



**Switching the EPLAN
Project Management to SQL-Server**
EPLAN Platform Version 2.9
Status: 05/2021



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 project management 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
- EPLAN Preplanning
- EPLAN 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:

Warning:

Text preceded by this symbol contains a warning; you should be absolutely sure to read this warning before proceeding!

Note:

Text preceded by this symbol 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 entries (among other things) 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 program's reaction 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) .
- 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 project management 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 project management. 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. 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.

Switching the Project Management

Establishing the Connection to SQL-Server and Database

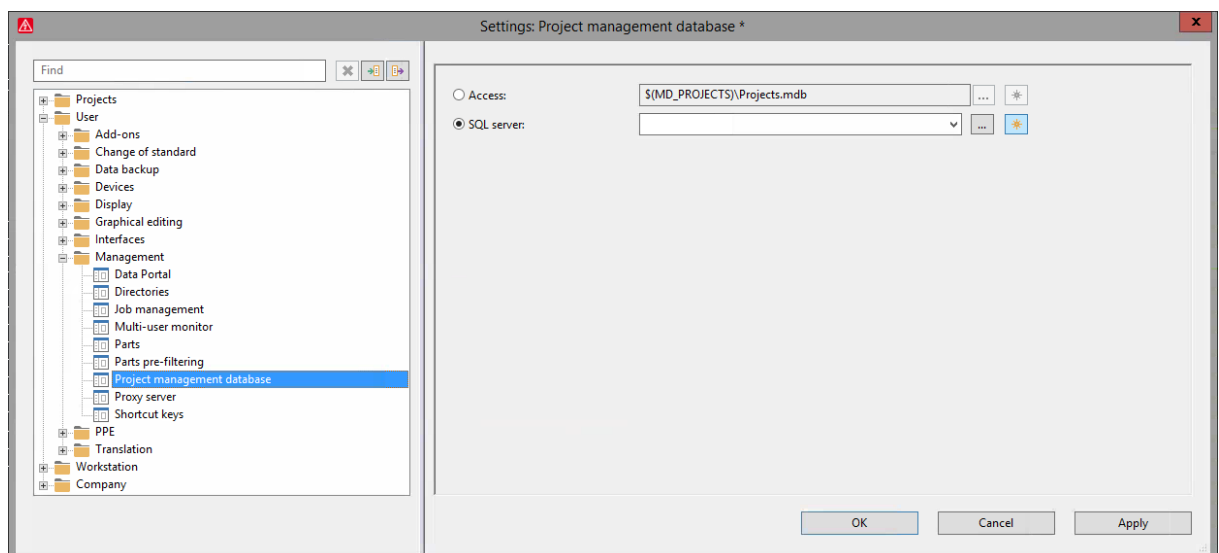
⚠ Caution:

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.

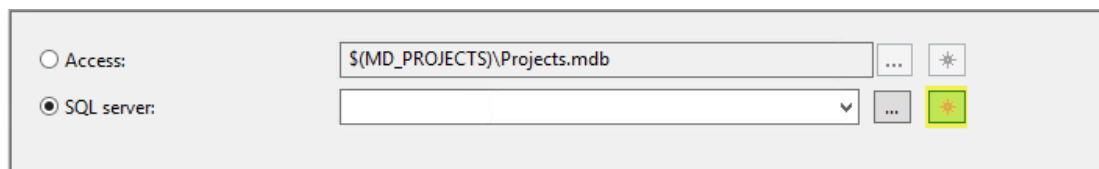
Open the settings dialog for the project management in order to set up the SQL-Server.

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

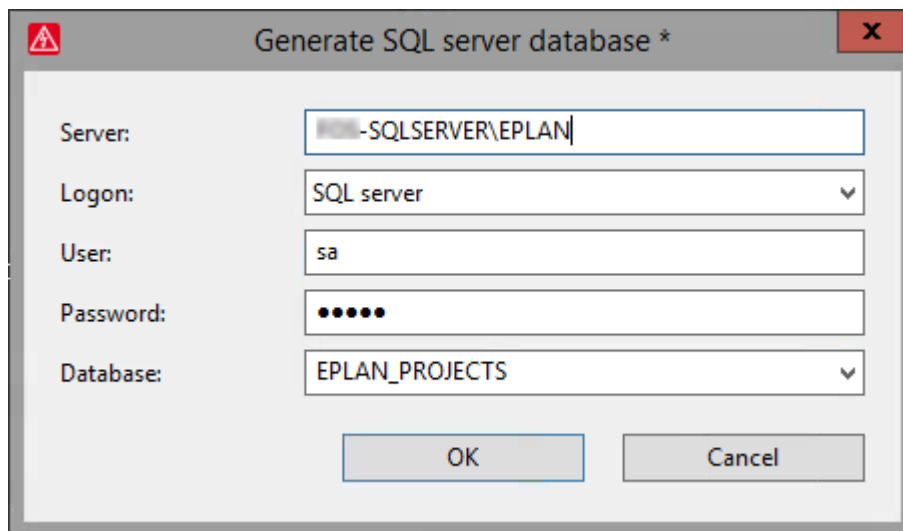
⇒ The **Settings: Project management database** dialog is opened.



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



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

 **Caution:**

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

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

 **Note:**

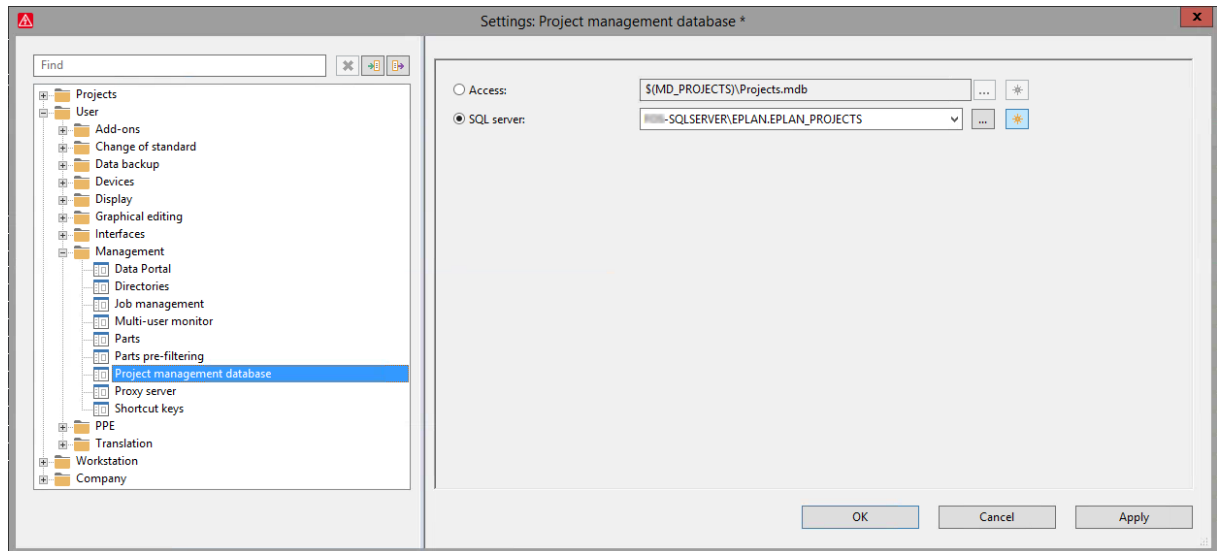
You have two possibilities for logging on to an SQL-Server:
"Windows authentication" uses the logon data of your Windows user account.

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.

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

⇒ The new database is created.



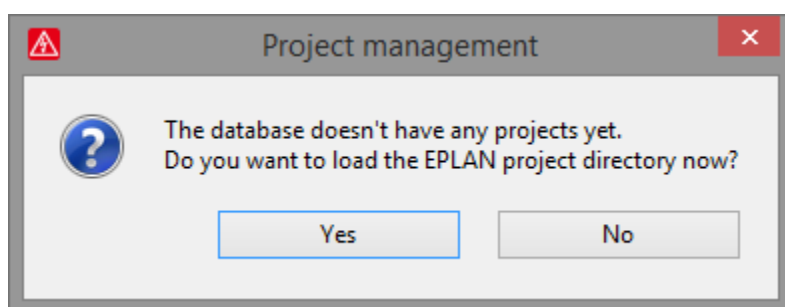
7. Click **[OK]** to confirm the settings.

Reading Projects into the SQL Database

After you have successfully created a database on the SQL-Server, it does not yet contain any projects. Carry out the following steps to read your projects successfully into the database:

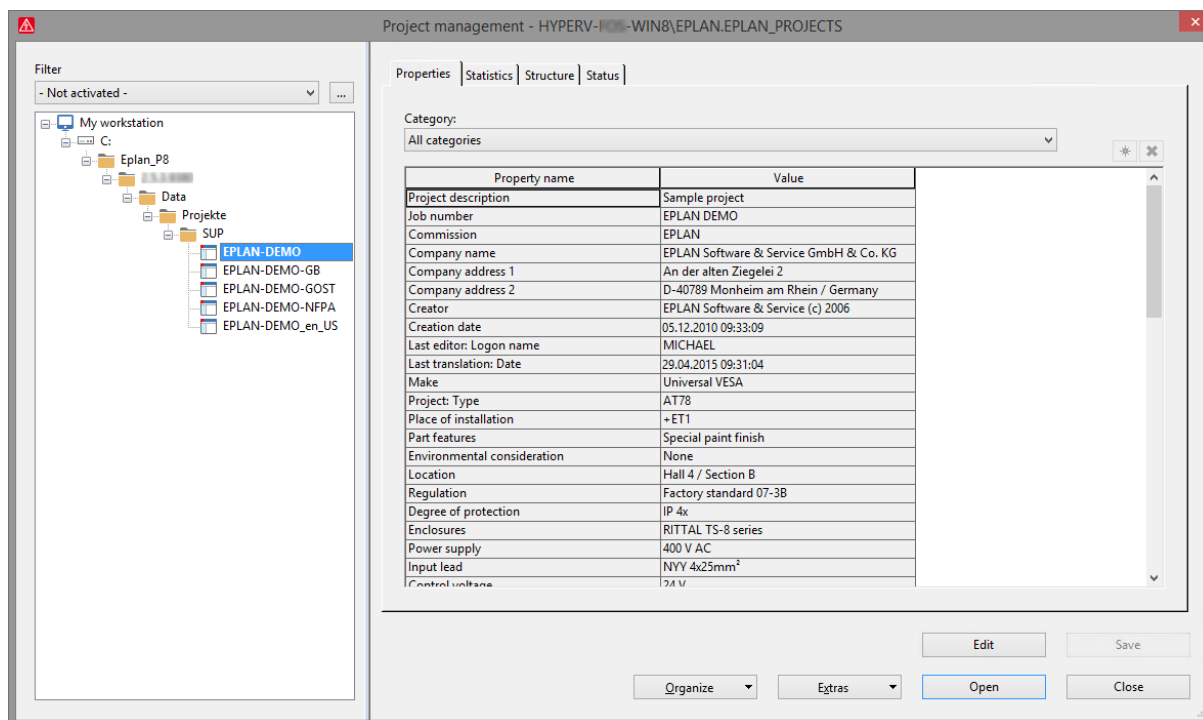
1. Select **Project > Management**.

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



2. Click **[Yes]** to read in the projects that are located in the set EPLAN project directory

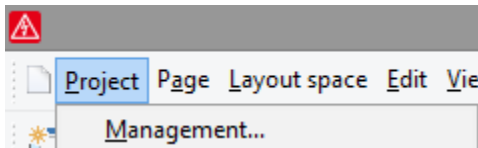
⇒ The **Project management** dialog opens.



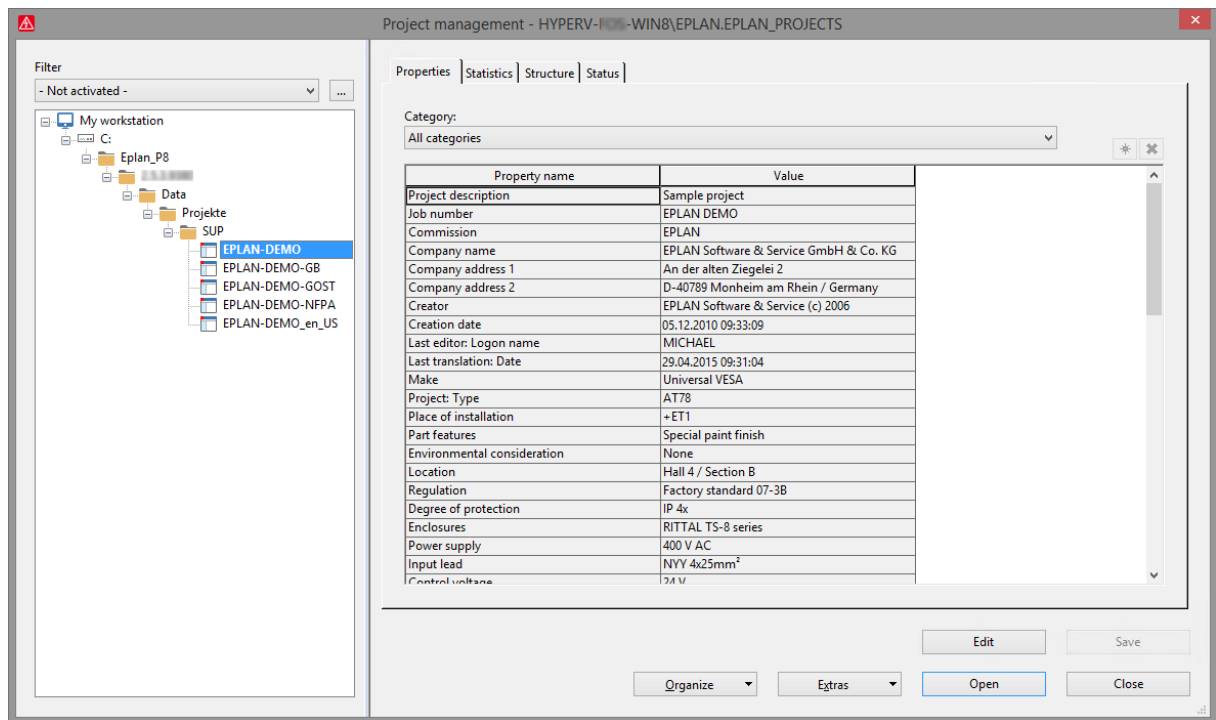
Reading More Directories into Project Management

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

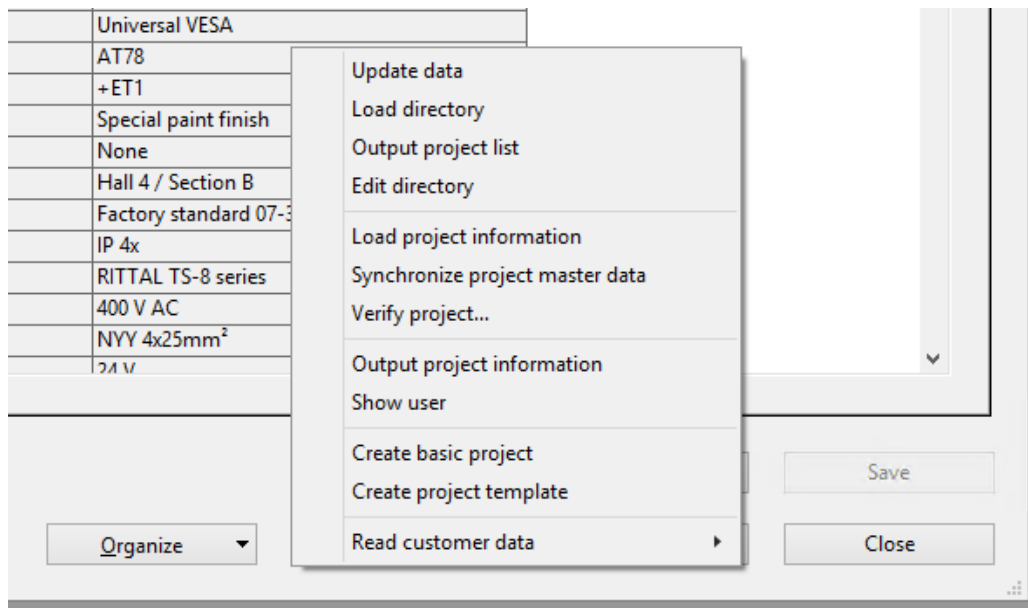
1. Select **Project > Management**.



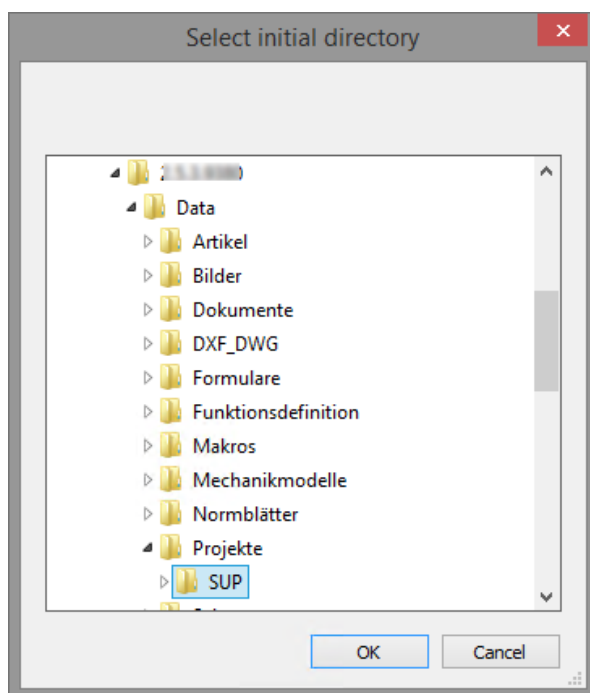
⇒ The **Project management** dialog opens.



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



⇒ The **Select initial 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 project management.



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