SQL Installation and Implementation

3300 N. Ashton Blvd. Suite 400
Lehi, UT 84043
www.efilecabinet.com
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Downloading Microsoft SQL Server

Please download a Free copy of any SQL installation files. Please only download one of the following (according to your copy of Windows):

Microsoft SQL Server 2008 Express (Free)
http://www.microsoft.com/en-us/download/details.aspx?id=16955
Select download, and chose the correct 32 bit or 64 bit for your system (between the top 2 options).

Microsoft SQL Server 2008 R2 Express (Free)
http://www.microsoft.com/en-us/download/details.aspx?id=304388
Select download, and chose the correct 32 bit or 64 bit for your system (Usually the 4th or 5th option down after clicking the download button).

Microsoft SQL Server 2012 Express (Free)
http://www.microsoft.com/en-us/download/details.aspx?id=290622
Select download, and chose the correct 32 bit or 64 bit version for your system (usually the 2nd option down for 64 bit or 4th from the bottom for 32 bit).

Windows 7 or Windows 8 (Acting as a Server Computer)
Please follow the same directions at **Microsoft SQL Server 2012 Express**.

Additional Downloads

Microsoft .NET Framework 4 (Standalone Installer)
http://www.microsoft.com/en-us/download/details.aspx?id=17718

SQL Installation Instructions

Install SQL. If you don't already have it installed, please use a free version of Microsoft SQL 2008 Express or newer). Older versions of Microsoft SQL Server such as 2005 will not work. You'll need the advanced tools that come with the larger install files. If you already have or use SQL, please continue to the next step **eFileCabinet Preparations**.

Note: Microsoft SQL Server 2012 won't install on older operating systems (i.e. Windows Server 2008, Windows Standard Server, or Windows XP). Windows SQL Server 2012 will work on Windows 7. On newer operating systems, Windows will need .NET Framework 4 and will prompt you upon attempting to install SQL if not already installed.

To install SQL Server 2012

1. Run the install file.

   Note: If Windows prompts, please click **Run**.

2. Click **Installation** in the left-hand navigation area, then click **New SQL Server stand-alone installation or add features or add features to an existing installation**.

   Note: The installation may or may not check for SQL Updates before continuing, if it does, follow those instructions. If no updates were found, please click **OK**. Also in the event that you are missing Setup Support Rules, if one is needed, the SQL Server install won't continue until it's resolved (i.e. Restart computer).

3. Click **I accept the license terms** then click **Next**.

4. Click **Next** if product updates comes up.

5. Setup Support Rules should run automatically, when it completes, click **Next**.

6. Feature Selection should have all instance features selected, including **Management Tools – Basic** (you may **Select All** if you're not sure), click **Next**.

7. Instance Configuration (you may choose to change your instance ID, but the default will work just fine), click **Next**.

8. Server Configuration may ask you to assign an Account Name for each Service, if so, click on the drop down menu and select an Account. (If unsure normally "Local" or "Network" is available and acceptable), click **Next**.

9. Database Engine Configuration (verify a "Specify SQL Server administrators" is selected), if a user name is not selected, click **Add Current User**, click **Next**.

10. Reporting Services Configuration ("Install and Configure" option is normally selected), click **Next**.

11. Error Reporting (optional), click **Next**.

    Note: If Installation Configuration Rules asks to continue, click **Next**.
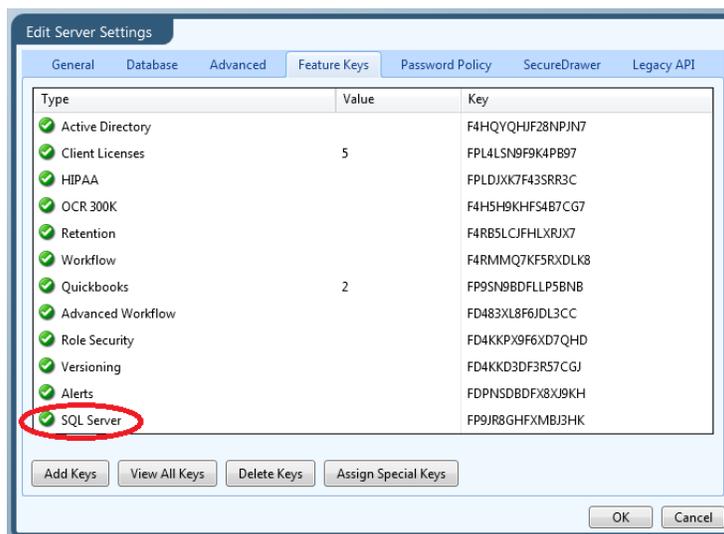
12. Once the installation finishes, click **Close**.

For detailed instructions provided by Microsoft:
http://msdn.microsoft.com/en-us/library/ms143219.aspx

eFileCabinet Preparations

1. Ensure eFileCabinet is on the newest version by right clicking on the **server tray icon**, click **Server Info**. Then click on **Check for Updates**, enter your Administrator password, and follow the prompts. The build version needs to be 5.3.240 or higher.

2. Verify you have your Feature Key plugged in. Login as the "Administrator" user in eFileCabinet, click on the **Administration** tab, click on **Server Settings**, and then click on **Feature Keys** tab.

   a. If you already have your "SQL Server" Feature Key in that list, click **OK**.
   b. If you don't have your "SQL Server" Feature Key listed, you may locate the Feature Key in the email received upon purchasing SQL Server Integration. You may also find the feature key listed in your "My Account" at https://www.efilecabinet.com/efc-desktop/my-account/ sign into your account, and click on **My Servers**. Your Feature Keys should be listed (please feel free to update any missing Feature Keys that you don't have at this time).

Once you have a copy of the Feature Key(s) please click **Add Keys**. Paste the Feature Keys into this window, click **OK**, and click **OK** one more time.

Note: It may take a few minutes for the server to accept the new Feature Keys.

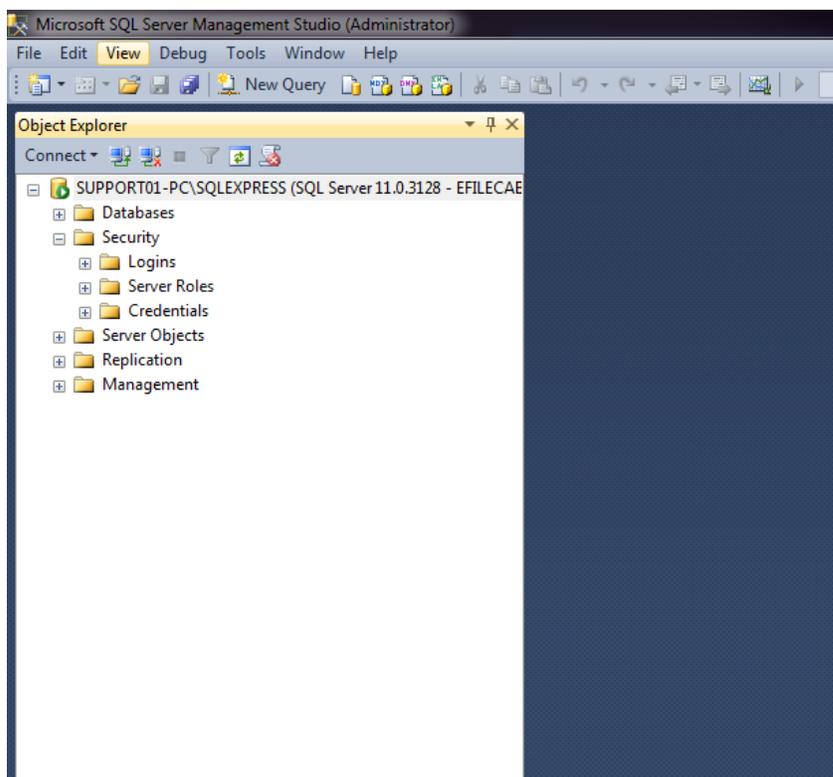# SQL Implementation with eFileCabinet

1. In SQL Management Studio, create a SQL Database. It doesn't need any settings changes, just a name for the database.

2. In SQL Management Studio, create a SQL Login. Create a login name by right clicking on **Security** in the Object Explorer. Enter a password, however uncheck **Enforce password policy**. The SQL Login needs to be a **sysadmin** under **Server Roles**. Under "User mapping" select the name of the eFileCabinet Database you created.

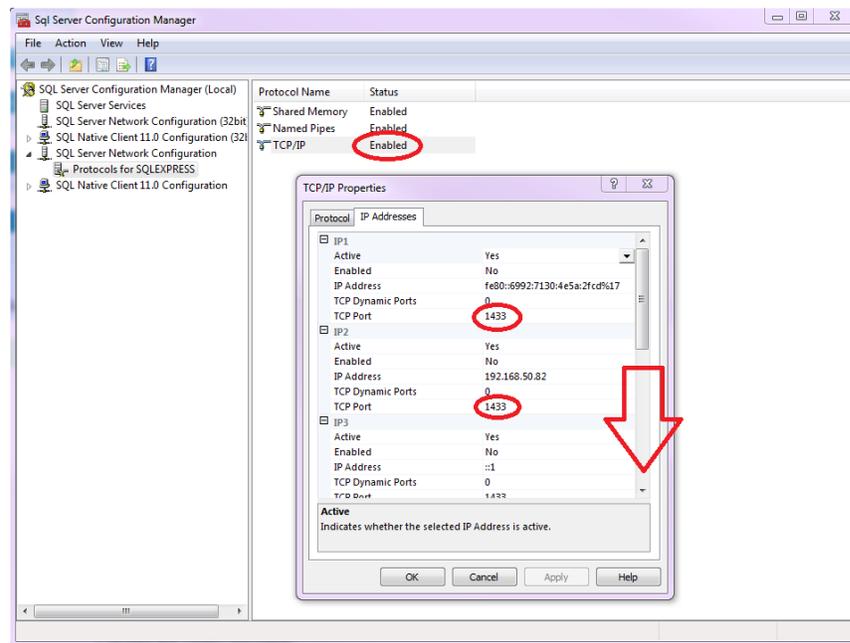   **Example for Login:**
   Login name: **EFC**
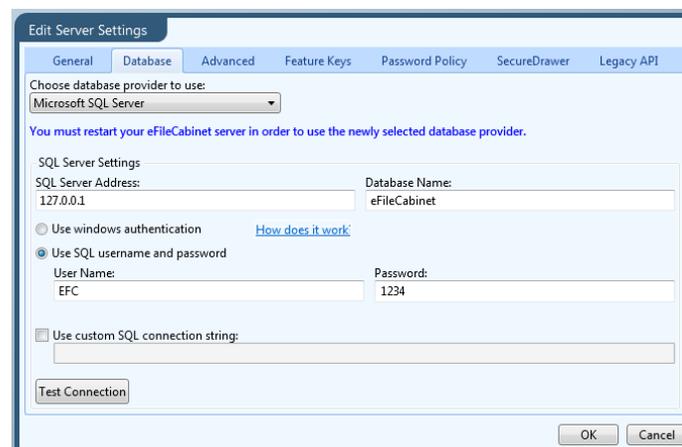   Password: **1234**

3. In SQL Management Studio, verify both SQL Server and Windows Authentication mode is enabled by right clicking on the server instance (i.e. **<Computer Name>\SQLEXPRESS** towards the very top and usually has a green play icon indicating that that server instance is running), then click **Properties** then under the **Security** tab, the first option is **Server Authentication**.

4. In SQL Server Configuration Manager, enable TCP/IP port 1433 on all ports for the name of you server. Usually by expanding **SQL Server Network Configuration** click on the **Protocols [your server instance name]** double click on **TCP/IP** then click the drop down for **Enabled** select **Yes.** Then move to the next tab called **IP Addresses** and enter **1433** for all line items stating **TCP Port**.

5. Restart the SQL Server by opening your Windows Services menu (either by searching for "Services" in Windows Start Menu, or "Run" "services.msc". Right click and restart the SQL Server (name).

6. Once SQL and eFileCabinet are both installed. Login as the "Administrator" user in eFileCabinet, click on the **Administration** tab, click on **Server Settings**, and then click on **Database**. Select **Microsoft SQL Server** from the drop down menu. Fill in the following information, and for the login, we recommend using the SQL username and password made earlier in step 4. Test the connection and make sure it successfully connects to SQL.

7. Close the eFileCabinet Client, and restart the eFileCabinet Server, by right clicking the task tray icon, and select **Stop** then **Restart** (if you select **Restart** it's known to break and should be fixed in a later release). Once it's started it'll now be referencing the empty database files in SQL, so don't panic when no data shows up, that'll show up after step .

8. Open the eFileCabinet Client, and simply hit login (the Administrator password will be blank). Once it logs in, click on the **Administration** tab, click on **Manage Users**. Double click on the Administrator user to change the password (this is temporary, it'll revert to your old Administrator password once this process it complete). Once the administrator password is temporarily changed, logout then log back in with the temporary administrator password. Once logged back in, click on the **Administration** tab, click on **Import Database**. It only has one option to import from, so simply select **Import**, and enter your temporary administrator password. Confirm the warning window that all users are out of eFileCabinet. The import will start, and take anywhere from a few second to 40 minutes depending on how big your old database files were.

9. Once it completes it'll bring you back to the login screen. All that's needed is to make sure all other workstations are on the new 2014 eFileCabinet Client version as well.