

# Installing and Setting up SiteMaster 200 v4

What you need to know.

2020 – Matrix Security

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## Important Information

After you install SiteMaster and enter your Registration Number, you must also activate your software by registering it with Matrix Security. By registering the program, you receive an Activation Key that you enter into SiteMaster. You only need to do this once. Until this is done, SiteMaster will continue to count down the number of times that you may still log into the software. If you allow this to expire, then you will be prompted to enter your activation key when you run the program.

A complete Help Manual is built into the software program. The Help Manual (HelpSM4.chm) is located in the SiteMaster install directory, SITEMASTER 200® v4.0. You can also access the updated Help Manual on-line at <https://www.matrixsecurity.com/4Training.html>.

SiteMaster was designed to provide you with a number of different ways to get your data loaded into the program. The best ways are by importing your data, and/or using the built-in data loading Wizards.

We provide sample files on our Website that you may download and use for data importing, or to help you set up your own import files. These preferred methods for adding data, establish important relational links cutting down your data entry time. Even though, you can find an Add button on almost every screen, such as Key Numbers, this doesn't mean that you should use it. So, we encourage you to learn all of the different data entry methods.

For those of you who want to jump right into the program and look around, we recommend that you at least review the Data Entry Walk-through topic and watch the optional training videos in that topic for setup. All users should review the Help Manual in-depth before committing to serious data entry and program setup.

## System Requirements

Operating Systems: Windows 7, 8, 8.1, 10, 11 = 32- or 64-bit

Memory: Recommend, 1 GB or better

Processor: Recommend, 2.0 GHz or better

Hard Disk: 6 GB or better needed for SQL Server temporary files.

Processor Type:

x64: AMD Opteron, AMD Athlon 64, Intel Xeon with Intel EM64T support, Intel Pentium IV with EM64T support

x86: Pentium III-compatible processor or faster

Drive: A CD/DVD drive, as appropriate, is required for installation from disc. You may also download the Installer from our website to install without a CD/DVD drive.

Monitor: 1024 X 768 minimum resolution

Other Components: .NET 3.5 SP1 Framework

Remote Server: SQL Server 2005 or better

Microsoft Edge browser to access the on-line Help Manual from within the SiteMaster 200 v4.0 program.

## Installing SiteMaster 200 v4

**NOTE:** There is additional information on pages 7 and 8 for the setup of SiteMaster with a remote SQL Server.

To install SiteMaster, you must be a Full Windows Administrator. If you are not, do not attempt to install the program.

Before installing SiteMaster, it is essential that you contact your IT Group and/or DBA, due to SiteMaster's database integration with Microsoft SQL Server.

### **Important MSSQL Server installation notes:**

SiteMaster uses a MSSQL Server Database Backend, so its databases (datasets) are managed by SQL Server. Matrix Security, the developer of SiteMaster, does not support your management of SQL Server because it is licensed to you and supported by Microsoft. Optionally, we install a version of SQL Server (SQL Server Express 2012) included with SiteMaster as a convenience for those using a stand-alone PC setup and those who may not have a DBA. You may also install your own preferred version of SQL Server. See Installation Steps below.

The SQL Server version that gets installed with SiteMaster must be set up in Mixed Mode. If you wish to use an existing SQL Server installation, then your existing installation would have had to be originally installed as mixed-mode. You can also spin off a new instance of SQL Server and install it as Mixed Mode. For a remote SQL Server, we recommend a unique instance for SiteMaster.

You have installation options. You can install both SQL Server Express and SITEMASTER 200®. This option is intended for a stand-alone computer application where the computer acts as the server.

You can install just SITEMASTER 200® on the client workstation(s) by cancelling the SQL Server Express installation and continuing with the SITEMASTER 200® installation. Do this by closing the SQL Server Installation Center screen when it is first displayed. And, then click Yes, when asked to continue. Use this method when you wish to add the SiteMaster datasets (databases) to a SiteMaster instance of SQL Server that you created on your remote server. This is the normal setup for a multi-user application of SiteMaster 200 v4.

If you want to allow the PC with your own SQL Server Express to accept remote connections, you may need to make setting changes during the installation of SQL Server Express. For example, SQL Server Browser is disabled by default, so you may need to change that, plus port and firewall settings. We have an article on the Support page our website that may be helpful. Keep in mind, you will need to have SQL Server Management Studio in order to manage SQL Server Express for users and settings. This is one reason, we recommend a full standard version of SQL Server for remote connections.

### Installation Steps for Stand-alone PC:

**Note:** These steps below are for installing both SQL Server Express 2012 and SITEMASTER 200® for a stand-alone PC. You also have the option to install your own version of SQL Server if you prefer. For installing SiteMaster for use on a remote server, skip to page 4. Follow those instructions if you are providing your own SQL Server version for the stand-alone PC as the instructions are the same in this case.

1. Insert the CD into your CD/DVD drive or run the Setup (exe) file that you downloaded and extracted from [www.matrixsecurity.com](http://www.matrixsecurity.com). If using the downloaded Setup (exe), do not place it on your Desktop for installation. Use another location. **Stop:** Do you have our latest version? Check for the latest update on the Matrix Security website.
  2. Open your CD/DVD drive and copy the Setup file. Do not place it on your Desktop. Use another location. Double-click on the Setup.exe file.
  3. Click the Install button on the SITEMASTER 200® v4.0 – InstallShield Wizard screen.
  4. On the SQL Server Installation Center screen, click the option for, New SQL Server stand-alone installation or add features to an existing installation.
  5. On the License Terms screen, tick that you accept the license terms for SQL Server, and then click Next.
  6. On the Products Update screen, click Next.
  7. After the Install Setup Files is complete, click Next.
  8. On the Feature Selection screen, make sure that all of the features are checked, and click Next.
- On the Instance Configuration screen, click Next. Note: If you have an existing version of SQL Server on the PC, consider renaming the SiteMaster named instance/instance ID to something other than SQLEXPRESS. So, in case SQLEXPRESS already exists on the PC.
10. On the Server Configuration screen, click Next.
  11. On the Database Engine Configuration screen, select the Mixed Mode option, and then enter and confirm a Password for the SQL Server system administrator (sa) account. This is only a requirement for this installation step, and you can type in any password.
  12. On the Error Reporting screen, click Next. This begins the installation process for SQL Server.
  13. On the Complete screen, check to see that all features succeeded, and click Close.
  14. Close the SQL Server Installation Center screen to begin the SITEMASTER 200® v4.0 installation. You may receive a screen that the SQL Server installation has been terminated, asking you if you want to continue. Click Yes.
  15. On the Welcome screen, click Next.
  16. On the Customer Information screen, you have the option to change this information. Click Next.
  17. On the Destination Folder screen, click Next. You have the option to change the path of the installation to another location.
  18. On the Ready to Install the Program screen, click Install.
  19. On the final InstallShield Wizard Completed screen, click Finish.
  20. To run SiteMaster, double-click on the SITEMASTER 200® v4.0 shortcut link on your Desktop. **Note:** Skip down to, **When You First Run SiteMaster 200 v4**, to connect SiteMaster to SQL Server.

### Installation Steps for a Remote SQL Server:

Note: This method does not require, nor is it recommended, for you to install the provided version of SQL Server Express 2012 on the workstation. You can terminate this SQL Server installation by closing the SQL Server Installation Center screen when it gets displayed.

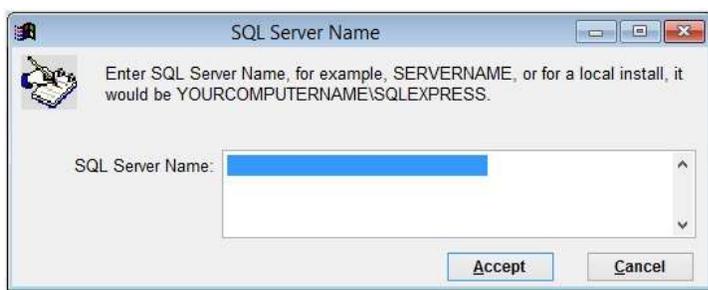
1. Insert the CD into your CD/DVD drive or run the Setup (exe) file that you downloaded and extracted from [www.matrixsecurity.com](http://www.matrixsecurity.com). If using the downloaded Setup (exe), do not place it on your Desktop for installation. Use another location.
2. Open your CD/DVD drive and copy the Setup file. Do not place it on your Desktop. Use another location. Double-click on the Setup.exe file.
3. Click the Install button on the SITEMASTER 200® v4.0 – InstallShield Wizard screen.
4. You will see files getting extracted. When the SQL Server Installation Center screen is displayed, simply close this screen (X button).
5. You will receive a screen message that the SQL Server installation has been terminated (failed) and do you want to continue? Click Yes to terminate. This will begin the SiteMaster installation.
6. On the Welcome screen, click Next.
7. On the Customer Information screen, you have the option to change this information. Click Next.
8. On the Destination Folder screen, click Next. You have the option to change the path of the installation to another location.
9. On the Ready to Install the Program screen, click Install.
10. On the final InstallShield Wizard Completed screen, click Finish.
11. To run SiteMaster, double-click on the SITEMASTER 200® v4.0 shortcut link on your Desktop. **Note: The information below covers your connection for SiteMaster and SQL Server.**

### When You First Run SiteMaster 200 v4

**For Stand-alone PC install:** When you first run SiteMaster, you will be presented with a screen to enter the SQL Server Name. The name of your computer followed by \SQLEXPRESS is displayed by default. Note: If you previously changed the instance name during the installation, then change SQLEXPRESS to that name.

MYCOMPUTER\SQLEXPRESS or MYCOMPUTER\INSTANCENAME

Click Accept, then skip down to, **Entering the Service Account's Password**, below.



**For Remote SQL Server Install:** Note: It is required, that you have already set up a standard version of SQL Server on your remote server for SiteMaster. SiteMaster creates and adds its own databases. Also, see **SiteMaster 200 v4 Recommended Setup for Remote Server**, and **Checklist for Installing SITEMASTER 200® v4 for a Remote Server Application**, below, for additional information.

**Required:** The user first installing will need a sql login account on the SQLServer using their windows account. Their account needs sufficient permission to create databases, tables, and user accounts. These permissions will not be required for additional client installations as the databases and service account are now created.

Enter your existing SQL Server Name. For example, SERVERNAME, or the full path name depending on your specific server configuration. Contact your DBA, if you are unsure.

Note: You may receive a connection error if the name is not entered properly or if the connection to the server is not set up properly. Contact your Database Administrator for help.

**Note:** If you have already installed to be used on a stand-alone PC and want to change this to a remote SQL Server, you will need to delete the ODBC.dat file that's located in the SiteMaster folder inside your Documents folder, or it may be in the SiteMaster install directory (SITEMASTER 200® v4.0). This will cause the SQL Server Name screen to open when you run SiteMaster. Enter your SERVERNAME, or the full path name depending on your specific server configuration.

**Note:** If you need to transfer (move) your data to another server, see **Moving SiteMaster v4 Databases from one SQL Server to Another SQL Server below on page 11. You cannot move your SiteMaster databases from one SiteMaster system to another using the SQL Server Management tool.**

#### Entering the SQL Server Service Account's Password:

After the SQL Server Name screen, SiteMaster displays the SQL Server Service Account Password screen. Enter a password for the service account that meets your password complexity settings. You will be presented with a second screen for confirming the password. This is for the SiteMaster service account.



#### When SiteMaster Starts Up:

1. The datasets get loaded in the background, and then the Welcome to SITEMASTER 200® version 4.0 screen is displayed.
2. You have the choice to View SiteMaster Demonstration or to Enter Registration Number. If you have your registration number, select the Enter Registration Number option. If this is for the demonstration version, select View SiteMaster Demonstration and follow directions.

**Note:** After entering your registration number, you can always switch back to Demodata for training and testing.

3. On the Enter Registration Number screen, type in your registration number that can be found in the booklet, read the License Agreement, and tick the checkbox that you have done so.

**Important:** The Software License Agreement is in the Help Manual (HelpSM4.chm) located in the install directory (C:\Program Files or Program Files (X86)\Allegion\SiteMaster 200 v4). Click the Software License Agreement link under About SiteMaster.

4. Click OK, and the Registration Complete screen is displayed. Click OK on this screen.

5. A second Registration Complete screen is displayed, explaining that you must register SiteMaster with Matrix Security in order to activate the software. Click OK, to continue.

**Note:** You don't have to activate SiteMaster right-away, but as you continue to run SiteMaster, a count-down system is engaged that will display how many times that you may continue to run the program before you must enter your activation key.

6. The SM20040 data gets loaded, and the Log In to SITEMASTER 200® v4.0 screen is displayed. Passwords are required in SiteMaster.

7. For the User Name type in **ADMIN**. For the Password type in **ADMIN** (case sensitive). The User Name field defaults to uppercase, but the Password field is case sensitive.

8. After typing in the ADMIN password, press your Tab key on your keyboard to turn on the Log On button.

**Note:** On the Log In to SITEMASTER 200® v4.0 screen, you have a choice to open the User Program (default) or the Administration Program. The User Program is for your operational users of SiteMaster. The Administration Program is for adding new named users and setting their status as administrator or non-administrator users. This is also where you control user access to the two new datasets (Demodata and SM20040), and perform maintenance functions on your data, such as data backup/restore. When a user logs in, who is not set up as an administrator, that user will not have the Administration Program option on the screen.

9. Keep the option to open the User Program, and click Log On. The Initial Password Setup screen is displayed, letting you know that you will need to change your password. Click OK.

**Very Important:** The password that you type in to change your password MUST MATCH the complexity settings of your Windows password settings.

If you don't know what those are ask your IT Group. Later, it's important that you set up the password complexity settings used in SiteMaster (Administration Program > Access Control screen) to match those used in Windows.

10. On the Change Password screen, type in the ADMIN password (case sensitive), and then a new password (case sensitive). Then, confirm the password by typing it in again (case sensitive).

**Note:** You are changing the password of the only SiteMaster user in the system, so do not forget the new password!

After you confirm your password, press your Tab key on your keyboard and click Finish.

11. Click OK, on the next screen that lets you know your password has been changed.

12. Congratulations, SiteMaster is installed and running.

13. The final steps are registration and activation.

14. Quit SiteMaster and then run the program again. On the Log In screen, type in your user name and password, and tick the Administration Program option. Click Log On. In the Administration Program, click on the Utilities pull-down menu and select the Enter Registration Number or Activation Key option. Record your Registration Number and Site Code. You can copy the number and code to the clipboard, by clicking the Copy Registration Info to Clipboard button.

15. When you're ready, register SiteMaster to receive your Activation Key. Go to [www.matrixsecurity.com](http://www.matrixsecurity.com) and click the v4 Registration link. You will need to enter your Registration Number and Site Code, plus some additional information. We do not store customer data on our website, so please allow up to 24 hours for us to process your registration and for you to receive your Activation Key by email.
16. After, you get your Activation Key, run SiteMaster and log into the Administration Program.
17. Click the Utilities pull-down menu at the top of the main screen, and select Enter Registration Number or Activation Key.
18. On the Enter Activation or Upgrade Key screen, type in the Activation Key that you received from Matrix Security, and click Finish. Your installation is now finalized and registered.
19. At this point, you need to figure out how to set up and use SiteMaster. The user ADMIN is a super administrator, and was not intended to be used as a normal operational user. You may wish to add at least one additional named user in the Users Admin screen for normal operations. Decide, if you want to add and set up your additional user(s), or if you want to go back to the User Program to learn the operations. In either case, you can use the Help Manual for complete information about both the Users and Administration Program. There are training videos for user and system setup on our Training page: <https://www.matrixsecurity.com/4Training.html>
20. When starting out, we recommend that you use our training resources, so you're not fumbling around. The preloaded Demodata dataset is provided, so you can learn to navigate and see how the data is tied together. Use the provided or the on-line Help Manual, plus the on-line Training Videos to learn how to set up SiteMaster and enter your data. We also offer free, but limited training to get you going. Fee-based training is also available.
21. To begin using the Help Manual, select the proper SiteMaster product type option that you purchased, so Full Version, Full Version with Lockshop Enhancement, or Existing SiteMaster v3 User. This will step you through the information that you need to know about setting up the program and performing data entry.

### **Load Data from Previous Version 3**

This information is covered in the Help Manual, but we recommend that you check for the latest documentation on our Website for up-to-date information.

For the manual, go to the Help Central page, click the Existing SITEMASTER 200® v3 User link to find out how. There's a link on the page with the instructions.

On the Support page of our Website, look for the tab, Loading v3 Data into v4.

**Note:** After loading your v3 data into v4, check your key number data for the total key quantities. If you may have skipped certain v3 updates in the past, or if you may have wound up with data corruption, call Matrix Security for recommendations.

### **SiteMaster 200 v4 Recommended Setup for Remote Server**

We recommend setting up a separate instance of SQL Server, if possible, with restricted access since this is building security information. The data should be protected at the server level as well.

With the one exception listed below, we now use a single service account (\_1FG04U44T) for making the connection to the database.

The password is entered at the beginning, just after entering the server name when setting up the software initially. This info is stored encrypted in the ODBC.dat file. That password is not used to access the SiteMaster software, just to make the connection. SiteMaster tracks its own internal users, their authentication and authorization within the system itself.

By restricting the service account to just the SiteMaster databases, we should be limiting the reach of this service account to only SiteMaster information, but please let us know if you find that to be different in your environment.

The service account currently needs the sysadmin role on the server, as well as membership to the master table as a dbowner. We will be looking into reducing the level of access required for that account in the future. We have many users that do not have a dba to work with, so we needed to be able to setup and control their environment for them. This requires the service account create and delete databases in the system as this is part of the feature set of SiteMaster.

The only exception to this is when you are initially setting up SiteMaster or setting up additional workstations. Initially, we will attempt to use a trusted connection to create the service account. Once the service account is connected, we no longer use the trusted account connection. So, the person setting up SiteMaster will need AD (or window login) access to the SQL Server database. You can avoid that initial trusted connection when setting up additional workstations by copying the ODBC.dat file from an established workstation to the new workstation. Add the copied ODBC.dat file to the SITEMASTER 200 v4.0 install directory on the client. Doing so, when you run SiteMaster you will go straight to the SiteMaster logon screen.

For all SiteMaster client users, in order for them to have access to SQL Server, they must be manually added to SQL Server or they may be denied access. You can create an access group in SQL Server and add/remove the users as needed.

## Final Checklist for a Remote Server Installation

In order to properly install SiteMaster v4 for a remote server application, it is essential that the following checklist of items are completed. This checklist may also help you to troubleshoot a potential problem. If you need to contact Matrix Security for a support issue relating to your SiteMaster v4 installation, such as a connection problem, we will first ask you if you have completed this checklist.

- You are installing SiteMaster version 4.03\_11 or greater. Check for an update on our [Support](#) page.
- SQL Server is not installed on the client PC(s). So, only SiteMaster gets installed.
- Only your full version of SQL Server is installed on the remote server. Do not install the SQL Server 2012 Express version that is provided. That's for a stand-alone PC installation.
- Do not install SiteMaster on your remote server. The SiteMaster program only gets installed on the client PC(s).
- We recommend that you create a dedicated SQL Server Instance for SiteMaster.
- You must install the SQL Server Instance used for SiteMaster as Mixed-Mode for authentication.
- You do not use SQL Server to add the SiteMaster databases. SiteMaster is programmed to add the databases contained in SQL Server.
- You must be a local administrator on the PC to install SiteMaster. The person installing SiteMaster, must have a SQL login account on the SQL Server using their Windows account. Their account needs sufficient permission to create databases, tables, and user accounts.
- All Windows account users (admins and standard users) of SiteMaster, must be added to SQL Server. You can create an access group in SQL Server, and then add or remove the users as needed.
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## SiteMaster 200 v4 Frequently Asked Questions for Setup and Installation

### Does it need SQLServer?

- No, it will install SQLExpress on the local workstation and use that for a stand-alone installation. You can also install your own preferred SQL Server version, before installing SiteMaster.

### Will it install on a single workstation like it used to?

- Yes, it will install SITEMASTER 200 and SQLExpress on the local workstation.

### Do you need a Database Administrator (DBA) to manage this software?

- No, it is designed to manage itself on whatever Microsoft SQLServer or SQLExpress server you designate when the software first runs.

#### **Tech details:**

For SQLServers - The user installing SiteMaster will need permission to create a service account, make it a sysadmin and add it as a dbowner of the master file.

### What kind of information does SiteMaster keep and how secure does it need to be?

- SiteMaster 200 contains information about your key system, keeping track of what key opens what door in your facility. For that reason, we suggest you isolate SiteMaster data onto its own named instance. That instance should have restricted access.

### Recommended process for setting up with a SQL Server or if you're having issues using SQLExpress.

Note: If you have already installed SiteMaster, don't uninstall. You can use your existing installation.

1. The users first installing will need a sql login account on the SQLServer using their windows account. Their account needs sufficient permission to create databases, tables, and user accounts.
2. Install SiteMaster v.4 on the initial workstation.
3. Upgrade to the latest version on the website. This process requires version 4.02\_03 or greater.
4. When you first run SiteMaster, it will create the system tables as well as the demodata dataset. It will also establish a service account using with a password you enter.
5. SiteMaster creates a file called ODBC.dat in the user's My Documents\SiteMaster folder.
6. When installing on subsequent workstations, the person installing will either:
  - Need to have the same permissions and the same service account password as initially entered.
  - Or, to copy the ODBC.dat file from the original user's Documents\SiteMaster folder into the new user's Program Files\Allegion\SITEMASTER 200® v4.0 folder.

Note: this process works even if you have already run SiteMaster and set up the connection. Repeat this process for each additional workstation.

## Uninstalling SiteMaster and SQL Server Express on a Stand-Alone PC

The following instructions for uninstalling SQL Server 2012 Express, only pertains to the installation of the SQL Server version that Matrix Security provides for a stand-alone PC installation. This does not apply to any other version of SQL Server.

### Removing SiteMaster 200 v4

Note: You can follow these directions to uninstall SiteMaster from a PC whether or not SQL Server is installed on the local PC or on a remote server that you've set up.

1. Quit the SiteMaster program, so it's not running.
2. A full Windows administrator user must be logged into the PC.
3. Go to the Control Panel and select Uninstall a program.
4. Select, SITEMASTER 200® v4.0 from the list of programs and click the Uninstall link.
5. After, SiteMaster is uninstalled, go to Program Files or Program Files (X86) and locate the Allegion directory.
6. Delete the Allegion directory.
7. Go to your Documents folder and locate the SiteMaster directory.
8. Delete the SiteMaster directory. This completes the removal of SiteMaster 200 v4.

### Removing SQL Server 2012 Express

Note: You may want to just uninstall SQL Server from the PC. For example, you no longer require the installation of SQL Server on the local PC, because you have installed your own version of SQL Server on a remote server.

1. If SiteMaster is still installed then quit the program.
2. A full Windows administrator user must be logged into the PC.
3. Go to the Control Panel and select Uninstall a program.
4. Select, Microsoft SQL Server 2012 from the list of programs and click the Uninstall link.
5. Select the Remove option from the displayed screen.
6. Follow the instructions to completely remove SQL Server.
7. After SQL Server is uninstalled, refresh the Uninstall a program (Uninstall or change a program) screen.
8. If the Microsoft SQL Server 2012 Native Client is displayed in the list of programs, then uninstall this program as well.
9. Go to Program Files and to Program Files (X86) to locate the Microsoft SQL Server directory.
10. Delete the Microsoft SQL Server directory. Note: Prior to deleting the Microsoft SQL Server directory, you need to verify that you do not have any other versions of SQL Server installed on the local PC. If you do, do not delete the Microsoft SQL Server directory until you verify that databases from other possible programs are not installed within this directory.
11. Restart the PC. This completes the removal of SQL Server.

## Moving SiteMaster v4 Databases from one SQL Server to Another SQL Server

There are two different methods to move your data from your previous SiteMaster system to the new SiteMaster system. Update your copy of SiteMaster 200 to the latest version available. Support for these features requires version 4.03\_22 at a minimum. [Support \(matrixsecurity.com\)](http://matrixsecurity.com)

**Important:** For method **2.** below, from any existing PC or client workstation that already has SiteMaster v4 already installed, you can redirect and reconnect that client(s) to the new server. Otherwise, first install SiteMaster on any new PC to be used.

- 1. Export/Import a Complete Dataset** – Use this method to move your data from one system to another if your original system was installed on a stand-alone PC and your new system is on a remote server. However, if your site's SiteMaster database is large, it may take a long time to import the data.
- 2. Use Microsoft SQL Server Management Studio** – Use this method if you're changing the SQL Server. For example, the hard drive crashed or you're just upgrading SQL Server. Additionally, sites with a very large amount of data and/or multiple SiteMaster users may prefer this method for moving the data.

### Method 1. Export/Import a Complete Dataset

#### To export the data from the old SiteMaster system:

**Note:** Except for the admin, this method will not export your users' data if it exists, because that user data is kept in a different dataset. You will need to add your users afterwards.

1. Log into the Users Program.
2. Open or change to the dataset that you want to export data.
3. Go to the Utilities pull-down menu and select Import/Export Utilities.
4. Select, Export Complete Dataset.
5. In the Save As screen, select the location that you want to create the export file to and click Save.

#### To import the data into the new SiteMaster system:

1. Log into the Users Program.
2. Open the SM20040 dataset or change to the dataset that you want to import the data into.
3. Go to the Utilities pull-down menu and select Import/Export Utilities.
4. Select, Import Complete Dataset.
5. In the Import Data File screen, locate and select the export file to import the data.

### Method 2. Use Microsoft SQL Server Management Studio

1. Make sure to update your copy of SiteMaster 200 to the latest version available. Support for these features requires version 4.03\_22 at a minimum.

2. Using SQL Server's backup function, make a backup of the three SiteMaster databases. SM20040, MATRIXCTRL, DEMODATA

**Note:** you may have more than these or you may have named your SM20040 database to a different name. Be sure and include all your databases including the DEMODATA database, even if you do not use it.

3. Use SQL Server to restore the databases onto the new server.

4. Locate the ODBC.dat file on your computer where you run SiteMaster and delete the file. It may be in a few different places on your computer so you can use Windows Explorer's search feature to locate it.

5. Run SiteMaster. You will be asked to enter the name of the SQL Server. Enter the new server's name. Then enter a password for the service account.

6. SiteMaster should run normally and request you to log into the system. Log in as a User.

7. The system will identify that the databases have been moved and give you a message indicating that you will need to reactivate your system.

8. It will then give you a message that the system needs to be activated and that your times to run it has expired. This is expected. Closing that screen will take you to the activation screen, where you can get a copy of your registration number and current site code. Follow the instructions on the screen to get your new activation code. You will not be able to access your system until you have reactivated it. **Note:** the old site code will no longer be valid, you must use the new site code.

9. Once you have entered the new activation code, you should receive a message saying your system has been activated and it should behave normally. You may first see the DEMODATA dataset. Just change to your SM20040 dataset and your data should all be available. For any additional SiteMaster clients, update them to the same latest version of SiteMaster, and replace their existing ODBC.dat file with a copy of the new one that connects to the new SiteMaster server.

## Getting Help

**Installation Problems and program error reporting:** First contact your IT Group in case there may be a user permissions or system-side problem.  
(303) 938-9374 – Press 1

**Registration, activation/upgrade keys, sales, and order status:** [registration@matrixsecurity.com](mailto:registration@matrixsecurity.com) or (800) 622-4893.

**Support Resources:** Website for SiteMaster demonstration software, software updates, support documents and articles, and data-loading template files for key systems, building information, and personnel.  
<https://www.matrixsecurity.com/4Support.html>

### Training Resources:

On-Line Help Manual – A detailed help manual that covers all of the features and functions in SiteMaster.  
On-Line Training Videos – Browser based videos for setting up SiteMaster, using data-loading wizards, importing data, and issuing keys to personnel.  
<https://www.matrixsecurity.com/4Training.html>

Matrix Security, the developers of SiteMaster provides free help if you have a quick question about a feature. We also offer in-depth training both on-line and by phone that is fee based. Visit the [Training](#) page of our Website to find out more. Training: (303) 938-9374