

Introduction

2. Setup

EDL is distributed via the Internet and must be installed in your Windows PC or server using the standard SETUP.EXE program. Perform the following steps:

1. Install EDL on the computer that will do the synchronization. Since EDL is a small application that doesn't consume a lot of resources, it is recommended that you install it directly on the server containing SQL Server. This will reduce network traffic and increase performance.
2. The following screen is displayed on first run:



3. If you purchased the software click the **Activate Software** button, otherwise click the **Begin Evaluation** button.
NOTE: You may activate your software at any time.
4. You are now ready to begin using the Enterprise Data Loader (EDL). If you already own QC-CALC and SQL Server, you can begin exporting your own data to SQL Server immediately.

2.1 How Do I Get a Copy of QC-CALC

If you do not own a copy of QC-CALC you can download a copy for free and try it for 30-days by visiting the **Downloads** page of our website at www.ProlinkSoftware.com. Make sure you download QC-CALC v.3.2 or higher as it contains full support for EDL.

If you have a Prolink account you must login to download. If you do not have an account, you can create one instantly by entering an email address and password. Don't forget to download the CMM manual so you can obtain the simple QC-CALC instructions to ensure successfully data collection with your particular CMM or Gage.

2.2 SQL Server

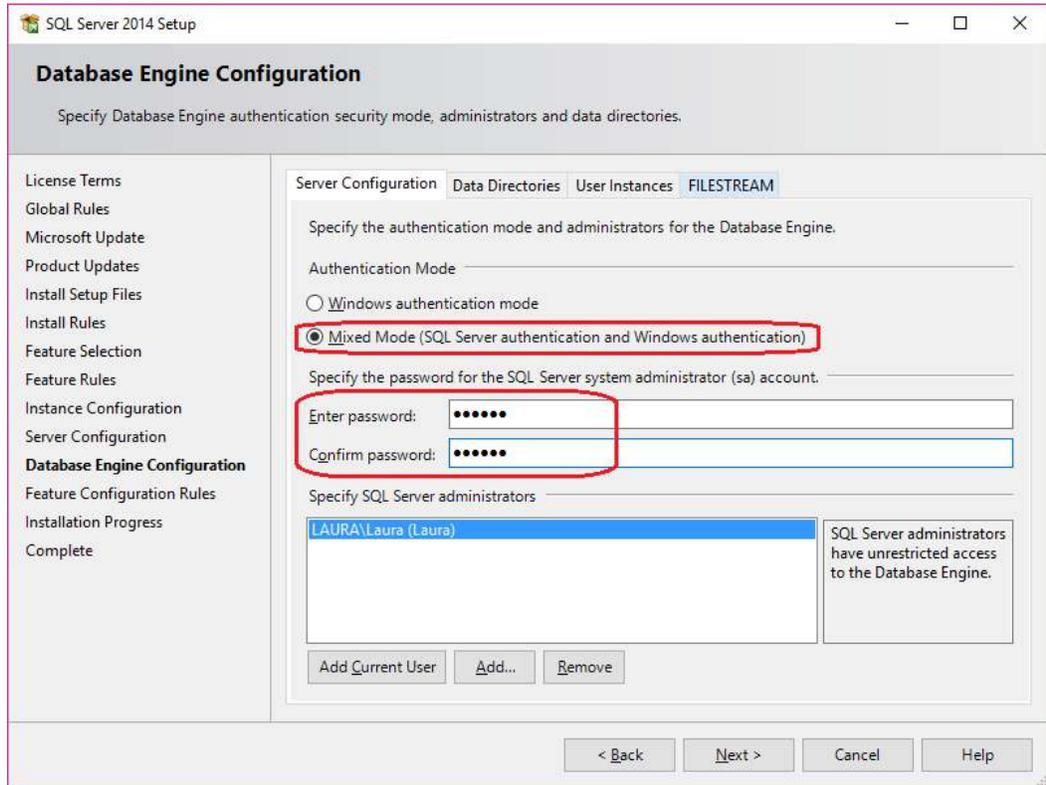
You must have a valid SQL Server database (version 2005 or higher) in order to send data via EDL. If you do not have SQL Server installed, you will need to either purchase a full version from Microsoft or you can download the latest SQL Server Express for free from Microsoft's website. This version has a couple of limitations, so it is not recommended for long-term use where a lot of data will be collected.

There is typically a link to download the latest version of SQL Server Express Edition for free from:

<http://www.microsoft.com/sqlserver>

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During the SQL Server install process, you will be asked which **Authentication Mode** to use. **Mixed Mode** (allows both SQL Server and Windows authentication) is the highly recommended method.



NOTE: The password for the SQL Server system administrator account entered on this screen will be needed later in the EDL setup process, so make sure you remember what was entered here.

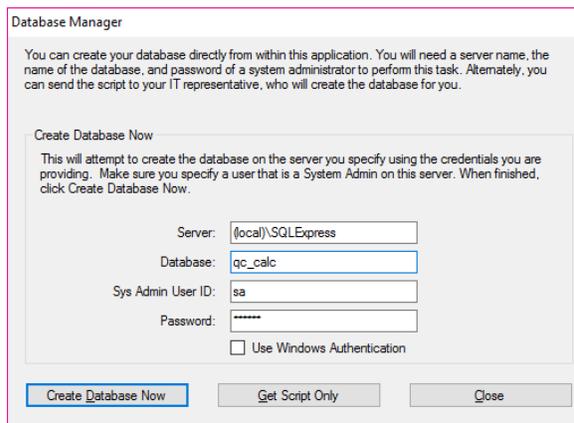
2.3 Database Setup

If your database does not exist, it is fairly simple to create. Either you can do it yourself manually or EDL can create the database for you.

2.3.1 Setting up the Database Automatically

You can choose to create the database automatically directly through either EDL or ERS.

1. In either application choose **Help – Create Database (Create Settings Database in ERS)**. The following screen will appear.



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2. Enter the server name and SQL instance (if necessary). If you are running SQL Express, this is “\SQLEXPRESS” by default.
3. Enter the name you would like for your database. By default, we suggest “qc_calc”.
4. Enter “sa” as the System Administrator ID and the password you specified when installing SQL Server ([SQL Server](#) section on page 2).
5. If you are getting this information from your IT department, please make sure you get an ID that has System Administrator privileges, as the ID will be used to create a database, add logins to the server, and add a user to the database.

NOTE (for IT Professionals): The SA user account is only needed for the initial database creation and will not be used going forward. When the script is run to create the database, it creates a separate user account called “qccadmin”. This account is given db_datareader, db_datawriter, and db_owner access to this database only. This ID will then be presented via a message box at the end of the script so the user can use this for reporting. The default password for the ‘qccadmin’ account is ‘NimdaccQ12’.

NOTE (for IT Professionals): The db_owner role was added to allow the user to update the database when new versions of EDL are available. This can be removed if there are security concerns.

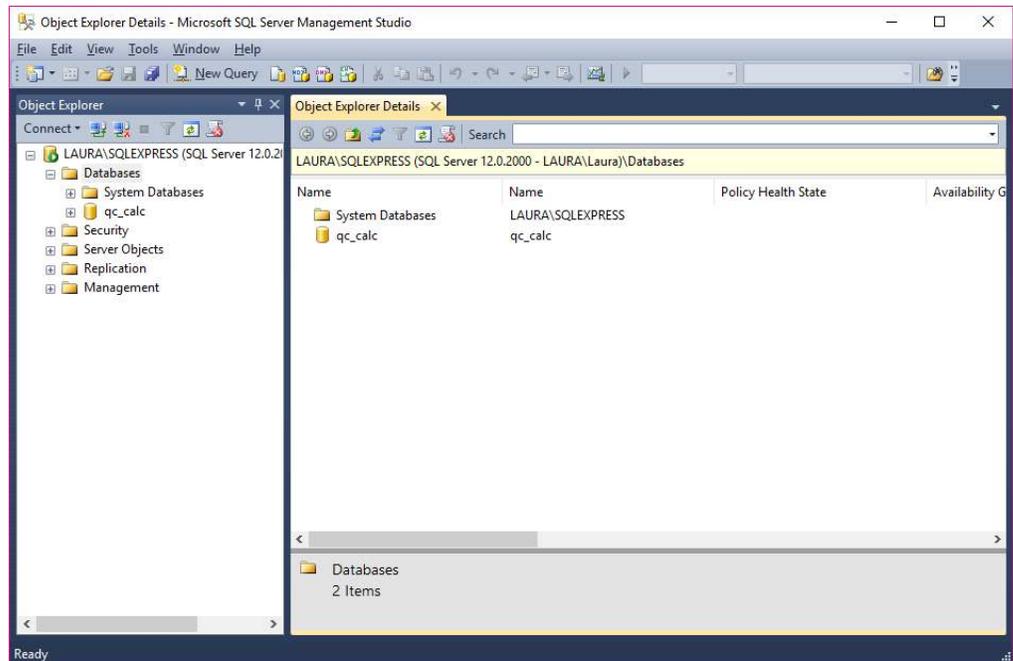
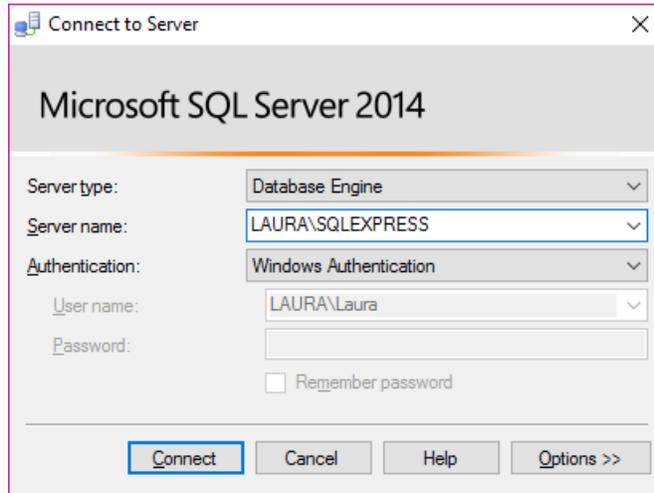
6. Create Database Now vs. Get Script -
 - a. When ready, click **Create Database Now**. Upon successful creation, you will see a message box containing the user and password to use for reporting. Please take care to write this down for future use. You are now ready to run EDL and ERS (they share the same database). You can skip section 2.4.
 - b. If there are errors creating the database, you may have to do it manually. If so, please read the next section.
 - c. You can alternately click **Get Script Only** to get the script that will be run. Please be aware that the script displayed is only for the tables of the database and does not include the actual CREATE DATABASE or other security related commands. The script in the window can be copied/pasted to SQL manually if needed.

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2.3.2 Setting Up the Database Manually

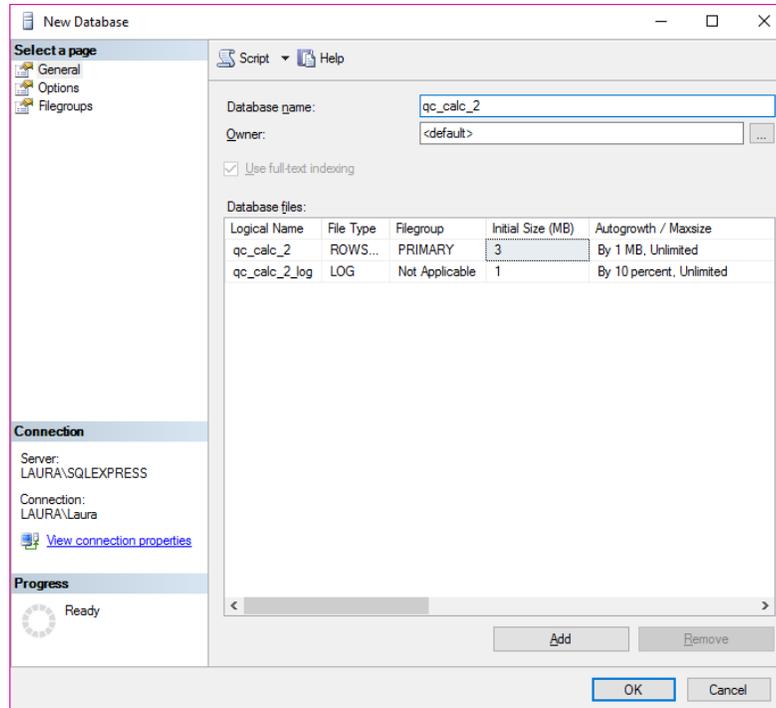
This section will help you create a database manually by adding the tables and user permissions. These steps will create the tables of your database and you will be ready to being using EDL and ERS once you have finished.

1. When **SQL Server Management Studio Express** opens, you will see the following screen. Click **Connect** to connect to the SQL Server using Windows Authentication for now.

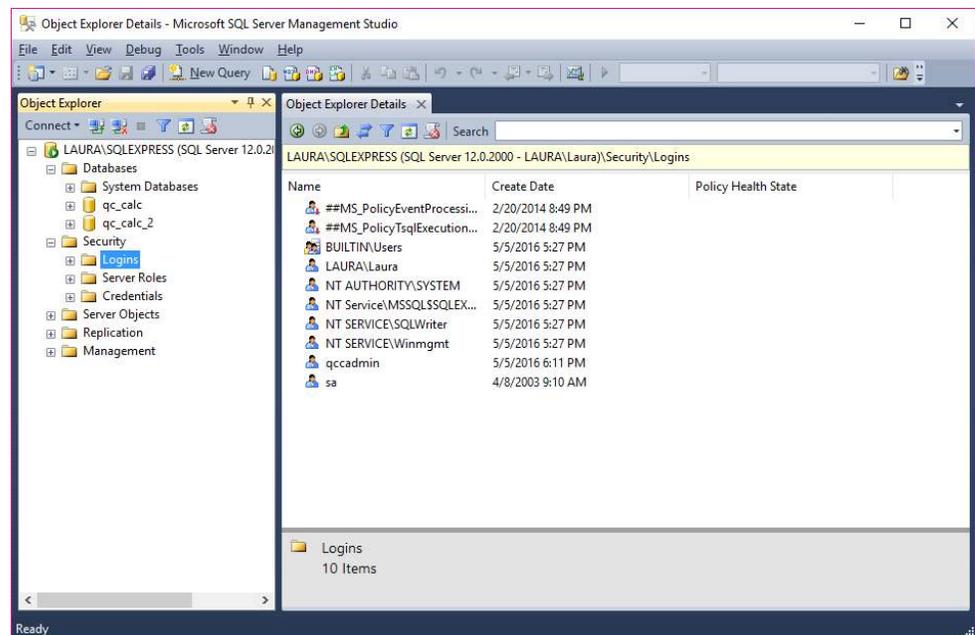


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2. Right click on **Databases** and select **New Database**.

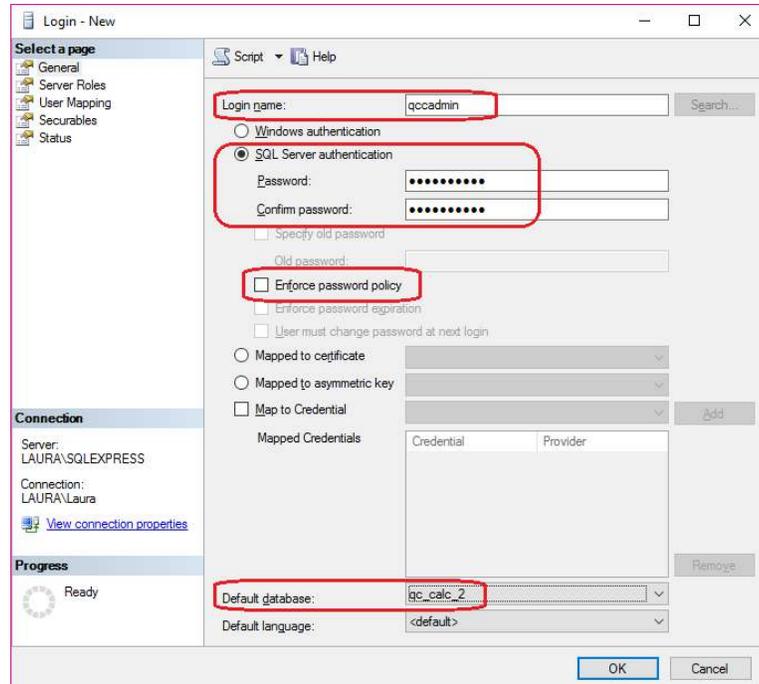


3. Give your database a name. For this example, we will be calling our database **qc_calc_2** since the standard qc_calc name was used during the **Create Database** operation. Click **OK**.
4. Now, expand **Security** on the left side of the screen.

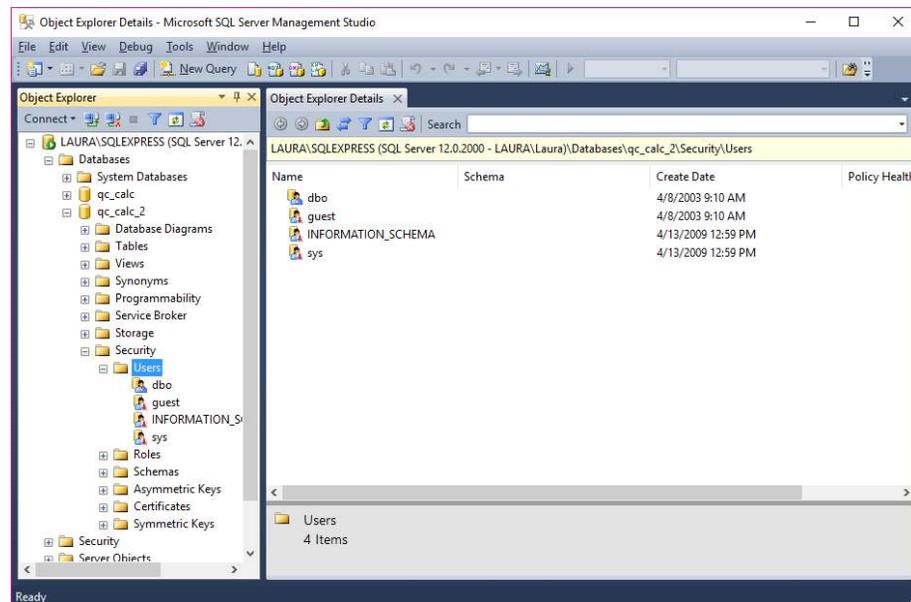


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5. Right click on **Logins** and select **New Login**.

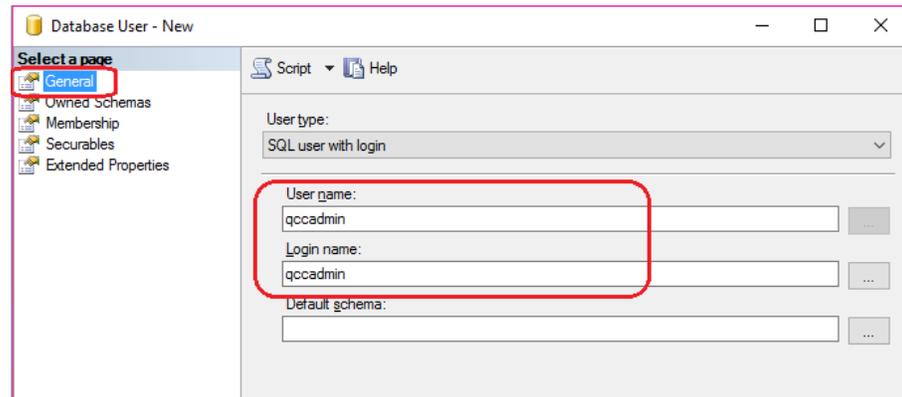


6. Create a **Login name**. For this example we'll be using **qccadmin**
7. Make sure that **SQL Server Authentication** is selected and then create and confirm a **Password**. Make sure that **Enforce password policy** is unchecked.
8. Select the database you just created as your **Default database**, for this example it would be **qc_calc_2**. Click **OK**.
9. Expand **Databases** on the left hand side, and then expand your default database. Within that, expand **Security**.

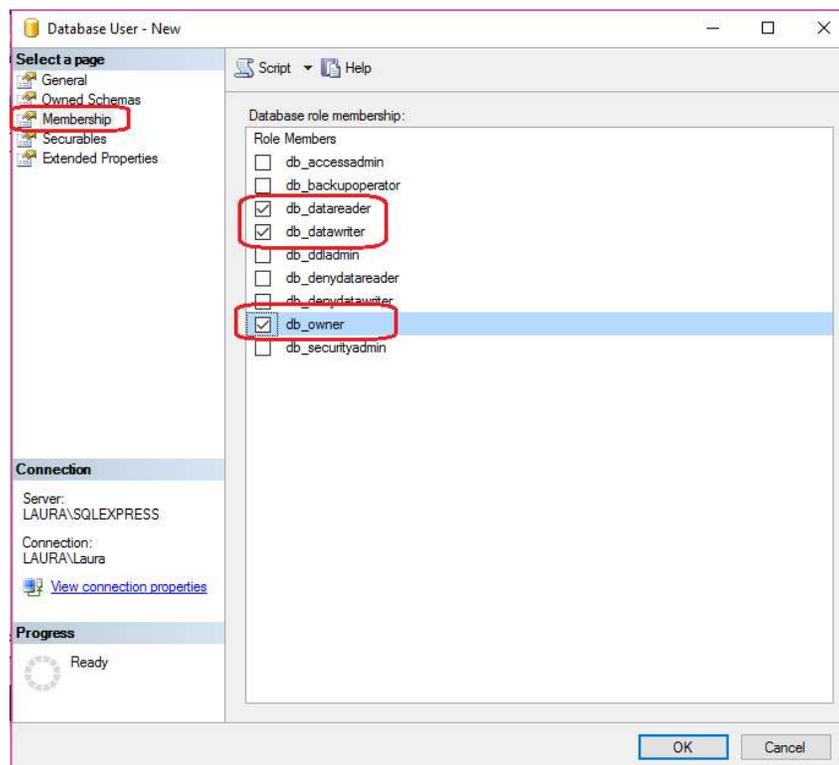


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10. Right click on **Users** and select **New User**.
11. On the **General** page, set your **User Name** and **Login Name** to match the one you just created.



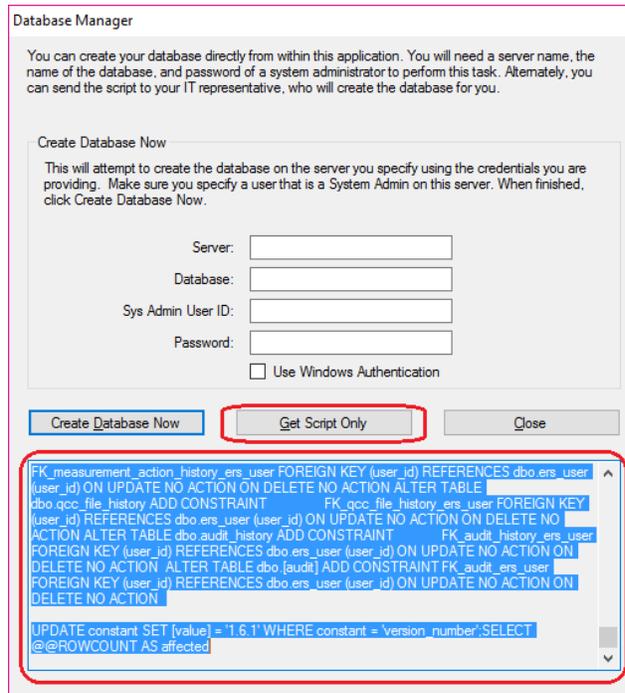
12. On the **Membership** page, under **Database Role Members** check **db_datareader**, **db_datawriter**, and **db_owner**. Click **OK**.



13. In the main **Microsoft SQL Server Management Studio Express** window, click **New Query**.

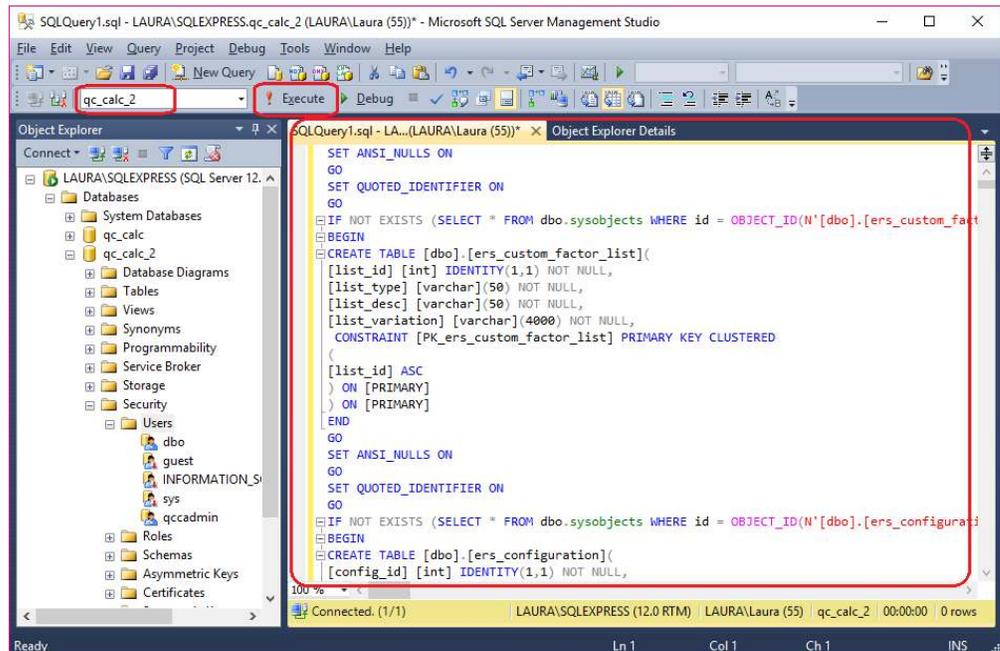
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14. In EDL, choose the **Help – Create Database** menu then click the **Get Script Only** button.



15. Click in the area that appears at the bottom of the screen, click the CTRL+Home keys to go to the very top of that area, then click the CTRL+Shift+End keys to highlight the entire script. Right-click on the highlighted text, and choose **Copy** to get the script into the clipboard.

16. Next, go back to the **Microsoft SQL Server Management Studio Express** window and paste your clipboard into your new query window.



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17. Make sure the database you created (**qc_calc_2** in our example) is shown in the upper left of the screen and click **Execute**.

