Changing over the EPLAN Parts Database to SQL Server
EPLAN Platform Version 2.4
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Technical Information
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Introduction

Dear EPLAN user,

this document describes how to change over the EPLAN parts database 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
- Preplanning
- 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:**
Text 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 parts database 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 parts database 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. The rights are required in order to create a database of the SQL Server. 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 parts database

Before you begin to set up the EPLAN parts database on the Microsoft SQL-Server 2012, you first have to export the existing parts database as an XML file. This backs up the data and the tree configuration of your parts database so that these can be transferred later to the new database of the SQL Server. Proceed as follows:

Exporting the EPLAN parts database

1. Start the EPLAN program variant (for example EPLAN Electric P8) that you have used up to now.

2. Select Utilities > Parts > Management.

⇒ The Parts management dialog opens.
3. Here select the **[Extras]** button and then the **Export** menu item.
The Export records dialog is opened. You have to export the existing data as an XML file.

4. Select the setting XML from the File type drop-down list to this purpose.

5. Select Entire file and enter a name for the export file in the File name field.

Note:
We recommend that you activate all the check boxes in the Record type and Trade sections do that the parts database is exported completely.
6. Click [OK].

- The parts records are exported.

Setting the connection to the SQL Server

⚠️ 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 parts management in the EPLAN Electric P8 Version 2.4.

1. Select **Utilities > Parts > Management**.

2. Click [OK] to confirm the **Parts management** message.

- The **Parts management** dialog opens.
3. In the Parts management dialog select the menu path [Extras] > Settings.

⇒ The Settings: Parts management dialog is opened.
4. Select the **SQL server** option and click [...].

![SQL server setting dialog](image)

⇒ The **SQL server setting** dialog is opened.

5. Enter the server name of the SQL Server in the **Server** field.

6. Leave the **Database** field empty.

7. 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.

   The "Use SQL Server full-text search" option can only be used on SQL systems on which the Advanced Services are also installed.

8. Confirm your settings in the **SQL Server setting** dialog with **[OK]**.
9. Confirm the **Settings: Parts management** dialog by clicking [OK].

10. Click [OK] to confirm the following message.

11. In the **Parts management** dialog select the menu path [Extras] > **New database**.

    ⚙ The **SQL server setting** dialog is opened.

12. Enter a new name for your database in the **Database** field.

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

13. Confirm the **Generate SQL Server database** dialog with [OK].
14. Confirm the **Generate new database** message with **[Yes]**.

![Generate new database](image)

15. Confirm the **Parts management** message with **[Yes]**.

![Parts management](image)

-The database created on the SQL Server is now opened.

**Tip:**
In most program variants such as "EPLAN Electric P8" you can also access the **Settings: Parts management** dialog from the main menu by using the menu path **Options > Settings > User > Management > Parts.**
Importing the parts database into the SQL database

After a new database has been created successfully on the SQL Server, import your "old" parts data structure in the next step. You stored this previously in the form of an XML file (see the section "Exporting the EPLAN Parts Database" on Page 10).

1. Select [Extras] > Import.
The **Importing records** dialog opens. You have to import the existing data as an **XML** file.

2. Select the setting "XML" from the **File type** drop-down list to this purpose.

3. Enter the file name of the previously exported **XML** file in the **File name** field.

4. Click **[OK]**.

   ⇒ The parts records are imported.