Changing over the EPLAN Project Management to SQL Server
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Technical Information
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Introduction

Dear EPLAN user,

this document describes how to change over the EPLAN project management to the Microsoft SQL Server 2012. We use "EPLAN Electric P8" as an example for this changeover, but a similar procedure can be used for installing the following program variants of the EPLAN platform:

- EPLAN CPM
- EPLAN Education
- EPLAN Electric P8
- EPLAN Fluid
- EPLAN PPE
- EPLAN Preplanning
- EPLAN ProPanel
- EPLAN Trial

These instructions are aimed at administrators who are already familiar with EPLAN and who know how to configure an SQL Server.

Note:

We used the fully licensed program variant "EPLAN Electric P8" and the SQL Server "Microsoft SQL-Server 2012 Express" when creating this document. If you use a different variant or have not licensed all the modules for P8 or use a different Microsoft SQL Server version, the figures in this documentation may go beyond the scope of functionality of the software you have purchased, that is, functions are also described and /or figures are displayed which may not be available to you.
Notes for the Reader

Before you begin reading, please note the following symbols and styles used in this document:

⚠️ Warning:
Texts preceded by this image are warnings. You must read these instructions before continuing processing!

🌟 Note:
Text preceded by this image contains extra notes.

💡 Tip:
Useful tips to facilitate your interaction with the program are presented after this image.

💡 Example:
Examples are highlighted by this symbol.

- User interface elements are marked in **bold** so they can immediately be located in the text.

- *Italic* text provides particularly important information that you should definitely pay attention to.

- Code examples, directory names, and direct input (among other elements) are displayed in a non-proportional font.

- Function keys, keyboard keys, and buttons within the program are shown in square brackets (e.g., `[F1]` for the "F1" function key).

- To improve the flow of the text, we often use "menu paths" in this document (for example, Help > Contents). In order to find a particular program function, the menus and options shown in a menu path must
be selected in the sequence shown. For example, the menu path mentioned above calls up the EPLAN help system.

- The operating information provides step-by-step instructions for reaching specific targets, and in many places, after the right-arrow symbol you'll also find the reaction of the program to your action.

- In combination with settings or fields (e.g., check boxes) which can only be switched on or off, in this document we often use the term "activate" (after which the setting is active) and "deactivate" (after which the setting is inactive).
Preconditions

You require one of the following Microsoft SQL Servers to change the project management over to the use of an SQL Server:


Notes:

- Please note that you must have installed a Microsoft SQL Server 2008 R2 / 2012 in order to change over the project management in your company. If this is not the case, please contact your SQL system administrator.

- If you use the "SQL-Server 2008 R2 / 2012 Express" version, you must have installed the Management Studio Express additionally in order to manage the databases and users.

- Further information about the individual versions of the Microsoft SQL Server operating system is available on the Microsoft website.

If you do not have Administrator rights on the SQL Server, contact your SQL system administrator. In order to establish a connection to the SQL Server, you furthermore need the name of the Server and have to be set up on the SQL Server as a user (with the corresponding password).
Approvals for the installation of the SQL Server

The following operating systems can be used for the *Microsoft SQL Server 2012 Standard*:

**Approved workstation operating systems:**
- Windows 7
- Windows 8
- Windows 8.1

**Approved Server operating systems:**
- Windows Server 2008 R2
- Windows Server 2012
- Windows Server 2012 R2

Further approved operating systems for the Microsoft SQL Server are listed on the Microsoft website.

**Note:**
Other database systems from other manufacturers are not currently supported.
Changing over the project management

Setting the connection to the SQL Server and database

**Warning:**
You require administration rights on the SQL Server for the following steps to create a database with the EPLAN table structure on the SQL Server. Contact your SQL system administrator to this purpose.

Open the settings dialog for the project management in order to set the SQL Server.

1. Select **Options > Settings > Company > Management > Project management database**.

   ⇒ The **Settings: Project management database** are opened.

2. Select the **SQL server** option and click **[New]**.
The SQL server setting dialog is opened.

1. Enter the server name of the SQL Server in the Server field.

2. Enter a new name for your project management database in the Database field.

⚠️ Warning:
Do not use a hyphen in the name of the SQL database.

3. At Logon select the variant specified by your SQL administrator.

Note:
You have two options for logging onto the SQL Server: "Windows authentication" uses the logon data of your Windows user. At the "SQL Server" option you use a separate user name and password. If no user has been set up for access to the SQL Server, please contact your SQL system administrator.

Confirm your settings in the SQL Server setting dialog with [OK].

The new database is created.

4. Click [OK] to confirm the settings.
Reading projects into the SQL database

After a new database has been created successfully on the SQL Server, it does not yet contain any projects. Carry out the following steps to read your projects into the database.

1. Select **Project > Management**.

   ⇒ The **Project management** message is opened.

2. Click the **[Yes]** button to read in projects contained in the set EPLAN project directory.

   ⇒ The **Project management** dialog is opened.
Reading further directories into the project management

If you want to additionally read projects from other directories into the project management, proceed as follows.

1. Select **Project > Management**.

   ![Image of Project management dialog]

   ⇒ The **Project management** dialog is opened.

2. Select **[Extras] > Load directory**.

   ![Image of Extras dialog]

   ⇒ The **Select start directory** dialog is opened.
3. Select the desired directory and click [OK].

All the projects from the selected directory and its subdirectories are read into the project management.