Switching the EPLAN
Parts Database to SQL-Server

EPLAN Platform Version 2.9
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efficient engineering.

EPLAN GmbH & Co. KG
Technical Information

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<Installation directory>\bin\License.txt

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Introduction

Dear users,

The team at EPLAN GmbH & Co. KG is pleased to welcome you as a new user.

This document describes how you can switch the EPLAN parts database over to the *Microsoft SQL-Server*. We are carrying out this switch for "EPLAN Electric P8" as an example. A corresponding transition is possible for the following program variants of the EPLAN platform:

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

These instructions are intended for 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 2014 Express" when drawing up 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 possibly go beyond the scope of functionality of the software you have purchased, that is, functions are also described which are not available to you.

Notes for the Reader

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

⚠️ **Caution:**

Text preceded by this image are warnings. You should be absolutely sure to read this warning before proceeding!

📌 **Note:**

Text preceded by this image contains extra notes.

ℹ️ **Tip:**

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

💡 **Example:**

Examples are highlighted by this symbol.

- Elements of the user interface are identified by **bold** print, making them easy to find immediately 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 brackets (such as **[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.

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- 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 ☐).

Requirements

You require one of the following Microsoft SQL-Server programs in order to switch the parts database over to an SQL-Server:

Microsoft SQL-Server 2016 / 2017 Express / Standard or Enterprise Edition.

More information about the software requirements and approvals can be found on the homepage:

https://www.eplan.help/en-us/Infoportal/Content/htm/portal_software_approvals.htm

Notes:

- Please note that you must have installed a Microsoft SQL-Server 2016 / 2017 in your company in order to switch the parts database. If this is not the case, contact your SQL system administrator.

- If you use the "SQL-Server 2016 /2017 Express" version, you must have installed the Management Studio Express as well in order to manage the databases and users.

- For further information about the individual versions of the Microsoft SQL-Server operating system please refer to the Microsoft Internet sites.

If you do *not* have administrator rights on the SQL-Server, please contact your SQL system administrator. The rights are required in order to create a database on the SQL-Server. You furthermore need the name of the server and have to be set up as a user (with the corresponding password) on the SQL-Server in order to establish a connection to the SQL-Server.
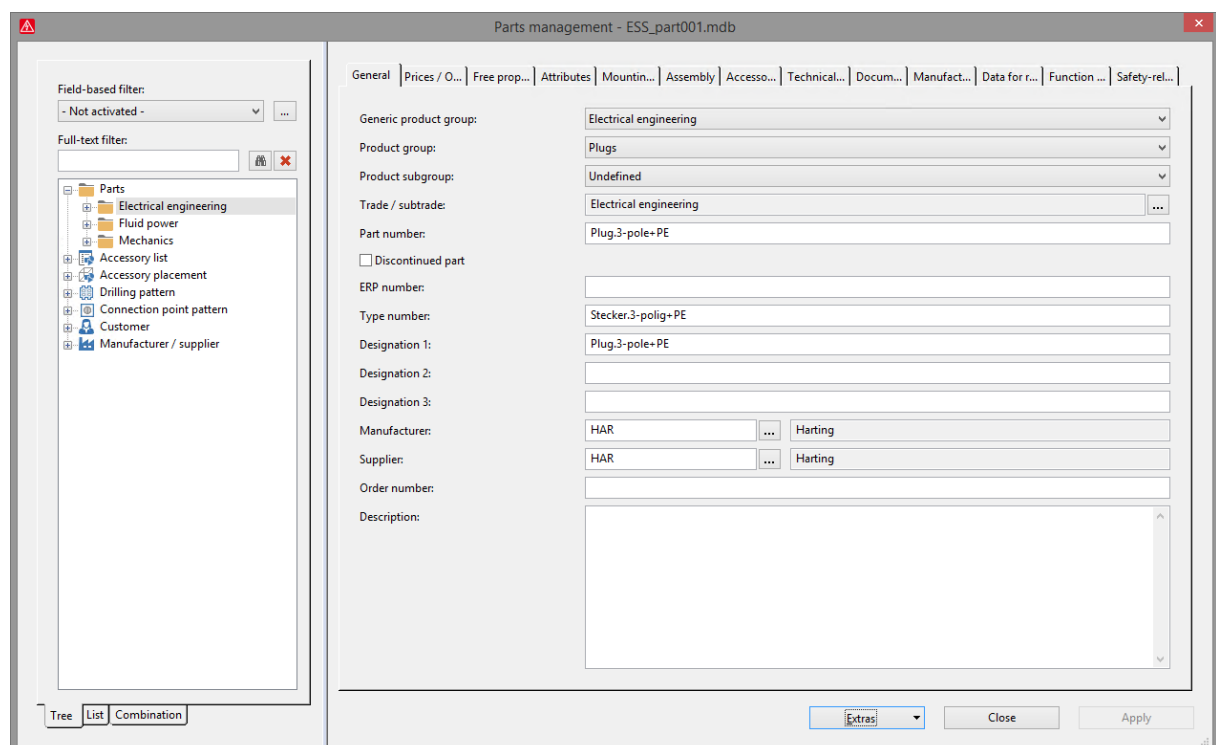
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Switching the Parts Database

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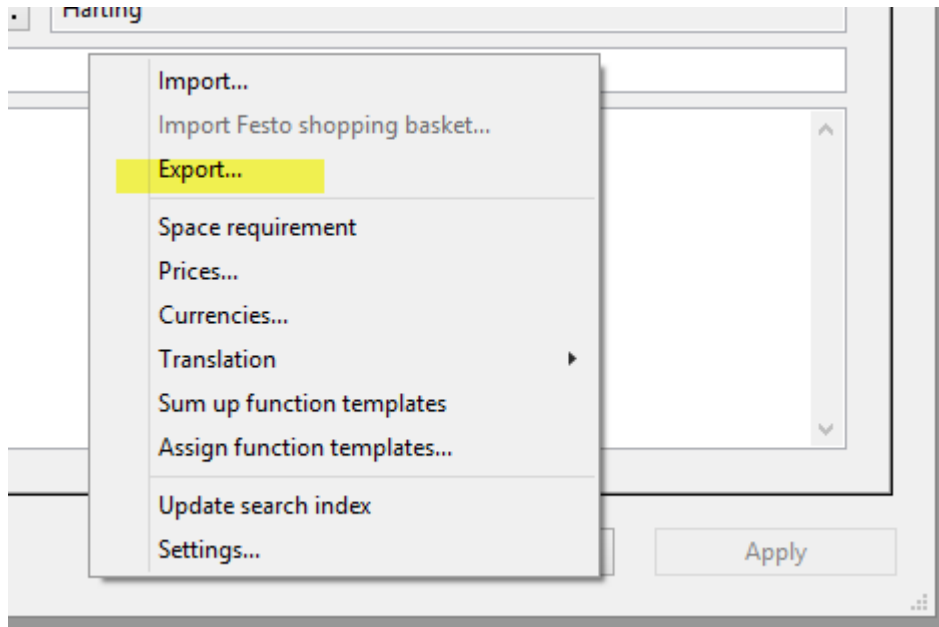
Exporting the EPLAN Parts Database

1. Start the EPLAN program variant you have used up to now (for example EPLAN Electric P8).
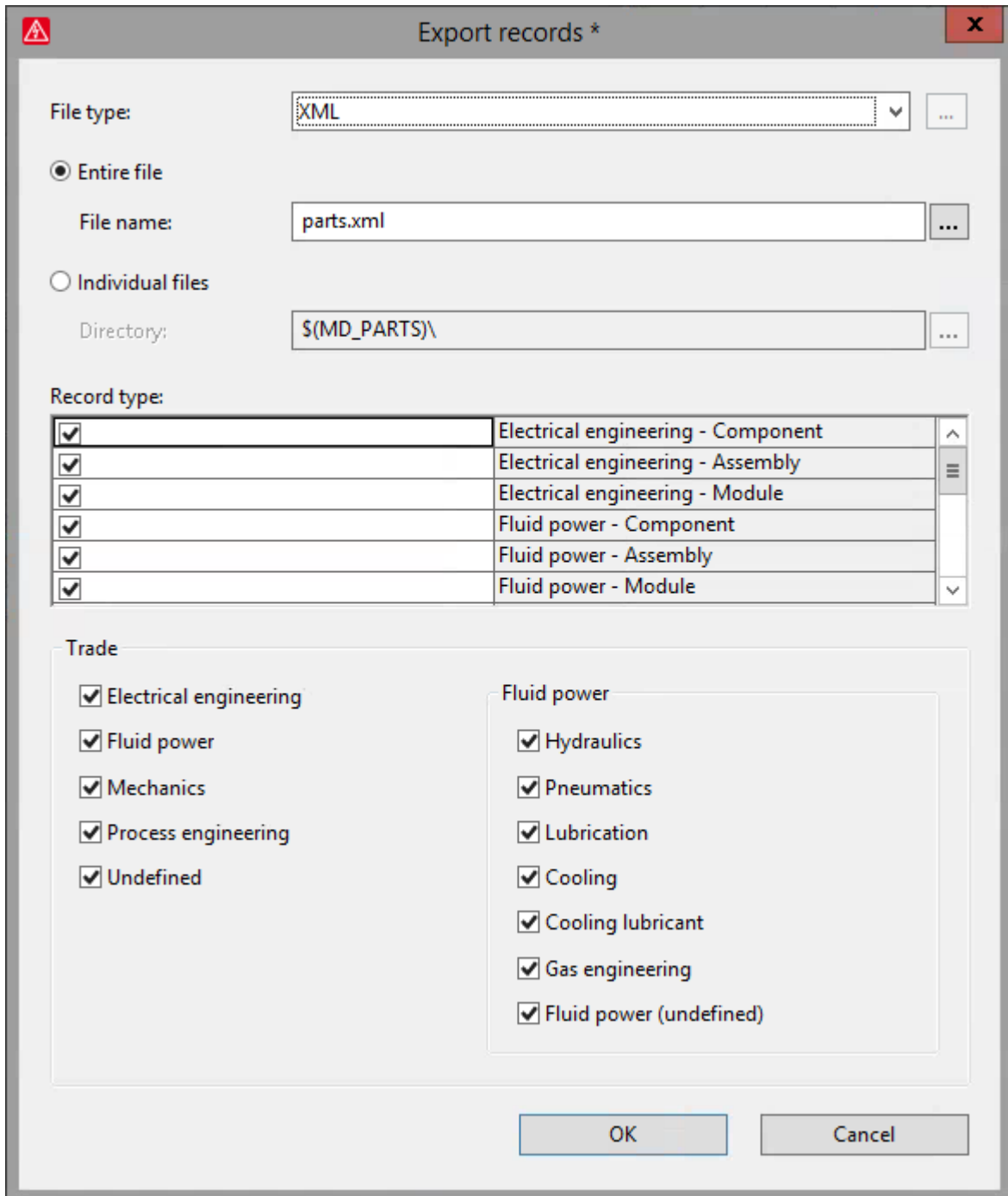
2. Select **Utilities > Parts > Management**.

    ⇨ 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 XML setting from the **File type** drop-down list.

5. Select **Entire file** and enter a name for the export file in the **File name** field.
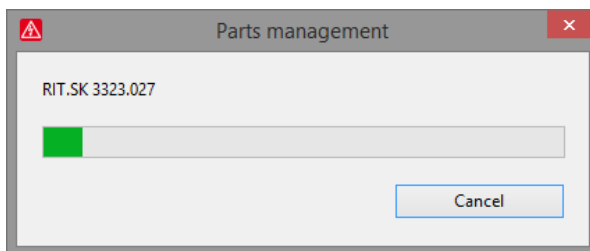
> **Note:**
>
> We recommend activating all the check boxes in the **Record type** and **Trade** sections so that the parts database is exported completely.

6.   Click **[OK]**.
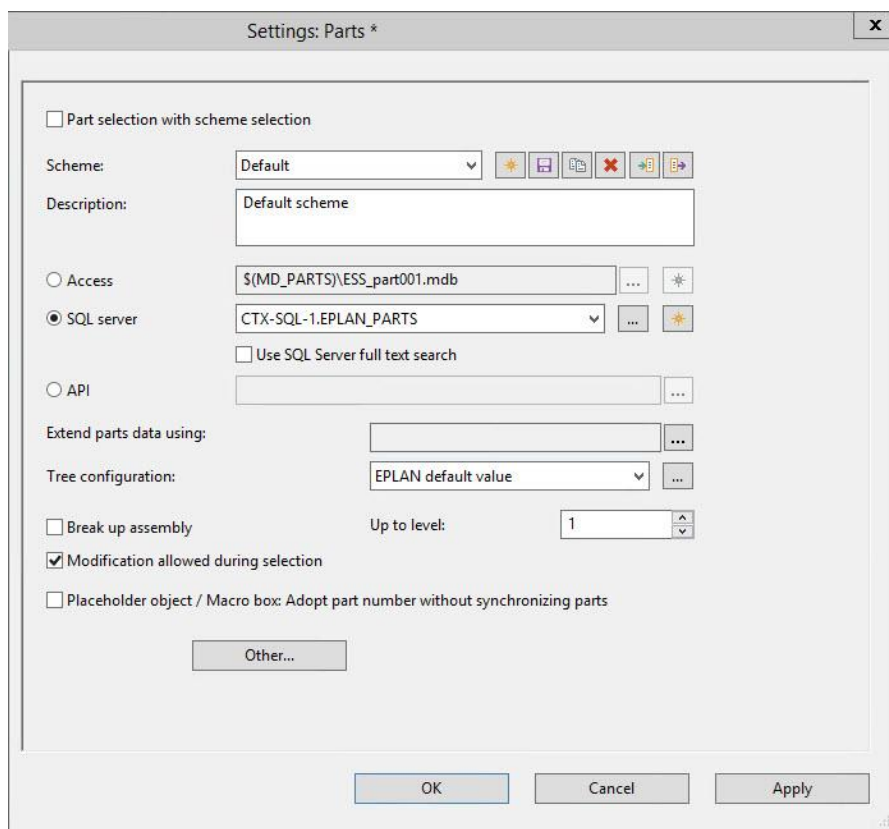
⇨   The parts records are exported.

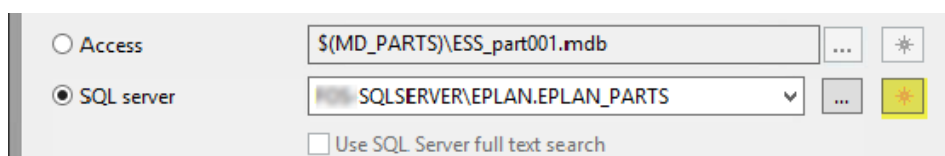# Establishing the Connection to the SQL-Server

> ⚠️ **Caution:**
>
> In order to create a database with the EPLAN table structure on the SQL-Server you require administrator rights on the SQL-Server for the following steps. Please contact your SQL system administrator to this purpose.

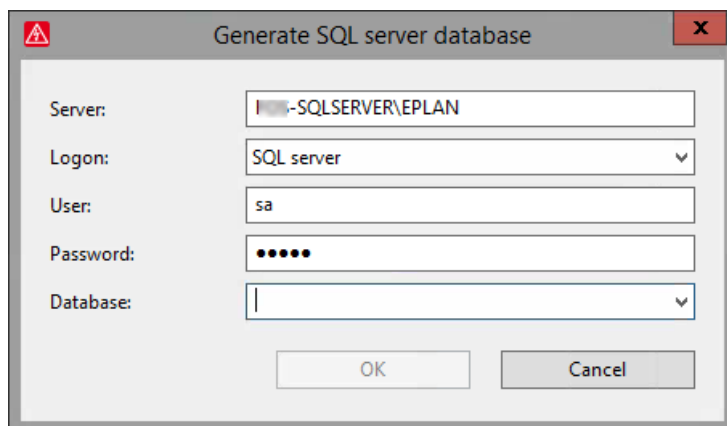1. Select **Options > Settings > User > Management > Parts**.

   ⇨ The **Settings: Parts** dialog is opened.

2. Select the **SQL-Server** option and click the **[New]** button.

   ⇨ The **Generate SQL-Server database** dialog is opened.

3. Enter the server name and the instance name of the SQL-Server in the **Server** field.

4. In the **Database** field, enter the name for the parts database to be created.

⚠️ **Caution:**

Do not use hyphens in the name of the SQL database.

5. During **Login**, select the variant specified by your SQL administrator.

📌 **Note:**

You have two possibilities for logging on to an SQL-Server:
"Windows authentication" uses the logon data of your Windows user account.
If "SQL-Server" is selected, you use a separate user name and password.
If a user has not been set up yet for accessing the SQL-Server, please contact your SQL system administrator.
The option "Use SQL-Server full text search" can only be used on SQL systems on which the Advanced Services are also installed.

6. Confirm your settings in the **Generate SQL-Server database** dialog by clicking **[OK]**.

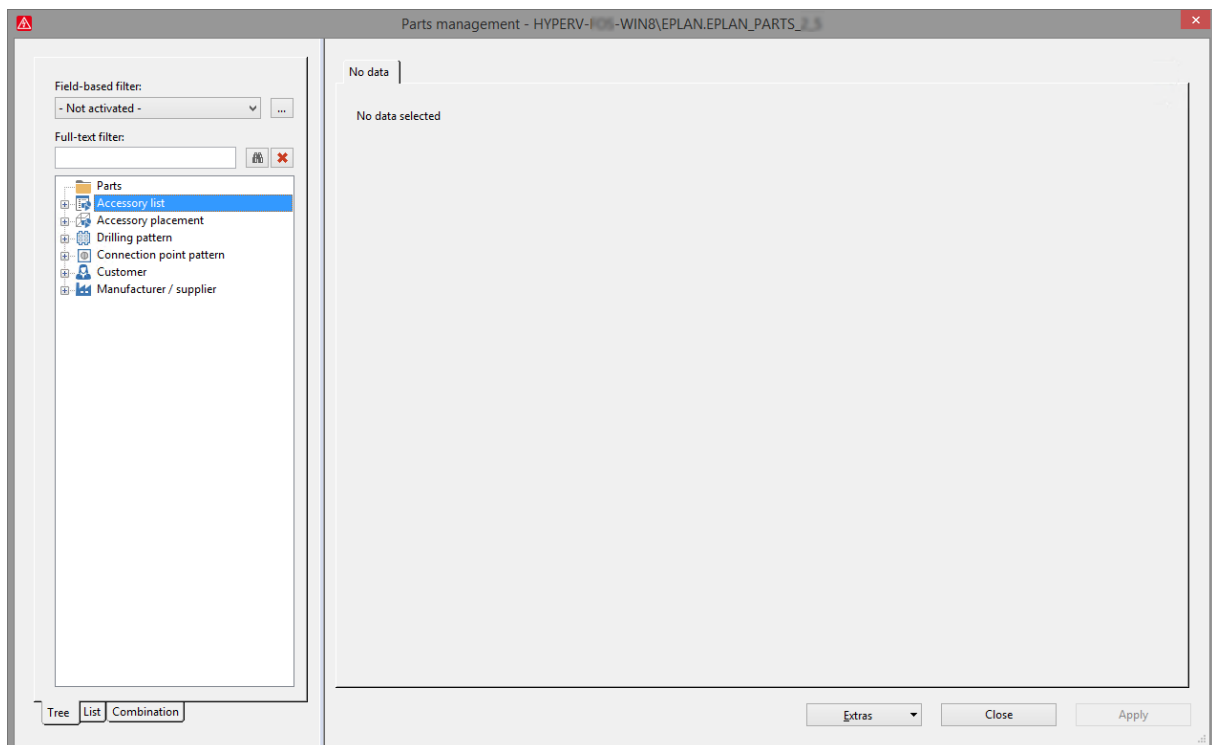7. Confirm the **Settings: Parts** with **[OK]** dialog.

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

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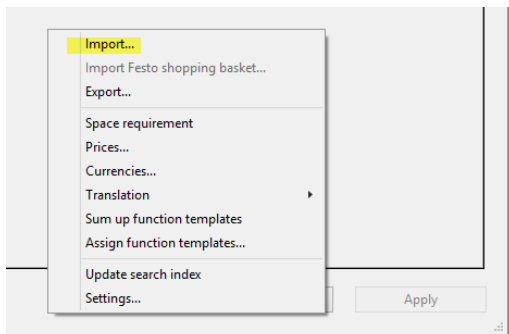# Importing a Parts Database into the SQL Database

After you have successfully created a new database on the SQL-Server, import your "old" parts data structure in the next step. This was saved beforehand in the form of an `XML` file (see the section "EPLAN Parts Database" on page 9).
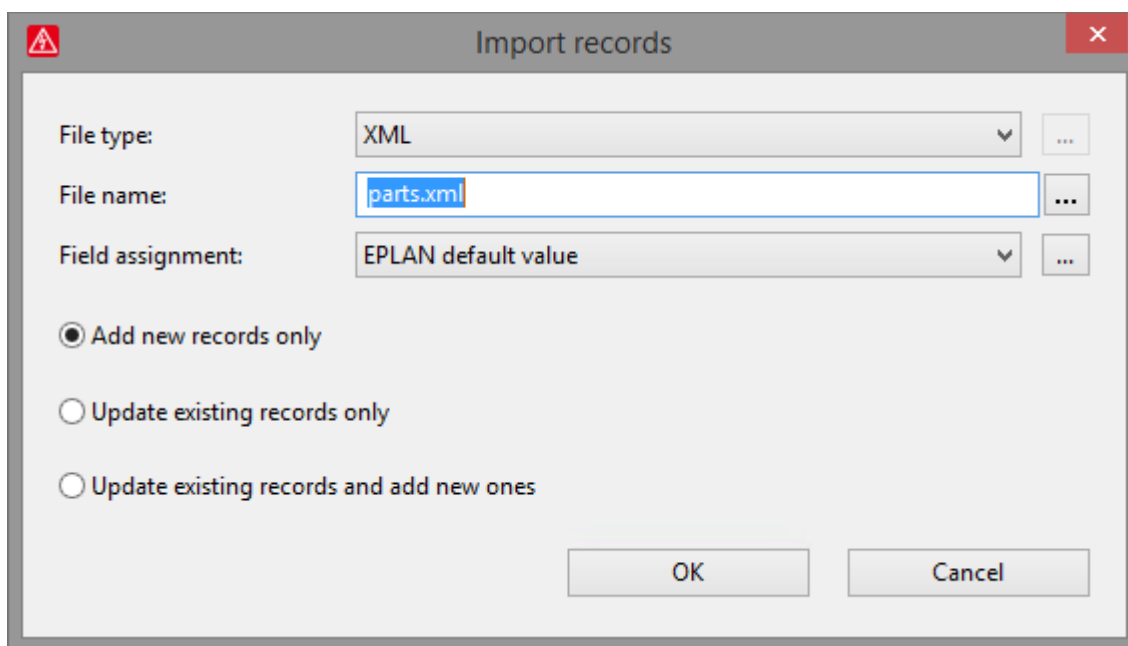
1. Select **Utilities > Parts > Management**.

   ⇨ The **Parts management** dialog opens.

2.   Select **[Extras] > Import**.

⇨   The **Import records** dialog is opened. You have to import the existing data as an XML file.

1. Select the "XML" setting from the **File type** drop-down list.

2. Select the name of the XML file that you exported beforehand in the **File name** section.

3. Click **[OK]**.

    ⇨ The parts records are imported.

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