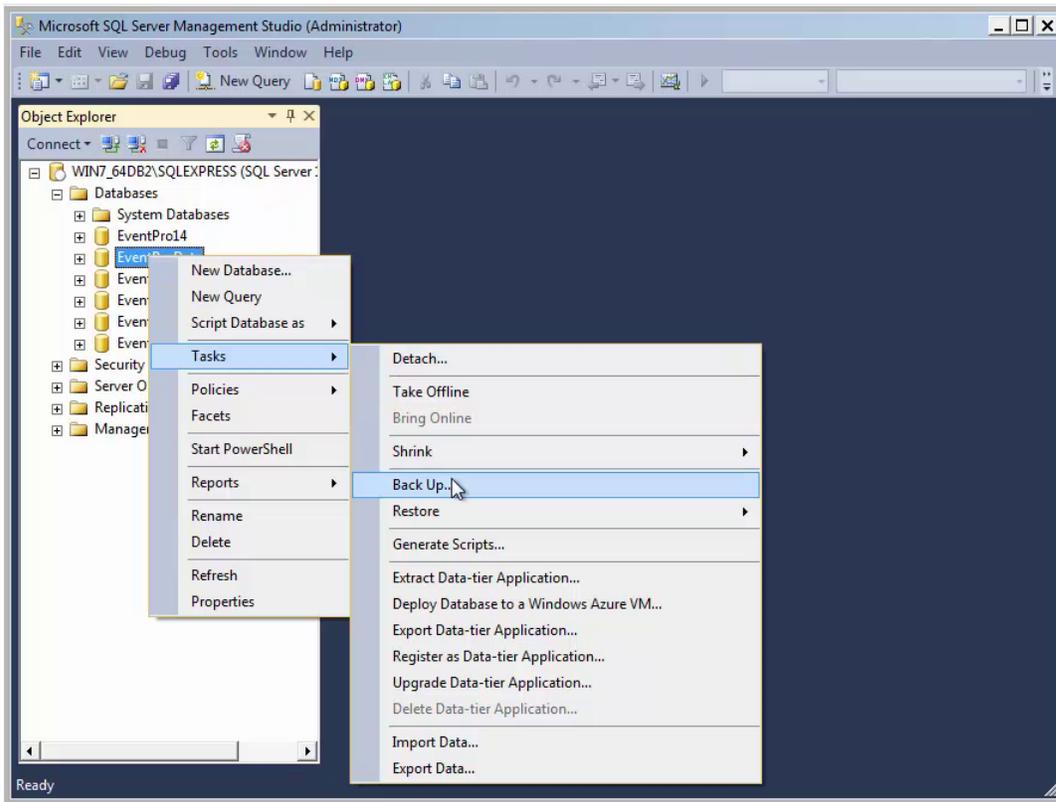
You can then transfer it to Support using one of three methods:

- [Transfer Method 1](#)^[23]
- [Transfer Method 2](#)^[25]
- [Transfer Method 3](#)^[25]

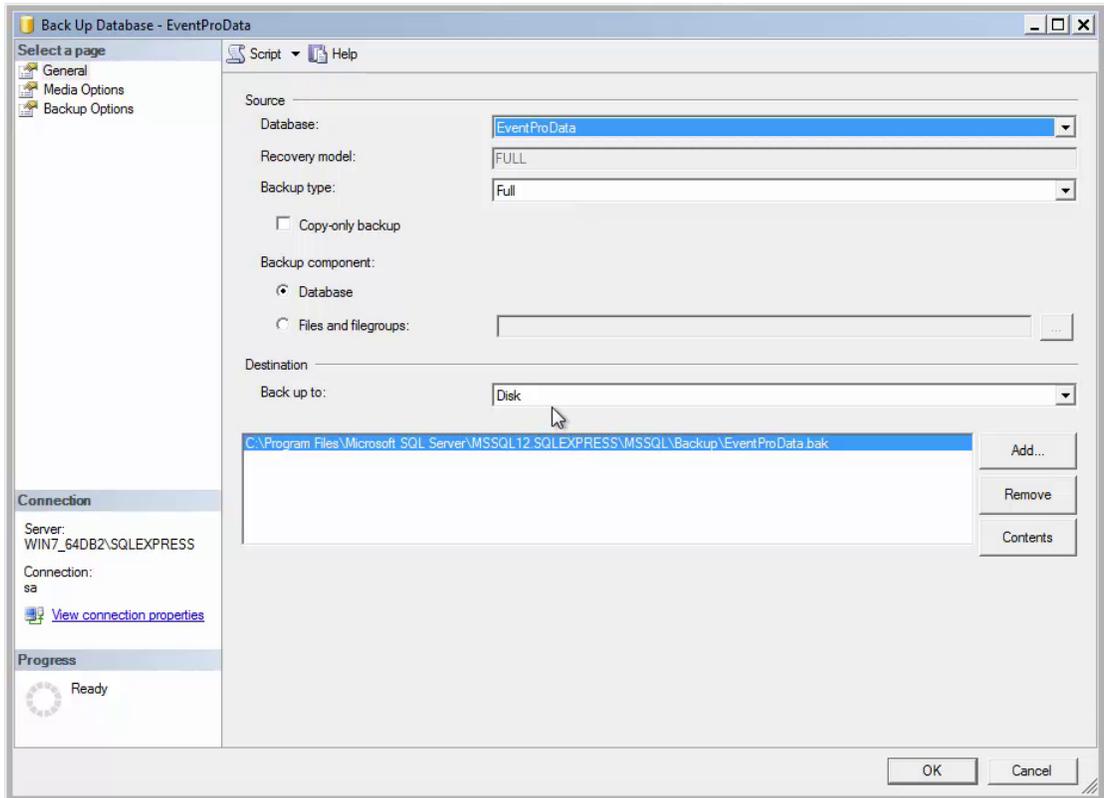
If none of those transfer methods work, please contact [Support](#)^[40] for further assistance.

Create Database Backup

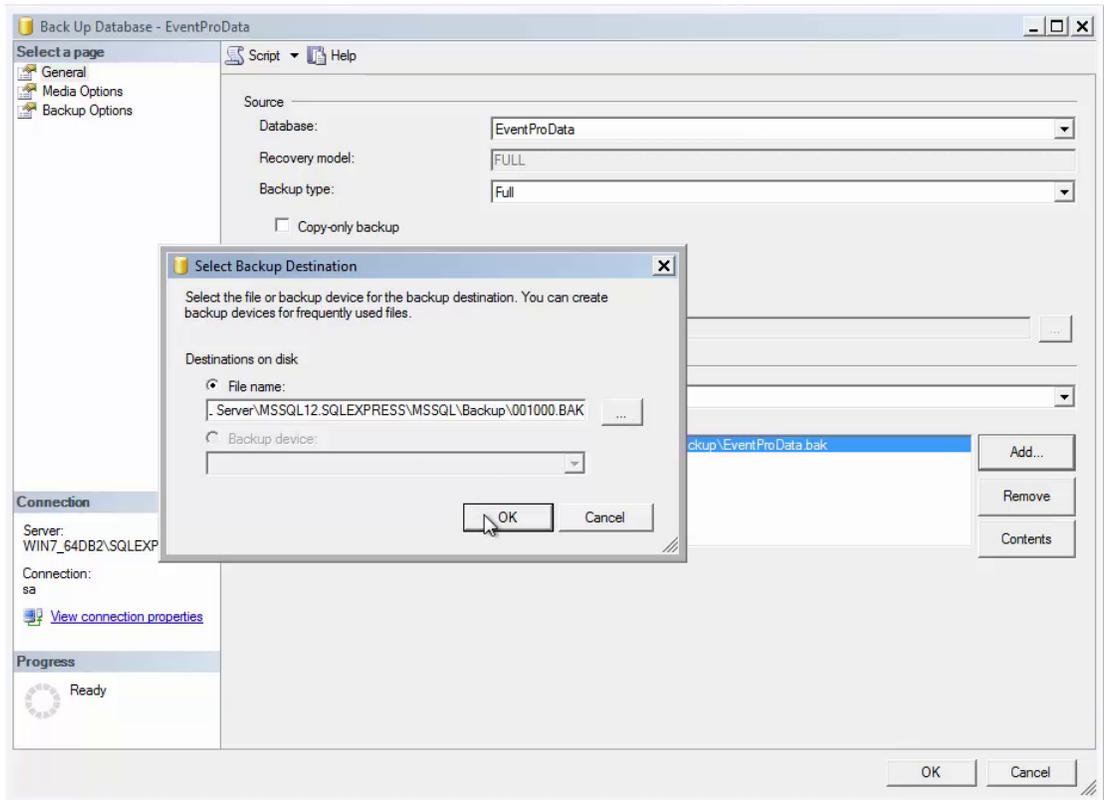
1. Go to your **Microsoft SQL Server Management Studio**.
2. Right-click on the database you want to backup. The database is likely called **EVENTPRODATA**, unless otherwise renamed by you.
3. From the right-click speed menu, select **Tasks > Backup**.



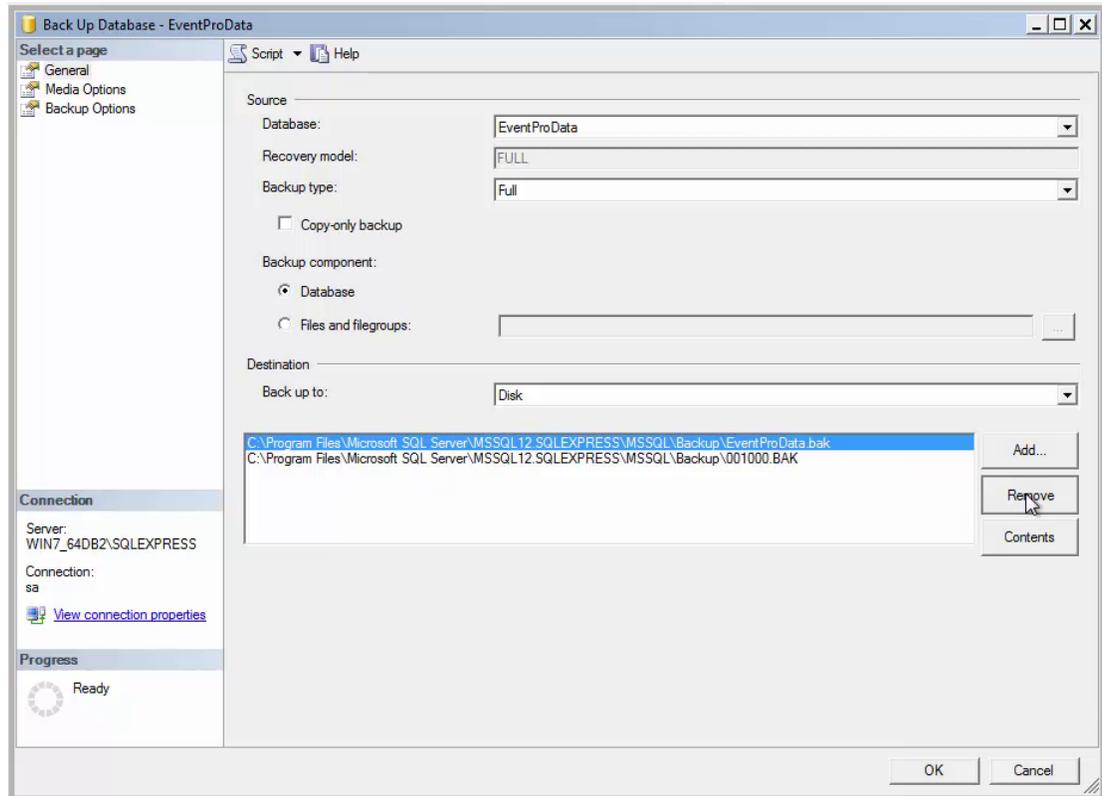
4. In the **Back Up Database** window, ensure that these settings have been selected:
 - a. Under the **General** page:
 - i. **Backup type:** Full
 - ii. **Back up to:** Disk



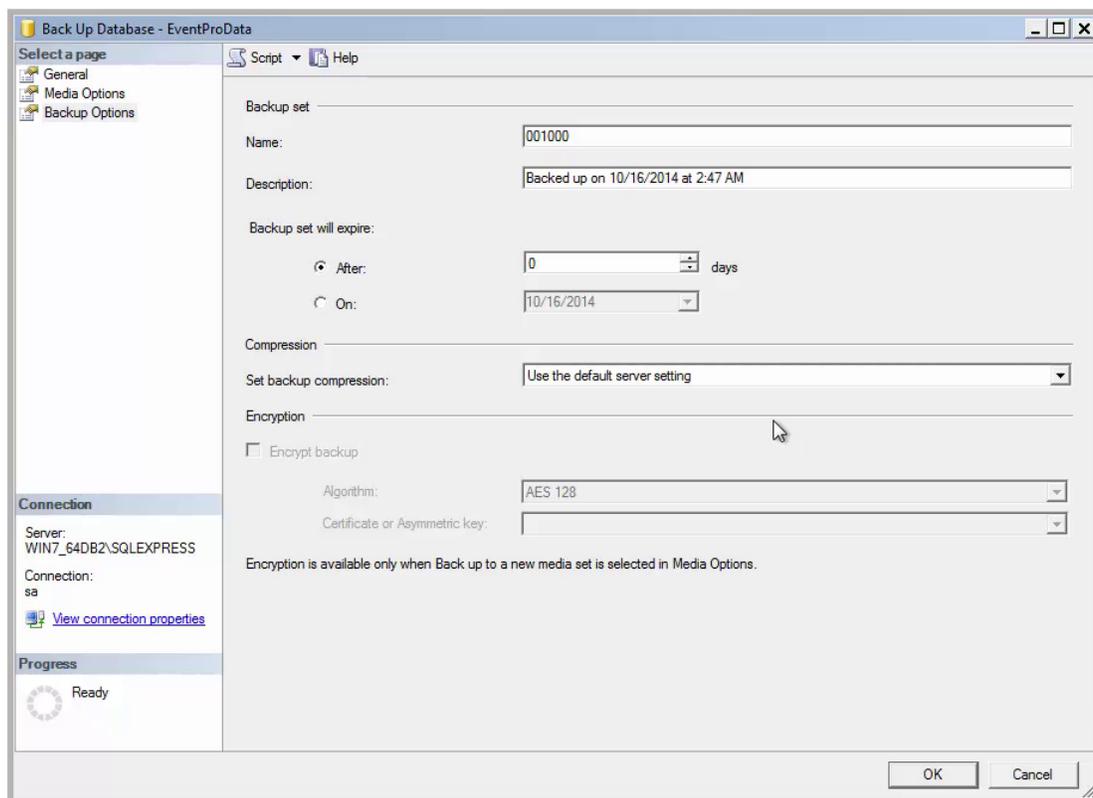
- iii. Since EventProData is the default name for all databases, you should ideally rename your backup database so that it is more easily identifiable for EventPro Support. At the bottom of the window, click **Add**. In the **Select Backup Destination** dialog, name the Destination with your **6-digit User ID**.



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

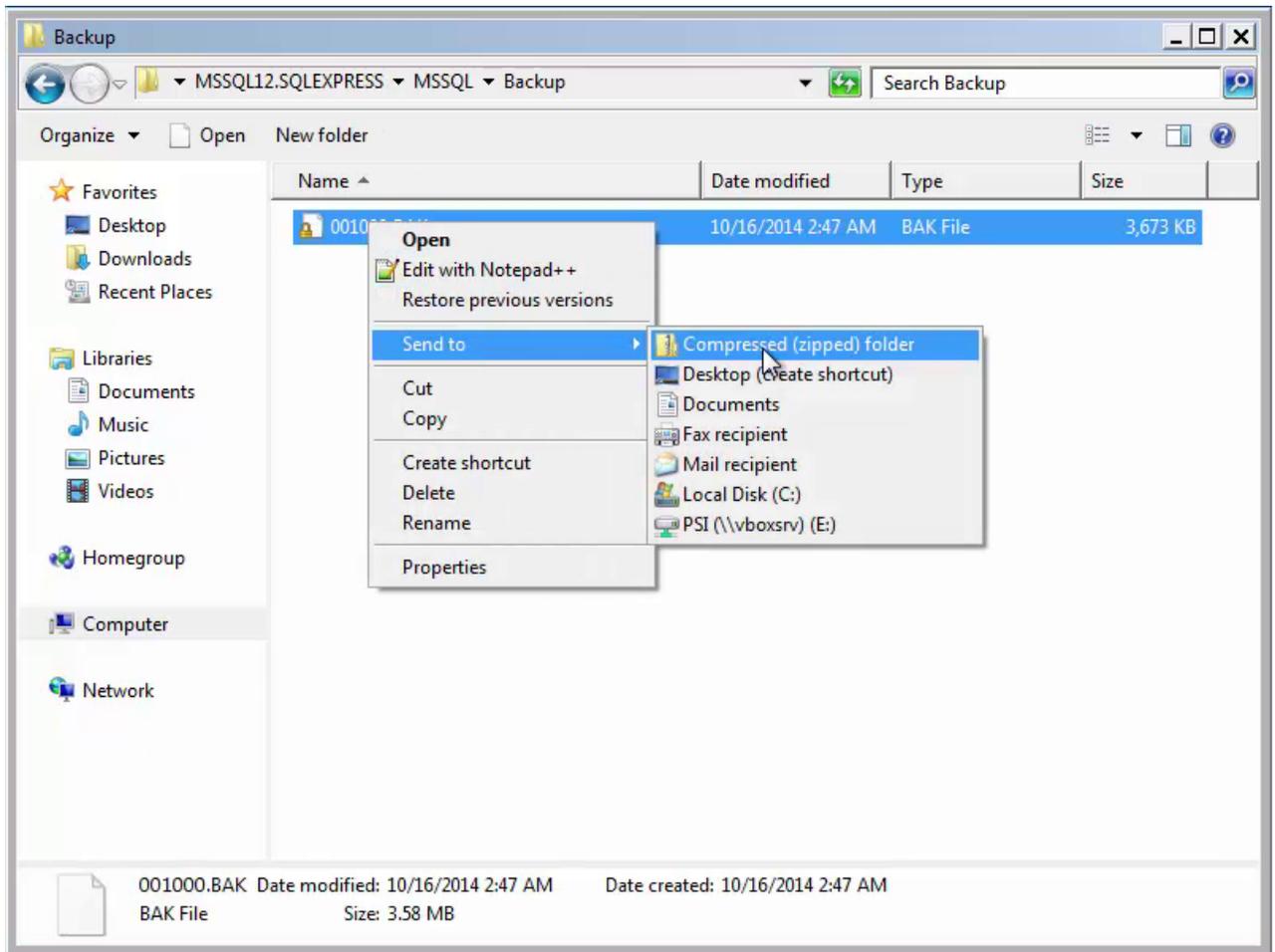


- b. Under the **Backup Options** page:
- Name:** Also change this name to your 6-digit User ID.
 - Description:** Enter a description, such as **Backed up on DATE at TIME**.



- 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.

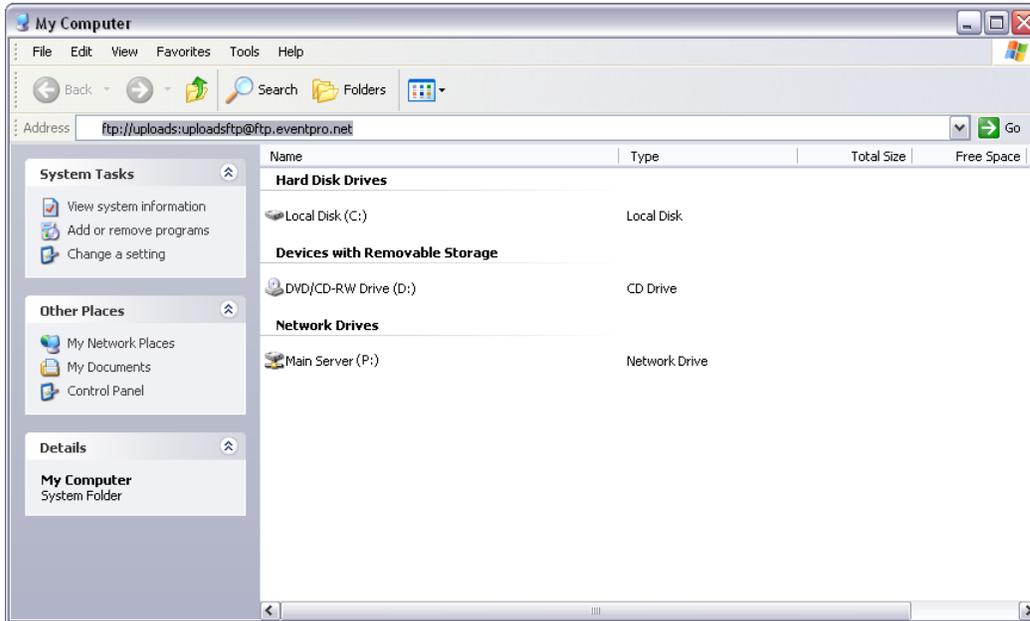
You can now send the data to EventPro Support in one of three ways:

- [Transfer Method 1](#) ²³
- [Transfer Method 2](#) ²⁵
- [Transfer Method 3](#) ²⁵

Transfer Method 1

1. Open a Windows Explorer window, e.g. "My Computer". Paste the following URL into the address bar and press Enter:

ftp://uploads:uploadsftp@ftp.eventpro.net

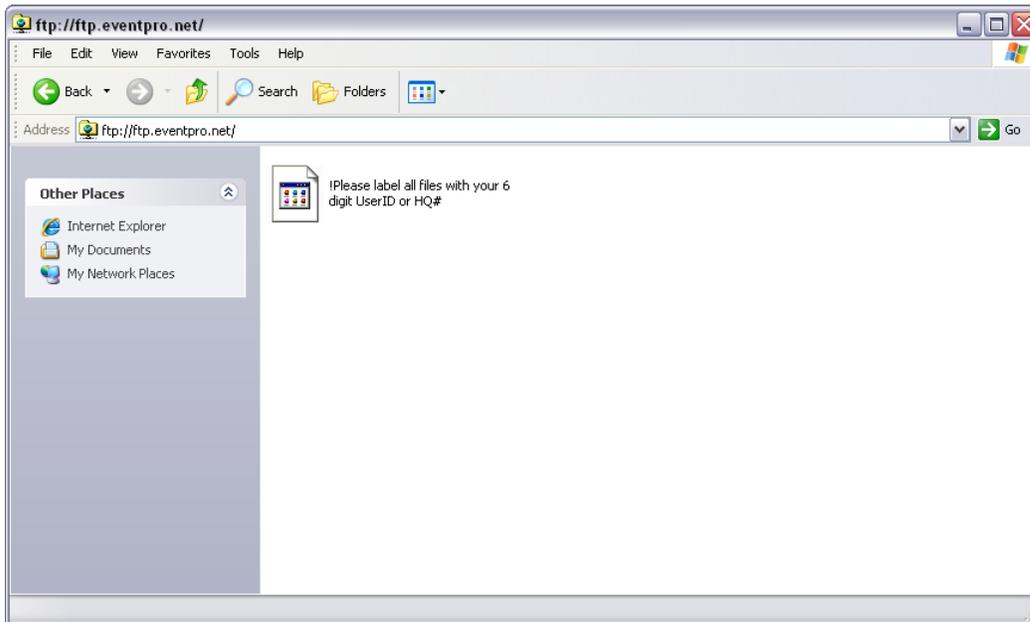


This opens an FTP site.

(Alternative transfer methods are described below.)

2. Copy the zipped folder you created, and paste it into the FTP site you just navigated to in the Windows Explorer window.

If you can't paste the zipped folder, try [Method 2](#)²⁵.



3. When it finishes uploading, send an email to Support@eventpro.net to let us know that your data has been sent.

Transfer Method 2

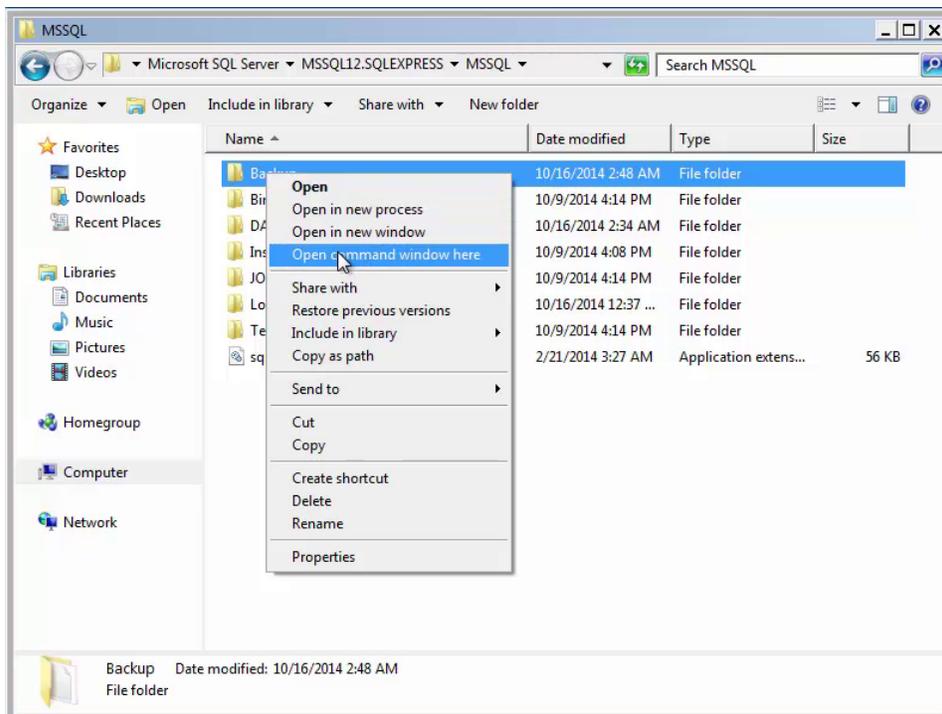
If you cannot [paste the zipped folder](#)^[24] into the FTP site as described in [Method 1](#)^[23] above, try the following:

1. In an internet browser, go to the following site: <http://www.eventpro.net/usersupport/uploadfileform.cfm>
2. Login with your 6-digit User ID and 4-digit Password.
 - a. If you do not know your company's User ID and Password, please consult with the program administrator.
 - b. If you originally received an email from us with these numbers, but have since lost it, please let us know and we'll be happy to resend it.
3. After logging in, click the **Browse** button, find the zipped folder with your database and click **OK**.
4. Click the **Upload** button.
5. When the upload is completed, send an email to Support@eventpro.net to let us know that the data has been sent.

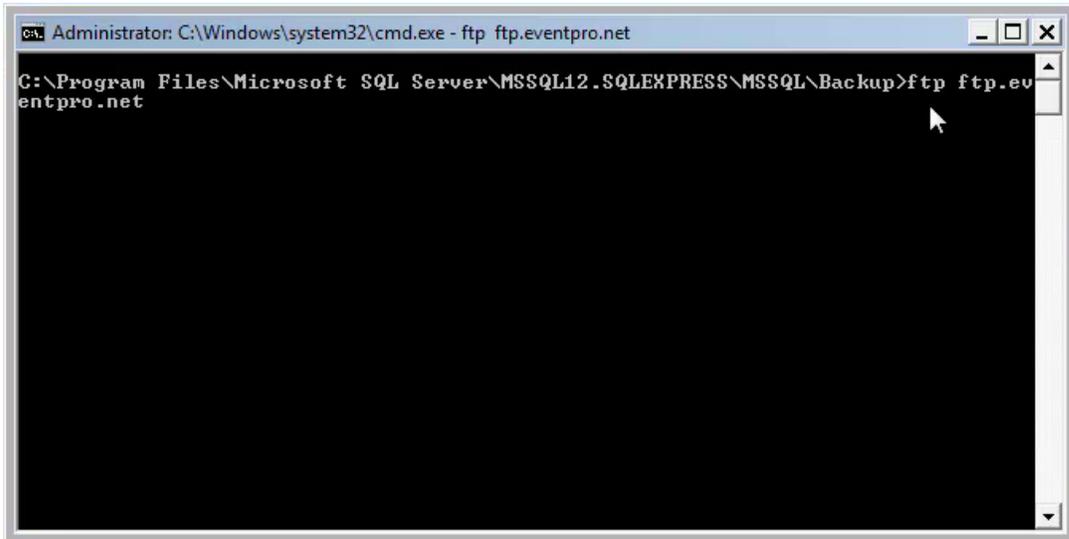
Transfer Method 3

An alternative method of submitting the file involves using a command window:

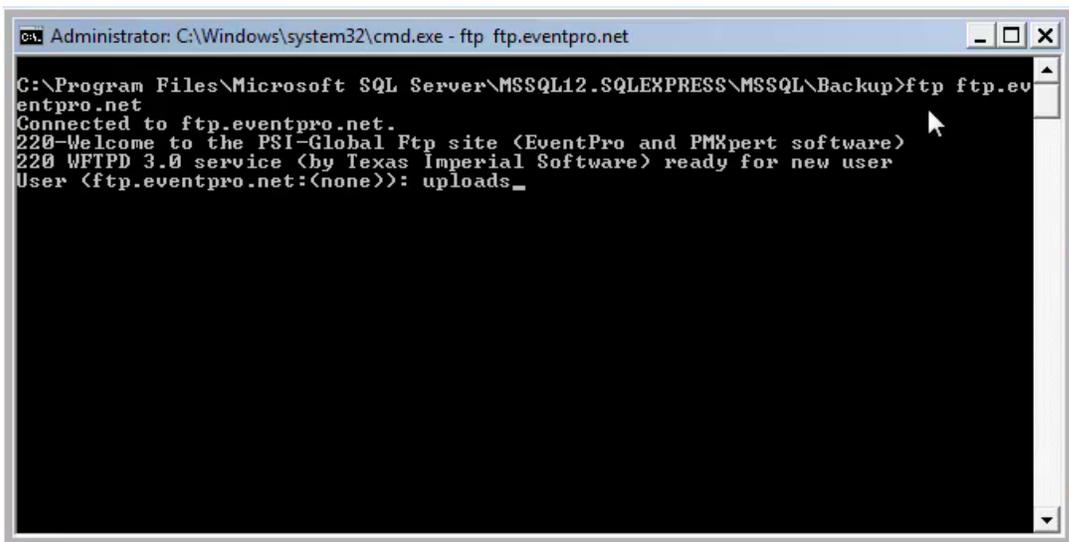
1. Navigate to find your **Backup** folder on your SQL Server.
2. Hold down your **Left SHIFT** key, right-click on the **Backup** folder, and select the command **Open command window here** from the speed menu.



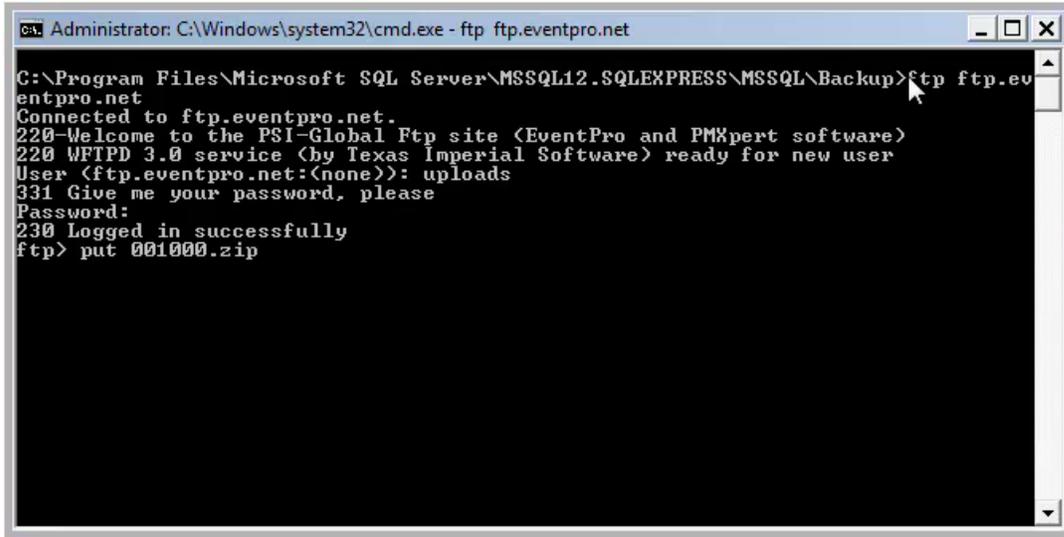
3. A command window opens. Enter the command: **ftp ftp.eventpro.net**



4. You will then be prompted for a User, where you can type: **uploads**

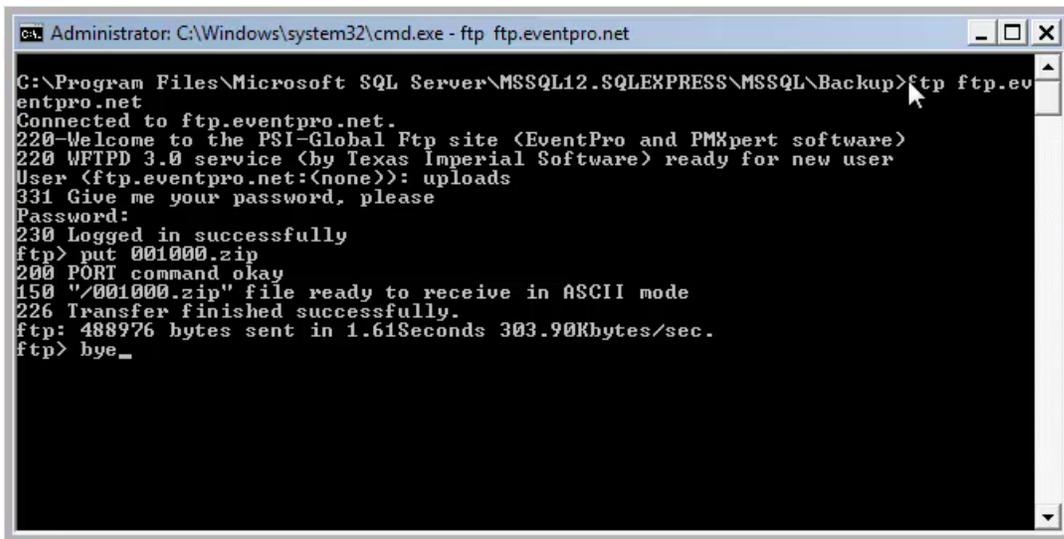


5. You will then be prompted for a Password: **uploadsftp**
6. Once you're logged in, at the ftp> prompt, you will type: **put [zip file you created]** e.g. put 123456.zip



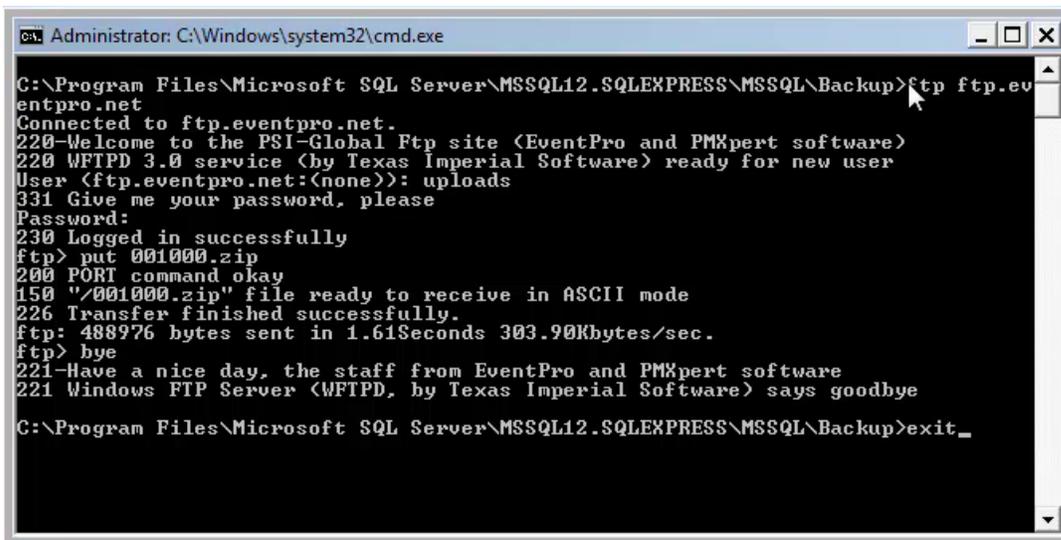
```
Administrator: C:\Windows\system32\cmd.exe - ftp ftp.eventpro.net
C:\Program Files\Microsoft SQL Server\MSSQL12.SQLEXPRESS\MSSQL\Backup>ftp ftp.ev
entpro.net
Connected to ftp.eventpro.net.
220-Welcome to the PSI-Global Ftp site (EventPro and PMXpert software)
220 WFTPD 3.0 service (by Texas Imperial Software) ready for new user
User (ftp.eventpro.net:(none)): uploads
331 Give me your password, please
Password:
230 Logged in successfully
ftp> put 001000.zip
```

7. It will execute the file transfer.
8. To disconnect, type: **bye**



```
Administrator: C:\Windows\system32\cmd.exe - ftp ftp.eventpro.net
C:\Program Files\Microsoft SQL Server\MSSQL12.SQLEXPRESS\MSSQL\Backup>ftp ftp.ev
entpro.net
Connected to ftp.eventpro.net.
220-Welcome to the PSI-Global Ftp site (EventPro and PMXpert software)
220 WFTPD 3.0 service (by Texas Imperial Software) ready for new user
User (ftp.eventpro.net:(none)): uploads
331 Give me your password, please
Password:
230 Logged in successfully
ftp> put 001000.zip
200 PORT command okay
150 "/001000.zip" file ready to receive in ASCII mode
226 Transfer finished successfully.
ftp: 488976 bytes sent in 1.61Seconds 303.90Kbytes/sec.
ftp> bye_
```

9. To exit the command window, type: **exit**



```
Administrator: C:\Windows\system32\cmd.exe
C:\Program Files\Microsoft SQL Server\MSSQL12.SQLEXPRESS\MSSQL\Backup>ftp ftp.ev
entpro.net
Connected to ftp.eventpro.net.
220-Welcome to the PSI-Global Ftp site (EventPro and PMXpert software)
220 WFTPD 3.0 service (by Texas Imperial Software) ready for new user
User (ftp.eventpro.net:(none)): uploads
331 Give me your password, please
Password:
230 Logged in successfully
ftp> put 001000.zip
200 PORT command okay
150 "/001000.zip" file ready to receive in ASCII mode
226 Transfer finished successfully.
ftp: 488976 bytes sent in 1.61Seconds 303.90Kbytes/sec.
ftp> bye
221-Have a nice day, the staff from EventPro and PMXpert software
221 Windows FTP Server (WFTPD, by Texas Imperial Software) says goodbye

C:\Program Files\Microsoft SQL Server\MSSQL12.SQLEXPRESS\MSSQL\Backup>exit_
```

10. Send an email to Support@eventpro.net to let us know that the database has been transferred.

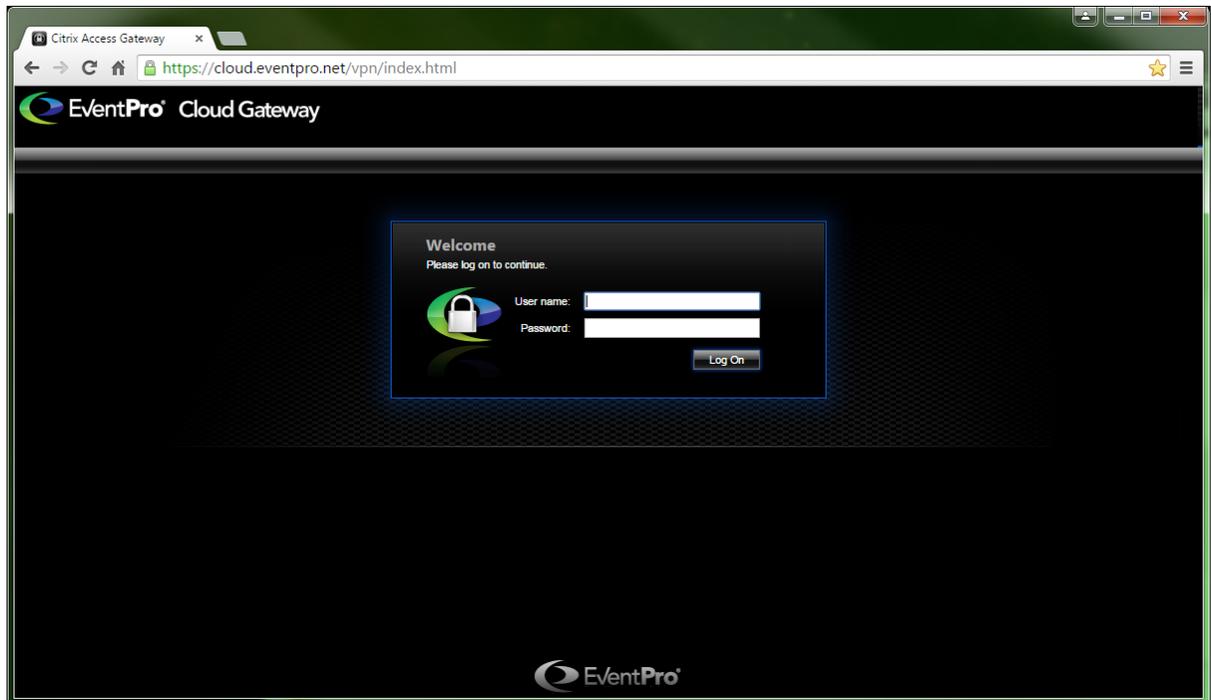
Step 2: Login First Time as Admin

If you sent your data to be converted, as per the instructions above, we will notify you when the data is ready. When you have been duly notified, you can access your converted data in the EventPro cloud application with these instructions.

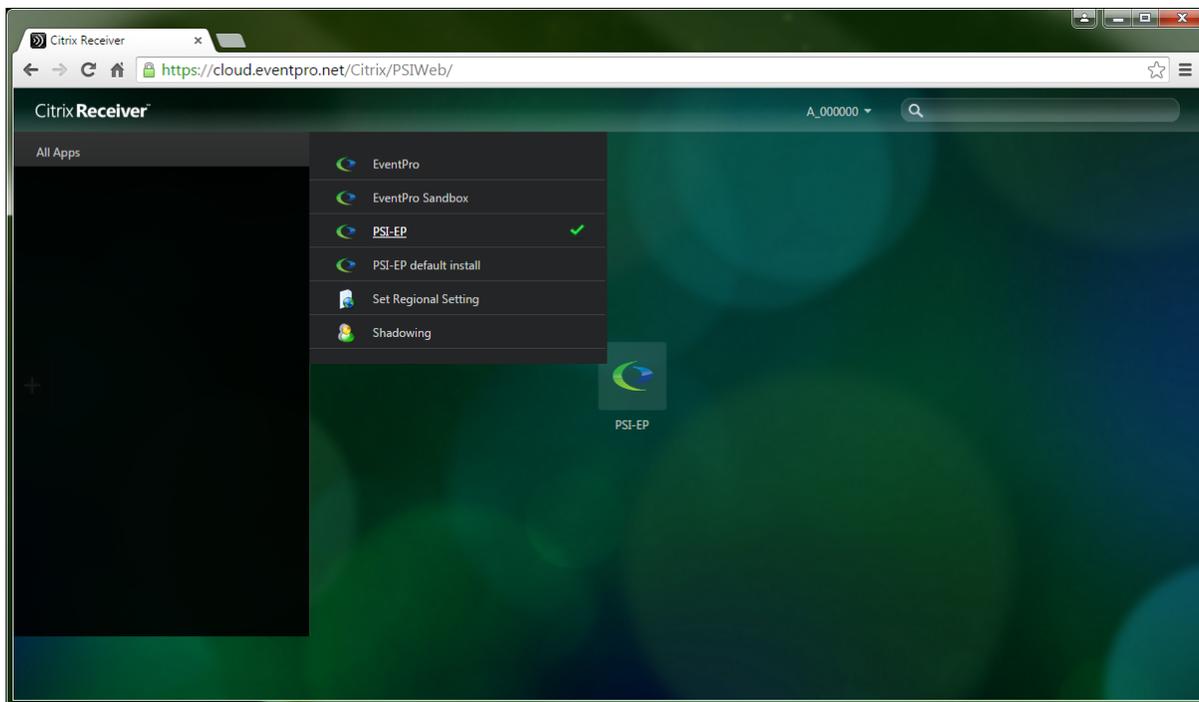
If you are using the EventPro Cloud application with an entirely new database, you can also follow these instructions to log in and begin using EventPro.

1. In your internet browser, go to <https://cloud.eventpro.net>.
2. Your EventPro cloud application will have a default administrative user already created. You can log in with these default credentials:
 - a. **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).
 - b. **Password:** **EventPro1234** (once you are in EventPro, you will want to change this password for this admin user).

Click **Log On**.



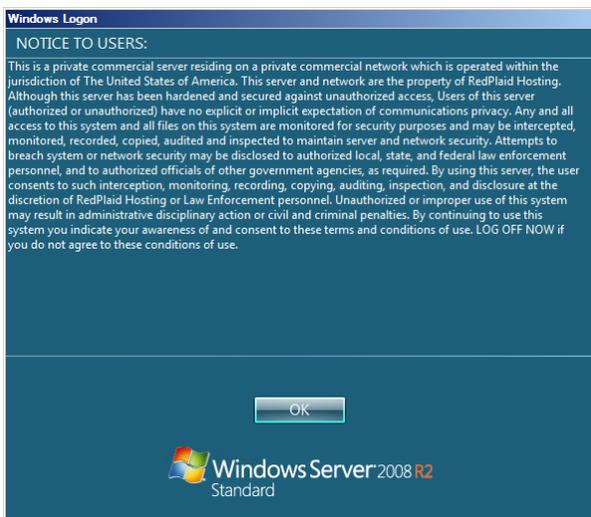
3. If this is the first time you are accessing EventPro in the cloud, you will need to install CitrixReceiver.
 - a. In the dialog that appears, choose the option "**I agree with the Citrix license agreement**", and click **Install**.
 - b. In the next dialog, click **Run**. The **CitrixReceiverWeb.exe** file will download and install.
 - c. If you use **Internet Explorer** as your browser, please note these extra steps you need to take:
 - i. When asked, choose **Yes** in order to allow CitrixReceiver to make changes to the computer.
 - ii. When asked, choose **Allow** in order for Citrix Systems, Inc. to open web content using CitrixReceiver on the computer.
4. The CitrixReceiver home screen will be displayed.
5. If this is the first time you have logged into EventPro in the cloud, you will have to add the application to your screen.
 - a. Click the plus sign (+) along the left sign of the screen.
 - b. Click **All Apps**.
 - c. Choose EP from the list. It will now become a part of your CitrixReceiver home screen.



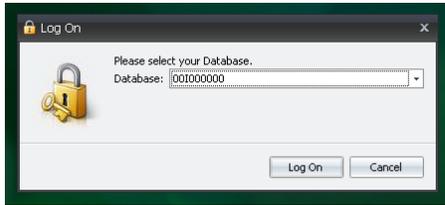
- 6. On the CitrixReceiver home screen, click the EP app icon you added. The **Windows Logon** dialog should appear.

If the Windows Logon dialog doesn't appear, and nothing seems to be happening, it is very likely that your browser settings are **preventing plug-ins** from running. The browser will probably display some kind of indication - perhaps in the address bar or a pop-up - that it is **blocking Citrix Receiver**. You must allow Citrix Receiver to run in order to access EventPro's cloud application.

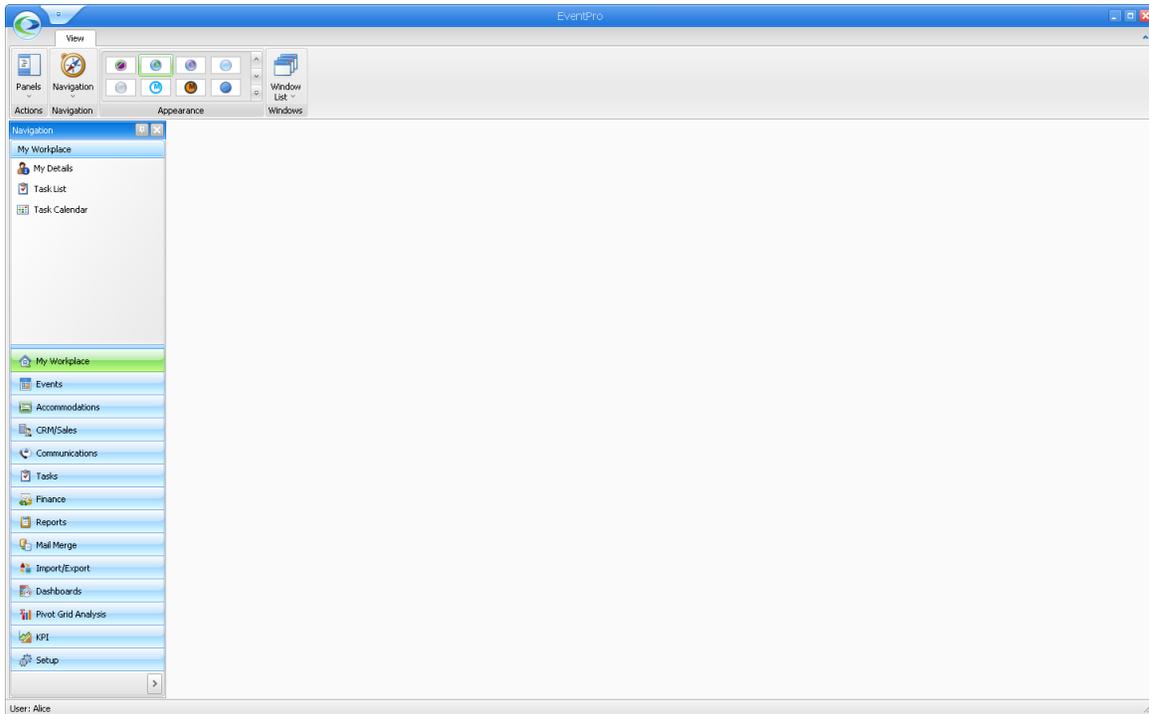
- 7. If you agree with the conditions of use that appear in the **Windows Logon** dialog, click **OK**.



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



9. The EventPro screen appears.



10. The first thing you will want to do is **CHANGE YOUR ADMIN PASSWORD**, which you can do under **My Details**. Please do not leave it 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. Review the requirements for a cloud password under [Cloud Password Policy](#)^[32].

Now, if applicable, you can create other EventPro Users in the program and set their user rights so that they can begin using EventPro as well.

Note that you can also edit the "admin" part of the default login name, so that instead of admin_123456, it can be Bill_123456 or Jane_123456, or whatever you want to use as part of the login name.

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.

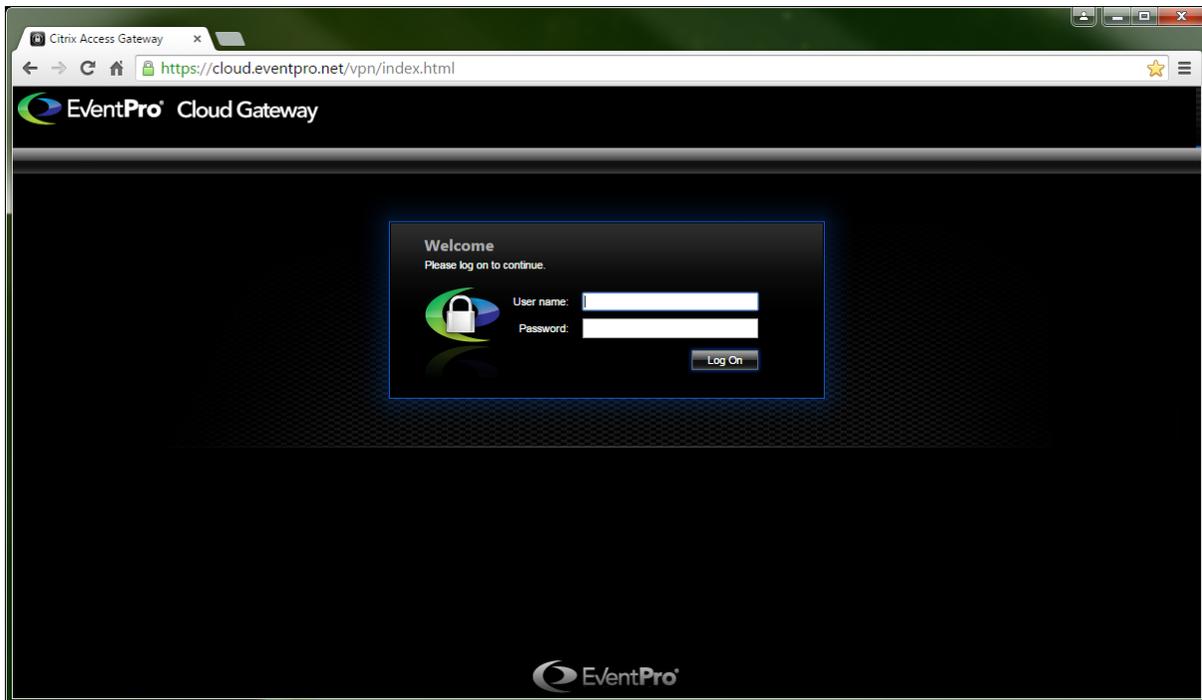
- The password must not contain your User Name
- The password must contain characters from at least 3 of these 5 categories:
 - Uppercase characters
 - Lowercase characters
 - Digits 0 through 9 (Base 10 digits)
 - Non-alphanumeric characters ~ ! @ # \$ % ^ & * _ - + = ` | \ () { } [] : ; " ' < > , . ? /
 - 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.

Cloud Log In

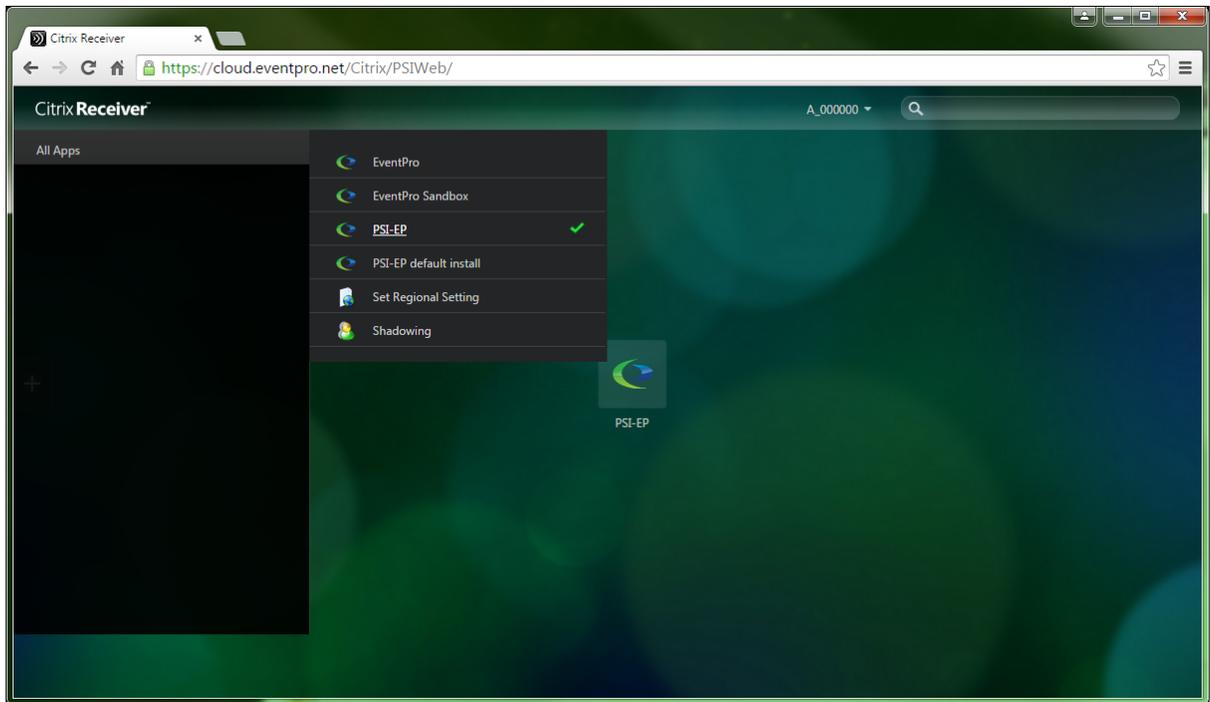
You should already have an EventPro Cloud user name and password assigned to you.

If not, please consult a user with sufficient security rights to create a user for you.

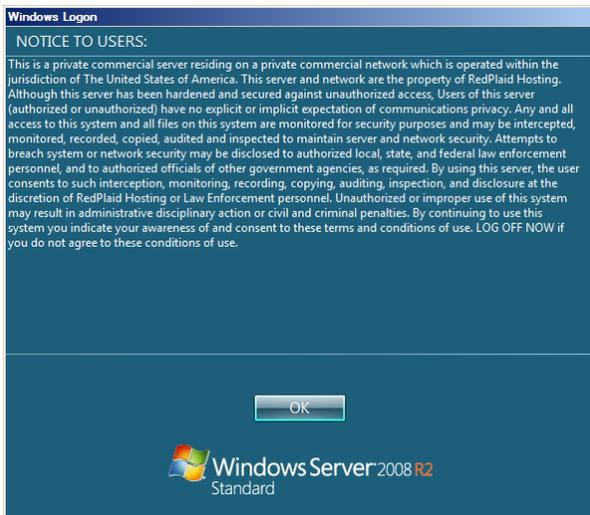
1. Go to <https://cloud.eventpro.net>.
2. Enter your User Name and Password.



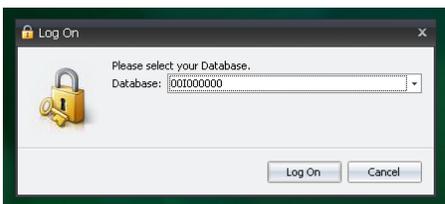
3. If this is the first time you have logged in to EventPro, you will have install **CitrixReceiver**.
 - a. In the dialog that appears, choose the option "**I agree with the Citrix license agreement**", and click **Install**.
 - b. In the next dialog, click **Run**. The **CitrixReceiverWeb.exe** file will download and install.
 - c. If you use **Internet Explorer** as your browser, please note these extra steps you need to take:
 - i. When asked, choose **Yes** in order to allow CitrixReceiver to make changes to the computer.
 - ii. When asked, choose **Allow** in order for Citrix Systems Inc. to open web content using CitrixReceiver on the computer.
4. The CitrixReceiver home screen will be displayed.
5. If this is the first time you have logged into EventPro in the cloud, you will have to add the EP application to your CitrixReceiver home screen.
 - a. Click the plus sign (+) along the left sign of the screen.
 - b. Click **All Apps**.
 - c. Choose EP from the list. It will now become a part of your CitrixReceiver home screen.



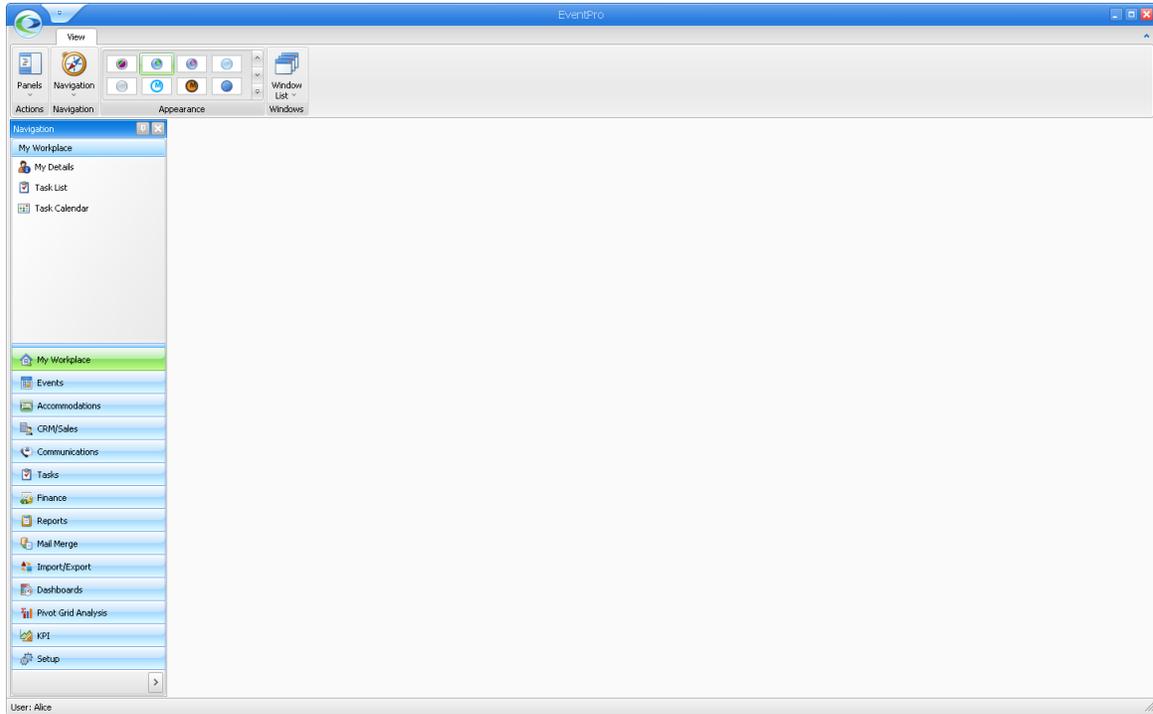
- 6. On the CitrixReceiver home screen, click the EP app icon.
- 7. The Windows Logon appears. If you agree with the conditions of use, click **OK** to continue logging in.



- 8. If you have more than one database, select the correct database from the drop-down list and click **Log On**.



- 9. The EventPro screen appears.

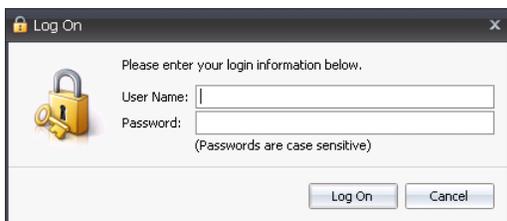


Local/Network Log In

You should already have an EventPro application user name and password assigned to you.

If not, please consult a user with sufficient security rights to create a user for you.

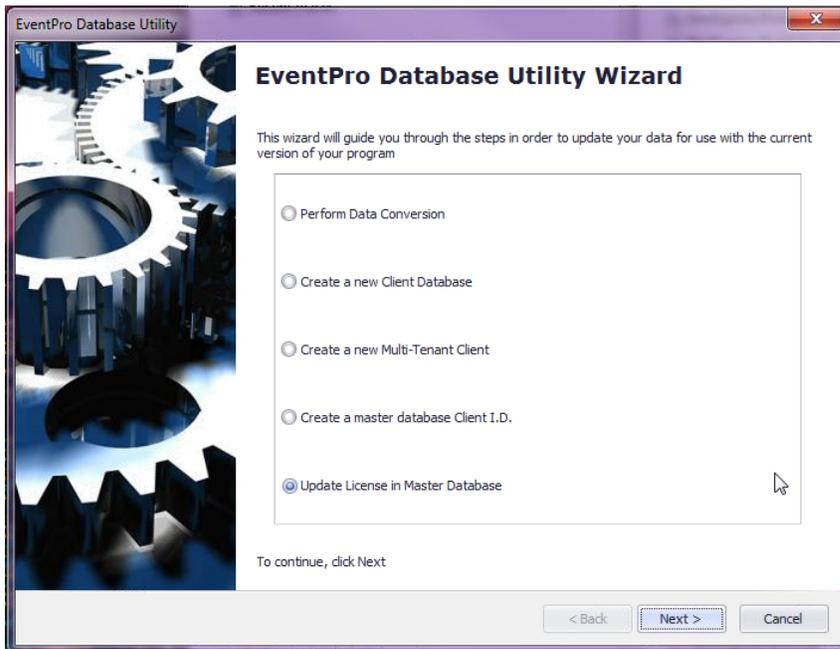
1. Double-click the EventPro shortcut icon on your desktop.
2. Enter your **User Name** and **Password** in the **Log On** dialog.



3. The EventPro program opens.

Update Software License

1. Login to the EventPro **Support Website** with your 6-digit 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. When first installing EventPro, you probably created a specific folder for your EventPro-related downloads, e.g. **C:\PSI Applications\EventPro\Installs**.
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.



- a. Choose the **Update License in Master Database** option. Click **Next**.
 - b. **Database Information:**
 - i. Enter in your **Database Type** and **Server** name.
 - ii. If you are using **SQL Authentication**, check the Authentication checkbox and enter in the SQL server username and password.
 - iii. If you are using **Windows Authentication**, leave the Authentication checkbox unchecked.
 - c. **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.
 - d. Click **Update**.
6. **"Completed"** will be displayed in the **Results** section of the **Database Conversion Complete** window. Click **Finish**.

7. Your license has now been updated. You (as the person with admin rights to perform this update) should log into EventPro first, before other users, to complete the update process. After you have logged into EventPro, the other users can log in as usual.

Update Cloud Software

You will not need to download and install anything to update the Cloud software. If there has been a software update since you last logged in, a dialog will inform you that the software has been updated and 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 in 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, if you have multiple users in the cloud software, it is important that you all update at the same time so that you are not operating in different versions.

Ensure that you have:

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

Contact Support

If you require assistance with downloading, installing or logging into your EventPro application, please contact the Support Department in the region nearest you:

- **EventPro Support: North America**
 - Phone: (306) 975-3737, Press 2 for Support
 - Fax: (306) 975-3739
 - Email: Support@EventPro.net
- **EventPro Support: Australia & New Zealand**
 - Phone: +612 9504 6999
 - Fax: +612 9570 1233
 - Email: Support.AU@EventPro.net
- **EventPro Support: United Kingdom**
 - Phone: 0871 218 0912
 - Fax: 0700 598 0910
 - Email: Support.UK@EventPro.net

Contact Us

With offices in around the world, we provide sales, training and support services to our clients in all time zones.

Please select the location closest to you:

North America

	Sales	Support	Training	General Enquiries
Email:	Sales@EventPro.net	Support@EventPro.net	Training@EventPro.net	Business@EventPro.net
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Fax:	(306) 975-3739			
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Report Errors in the User Manual

Please report errors or submit suggestions regarding the content of the User Manual to Manual@EventPro.net.

For questions related to program functionality, please contact Support@EventPro.net.

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