



Estimate 20.2 and later

SQL Installation and Configuration



InEight®
ESTIMATE

Changelog

This changelog contains only significant or other notable changes to the document revision. Editorial or minor changes that do not affect the context of the document are not included in the changelog.

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SQL Server Settings and Requirements

Before you begin to install the SQL server, you must first set up some preliminary software. When installing the SQL server, you must be a System Administrator.

NOTE: We strongly recommend that a separate SQL instance be used for InEight Estimate. Preferably called **HDBID**.

A **folder** must be created on the SQL Server to where the databases mdf's and Log files ldf's are going to be stored. This folder must be **shared**. This document will assist in the creation of this folder.

A **Service Account** must be created to operate InEight Estimate. The Service Account created for InEight Estimate must be added to SQL through the **SQL Management Studio**.

The Service Account must be added to the local Administrators group in Windows. The Service Account must be given **Full Access** (Admin Rights) to the shared folder. This document will assist in the creation of these requirements.

Installing Microsoft .NET 4.7

Microsoft .NET 4.7 is required in order to install and run SQL. Microsoft .NET 4.7 installer is packaged with the InEight Estimate installer.

1. Launch the **Estimate** installer downloaded from the InEight website.
2. After the Estimate executable is downloaded, double-click to run the program. It will extract the files to *C:\Estimate Update\Version XX.X*.
3. At the **User Account Control** screen, click **Yes** to allow the InEight Estimate application to make changes to your computer.
4. On the **Installation Package** screen, click the **Install** button to continue
5. Click **Microsoft Installers**. This will open to the Microsoft Installers window.
6. Select the **DotNet Framework** folder. The DotNet Framework folder opens.
7. Select the following executable **NDP47-KB3186497-x86-x64-AllOS-ENU.exe** to install the **DotNet Framework 4.7**.
8. At the **User Account Control** screen, click **Yes** to allow the Microsoft .NET Framework to make changes to your computer. It will then begin to extract Microsoft .NET Framework from the installer.
9. Select the check box **I have read and accept the license terms** on the **.NET Framework 4.7 Setup window**. Then select **Install**.
10. On the Installation Is Complete window, select **Finish**.

Installing SQL Server 2014

The most common version of SQL is SQL Express. SQL Express is usually packaged with the InEight Estimate installer. There are three ways to install SQL Express. The following sections will explain the different options you have when installing SQL Express.

Estimate Package SQL Express 2014

1. Launch the **Estimate** installer downloaded from the InEight website.
2. Once the Estimate executable is downloaded, double-click to run the program. It will extract the files to *C:\Estimate Update\Version XX.X*.
3. At the **User Account Control** screen, click **Yes** to allow the InEight Estimate application to make changes to your computer.
4. On the **Installation Package** screen, click the **Install** button to continue.
5. Click **Install Estimate** to continue.
6. At the **License Agreement** screen, select **I Accept the Agreement**. Then click Continue to continue.
7. If other Estimate client or server applications have already been installed on the server, select **Install** on the **Upgrade or Install** dialog box.
8. Click **Next >** to continue.
9. At the **Components** screen under **User Workstation Components**, select the **Estimate Client** check box, then select the **Network** radio button.
10. On the **Components** screen under **Enterprise Server Components**, select the **Estimate Server** check box.
11. If you intend to use **SQL Server 2014 Express Edition** as the database for Estimate, select **Install SQL Express Edition with HDBID instance**.
12. If you choose not to use SQL Server 2014 Express Edition because you are using a different edition or version of SQL Server instead, deselect the **Install SQL Express Edition with HDBID instance**. If you don't select this option, another version of SQL Server must be installed manually.
13. Click **Next >** to continue
14. The installation was successful, click **Close**.

Microsoft Installer SQL Express 2014

1. Launch the **Estimate** installer downloaded from the InEight website.
2. Once the Estimate executable is downloaded, double-click to run the extraction program. It will extract the files to *C:\Estimate Update\Version XX.X*.
3. At the **User Account Control** screen, click **Yes** to allow the InEight Estimate application to make changes to your computer.
4. On the **Installation Package** screen, click the **Install** button to continue
5. Click **Microsoft Installers**. This will open to the Microsoft Installers window. Browse to the install folder for SQL Express 64 and launch the **SQLEXP_x64_ENU** installer.
6. At the **Choose Directory for Extracted Files** screen, choose the directory where you want to extract the SQL installation. Then click **OK**.
7. When the SQL Server Installation Center window appears, choose how you want to install SQL. If you are installing SQL for the first time, select **New SQL Server stand-alone installation or add features to an existing installation**.
8. On the SQL Server 2014 Setup screen, under the **License Terms** section, check the box **I accept the license terms**. Then select **Next**.
9. Under the Microsoft Update section, select **Next**.
10. On the **Feature Selection** section, under **Instance Features**, select all 3 check boxes if they are not already checked. Then select **Next**.
11. Under the **Instance Configuration** section, select the radio button for **Named Instance**. Change the name in the field to **HDBID**. Notice the **Instance ID** field changed automatically to **HDBID**. Select **Next** to continue with the install.
12. Under the Server Configuration section, select the **Service Accounts** tab if it is not already selected. Set the **Account Name** for the **SQL Server Database Engine** to **NT AUTHORITY\SYSTEM**. Then select **Next**.
13. Under the Database Engine Configuration section, select the **Server Configuration** tab if it is not already selected. Set the **Authentication Mode** to **Mixed Mode**. For the SA Account, enter the password: **Hard\$123abc**. Then select **Next** to continue.
14. The installation was successful, click **Close**.

SQL Server Configuration Manager

1. On the **Start** menu, search for SQL Server 2014 Configuration Manager. You can also find this application by going to *C:\ProgramData\Microsoft\Windows\Start Menu\Programs\Microsoft SQL Server 2014\Configuration Tools*.
2. On the SQL Server Configuration Manager, expand the **SQL Server Network Configuration** dropdown in the left pane.
3. Select **Protocols for HDBID**.
4. To enable **Shared Memory**, right-click the **Shared Memory** protocol name, and select **Enable**.
5. To enable **TCP/IP**, if it is not already enabled, right-click the **TCP/IP protocol name** and select **Enable**.
6. When you click **Enabled** on step 4 and 5 you'll receive a pop-up. This warning informs you changes made will be saved but not applied until the services are stopped and restarted. Select **OK** to close it.
7. Before restarting the services mentioned in the prompt above you'll need to make a change to the **SQL Server (HDBID) Service**. On the left column, select SQL Server Services. On the right side, right-click on **SQL Server (HDBID)** and click **Properties**.
8. On the **SQL Server Properties** window, select the **Startup Parameters** tab, then add **-T1802** as a parameter in the **Specify a startup parameter**. Then select **Apply**.
9. Click **OK** to exit out of the SQL Server Properties window.
10. The changes that were made to the HDBID Protocols require the SQL Server Service to be restarted. In the left pane, click **SQL Server Services** if it is not already selected.
11. On the right side, right-click on **SQL Server (HDBID)**. Then select **Restart**.
12. The configuration is complete, you can close the **SQL Server Configuration Manager**.

Service User Account Necessities

For InEight Estimate and SQL to communicate, a service user must be created for use by the InEight Estimate application.

NOTE: When SQL and InEight Estimate Server are on the same computer this is not required.

If InEight Estimate is installed in a Domain environment, create an Active directory user for use by Estimate.

If Estimate is installed in a Workgroup environment, on each computer where an InEight Estimate server application or SQL will be installed, create a local user for use by InEight Estimate (this does not apply to the InEight Estimate Client).

This user must be given the following permissions:

- This user must be added to the local **Administrators** group on the SQL server.
- This user must be given the **sysadmin** role in the SQL instance that will be used for InEight Estimate.
- This user must be given **full control** in the security tab for the SQL Data directory.

Users should not normally log on using this account, and the account password should never change or expire.

Adding the Service Account to SQL

If you do not have SQL Management Studio on your machine currently, navigate to the SQL Express 2014 downloader on the Microsoft website. Then select the **Management Studio** download.

1. After downloading Management Studio, launch **SQL Management Studio**.
2. At the Connect to Server screen, Login to the **InEight Estimate Instance** with a user that has Admin rights. Select **Connect**.
3. After you are connected, select the **Security** drop down in the left pane. Then select **Logins**.
4. Right click on **Logins** and select **New Login**.
5. Select the radio button for **Windows Authentication**.
6. In the **Login Name**, type in the URL path to the Active Directory **Service Account** or select the **Search** button to search Active Directory users and groups and select the service user.
7. After you have selected the Service Account, select **Server Roles** from the left side of the screen. Check the box for **Sysadmin** and click **OK**. You have now added the Service Account to SQL.

Set InEight Estimate Services to Log On

1. To open Services, search for **Administrative Tools**. Then select **Services**.
2. Locate the **InEight Estimate Server Service**. Right-click on it and go to **Properties**.
3. On the **Properties** window, select the **Log On** tab. Select the radio button for **This account**.
4. In the field marked **This account**, input the name of the service user account. Then enter the password for the Service Account. Click **OK** to close the window.
5. You'll receive a pop-up informing you the service user account you selected has been granted permissions to Log On as a Service.
6. Now you can start the **InEight Estimate Server Service**. Right-click on the service and select **Start**.

Configure Shared Data Folder

InEight Estimate requires access to the SQL DATA folder through the File System. To accomplish this the Data Folder must be shared.

1. Open Windows Explorer and navigate to the **DATA Folder** that was created on Page 4.
2. Right click on the **DATA Folder** and select **Properties**.
3. Select the **Sharing** tab.
4. Select **Advanced Sharing**. Then check the box to **Share this folder**.
5. Click **OK** to exit out of the Advanced Sharing window.
6. Select the **Security** tab. Then click Edit and add the **Service User** that was created from Page 4. Set the Permissions to **Full Control**. Confirm that the **Administrators** have Full Control as well.
7. Click **Apply** and **Close**.

Copying and Attaching Estimate Databases to the SQL Server

1. Log on the **InEight Estimate Server** as an Administrator that has Write permissions on:
 - \\(SQL Server)\Jobs Folder
2. Open Windows Explorer and navigate to *C:\Program Files\InEight\InEight Estimate\Jobs*
3. Copy Databases to the SQL Server.
4. Copy **BidMaster_data.mdf** to: \\(SQL Server)\Jobs Folder
5. Copy **HDLibrary** folder to: \\(SQL Server)\Jobs Folder
6. Copy the **Training Job** folder to: \\(SQL Server)\Jobs Folder

Attach Databases

1. Go to the SQL Server and open **SQL Management Studio**.
2. Login as an administrator.
3. Right Click on **Databases** and select **Attach**.
4. Click **Add**.
5. Go to the shared drive where you copied the database files to and select **BidMaster_Data.mdf**.
6. Click **OK** to continue.
7. Click **OK** again to continue.
8. A pop-up appears asking if you are certain that you have added all the necessary full-text catalogs, click **OK**.
9. There are 2 more databases that need to be attached, **HDLibrary_data.mdf** and **Training Job.mdf**. Please repeat steps 3-6 and attach these two databases.