RELATE SOFTWARE APPLICATIONS AND MICROSOFT SQL SERVER 2017 INSTALLATION GUIDE

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INSTALLING SQL SERVER 2017

To download the install files open your browser and go to www.relate-software.com You must log in to the website using the 'Login' option in the top right-hand corner [**Figure 1**]. If you do not have a login then you can choose to 'Sign Up'. This is a quick five minutes process.

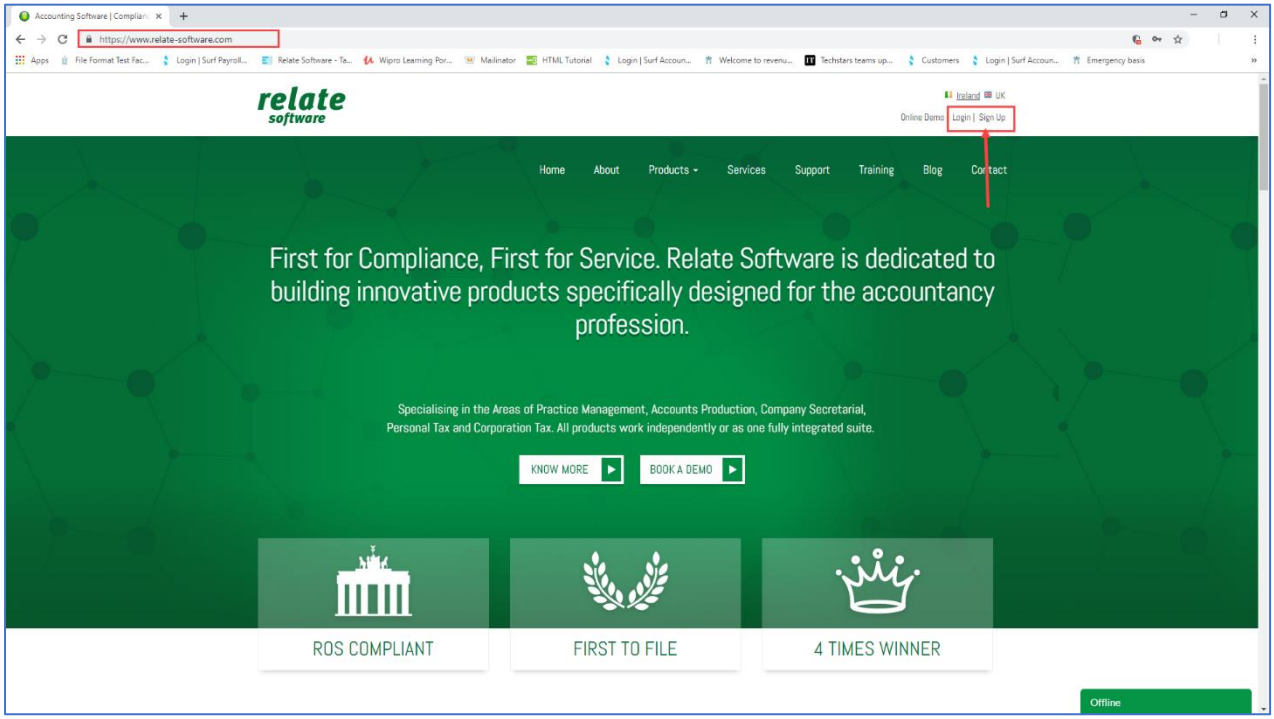

Figure 1

When logged into the website choose the DRIVE icon from the list of products [**Figure 2**].

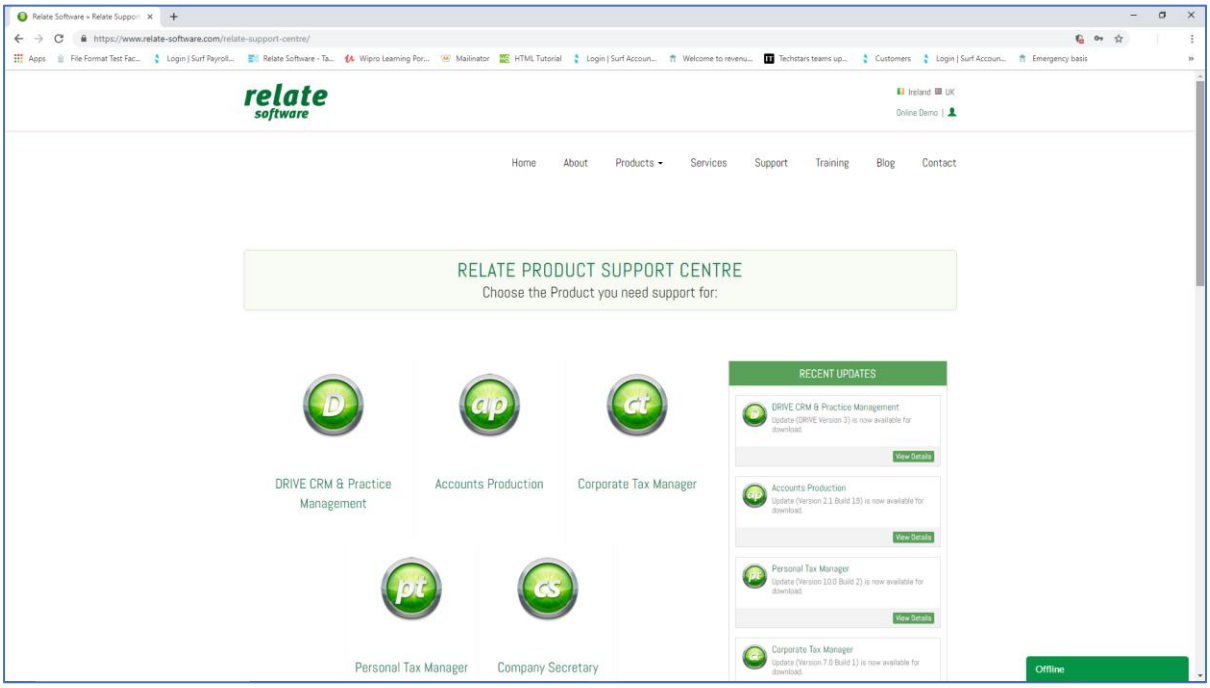

Figure 2

From the next screen choose Downloads A list of avilable downloads will appear [**Figure 3**].

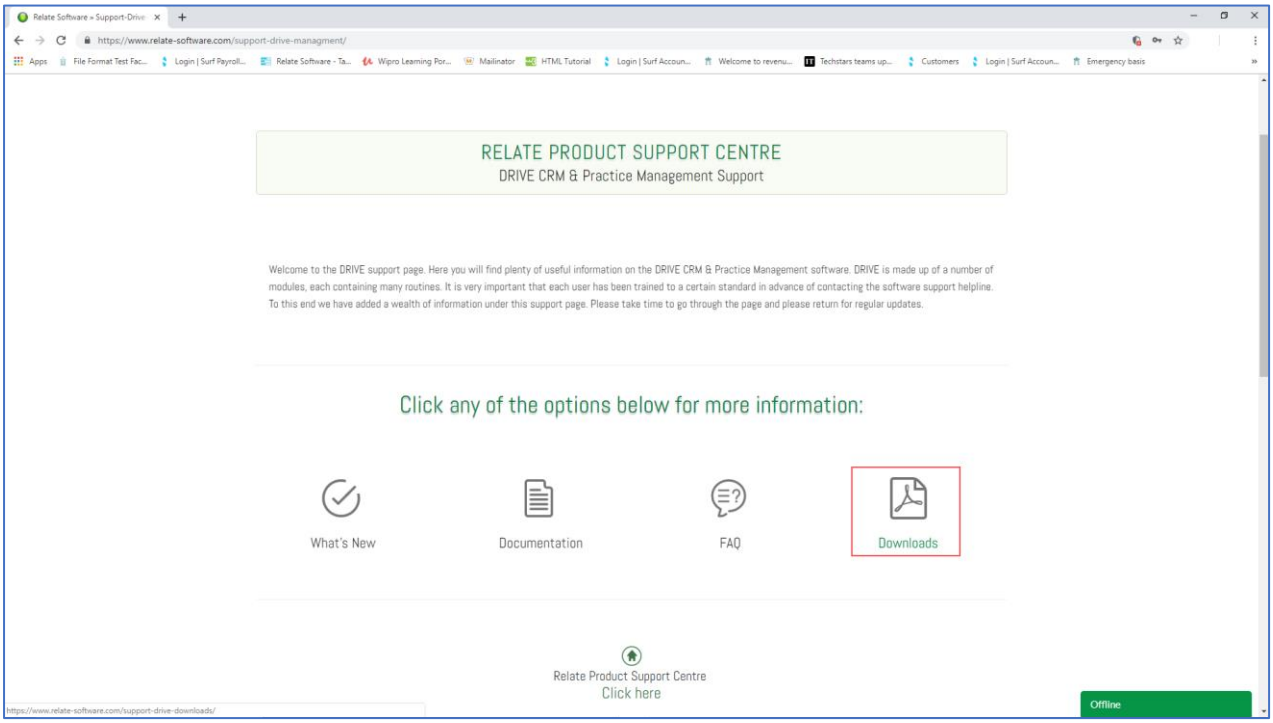

Figure 3

Choose to Download 'All Products Install' by selecting **'Click here to download'**. [**Figure 4**]

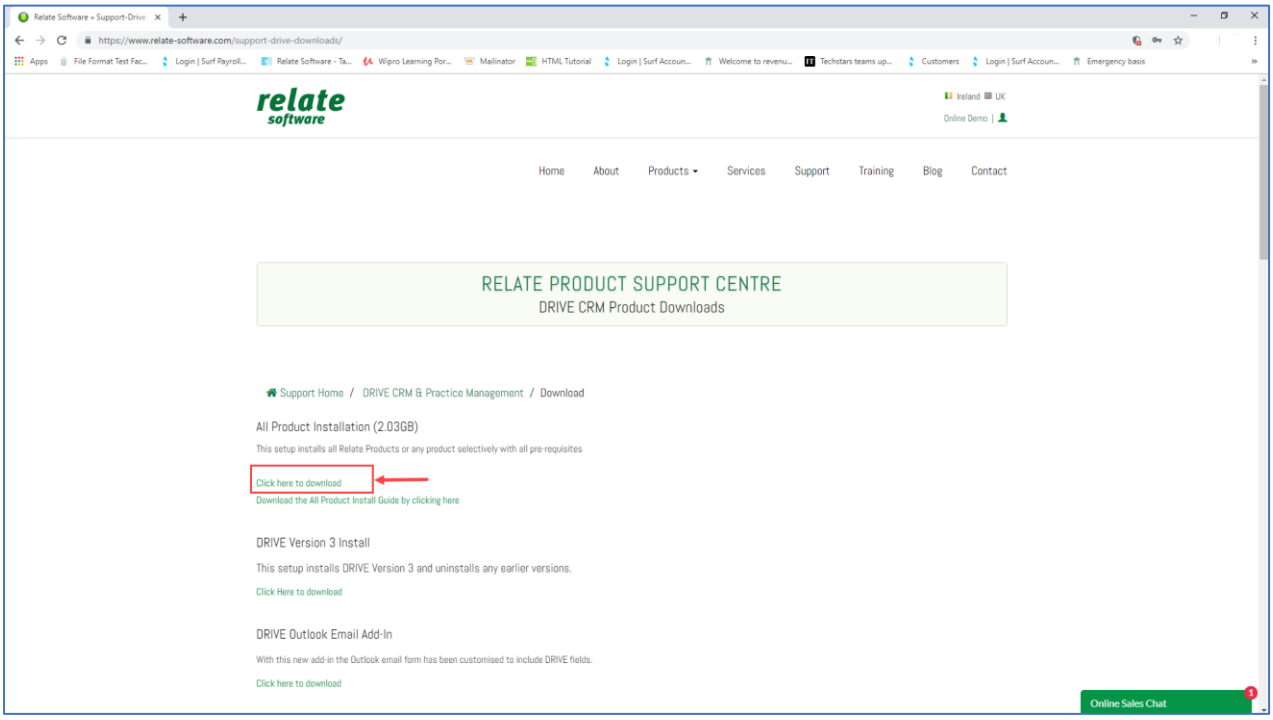

Figure 4

The 'All Products Install' files will be downloaded, this is a zipped file so must be extracted before use. To do this browse to the location of the downloaded file, right click on it and select Extract Files. You can then choose where you want the files extracted to. In the below example we have created a folder D:\Relate Software. [**Figure 5**]

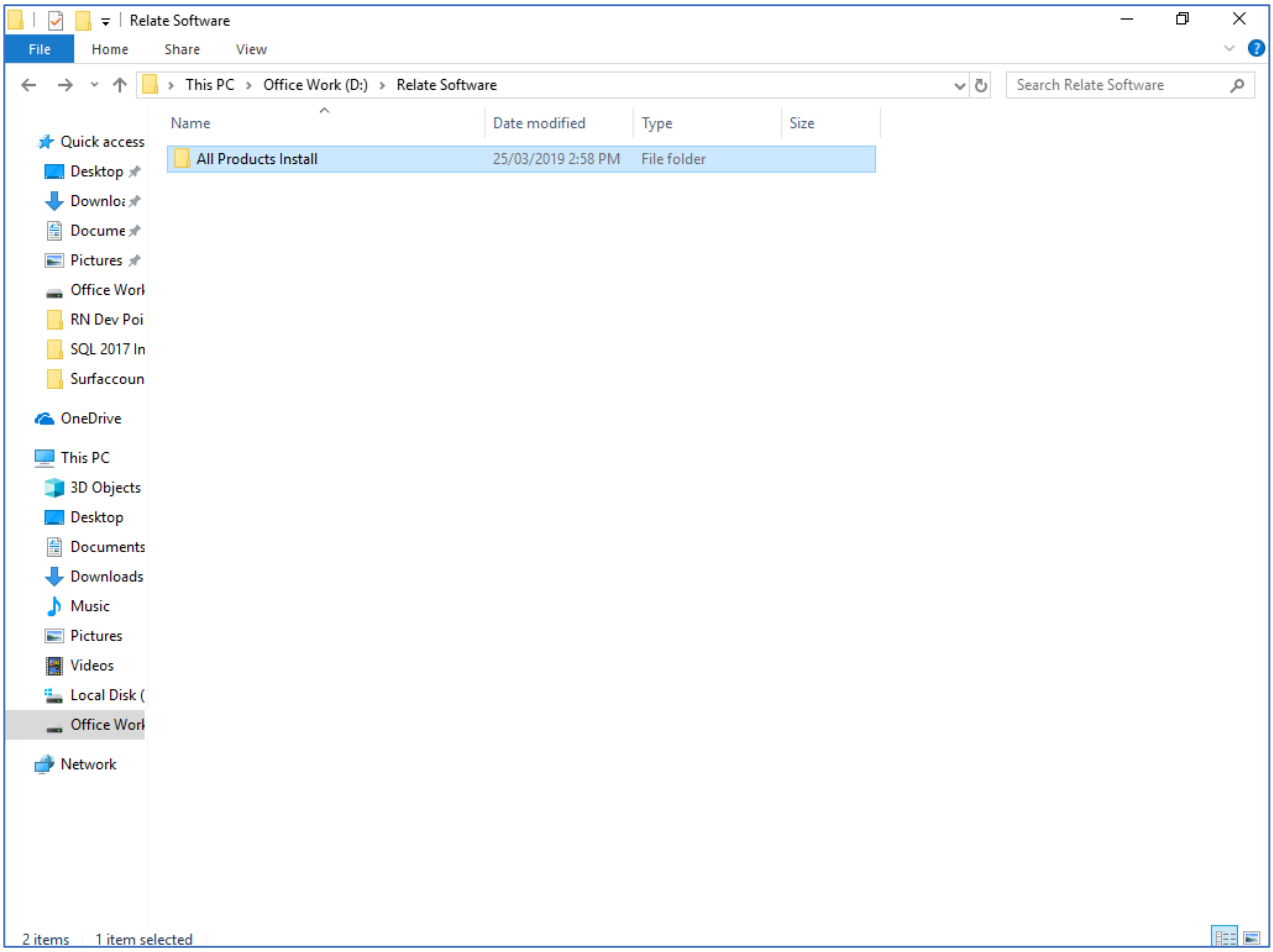

Figure 5

When the files have extracted browse to All Products Install, SQL2017. Here you will have an [**Setup**] option for 64-bit machines. **[Figure 6]**

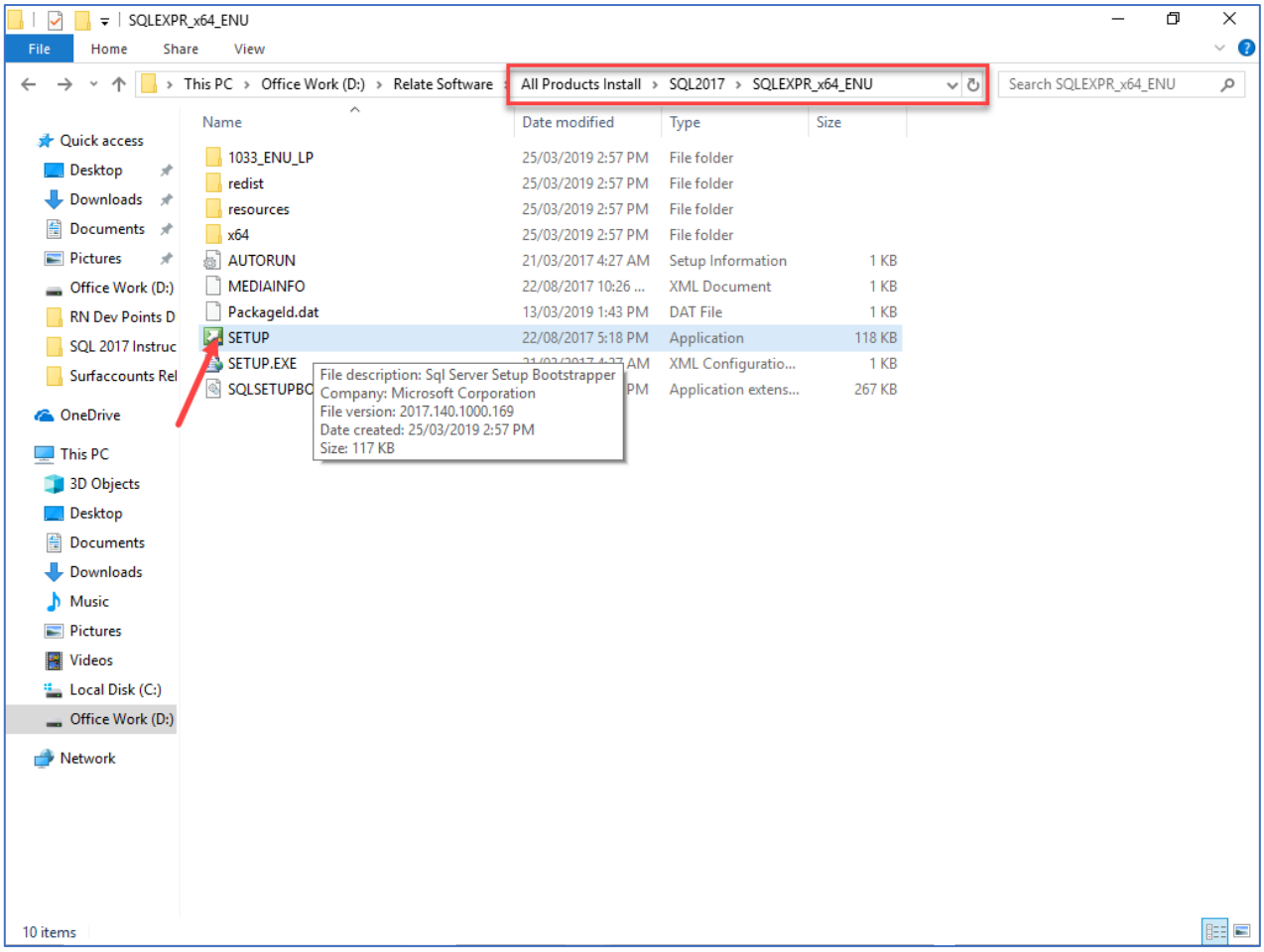

Figure 6

To find whether your machine is 64 bit or not, right click on [**Computer**] from the start menu or desktop or 'This PC' from the file explorer, as below and selecting Properties [**Figure 7**] and [**Figure 8**].

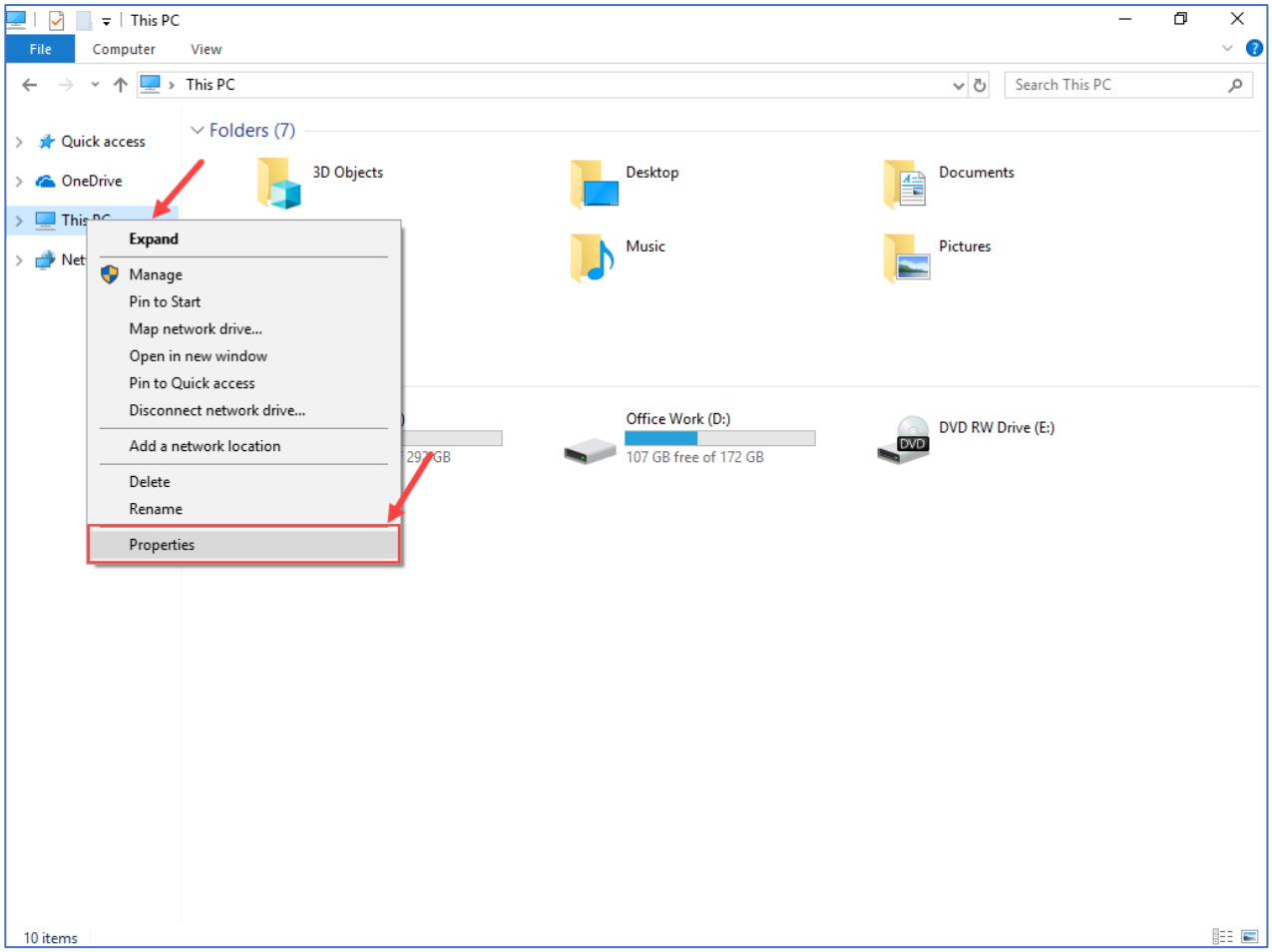

Figure 7

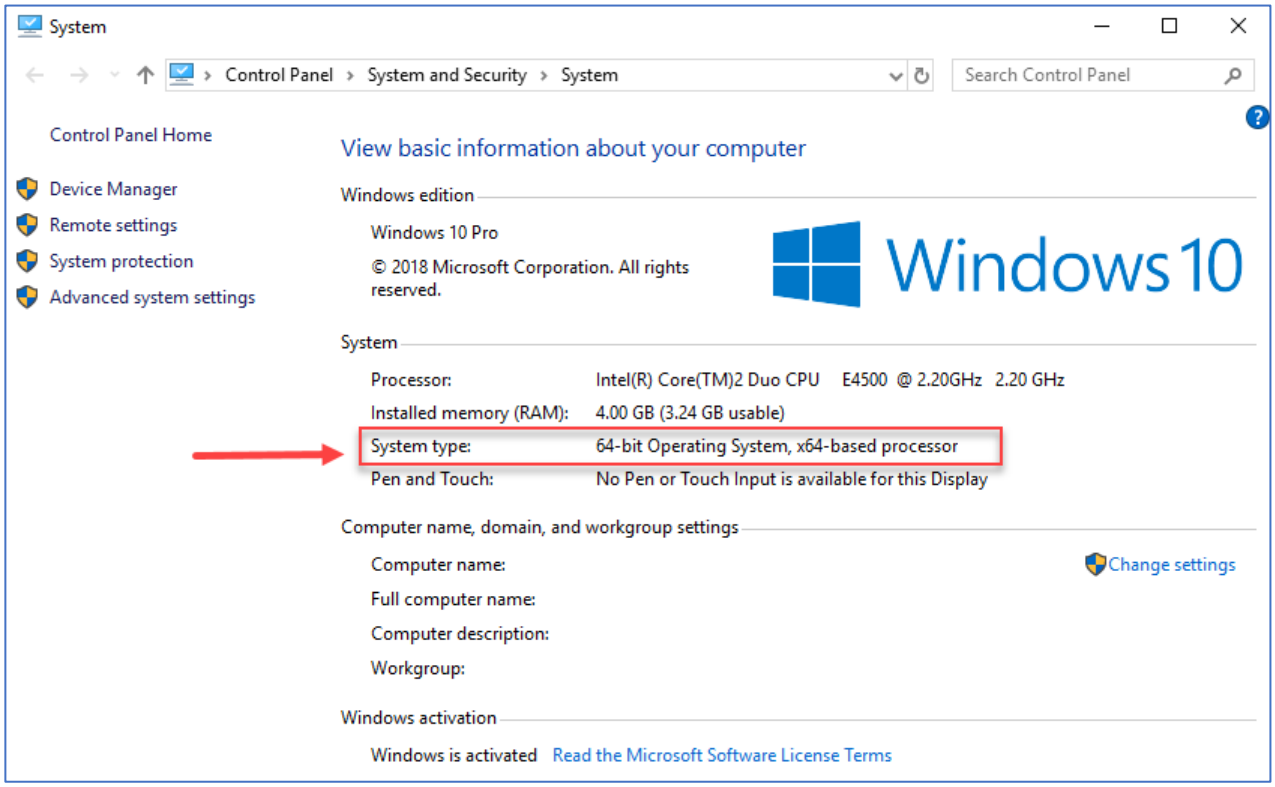

Figure 8

In above screen shot you can see the System Type is 64 -bit Operating System. For any machine with 64-bit OS you will need to run **SQLEXPRWT_x64_ENU**.

To run the file double click on it in the folder location. The installer will load, and the below screen will appear. [**Figure 9**]

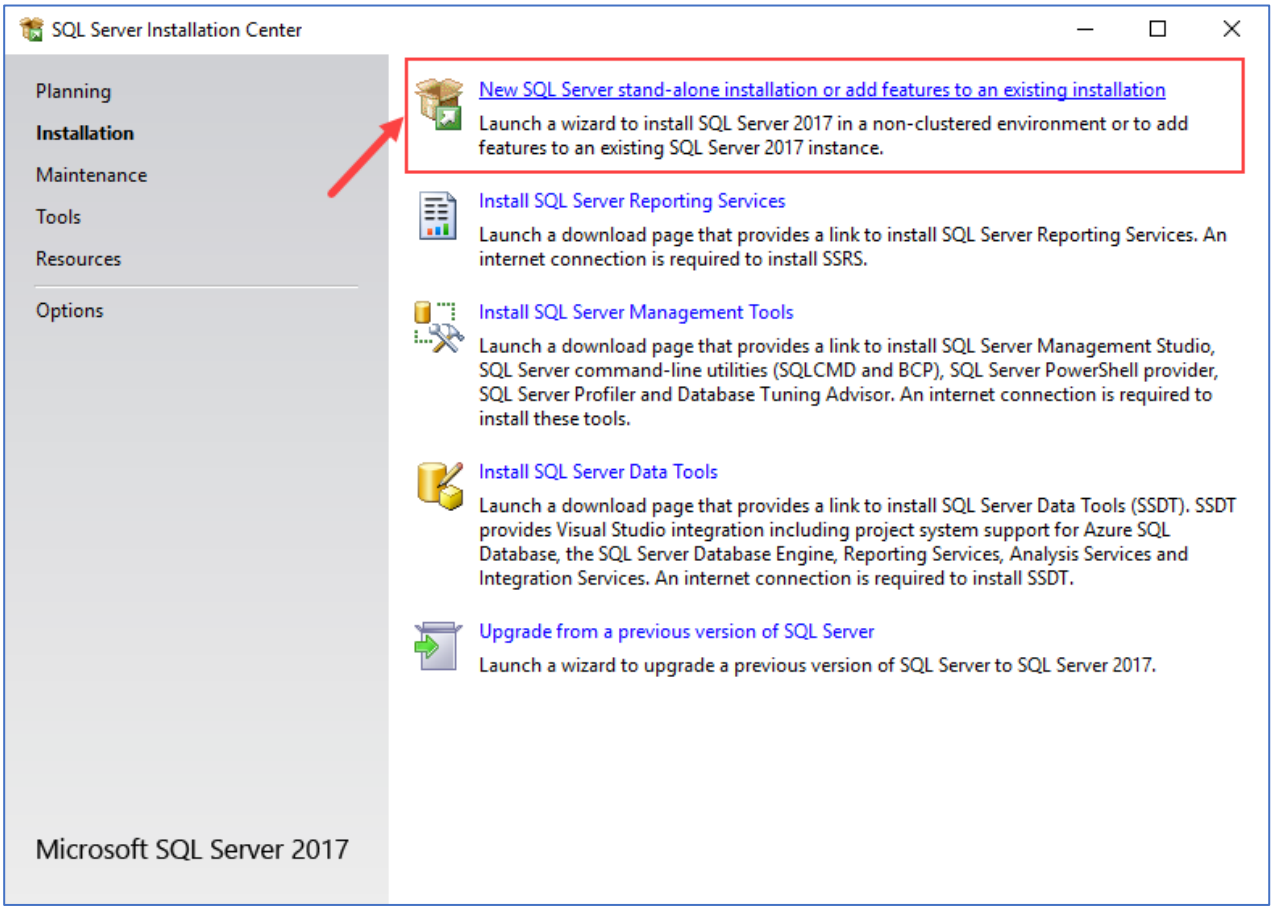

Figure 9

Choose 'New Installation or add features to an existing installation. Tick to accept the licence terms, as below. Then select Next. [**Figure 10**]

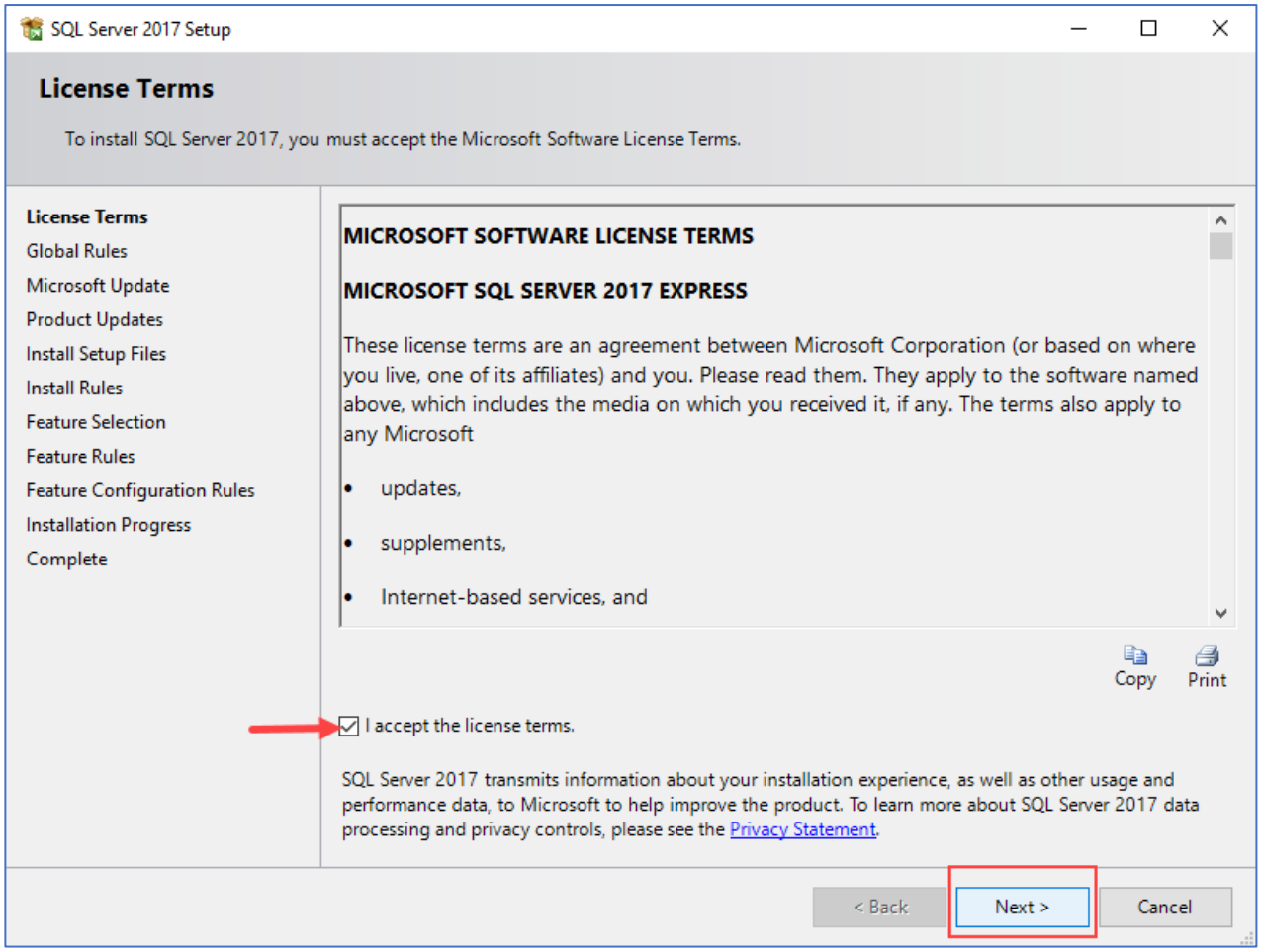

Figure 10

If you want to update the Microsoft Windows tick the box [**Use Microsoft Update to check for updates**] and click on 'Next'. [**Figure 11**].

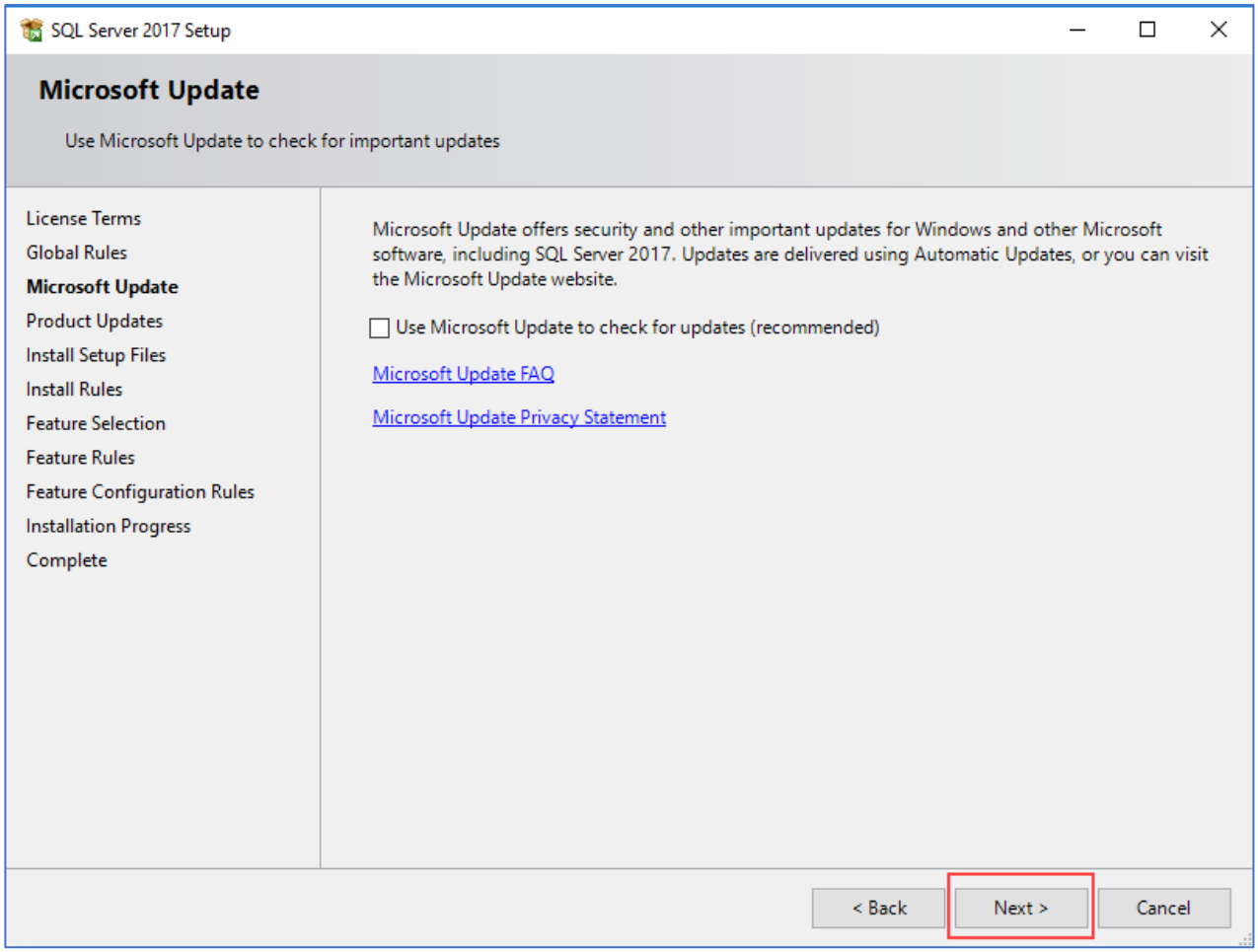

Figure 11

The Feature Selection screen will appear on your screen. [**Figure 12**]

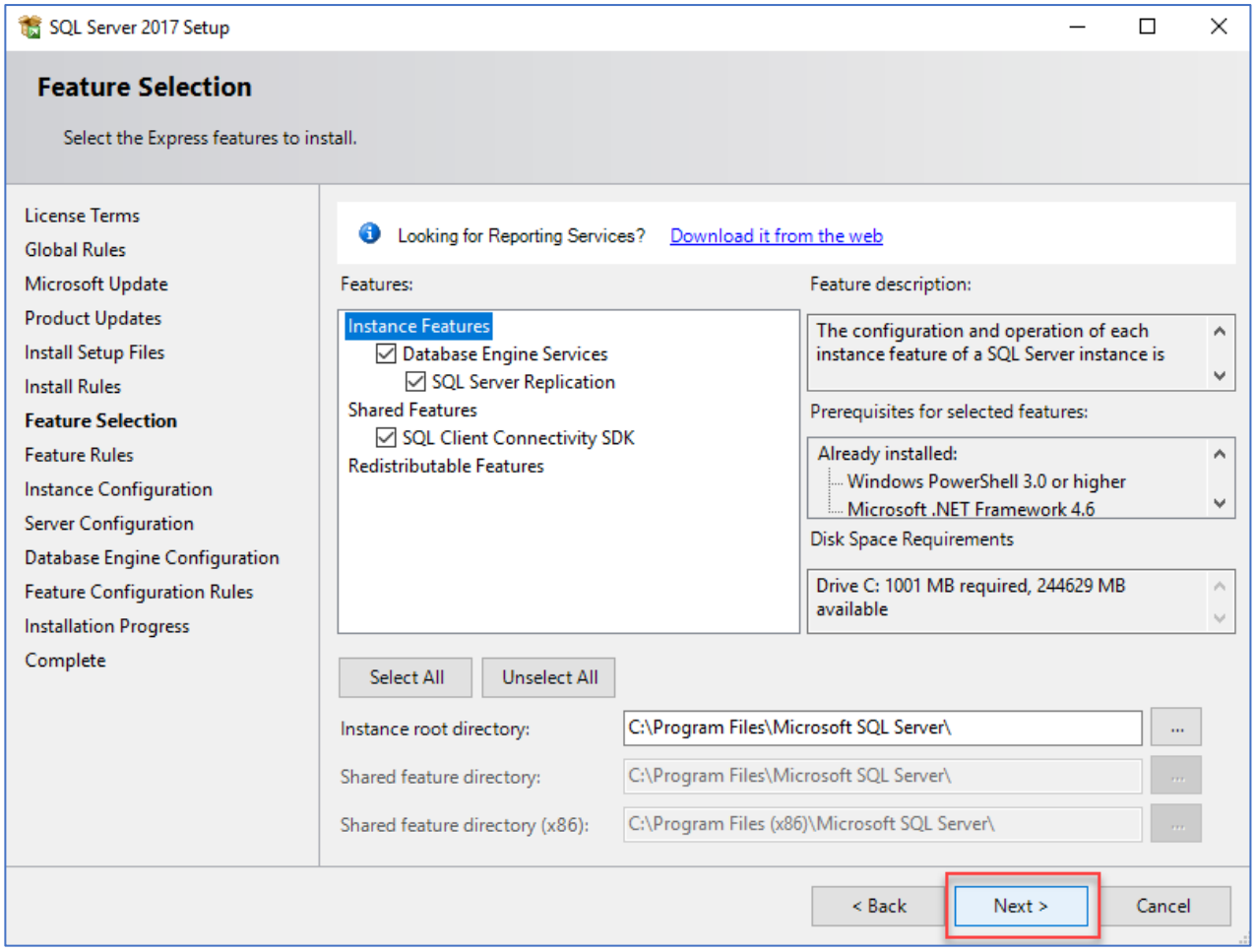

Figure 12

Within the [Feature Selection] screen all the relevant tick boxes will be ticked. Click on the [**Next**] button to proceed. [**Figure 13**]

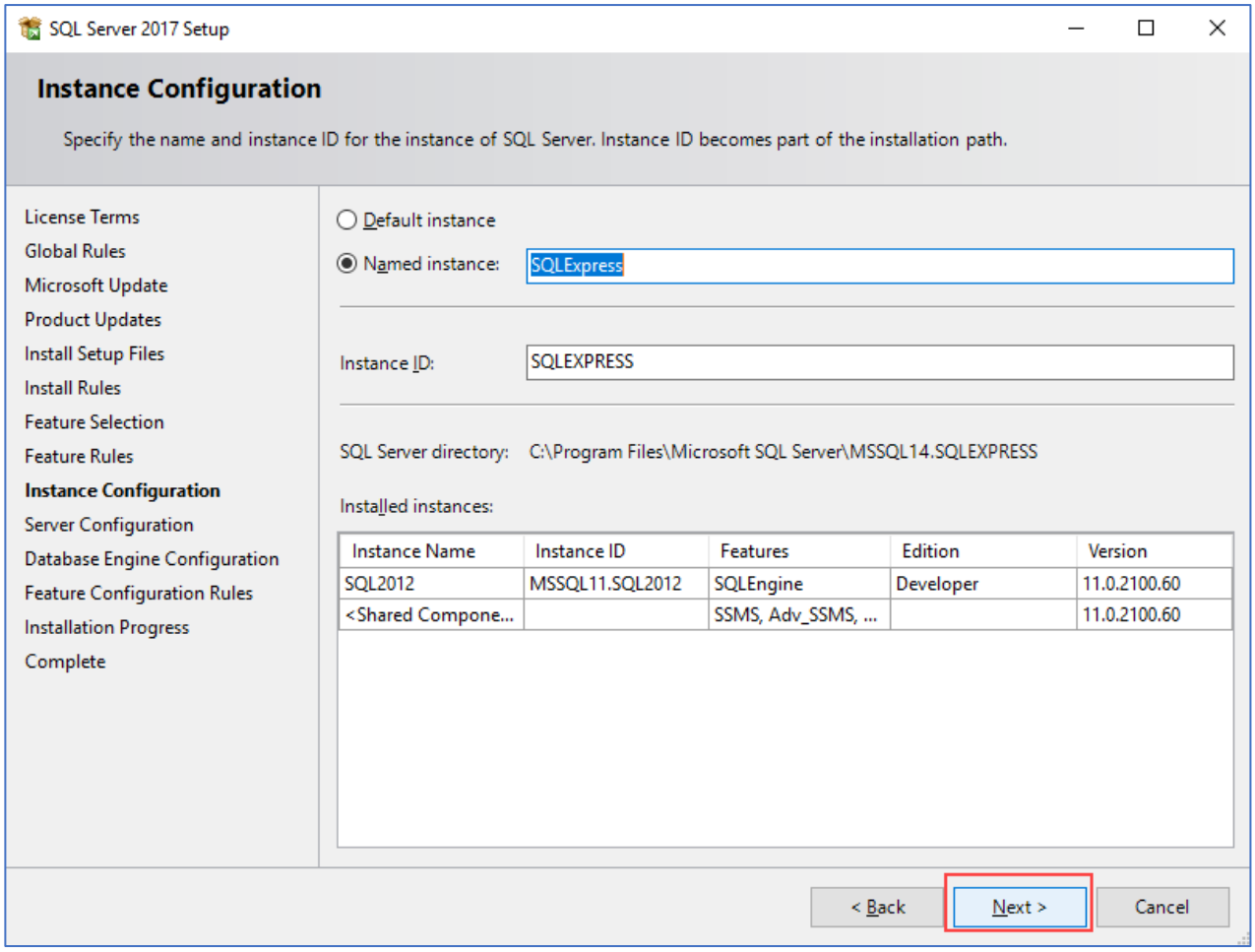

Figure 13

On the [**Instance Configuration**] enter the name as RELATE. Click on Next to proceed. [**Figure 14**]

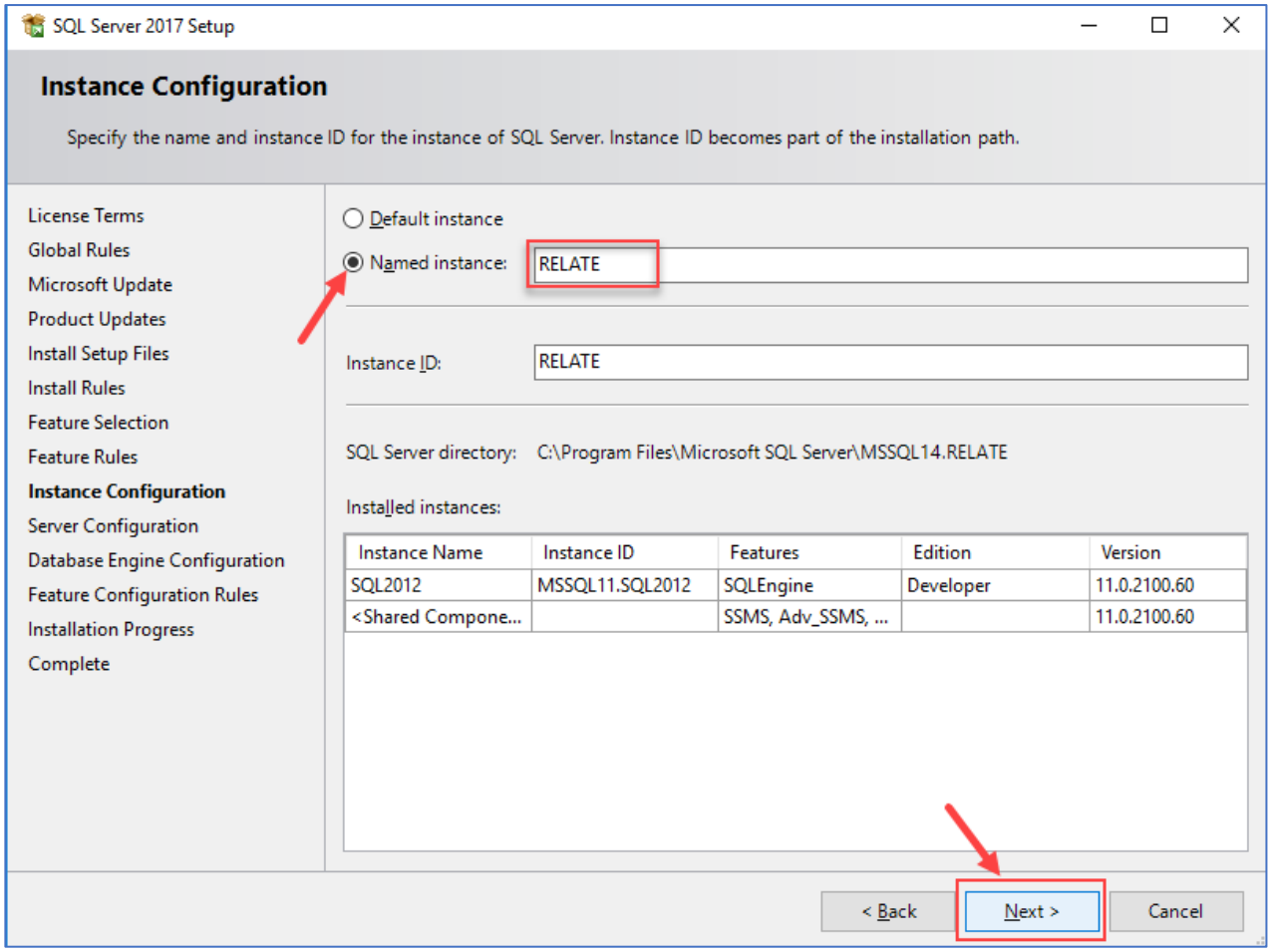

Figure 14

From the [**Server Configuration**] change the [**Startup Type**] from Disable to Automatic. Select Next. [**Figure 15**]

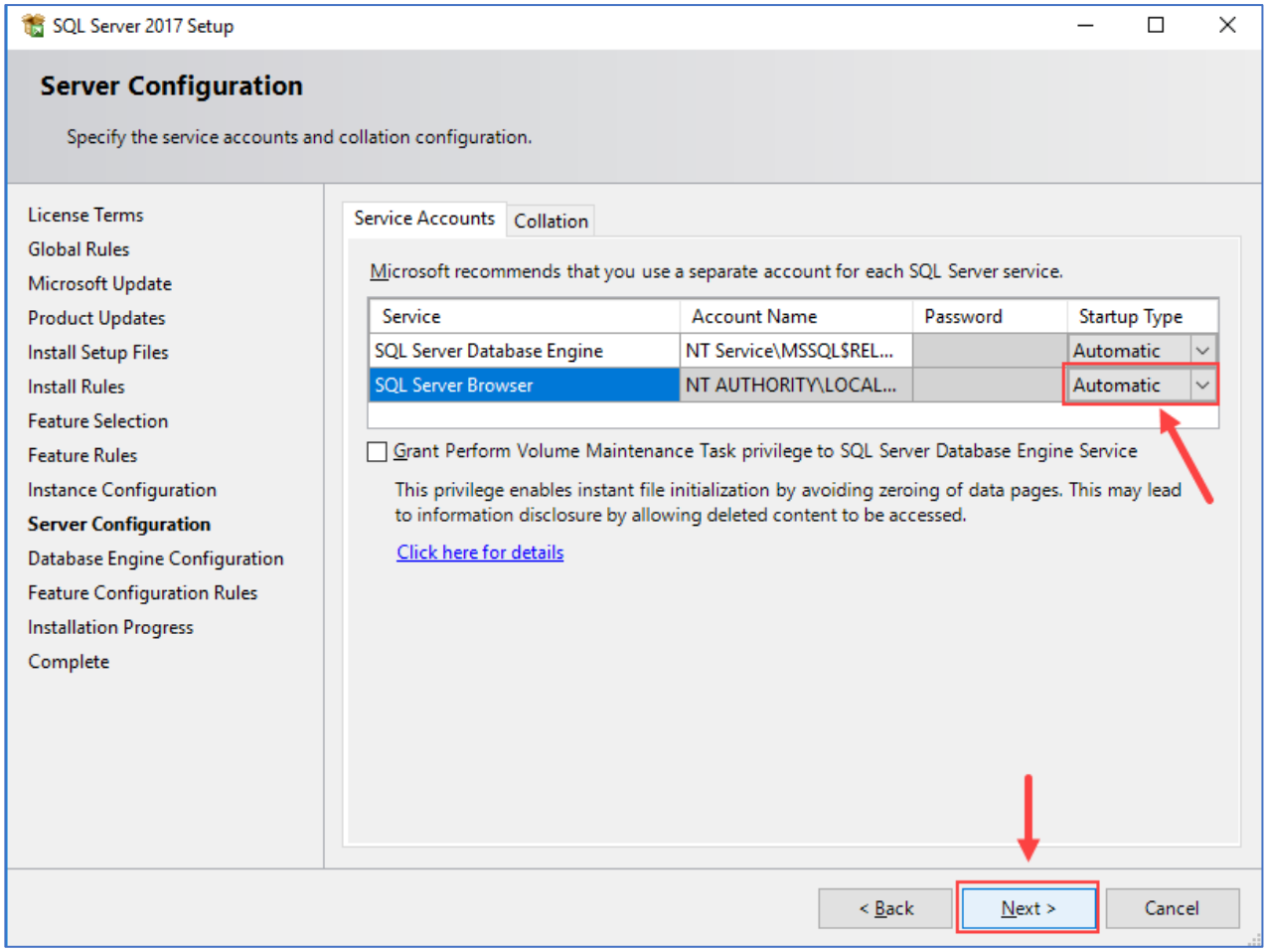

Figure 15

On the 'Database Engine Configuration' choose Mixed Mode as the authentication type. Enter the following password, **!!R314t3!!** and confirm the password. [**Figure 16**]

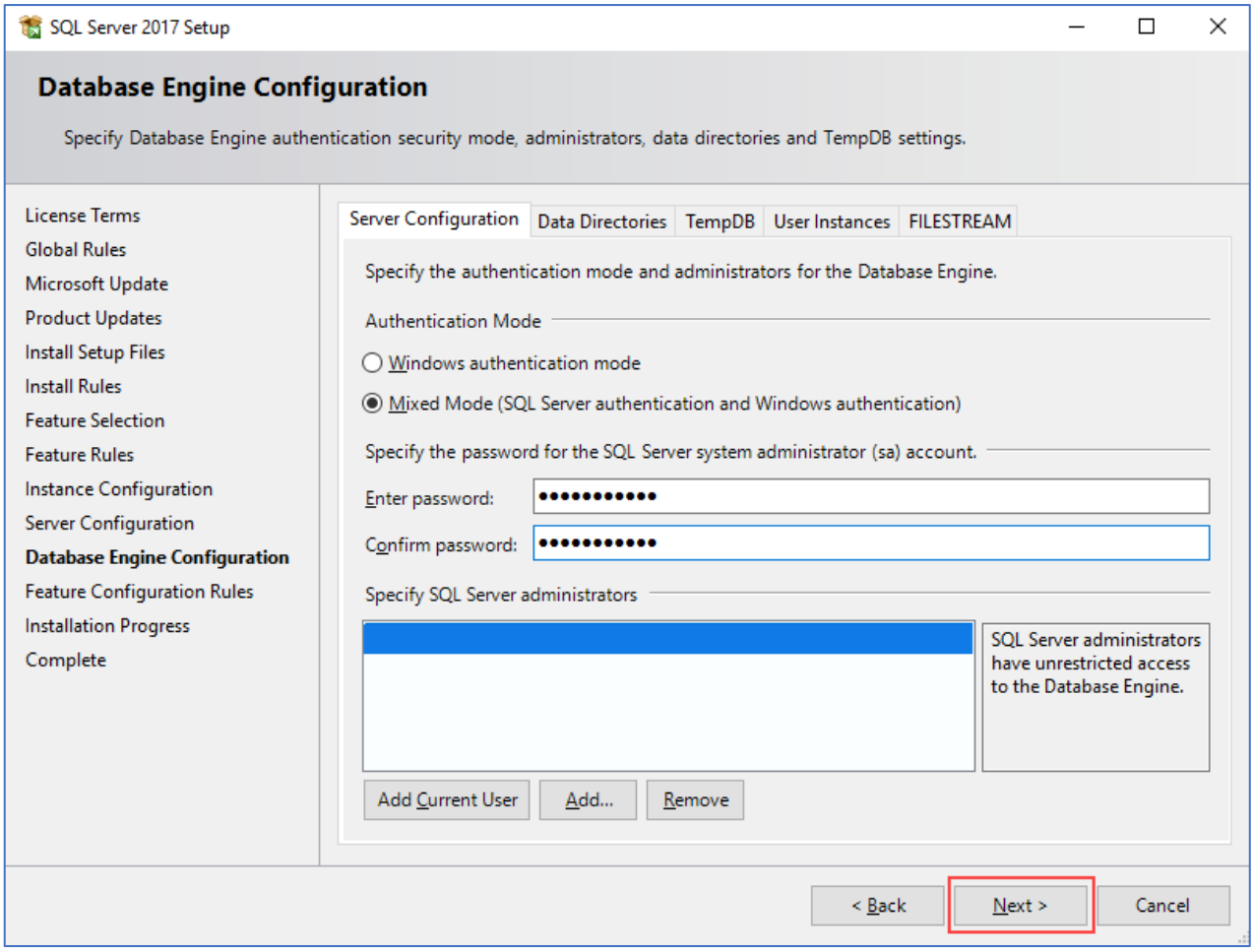

Figure 16

The installation will progress, this can take up to one hour depending on the specification of the machine. This process must be allowed to run to completion. [**Figure 17**]

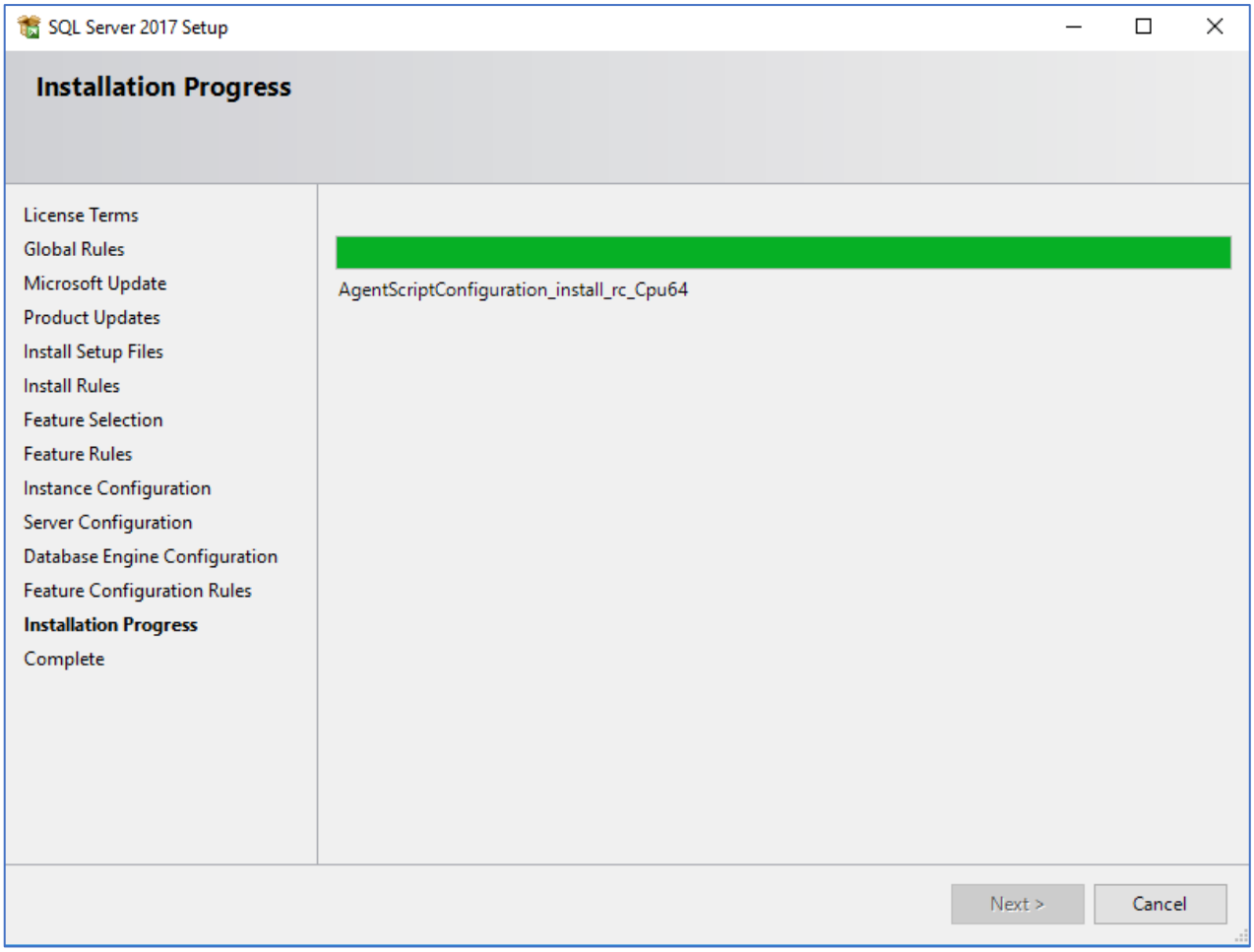

Figure 17

You must restart your machine once installation is complete. A pop-up message will appear on your screen confirming [**Computer restart required**]. Click on [**OK**] to restart after successful installation. [**Figure 18**] and [**Figure 19**].

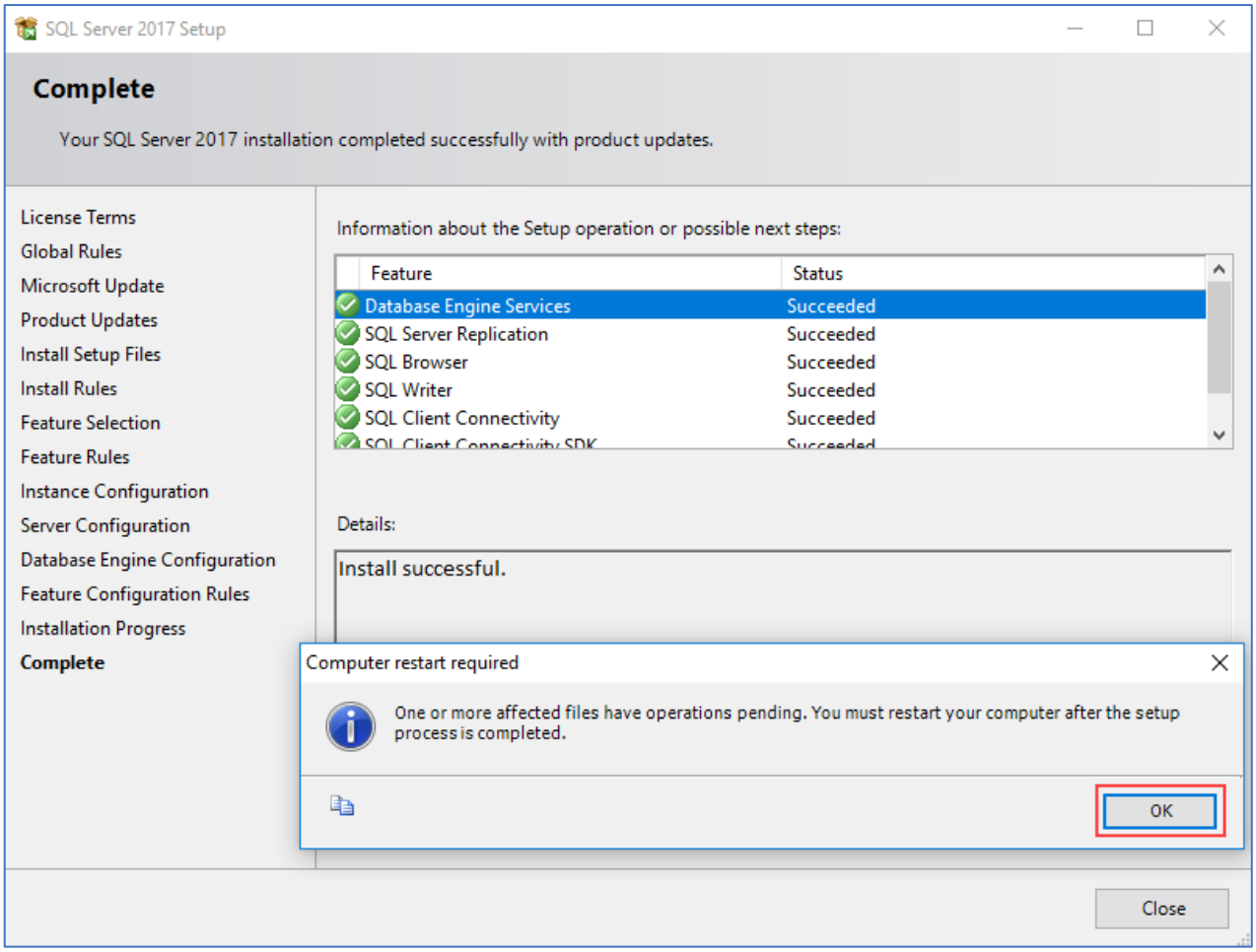
SQL Server 2017 Setup
Complete
Your SQL Server 2017 installation completed successfully with product updates.
License Terms
Global Rules
Microsoft Update
Product Updates
Install Setup Files
Install Rules
Feature Selection
Feature Rules
Instance Configuration
Server Configuration
Database Engine Configuration
Feature Configuration Rules
Installation Progress
Complete
Information about the Setup operation or possible next steps:
Feature
Status
Database Engine Services
Succeeded
SQL Server Replication
Succeeded
SQL Browser
Succeeded
SQL Writer
Succeeded
SQL Client Connectivity
Succeeded
Details:
Install successful.
Computer restart required
One or more affected files have operations pending. You must restart your computer after the setup process is completed.
OK
Close

Figure 18

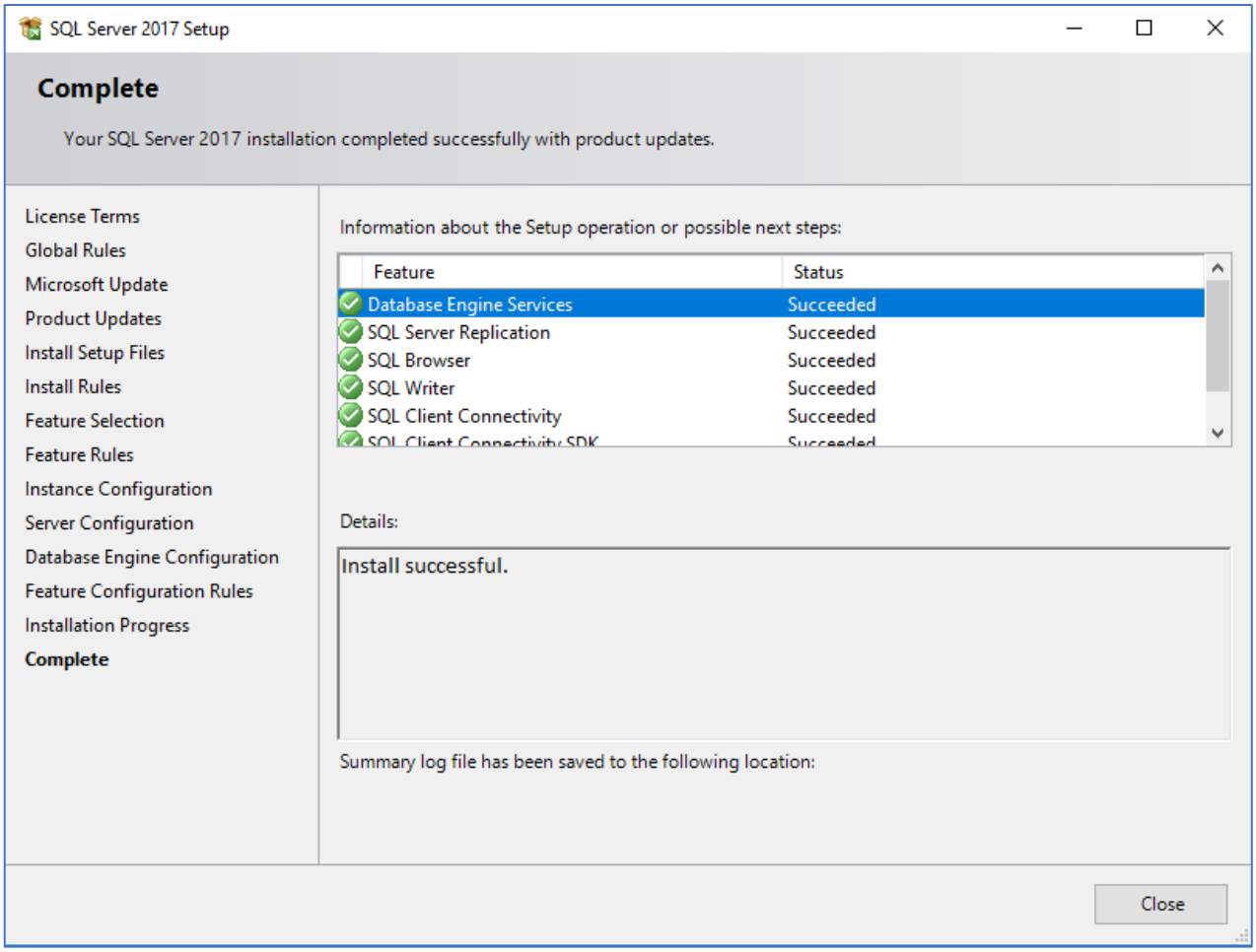
SQL Server 2017 Setup
Complete
Your SQL Server 2017 installation completed successfully with product updates.
License Terms
Global Rules
Microsoft Update
Product Updates
Install Setup Files
Install Rules
Feature Selection
Feature Rules
Instance Configuration
Server Configuration
Database Engine Configuration
Feature Configuration Rules
Installation Progress
Complete
Information about the Setup operation or possible next steps:
Feature
Status
Database Engine Services
Succeeded
SQL Server Replication
Succeeded
SQL Browser
Succeeded
SQL Writer
Succeeded
SQL Client Connectivity
Succeeded
Details:
Install successful.
Summary log file has been saved to the following location:
Close

Figure 19

INSTALL SQL SERVER MANAGEMENT STUDIO 2017

To install the SQL Server Management Studio, go to All Products Install and select SQL 2017 in your machine. Within the SQL 2017 folder double click the icon [**SSMS-Setup-ENU**]. [**Figure 20**]

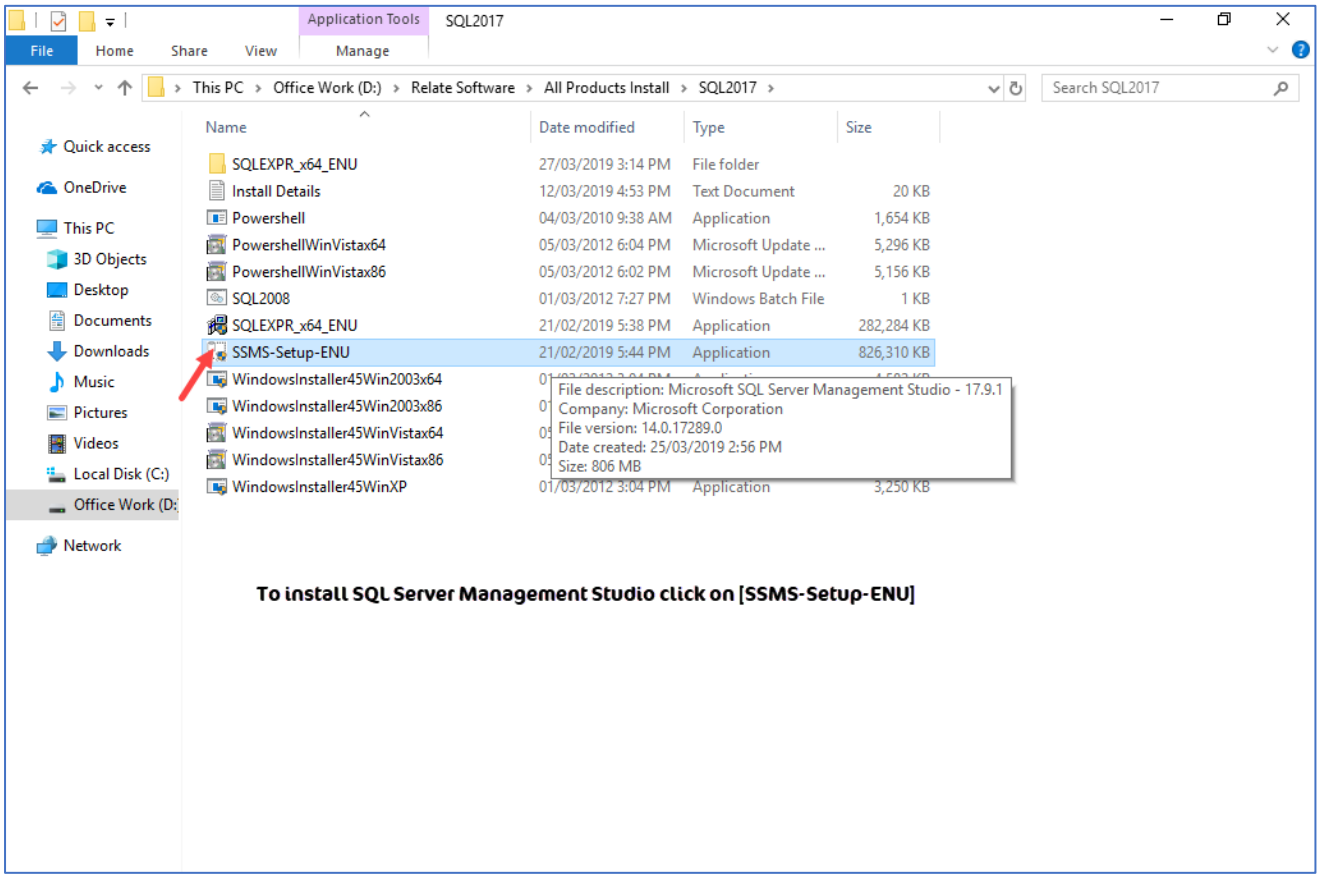

Figure 20

The installation screen will appear on your machine. To install Microsoft SQL Server Management Studio, click on [**Install**]. [**Figure 21**]

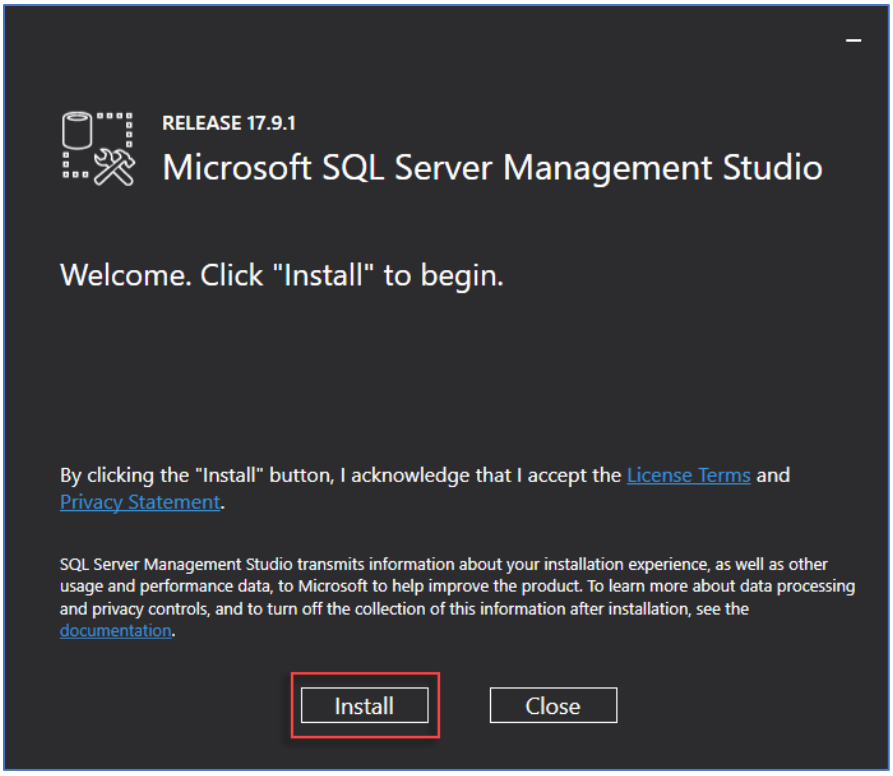

Figure 21

The following screens will appear on your machine and wait for the installation to complete. [**Figure 22**], [**Figure 23**] and [**Figure 24**].

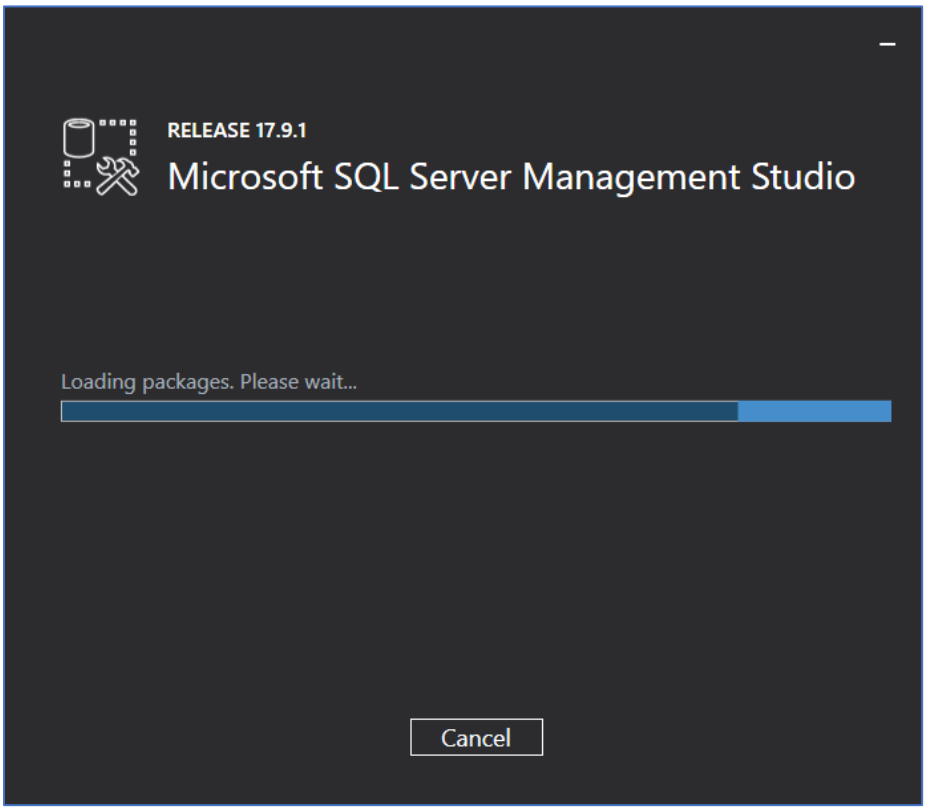

Figure 22

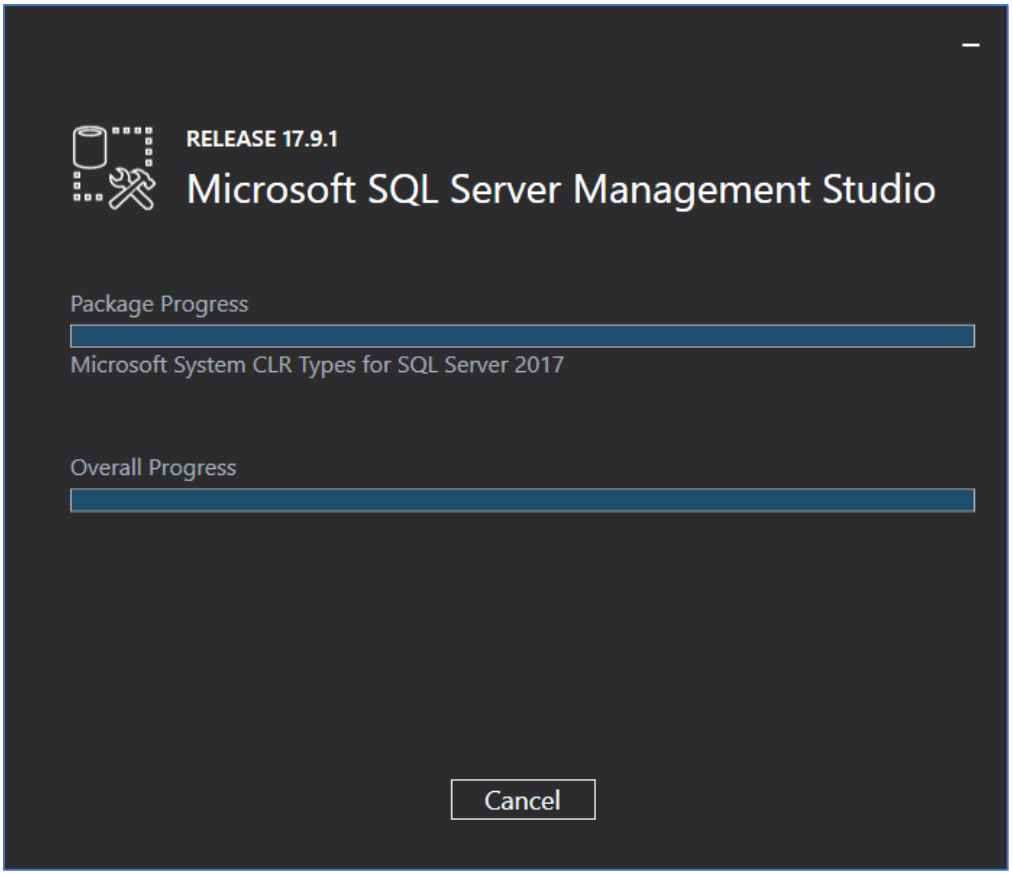

Figure 23

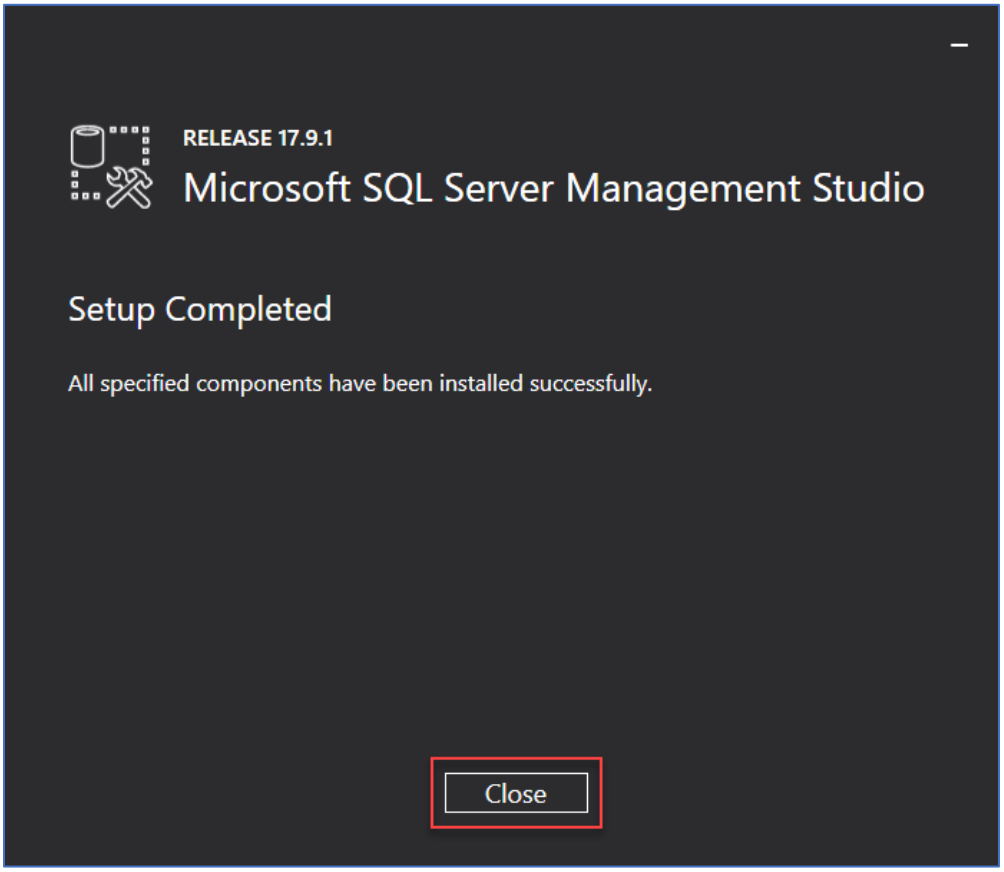

Figure 24

Once installed launch 'SQL Server Configuration manager'. This will be available from the Start Menu, All Programs, Microsoft SQL Server 2017. When it has launched browse to SQL Server Network Configuration and choose Protocols for **RELATE**. [**Figure 25**]

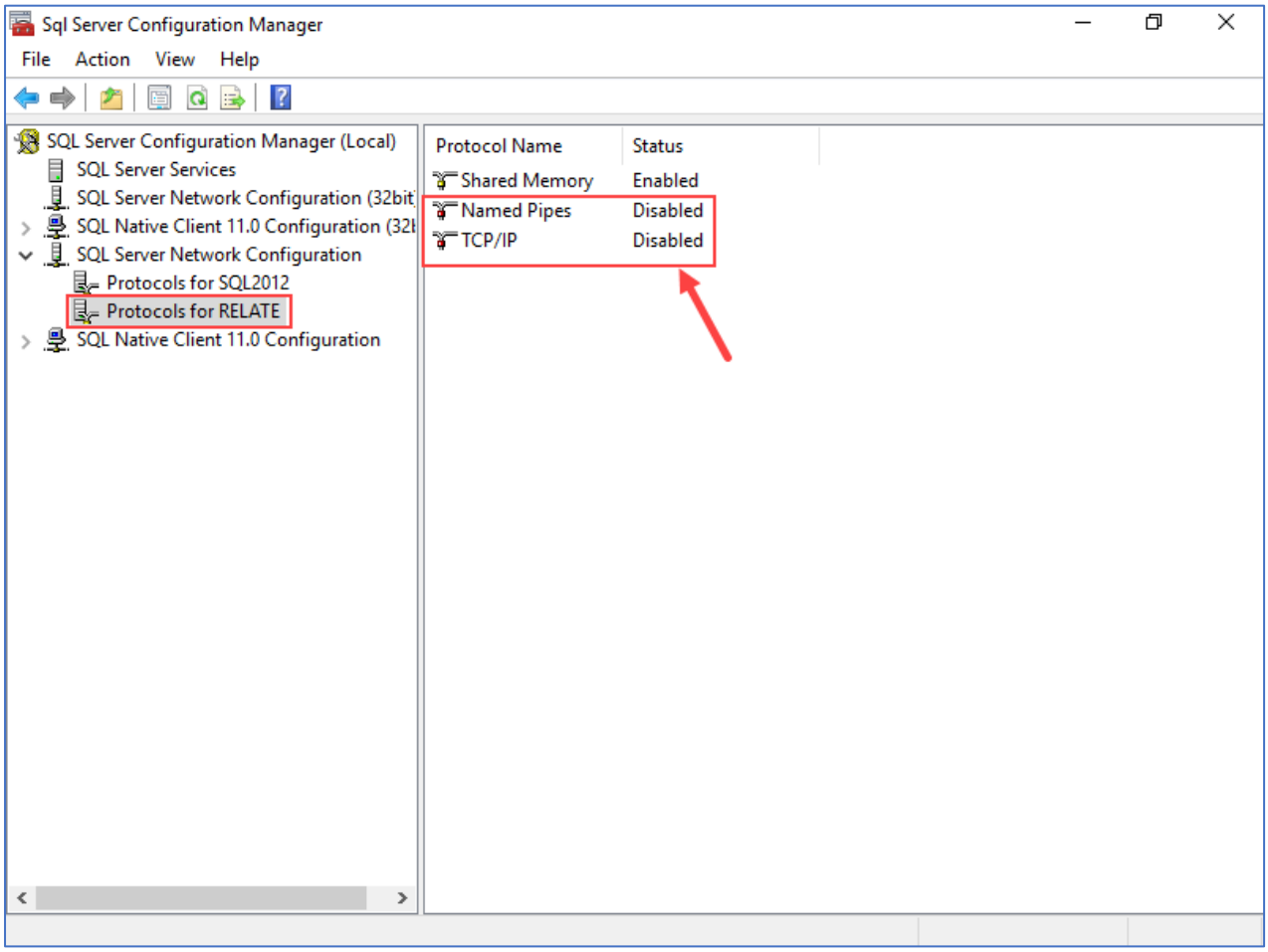

Figure 25

Ensure that the Protocols for Shared Memory, Named Pipes and TCP/IP are enabled. To enable a protocol right click on it and select '**Enable**'. [**Figure 26**]

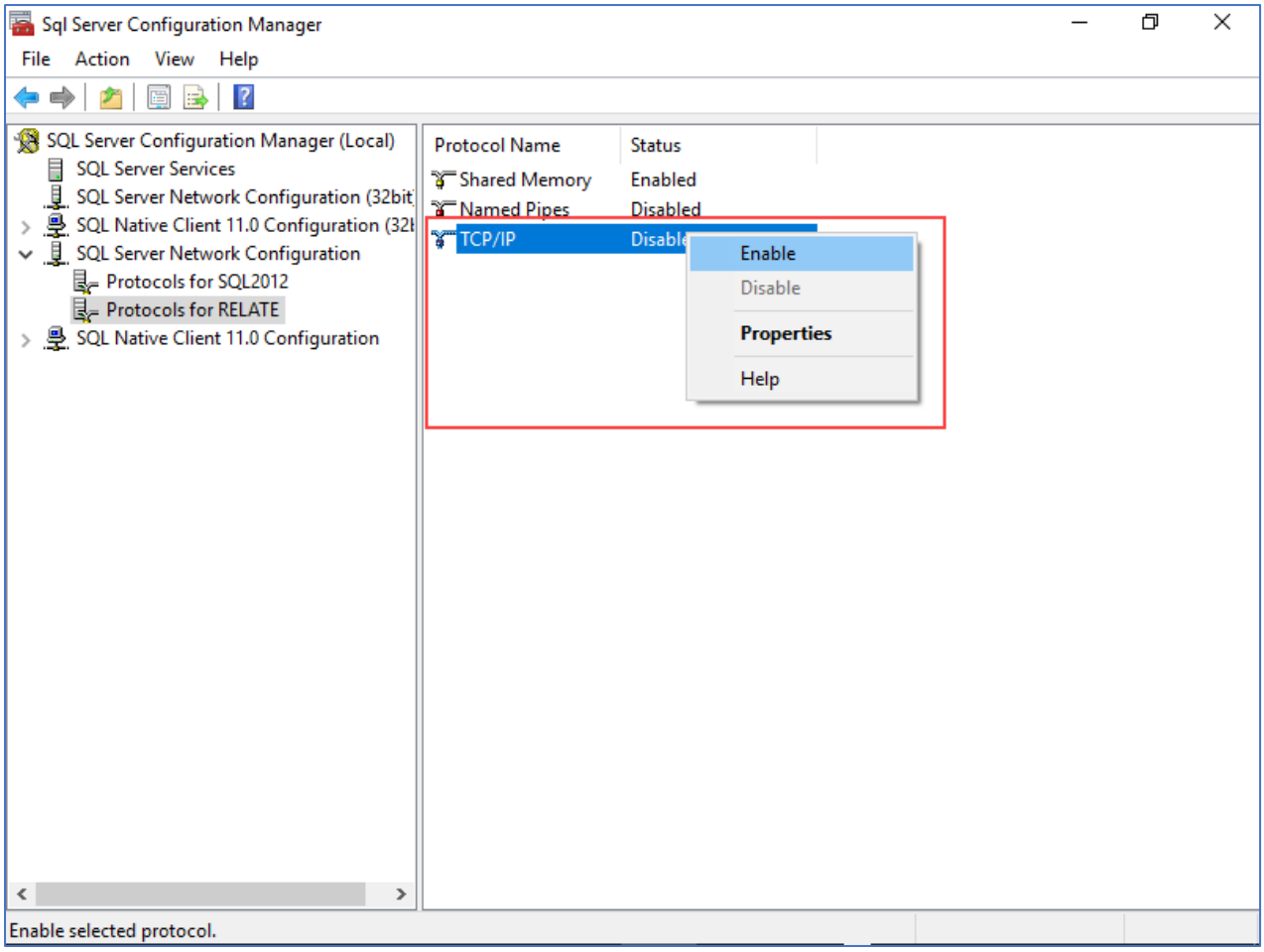

Figure 26

Select 'OK' when the warning message appears. [**Figure 27**]

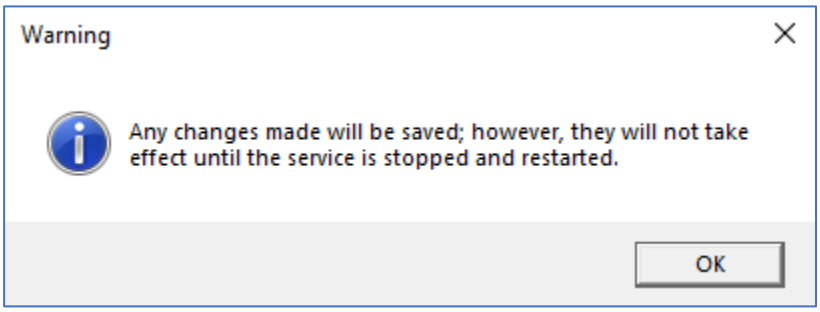

Figure 27

Once the protocols have been enabled, select SQL Server Services from the left panel. You will need to restart instance. To do this right click on the instance and select restart. [**Figure 28**]

Right click on SQL Server Browser and select Restart.

Right click on SQL Server (Relate) and select Restart.

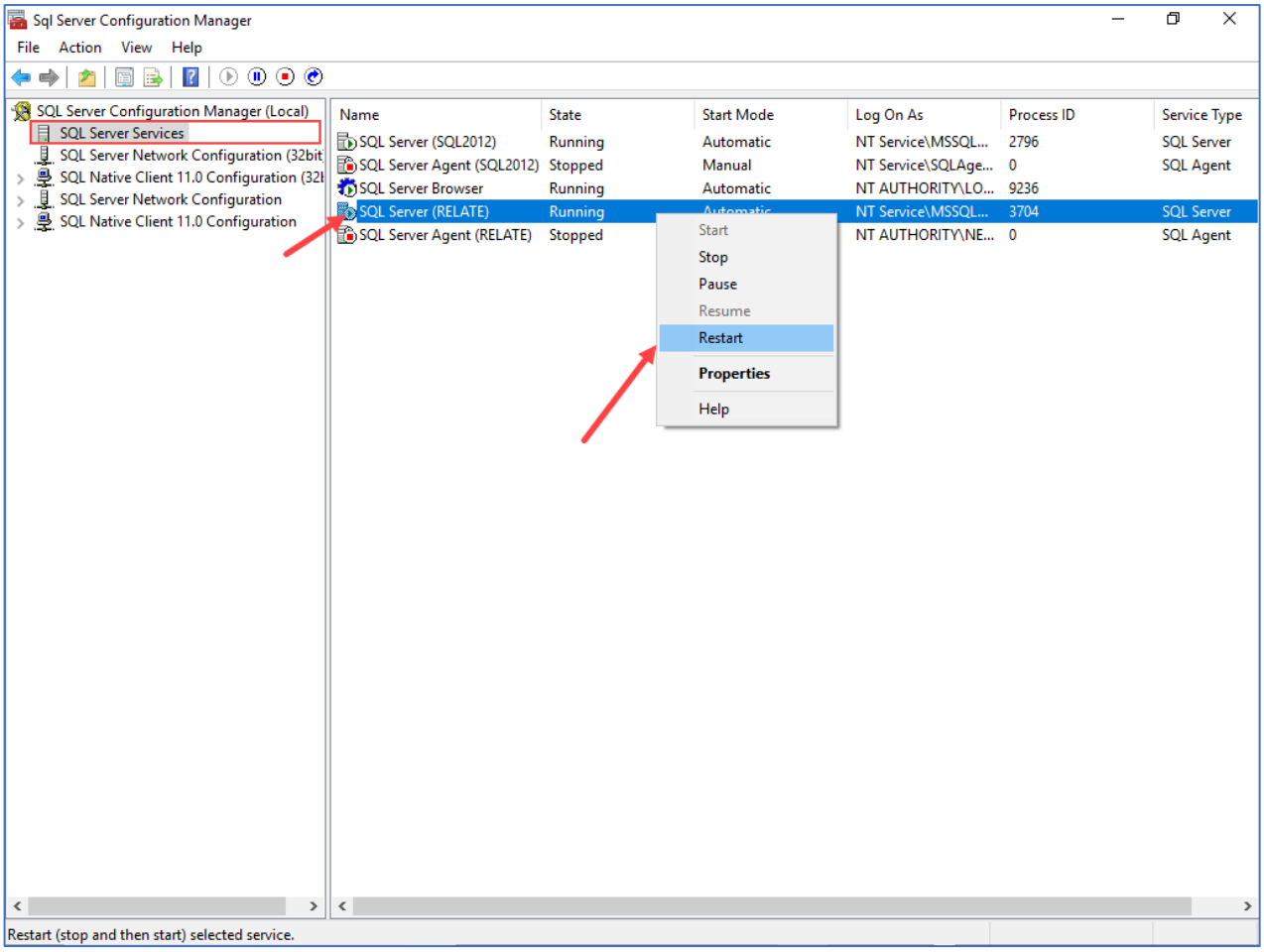

Figure 29

When both above options are running close the SQL Server Configuration Manager and launch Microsoft SQL Server Management Studio.

This can be launched from the Start menu, All Programs, Microsoft SQL Server 2017, Microsoft SQL Server Management Studio.

When the Management studio launches the server name may be filled up with the details you set up in SQL. If this is the case, select connect. If not select the drop down beside the server name and select <**Browse for more**>. [**Figure 30**]

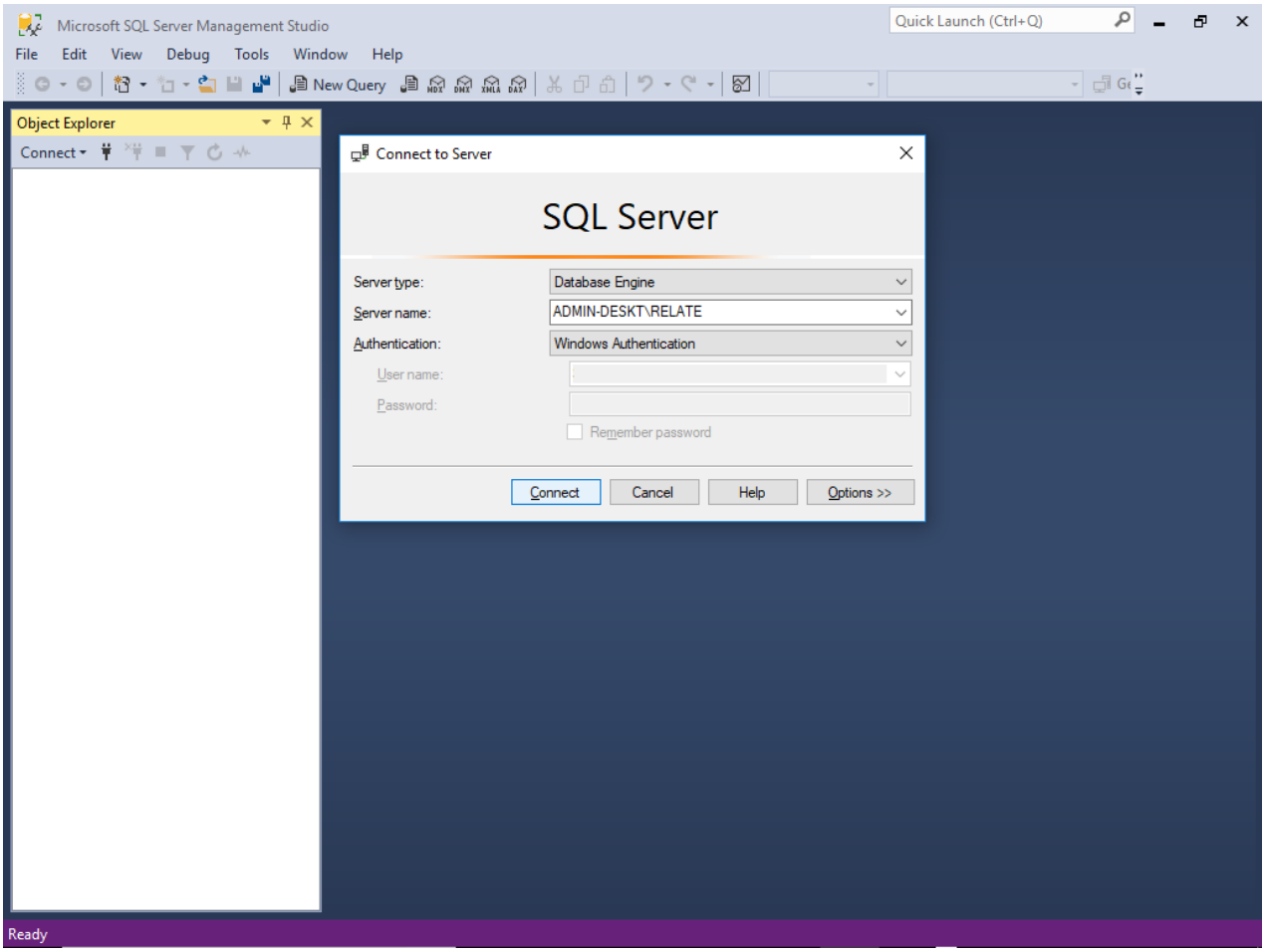

Figure 30

From the Local Servers tab browse to the details which you have just created through SQL. Select OK and then select Connect. [**Figure 31**]

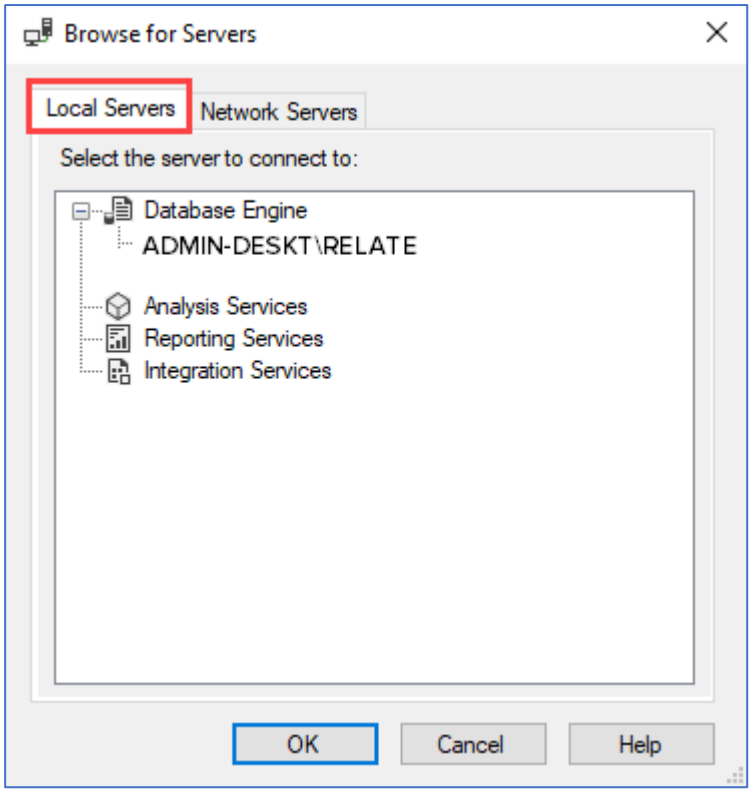

Figure 31

When the instance has connected the below screen will appear. You now need to attach your database. This is a blank database which was downloaded with the All Products Install. You will need to create a new folder at D:\RelateSoftware\DATA. Browse to the All Products Install folder, then DATA and copy DRIVE_Data.bak to the above newly created folder. To attach the database, right click on the Databases option and select Restore Database. [**Figure 32**]

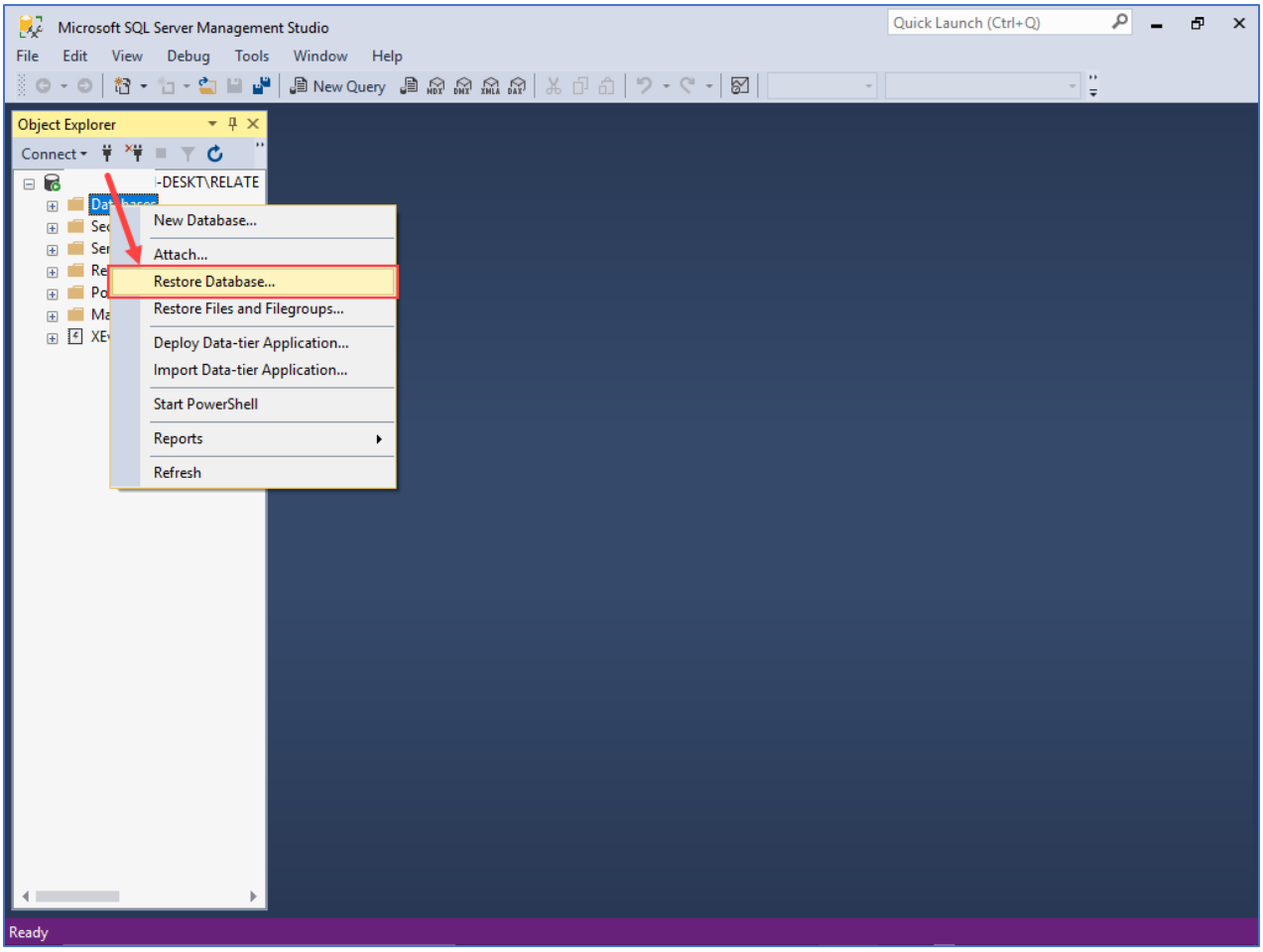

Figure 32

Enter the database name as DRIVE_[PRACTICENAMEINITIALS] for example, DRIVE_RS in this example, for Relate Software. Select the '**From Device**' option and use the box with 3 dots to browse your PCs folders. [**Figure 33**]

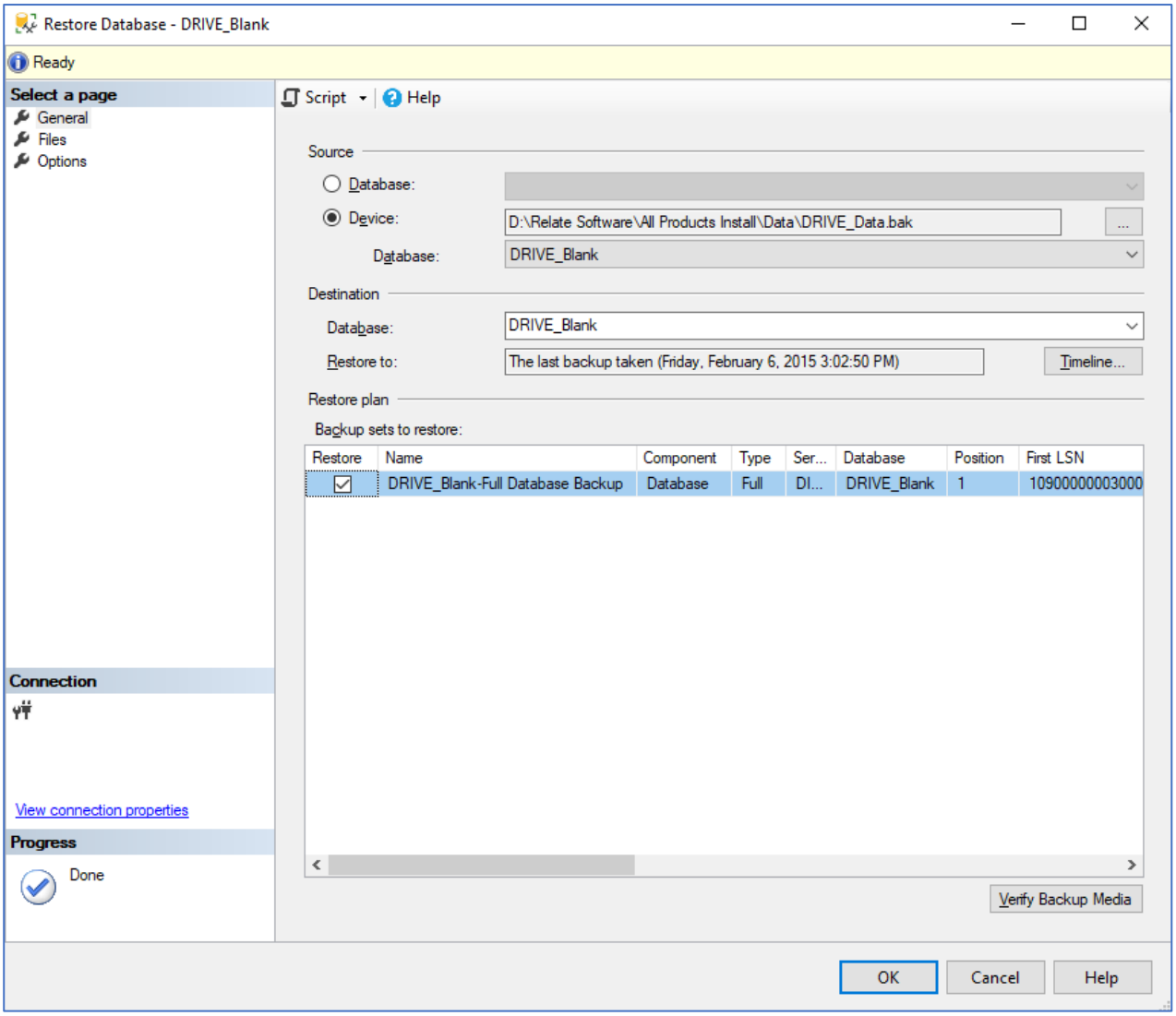

Figure 33

Select Add. [**Figure 34**]

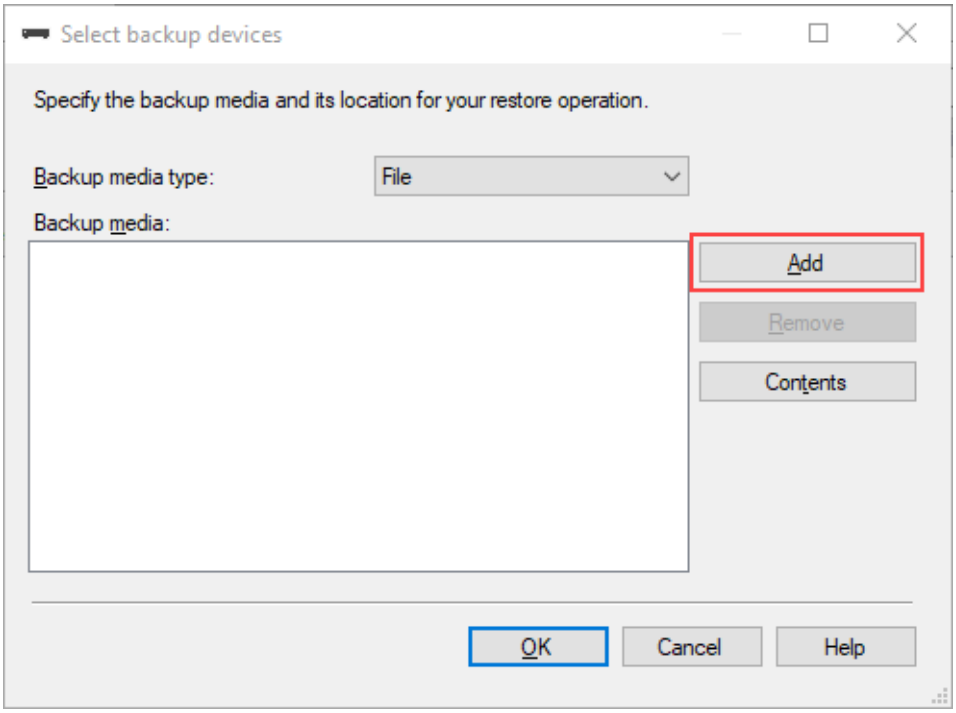

Figure 34

Browse to D:\Relate Software\ All Products Install\Data and highlight DRIVE_Data.bak. Select OK. [**Figure 35**]

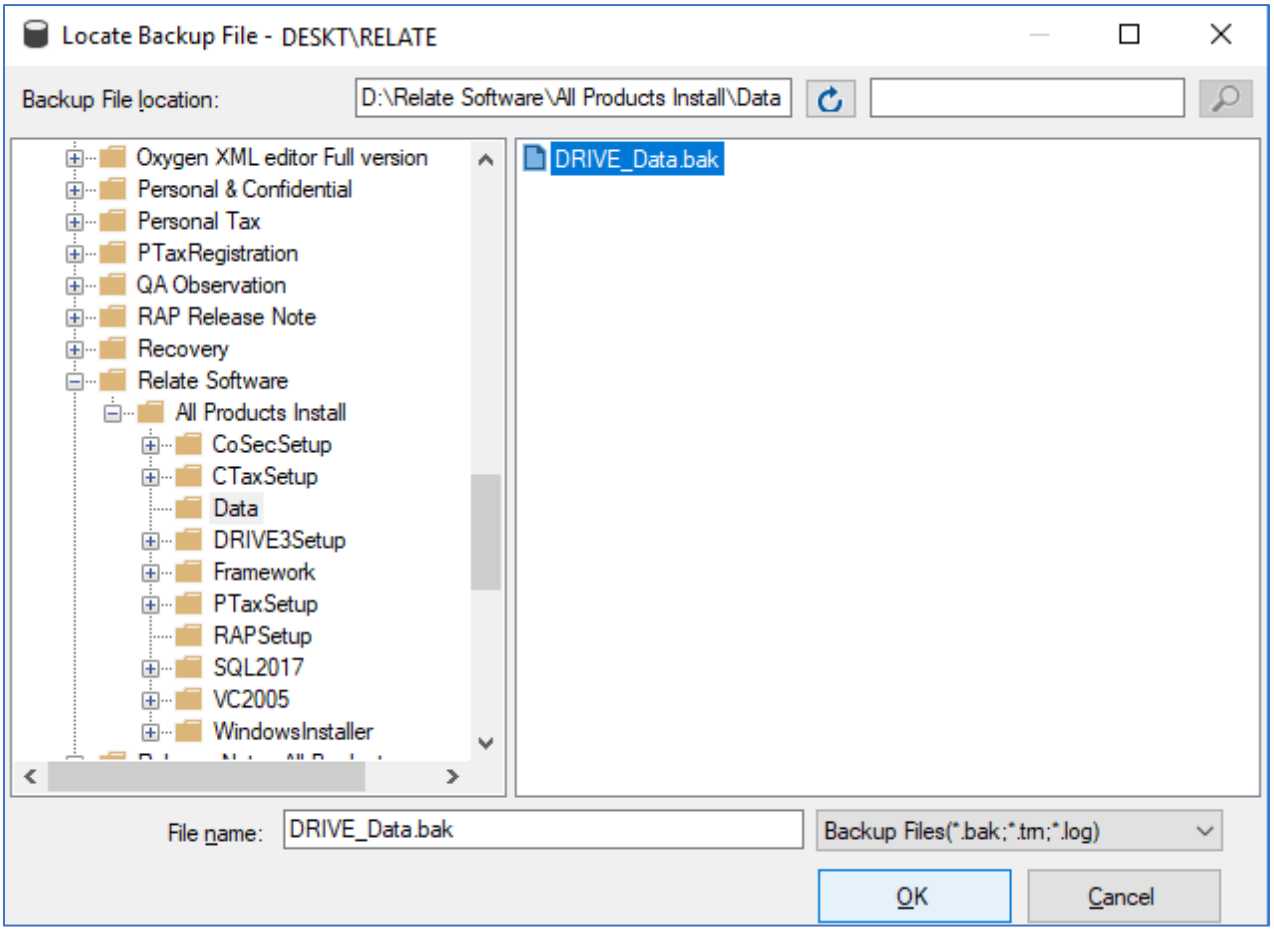

Figure: 35

Tick the '**Restore**' box as highlighted above. Then select 'Option' from the right. [**Figure 36**]

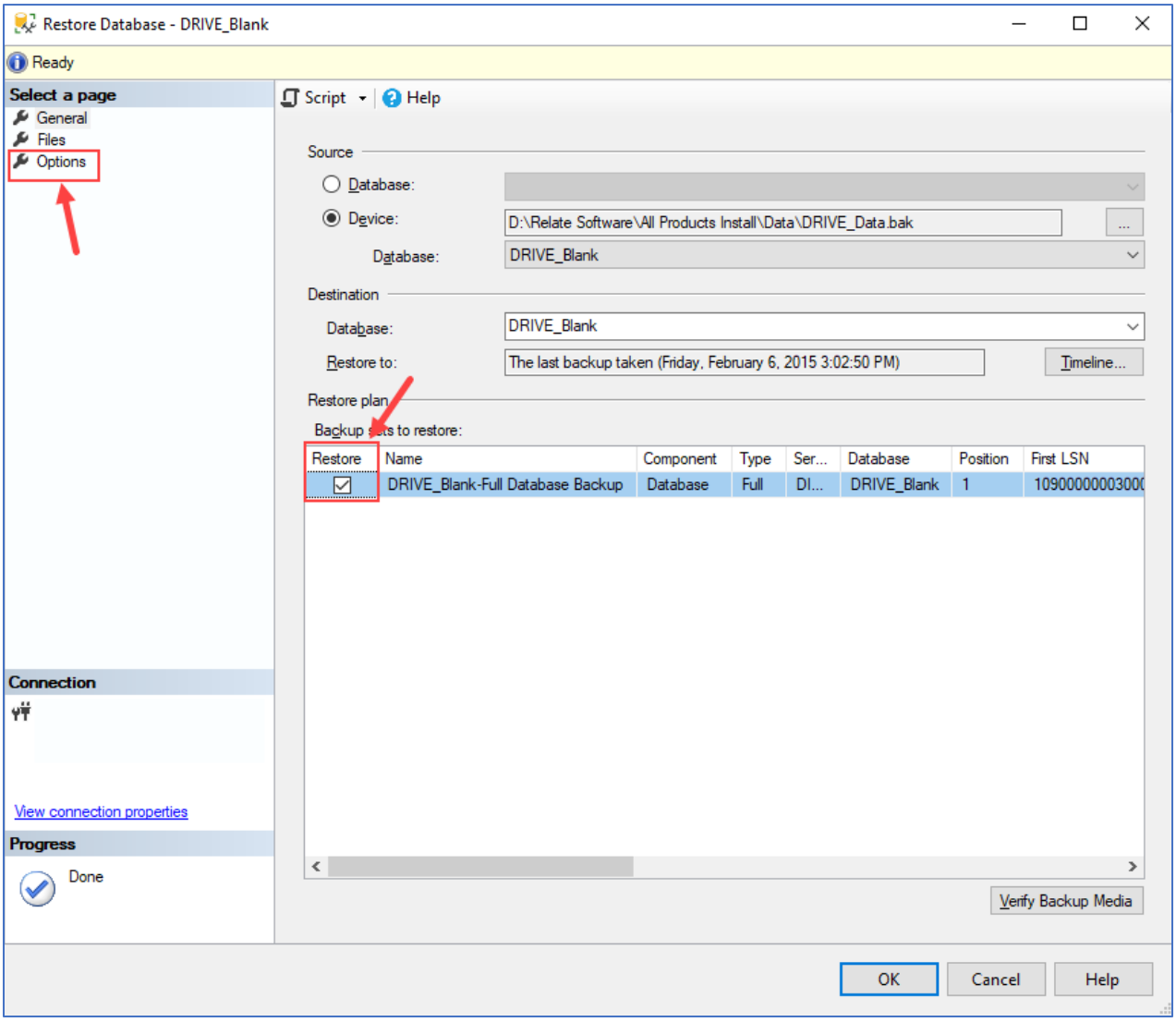

Figure 36

From the options menu you are going to change ‘Restore As’ locations. On the line where you see DRIVE Data_Data set the ‘Restore As’ location to: D\Relate Software\DATA\DRIVE_BLANK.MDF.

On the line where you see DRIVE_Data_Log set the Restore As location to: D:\Relate Software\DATA\DRIVE_Blank.LDF. Once complete select OK. [Figure 37]

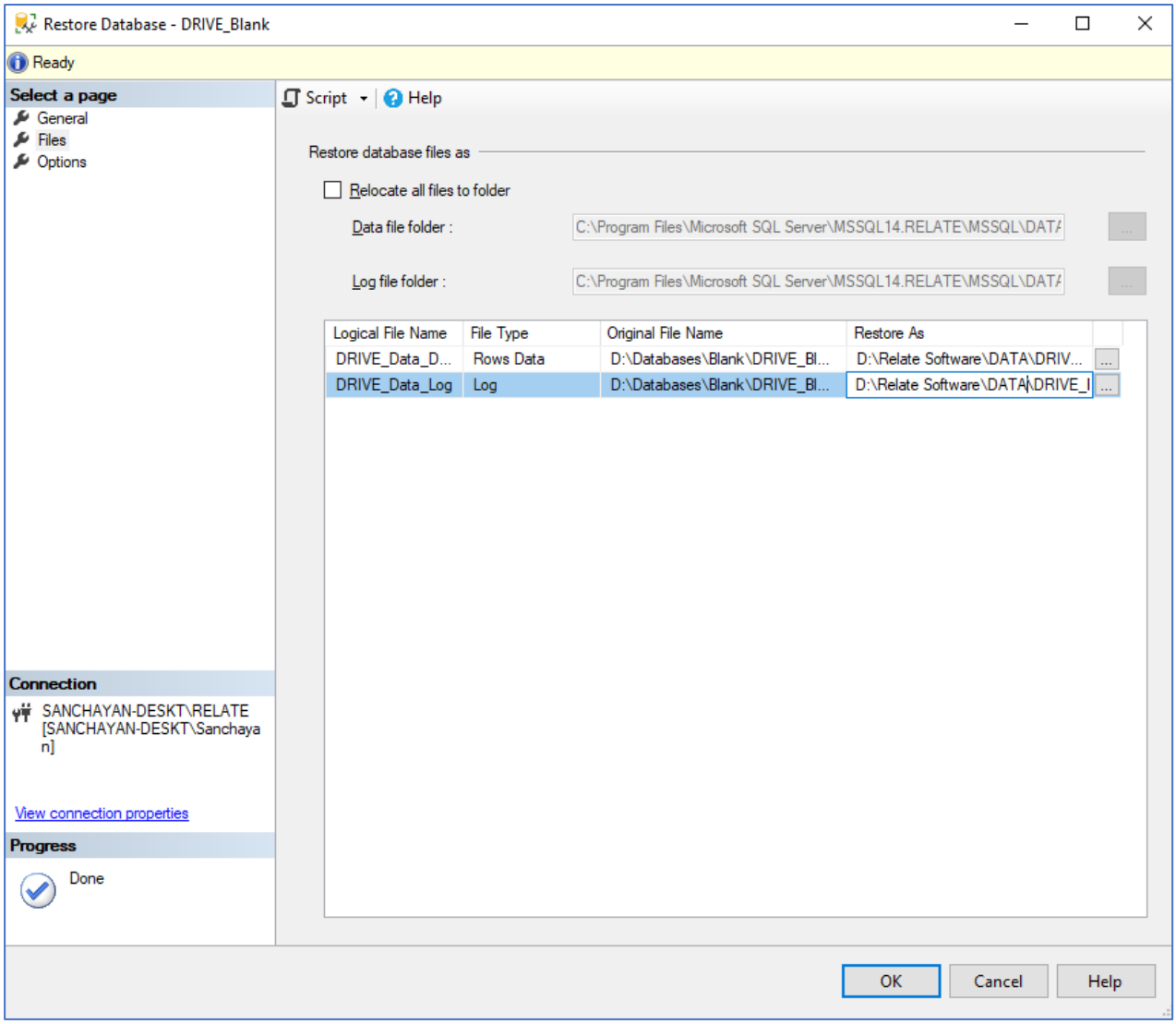

Figure 37

From the properties screen choose server roles from the left panel. Ensure that only the following 2 boxes are selected, public and sysadmin. You will need to repeat this for the Logins BUILTIN\Users. When you have applied access rights close out of Microsoft SQL Server Management Studio by pressing the x in the top right corner. [**Figure 38**]

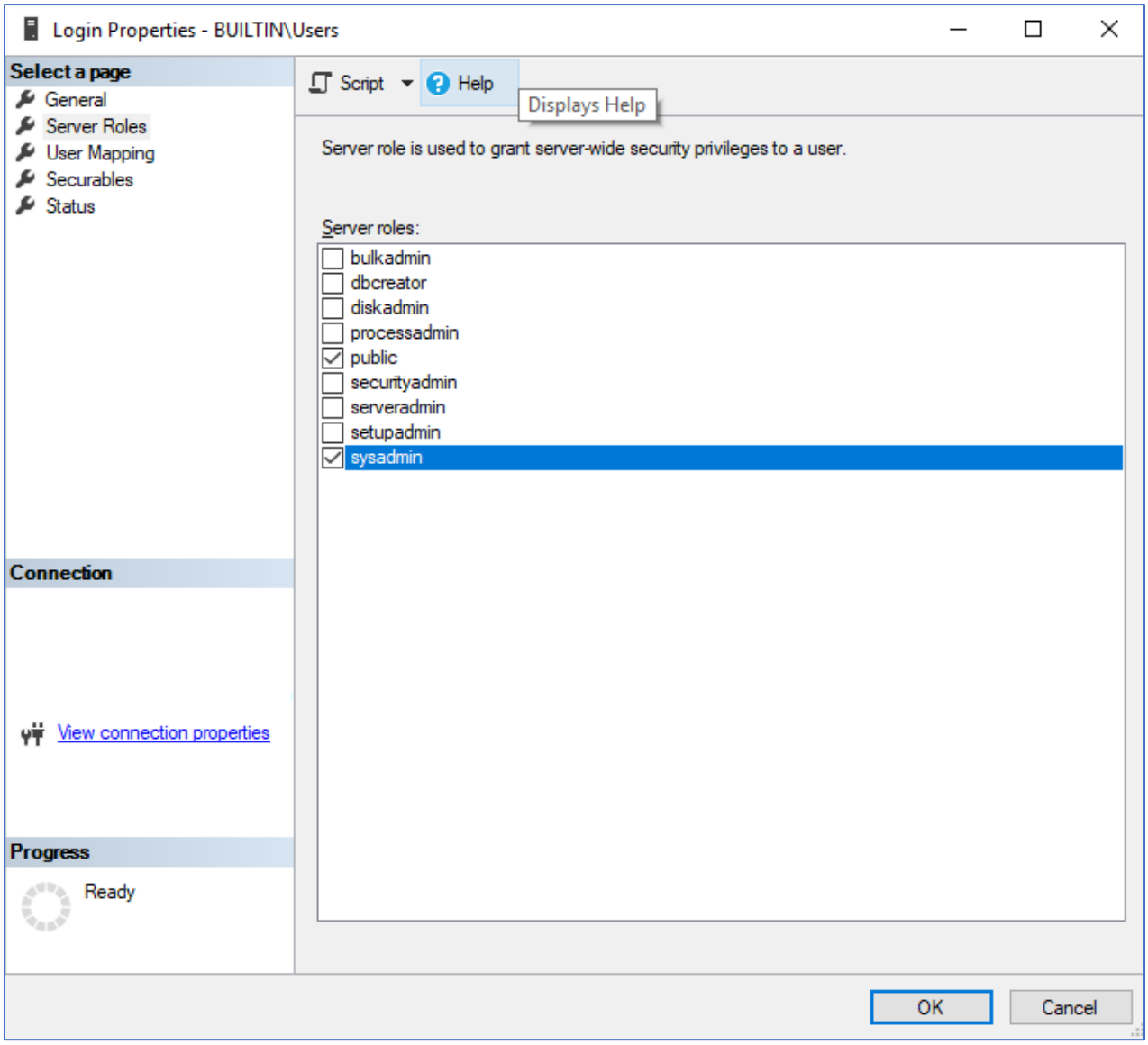

Figure 38

SQL 2017 is now installed, and the database is attached.

INSTALLING RELATE SOFTWARE APPLICATIONS

When SQL has been installed and the database attached you can proceed to installing the software. Browse to the 'All Products Install' folder and choose **Relate_Setup.exe**

You will be presented with the below 'Relate Product Installation' screen. From here choose the applications which you need to install from the left. You will not need to select anything from the right 'Database' section as this has already been installed. [**Figure 39**]

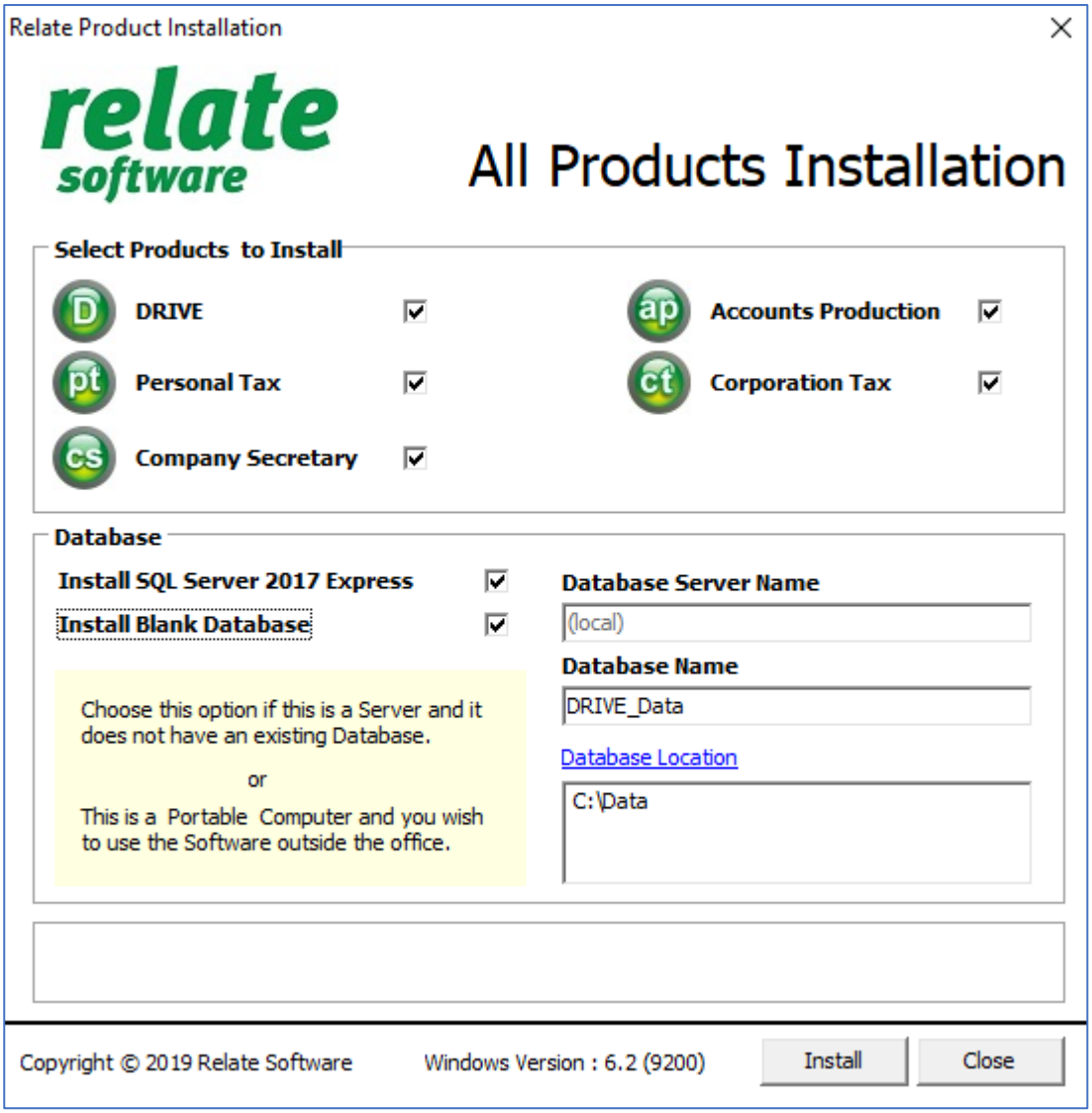

Figure 39

When the relevant applications have been installed shortcuts will be placed on your desktop.

You will need to enter the server details, this information can be found by launching Microsoft SQL Server Management Studio from the Start menu, All Programs, Microsoft SQL Server 2017. The server name will be listed on the first screen. [**Figure 40**]

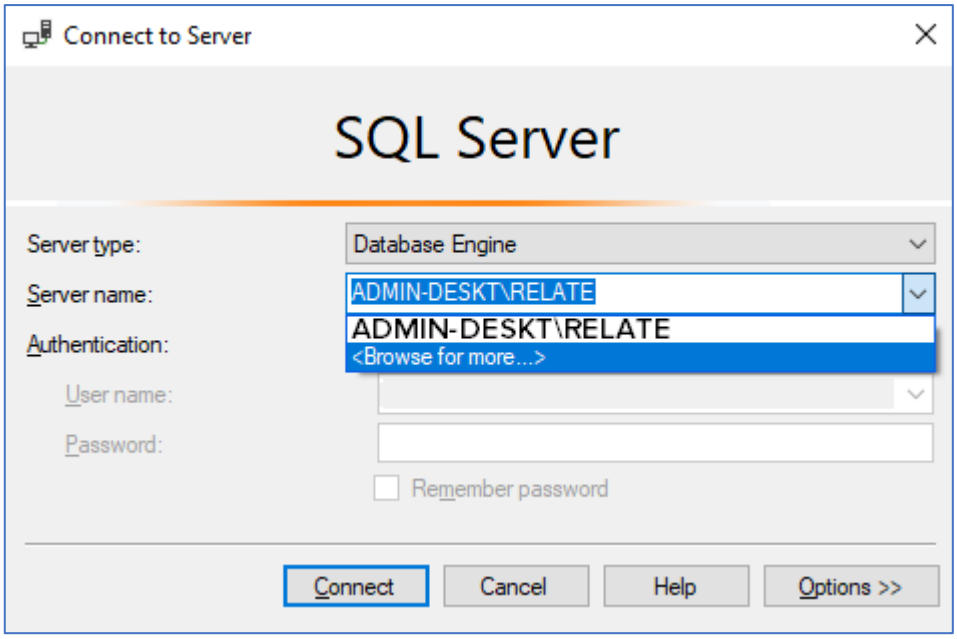

Figure 40

Enter these details to the DRIVE connection screen, then select the box with 3 dots from the 'Select Database' line to populate your database. From the drop down choose the database which has just been created. Authentication should be Windows Authentication and Network Protocol should be Named Pipes.

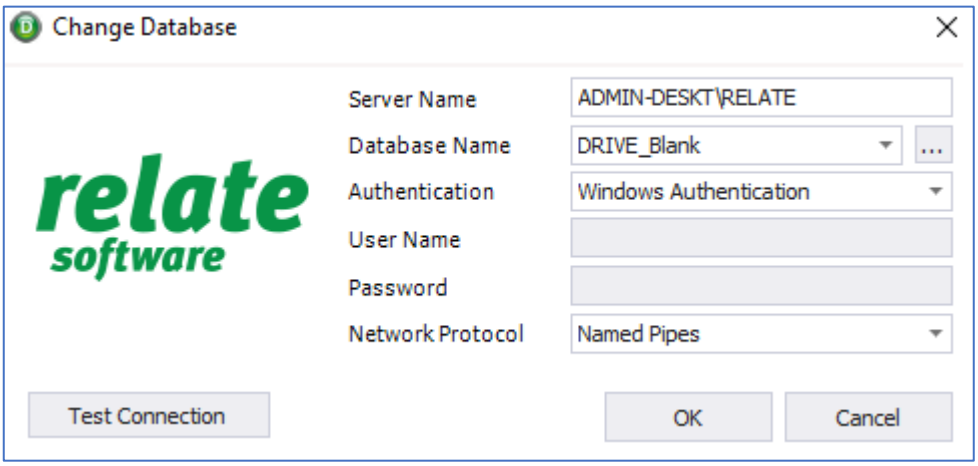

Figure 41

Select OK. You may be prompted to update the software. Please check our website www.relate-software.com for all the latest updates.

If you encounter any issues during the installation, please contact support@relate-software.com