

EDL, ERS Installation and Setup Guide

**EDL & ERS
Installation
Manual & Workbook**
Version 3.2.0

Notices

This document was produced by Prolink Corporation, 148 Eastern Blvd, Glastonbury, CT 06033.

Telephone: 860-659-5928

Fax: 860-633-7309

E-mail: sales@prolinksoftware.com

Internet: [http:// www.SPCOfficeBuddy.com](http://www.SPCOfficeBuddy.com)

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Table of Contents

1. INTRODUCTION	1
2. INSTALLING SQL SERVER 2005 AND MGMT STUDIO	2
2.1 INSTALLING MICROSOFT SQL SERVER 2005	2
2.2 INSTALLING SQL SERVER MANAGEMENT STUDIO EXPRESS	5
3. CONFIGURING MICROSOFT SQL SERVER 2005	7
3.1 NETWORK CONFIGURATION	7
4. INSTALLING THE ENTERPRISE DATA LOADER	10
4.1 INSTALLING ENTERPRISE DATA LOADER	10
5. SETTING UP THE SQL SERVER DATABASE	11
5.1 SETTING UP THE DATABASE AUTOMATICALLY	11
5.2 SETTING UP THE DATABASE MANUALLY	13
6. CREATING YOUR FIRST EVENT IN EDL	17
6.1 SETTING UP A FIRST EVENT	17
7. SETTING UP THE ENTERPRISE REPORT SCHEDULER	20
8. CONCLUSION	22

1. Introduction

This document is set up to guide you through the installation and setup of **Microsoft SQL Server 2005 Express Edition, SQL Server Management Studio Express, Enterprise Data Loader 3.2, and Enterprise Report Scheduler 3.2**. This guide does not have details on the specific features of these applications or their use, and is only intended to get you started with these programs.

This document is mostly about the installation of SQL Server 2005 Express. If you have troubles installing SQL Server, you may need to contact Microsoft or check their website in order to resolve.

EDL and ERS assume there is an existing SQL Server present. This document is meant to bring you to that point. All database scripts used to create/update the database where the data is actually stored are contained within EDL and ERS. Therefore, actual installation and configuration of these two products is very fast and is explained at the end of this document.

Definitions:

SQL Server 2005 Express – A lite version of the SQL Server database engine. This version is currently free and can be downloaded via Microsoft's website.

SQL Server Management Studio – The interface for using the SQL Server engine.

Enterprise Data Loader 3.2 – Prolink product that loads and synchronizes QCC files with an existing SQL Server database.

Enterprise Report Scheduler 3.2 – Prolink product that runs reports based on the data contained within the database.

NOTE: Both the Express and Full versions of SQL Server 2005 are very similar other than licensing. Therefore, these instructions should work for both versions.

2. Installing SQL Server 2005 and Mgmt Studio

The install packages for Microsoft SQL Server 2005 and SQL Server Management Studio Express can both be downloaded from Prolink's website at these two addresses:

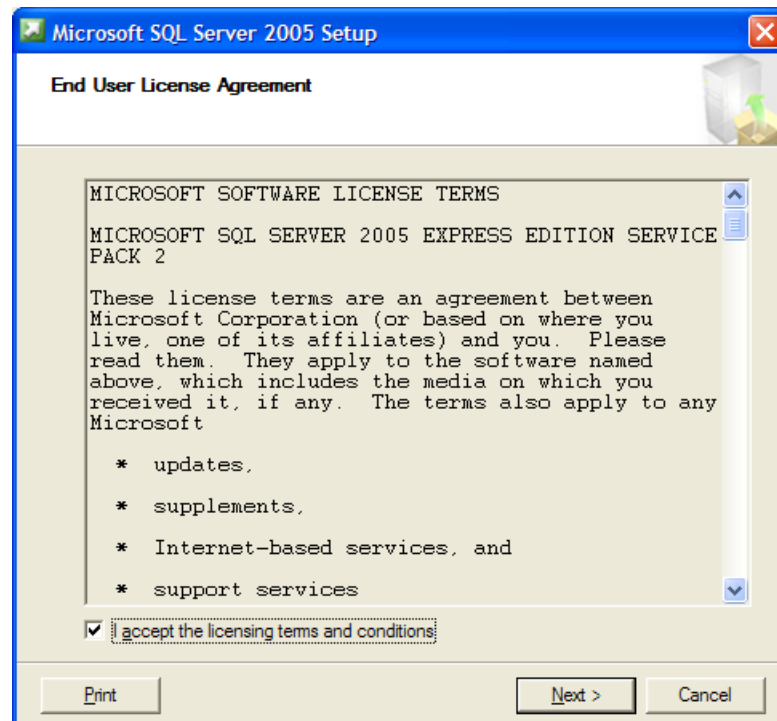
<http://www.prolinksoftware.com/upload/external/SQLEXP32.exe>

http://www.prolinksoftware.com/upload/external/SQLSERVER2005_SSMSEE.msi

2.1 Installing Microsoft SQL Server 2005

Once you have downloaded **SQLEXP32.exe** from the Prolink website, you are ready to install it onto your machine.

1. Start by running SQLEXP32.exe. When you first run **SQLEXP32.exe**, the following screen is displayed.



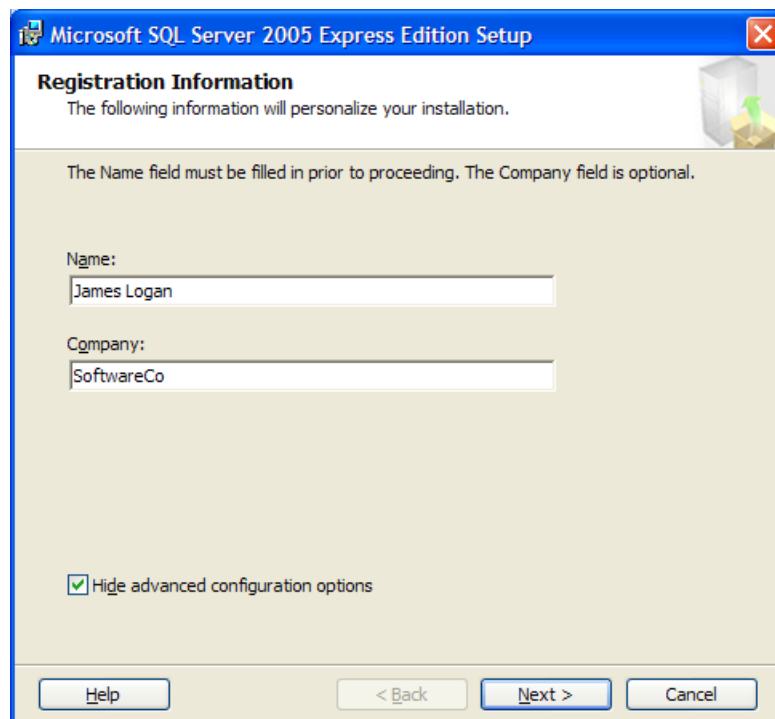
2. Check the box to accept the licensing terms and conditions and click **Next**.
3. Setup will install some components. When it's finished, click **Next**.

SQL Setup

- The **Server Installation Wizard** will open, click **Next**.



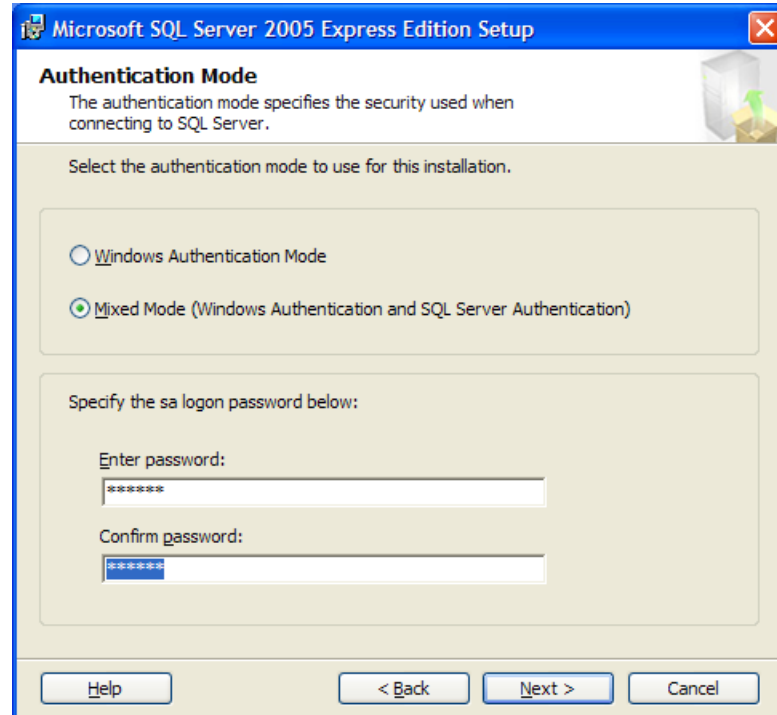
- The install software will run its **System Configuration Check**. When it's finished, click **Next**.
- Installation will begin. When it has completed, the following screen will appear.



SQL Setup

7. Fill in your information and click **Next**. The **Feature Selection** screen will appear; click **Next**.
8. The **Authentication Mode** screen will appear. Make sure that **Mixed Mode** is selected. Select a password for the System Admin login and press **Next** to continue.

IMPORTANT: Remember this password as you will need it in a short while.



9. The **Configuration Options** screen will appear. Make sure that the **Enable User Instances** and **Add user to the SQL Server Administrator Role** options are both unchecked.

Click **Next** to continue.

10. The **Error and Usage Report Settings** screen will appear. Make sure the **Automatically send Error reports** and **Automatically send Feature Updates** options are both unchecked.

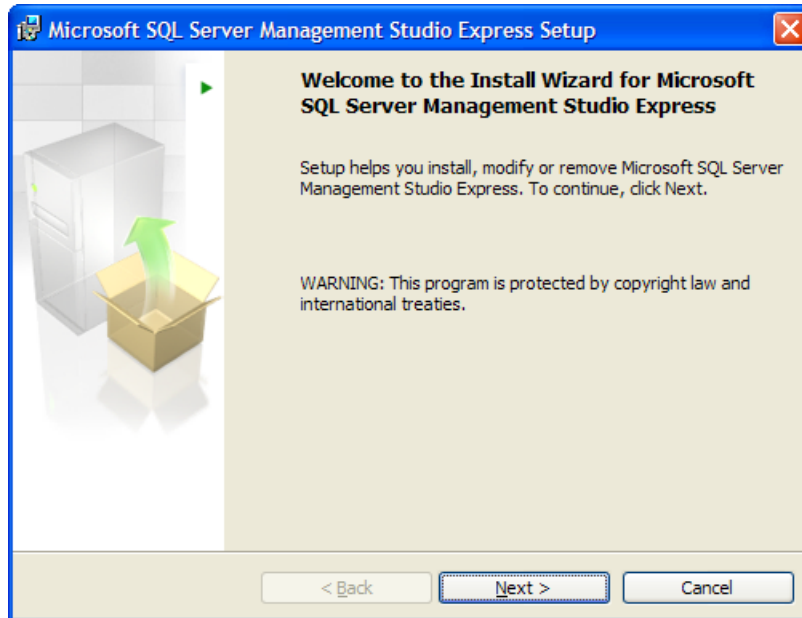
Click **Next** to continue.

11. The **Ready To Install** screen will appear. Click **Install** to continue.
12. When the installation has finished click **Next**.
13. Click **Finish** to finish the installation.

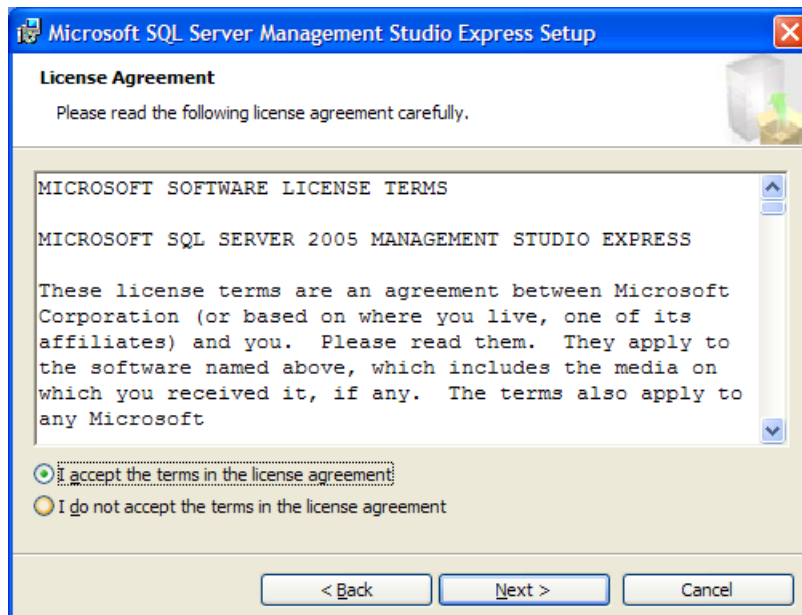
2.2 Installing SQL Server Management Studio Express

Once you have downloaded **SQLSERVER2005_SSMSEE.MSI** and installed **Microsoft SQL Server 2005** you are ready to install **SQL Server Management Studio Express**.

1. When you first open **SQLSERVER2005_SSMSEE.MSI** the following screen is displayed.



2. Click **Next**.
3. The **License Agreement** screen will appear. Select that you accept the terms of the license agreement and click **Next** to continue.



SQL Setup

4. The **Registration Information** screen will appear. Fill in your information and click **Next** to continue.
5. The **Feature Selection** screen will appear. Click **Next** to continue.
6. The **Ready to Install the Program** screen will appear. Click **Install** to continue.
7. When the installation is done, click **Finish** to complete the installation process.

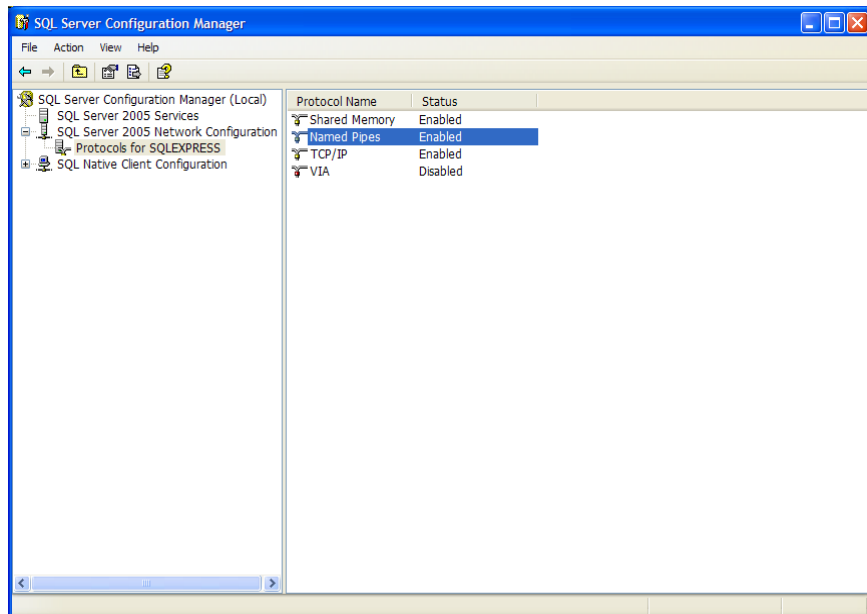
3. Configuring Microsoft SQL Server 2005

The next step is getting **Microsoft SQL Server 2005** set up for your use.

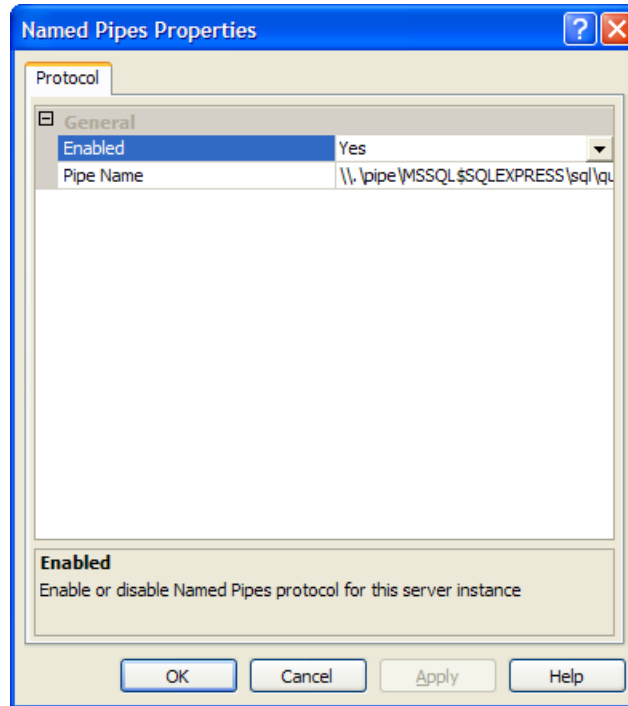
3.1 Network Configuration

You will need to run the **SQL Server Configuration Manager**, which can be found in the **Start Menu** under **Programs – Microsoft SQL Server 2005 – Configuration Tools**.

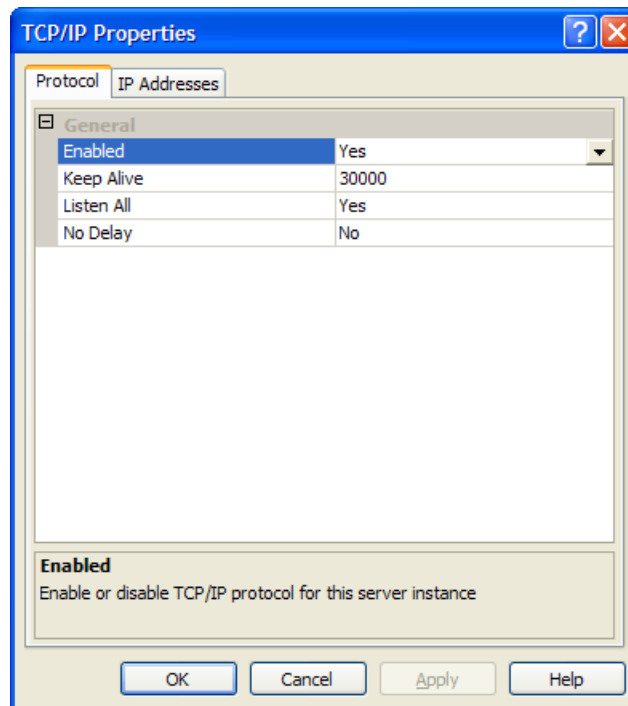
1. When **SQL Server Configuration Manager** opens up, click the **+** to expand **SQL Server 2005 Network Configuration** and click on **Protocols for SQLEXPRESS**.



2. Right click on **Named Pipes** and select **Properties**.

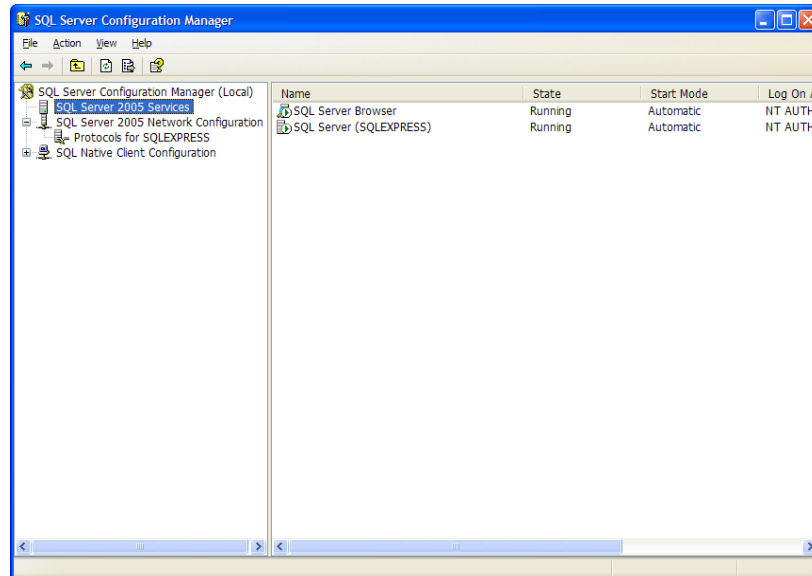


3. Change the setting for **Enabled** to **Yes** and click **OK**.
4. Now, right click on **TCP/IP** and select **Properties**.

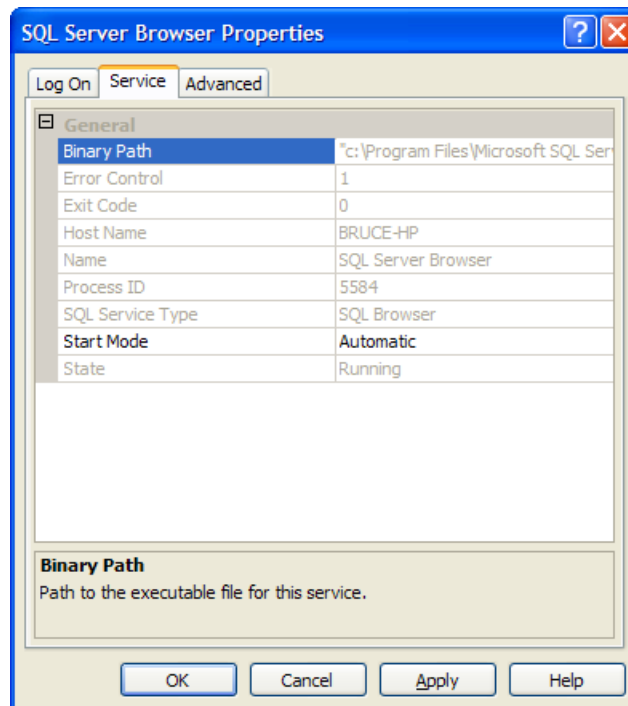


5. Change the setting for **Enabled** to **Yes**.

6. Click **OK**.
7. Click on **SQL Server 2005 Services**.



8. Right click on **SQL Server (SQLEXPRESS)** and select **Restart**.
9. Right click on **SQL Server Browser** and select **Properties**.
10. Select the **Service** tab.



11. Change the setting for **Start Mode** to **Automatic** and click **OK**.
12. Right click on **SQL Server Browser** and select **Start**.
13. Close **SQL Server Configuration Manager**.

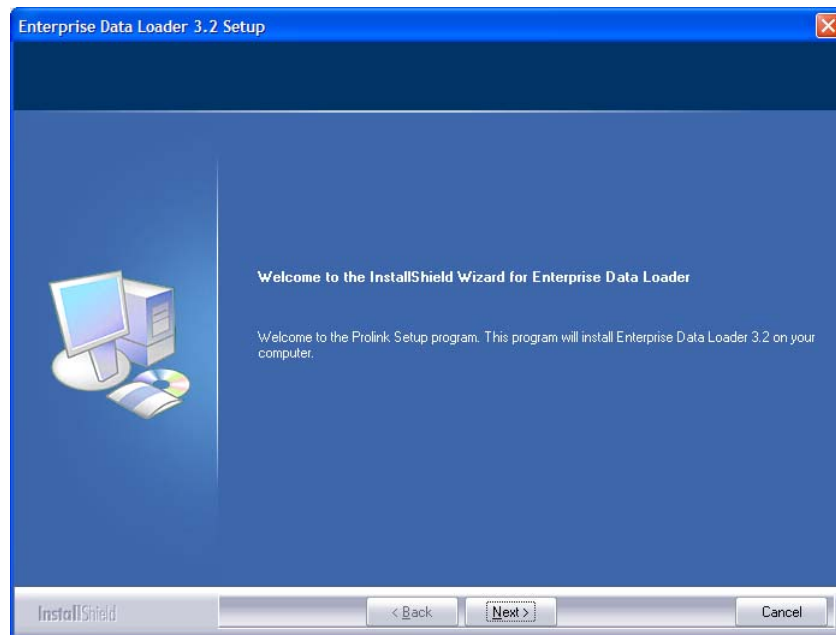
NOTE: The SQL Server Browser is not necessarily recommended for normal use in secure systems that are exposed on the internet. Please read the documentation about this product when securing your server. For now, we are leaving it on to get the system running easily and quickly.

4. Installing the Enterprise Data Loader

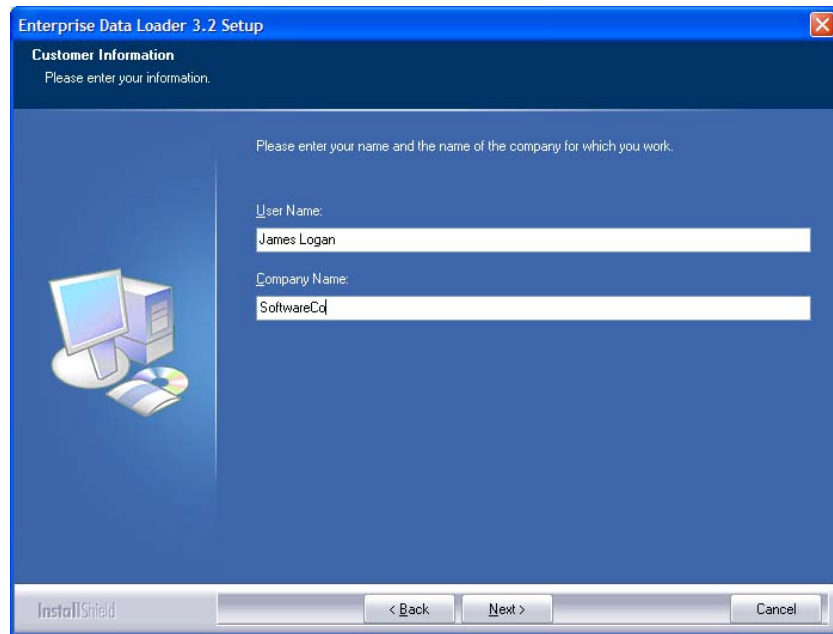
4.1 Installing Enterprise Data Loader

Enterprise Data Loader and **Enterprise Report Scheduler** are available from our website. Once downloaded, double click them to start the install wizard.

1. When the **Enterprise Data Loader** install file runs, the following screen will appear.



2. Click **Next** on this screen, and **Yes** on the next to bring up the **Customer Information** screen.



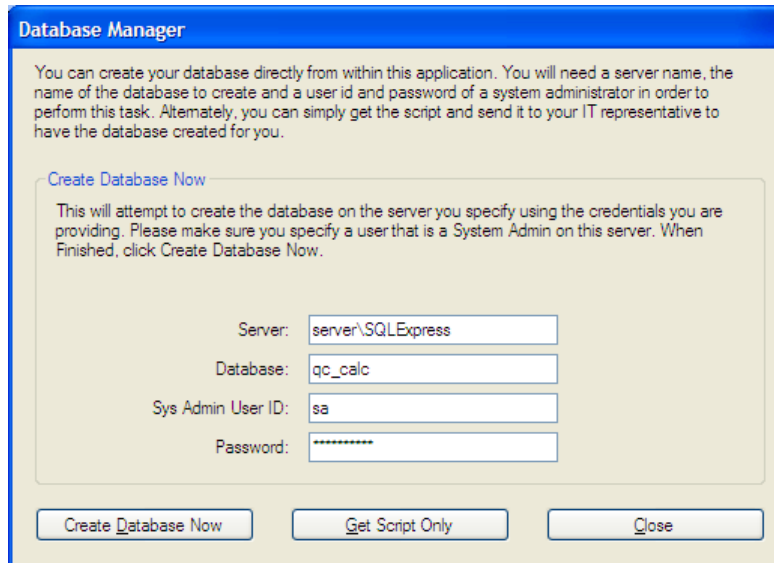
3. Make sure your information is correct. Click **Next** on this screen and the three after it to go through installation.
4. Click **Finish** to complete installation.

5. Setting Up The SQL Server Database

5.1 Setting up the Database Automatically

You can choose to create the database automatically directly through either EDL or ERS.

1. In either application choose **Help > Create Database (Create Settings Database** in ERS). The following screen will appear.



2. Enter the server name and SQL instance (if necessary). If you are running SQL 2005 Express, this is “SQLEXPRESS” by default.
3. Enter the name you would like for your database. By default, we suggest “qc_calc”.
4. Enter “sa” as the System Administrator ID and the password you specified when installing SQL (above).

If you are getting this value from an IT department, please make sure you get an ID that has System Administrator privileges as the ID will be used to create a database, add logins to the server, and add a user to the database.

NOTE (for IT Professionals): The SA user account is only needed for the initial database creation and will not be used going forward. When the script is run to create the database, it creates a separate user account called “qccadmin”. This account will be given db_datareader and db_datawriter access to this database only. This ID will then be presented via a message box at the end of the script so the user can use this for reporting.

5. When ready, click **Create Database Now**. Upon successful creation, you will see a message box containing the user and password to use for reporting. Please take care to write this down for future use. You are now ready to run EDL and ERS (they share the same database). You can skip section 5.2.

If there are errors creating the database, you may have to do it manually. If so, please read the next section.

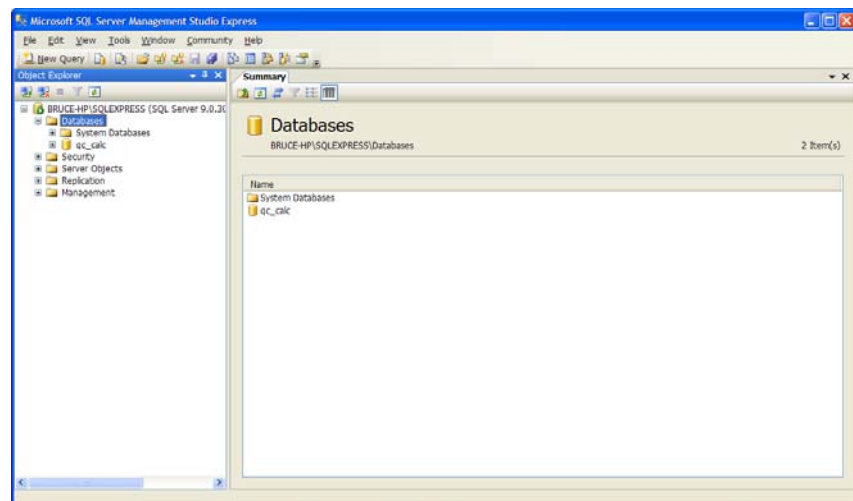
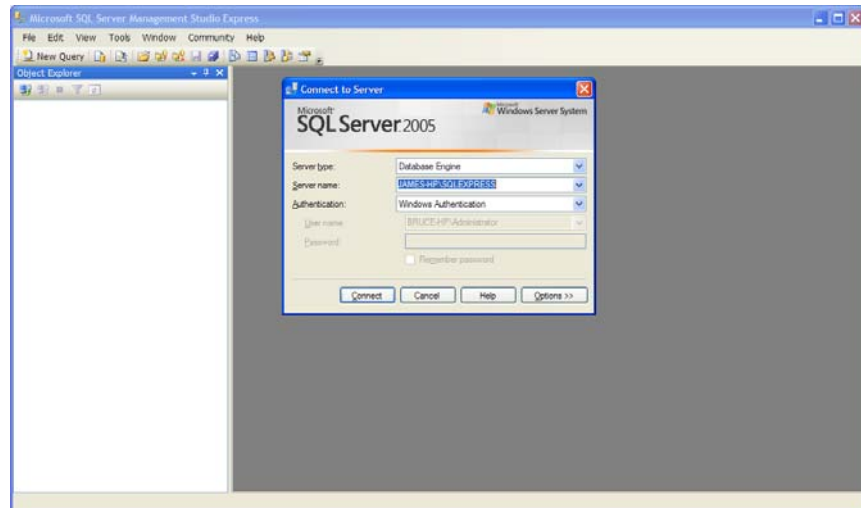
You can alternately click **Get Script Only** to get the script that will be run. Please be aware that the script displayed is only for the tables of the database and does not include the actual CREATE

DATABASE or other security related commands. The script in the window can be copied/pasted to SQL manually if needed.

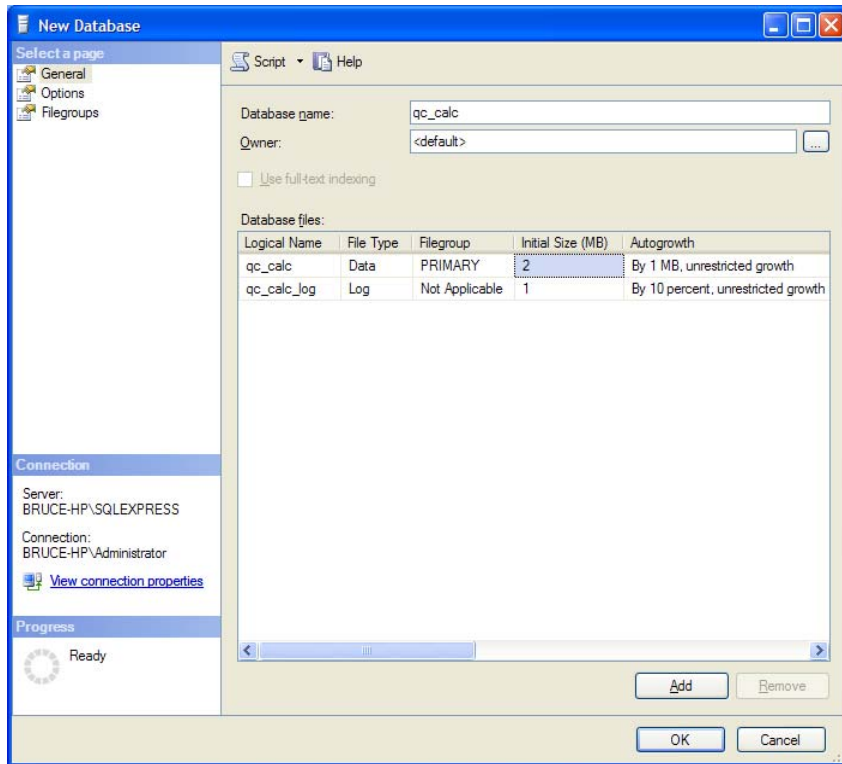
5.2 Setting Up the Database Manually

This section will help you create a database manually by adding the tables and user permissions.

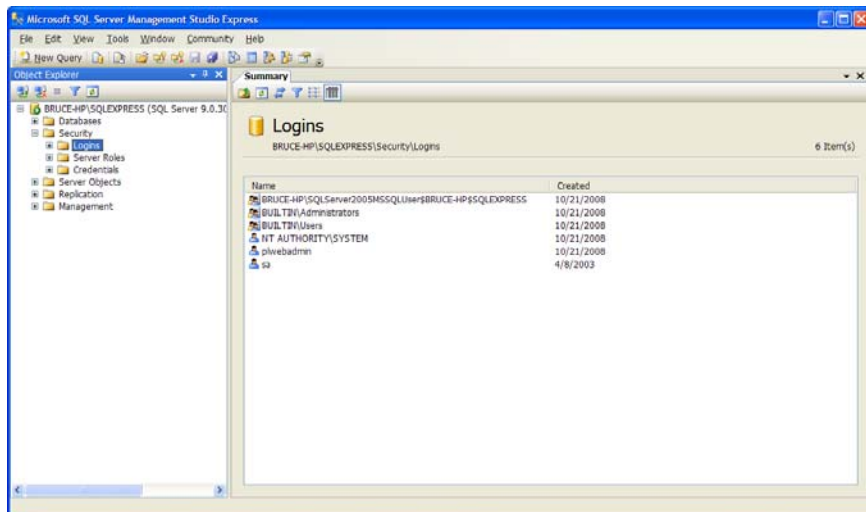
1. When **SQL Server Management Studio Express** opens, you will see the following screen. Click **Connect** to connect to the SQL Server using Windows Authentication for now.



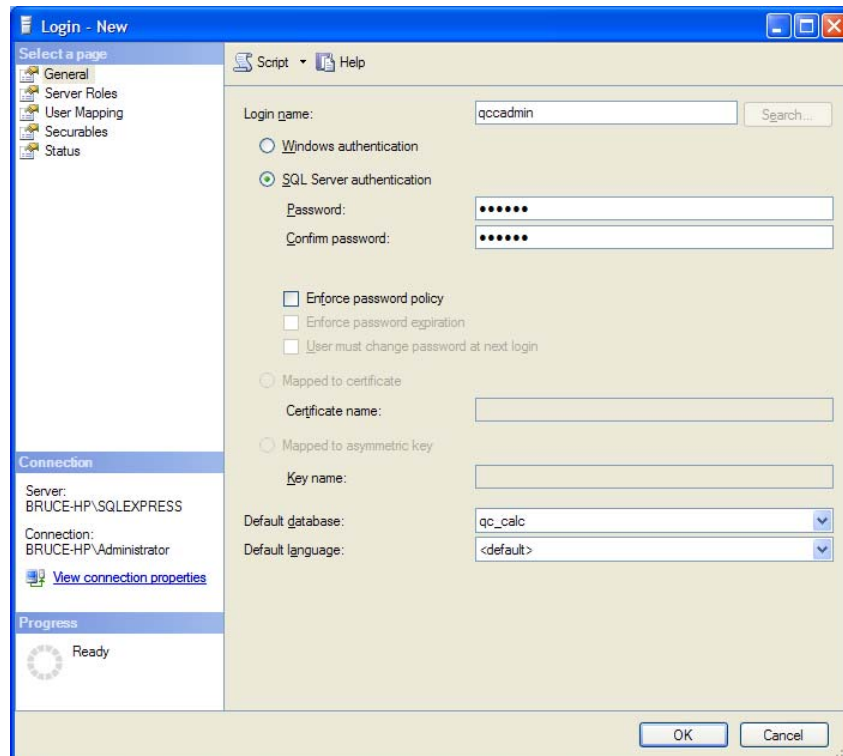
2. Right click on **Databases** and select **New Database**.



3. Give your database a name. For this example, we will be calling our database **qc_calc**. Click **OK**.
4. Now, expand **Security** on the left-hand side.

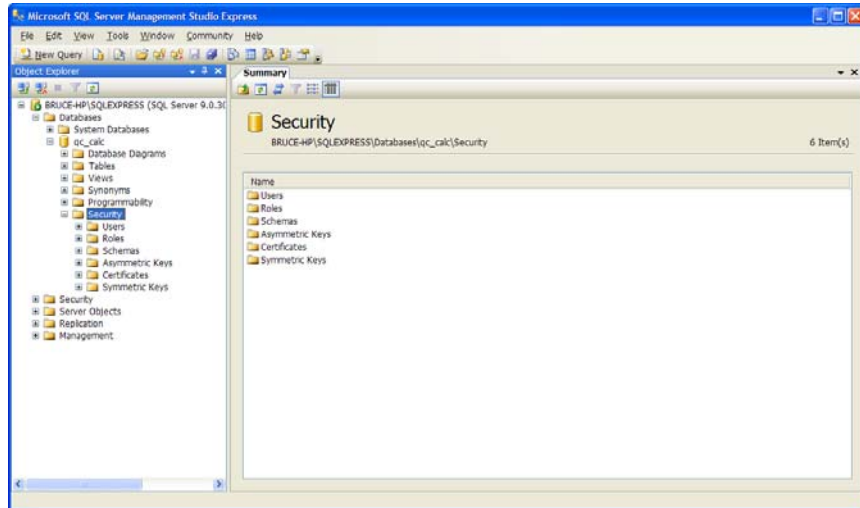


5. Right click on **Logins** and select **New Login**.

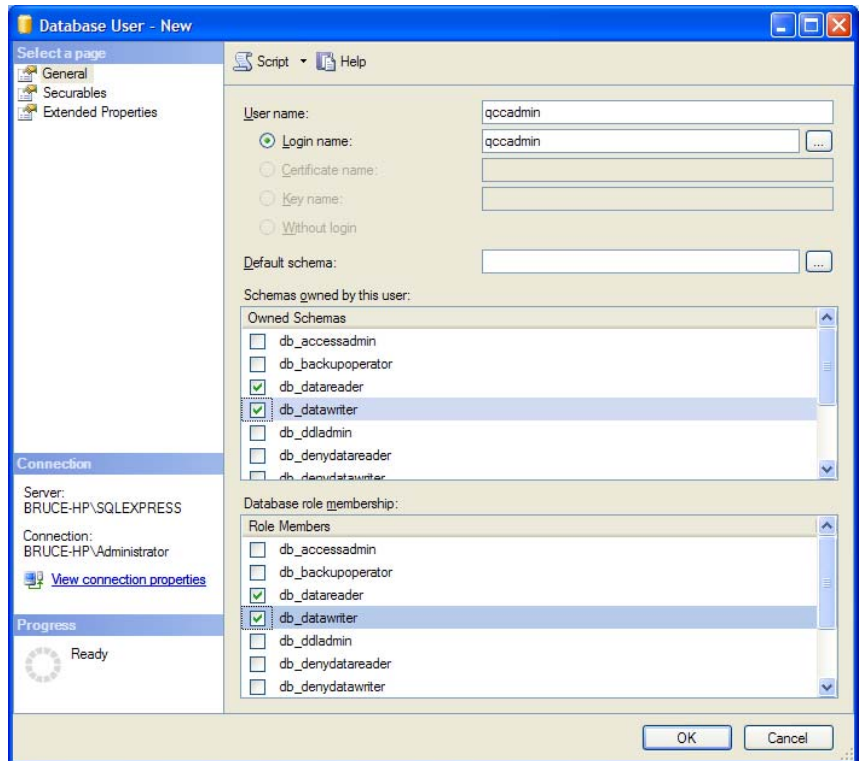


6. Create a **Login name**. For this example we'll be using **qccadmin**
7. Make sure that **SQL Server Authentication** is selected and create and confirm a **Password**. Make sure that **Enforce password policy** is unchecked.
8. Select the database you just created as your **Default database**, for this example it would be **qc_calc**. Click **OK**.

- Expand **Databases** on the left hand side, and then expand your default database. Within that, expand **Security**.

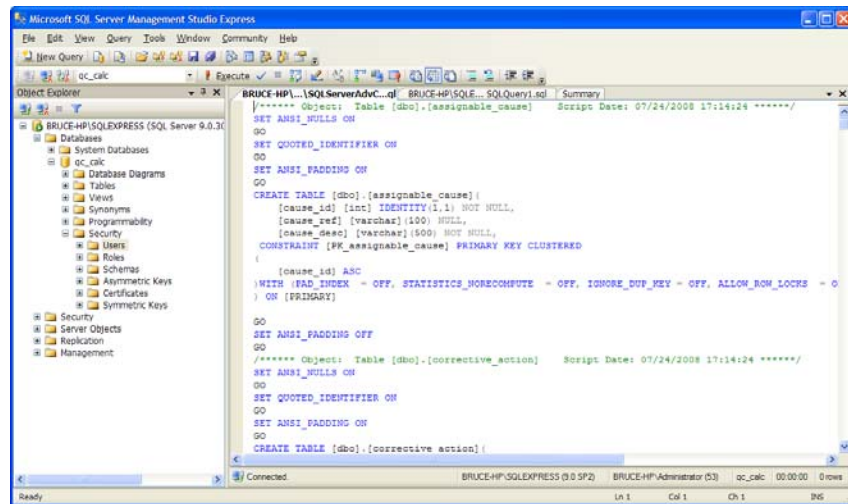


- Right click on **Users** and select **New User**.



- Set your **User Name** and **Login Name** to match the one you just created.
- Under **Owned Schemas** check **db_datareader** and **db_datawriter**.

13. Under **Role Members** check **db_datareader** and **db_datawriter**. Click **OK**.
14. In the **Microsoft SQL Server Management Studio Express**, click **New Query**.
15. Highlight the entire script in Section 5.1, step 5, right click and choose **Copy** and then paste it into your new query window.



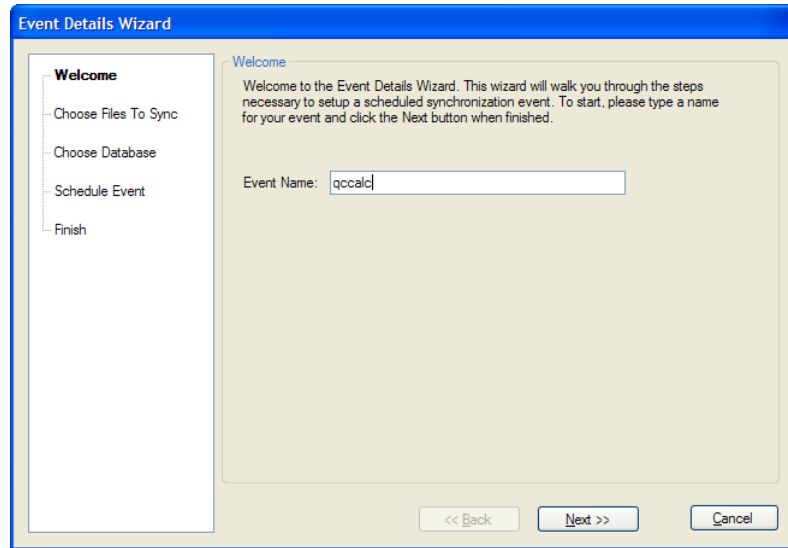
16. Make sure the drop-down menu at the upper left of the screen is set to the database you created. In our example, it would be set to **qc_calc**.
17. Click **Execute**.

6. Creating Your First Event in EDL

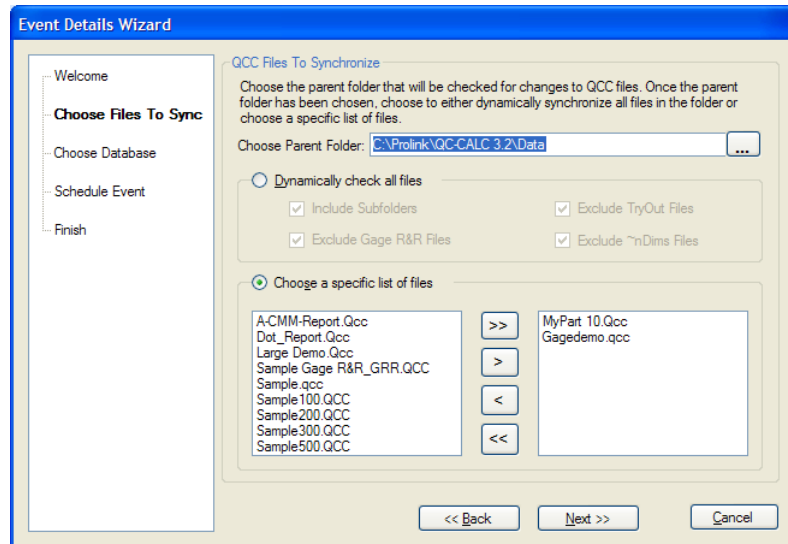
6.1 Setting up a First Event

In this step, you'll create an event in EDL that will load the database you just created. An event is nothing more than a list of QCC files to synchronize, a database with which to synchronize, and a scheduled time to do the synchronization.

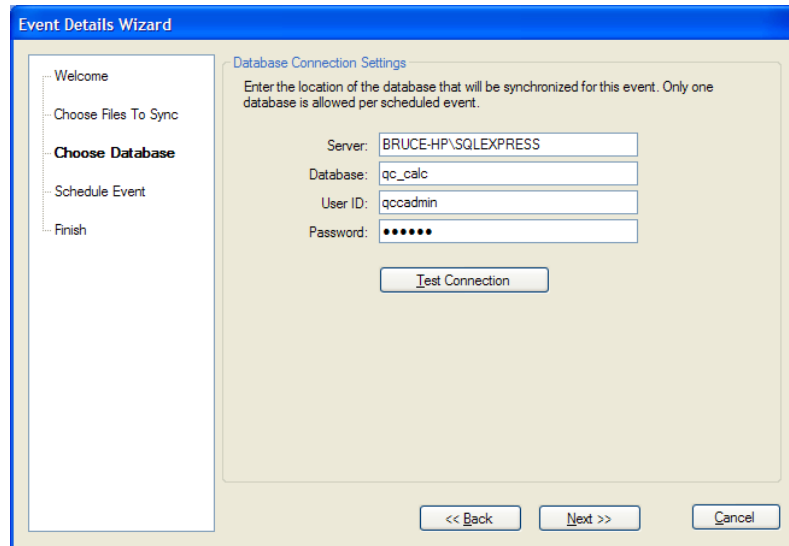
1. Open **Enterprise Data Loader 3.2**, which can be found in the **Start** menu under **Programs – Prolink**.
2. When the program opens, click **File – New Event**



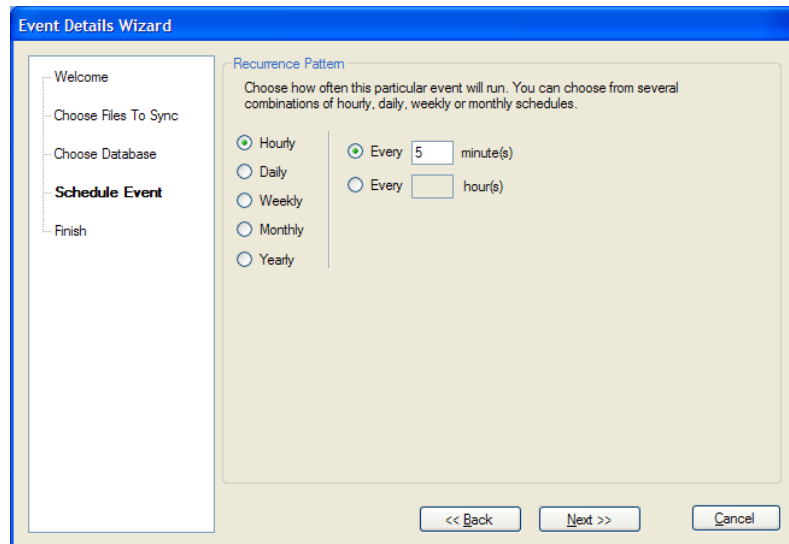
3. Fill in an **Event Name** and click **Next**.



4. Click the ... button and navigate to the path where your QC-CALC data is stored.
5. Choose to either **Dynamically check all files** or to **Choose a specific list of files**. For a more detailed description of these two options, consult the **Enterprise Data Loader** help file. Click **Next** to continue.



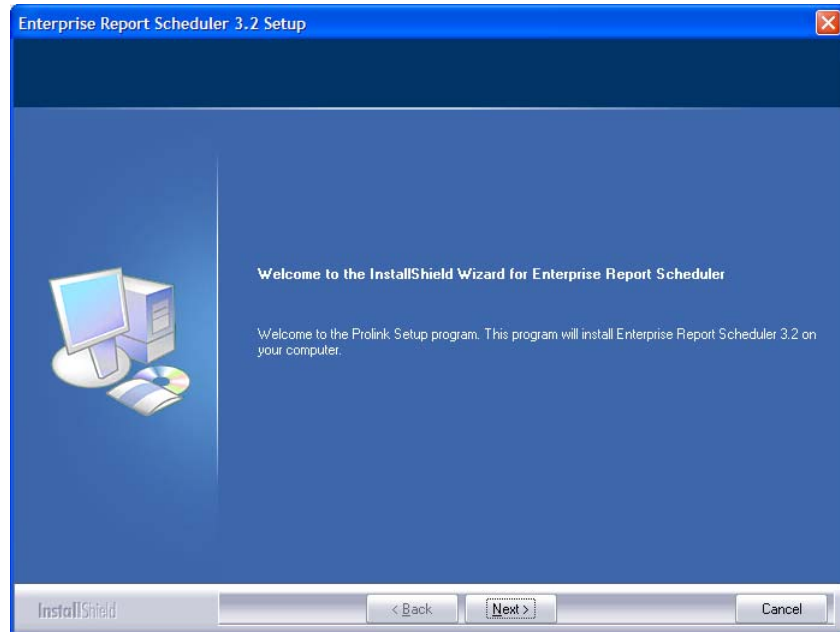
6. Fill in all the connection information for the database you just created, taking the **Server Name**, **Database**, **User ID**, and **Password** from what was set up in **Microsoft SQL Server Management Studio Express**. Click **Test Connection** to make sure all the information you entered was correct, and click **Next** when you're ready to proceed.



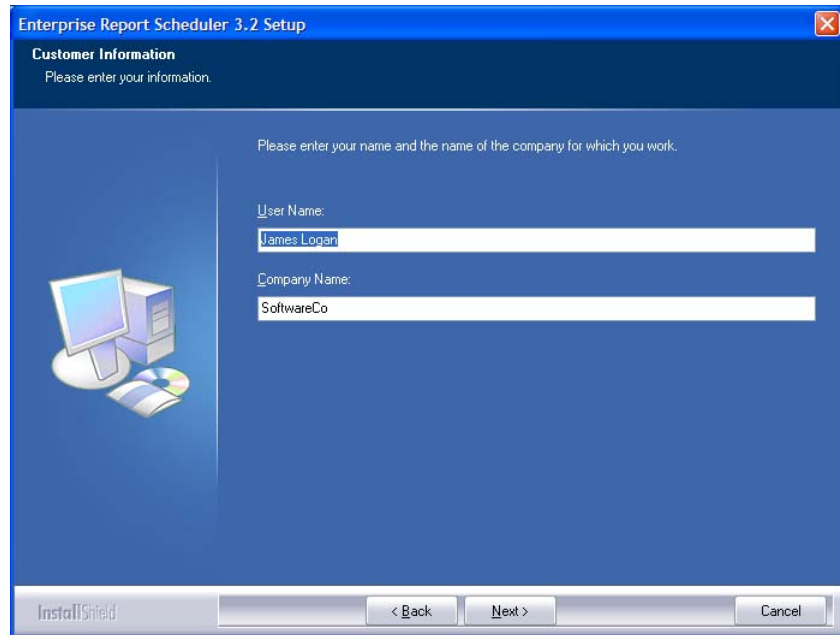
7. Select how often you would like this event to run. Click **Next** to continue.
8. Check **Enable Event** and click **Finish**.
9. The event will now show on the main screen in EDL. To immediately load the data in your QCC files, click **Run Now** and wait for the event to finish.

7. Setting Up the Enterprise Report Scheduler

Once you have **Enterprise Data Loader** installed and set up, your next step is to install **Enterprise Report Scheduler**. To do this, run the ERS installation package.



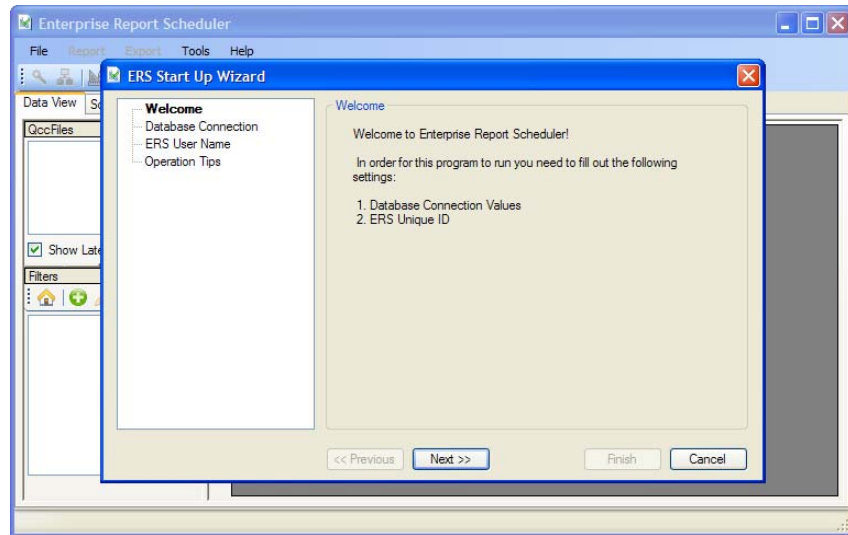
1. When this first screen appears, click **Next** and then **Yes** on the next screen.



2. Verify that this information is correct. Click **Next** on this screen and the 3 screens after it to proceed through the installation.

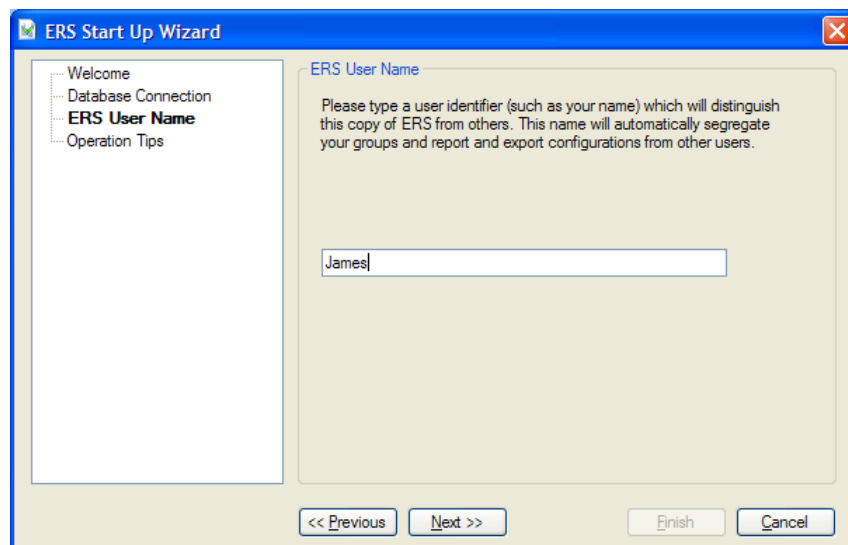
3. Click **Finish** to complete installation.
4. Run **Enterprise Report Scheduler**, which can be found in the **Start** menu under **Programs – Prolink**.

Note: The first time ERS is launched, this wizard will appear helping you to get started. After the initial run, all settings can be found in **Tools - Options**.



5. Click **Next** to get to the **Database Connection** screen. Just like with **Enterprise Data Loader**, verify your information and **Test Connection** to make sure it's working.

Click **Next** when done.



6. Enter a **User Name** and click **Next** to proceed.
7. Click **Finish** to complete the **Start Up Wizard**.

8. Conclusion

At this point you should now see the main ERS screen. On the left side is a panel showing your currently loaded QCC files (if you chose the Run Now link in EDL). Click on any of the QCC files to display the data on the right side in the grid.

Record	Date Received	Drilled Hole A:X	Drilled Hole A:Y	Drilled Hole A:Dia	Hole Chamfer	Tab #2 Length	Tab #2 Width	Slot B:Dia	Slot
001351	7/1/2009 12:00:00 AM	1.4958	2.5015	3.5036	4.5015	5.4963	6.4927	7.5042	8.50
001352	7/1/2009 12:59:59 AM	1.4988	2.4995	3.5013	4.5005	5.4997	6.5018	7.5028	8.50
001353	7/1/2009 2:00:00 AM	1.4967	2.5026	3.5008	4.4999	5.4983	6.4995	7.5018	8.49
001354	7/1/2009 3:00:00 AM	1.4983	2.4998	3.5018	4.4999	5.4991	6.4983	7.5022	8.49
001355	7/1/2009 3:59:59 AM	1.4967	2.4979	3.5015	4.4992	5.4970	6.5012	7.5031	8.49
001356	7/1/2009 5:00:00 AM	1.4991	2.5004	3.5011	4.4984	5.4986	6.4972	7.5018	8.49
001357	7/1/2009 6:00:00 AM	1.4982	2.4997	3.5021	4.4972	5.4975	6.5015	7.5028	8.50
001358	7/1/2009 6:59:59 AM	1.4985	2.5022	3.5016	4.5016	5.4993	6.4994	7.5036	8.50
001359	7/1/2009 8:00:00 AM	1.4953	2.4996	3.5014	4.5022	5.4982	6.4985	7.5018	8.50
001360	7/1/2009 9:00:00 AM	1.4977	2.4981	3.5025	4.5027	5.4986	6.5006	7.5039	8.50
001361	7/1/2009 2:00:00 PM	1.4993	2.5002	3.5017	4.5004	5.4962	6.4974	7.5042	8.50
001362	7/1/2009 3:00:00 PM	1.4984	2.4969	3.5018	4.5006	5.4980	6.5012	7.5001	8.50
001363	7/1/2009 3:59:59 PM	1.4997	2.5018	3.5028	4.5003	5.4997	6.4994	7.5005	8.50
001364	7/1/2009 5:00:00 PM	1.4983	2.4995	3.5018	4.4996	5.4988	6.4988	7.5000	8.49
001365	7/1/2009 6:00:00 PM	1.4991	2.4983	3.5022	4.4997	5.4999	6.5003	7.5002	8.49
001366	7/1/2009 6:59:59 PM	1.4970	2.5012	3.5031	4.4990	5.4983	6.4976	7.5009	8.49
001367	7/1/2009 8:00:00 PM	1.4986	2.4972	3.5018	4.4980	5.4995	6.5009	7.5008	8.49
001368	7/1/2009 9:00:00 PM	1.4975	2.5015	3.5028	4.5010	5.4974	6.4994	7.5004	8.50
001369	7/1/2009 9:59:59 PM	1.4993	2.4994	3.5036	4.5018	5.4989	6.5031	7.5012	8.50
001370	7/1/2009 11:00:00 PM	1.4982	2.4985	3.5018	4.5023	5.4980	6.5000	7.5011	8.50

This concludes the document on installing all products, configuring SQL Server, creating the database, loading the tables, and viewing the data in the Enterprise Report Scheduler. Please read the manuals for both the Enterprise Data Loader and Enterprise Report Scheduler to go into more detail on the functionality of each.