This document will go through a basic SQL Server 2008 R2 Express installation using the TRAVERSE 11 DVD. SQL 2008 Express is also available for download from Microsoft. For installation requirements, support and download information please visit the following Microsoft websites.
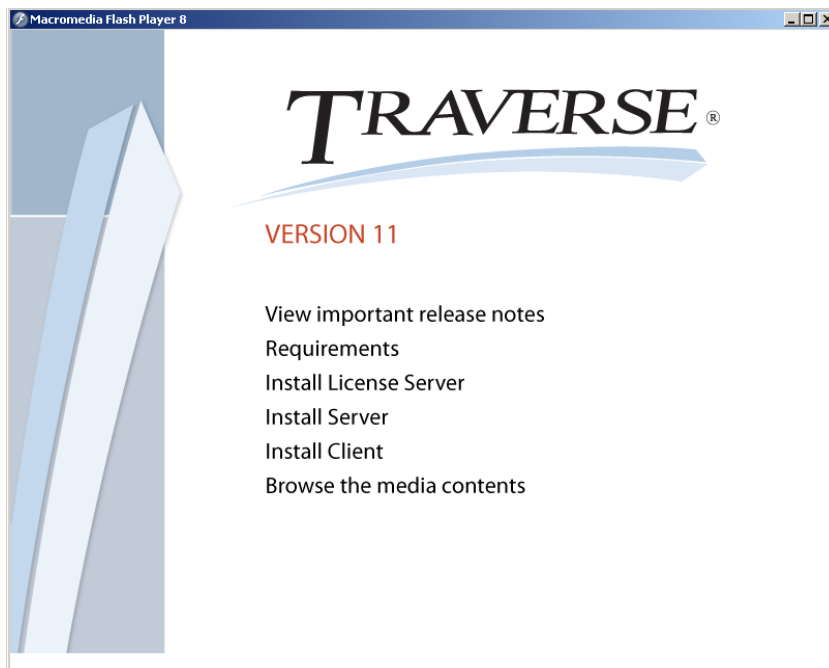
Support and System Requirements: http:/www.microsoft.com/express/support/

Downloads: http://www.microsoft.com/express/sql/download/

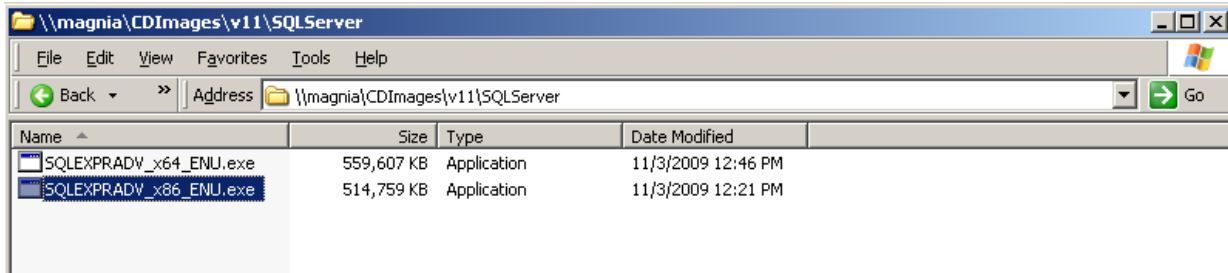Before you start, you will want to verify the following are installed or the installation will be stopped:

1. .Net 3.5 SP1
2. Windows Installer 4.5
3. Windows Powershell 1.0

Installing SQL 2008 R2 Express from the DVD

1. To install SQL Server Express from the TRAVERSE DVD, insert the DVD into the server DVD drive. The TRAVERSE Startup screen should appear.
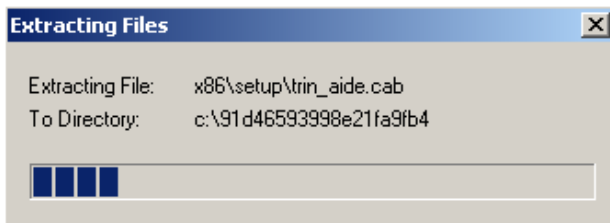

2. After reviewing the requirements and other documentation, click on **Browse the media contents** option and go to the **SQLServer** directory.
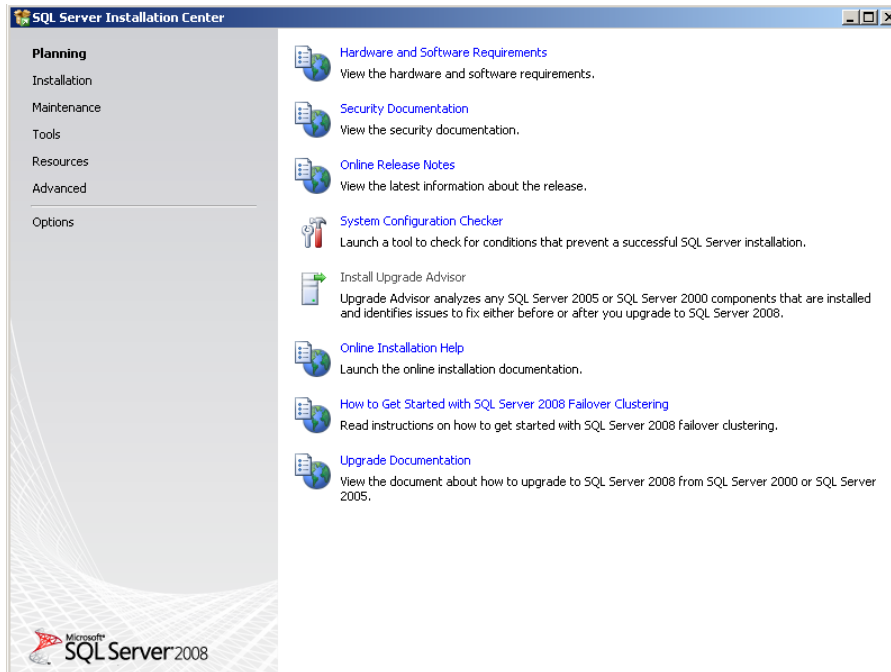
3. Double click on the appropriate version of SQL Server Express to install. Choose **SQLEXPRADV_x64_ENU.exe** if running on a server with a 64 bit OS. Choose **SQLEXPRADV_x86_ENU.exe** for servers running on a 32 bit OS.
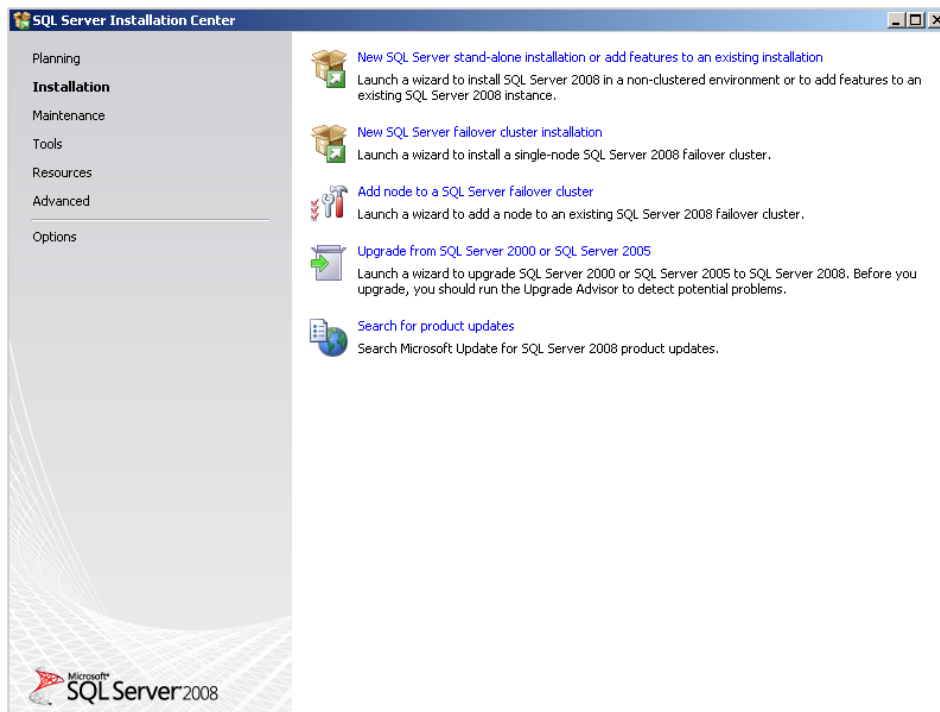

4. Choose **Run** to start the installation.

5. The installation should now start extracting files to the server.

6. Once the server is ready for installation, you should get the SQL Server Installation Center screen.
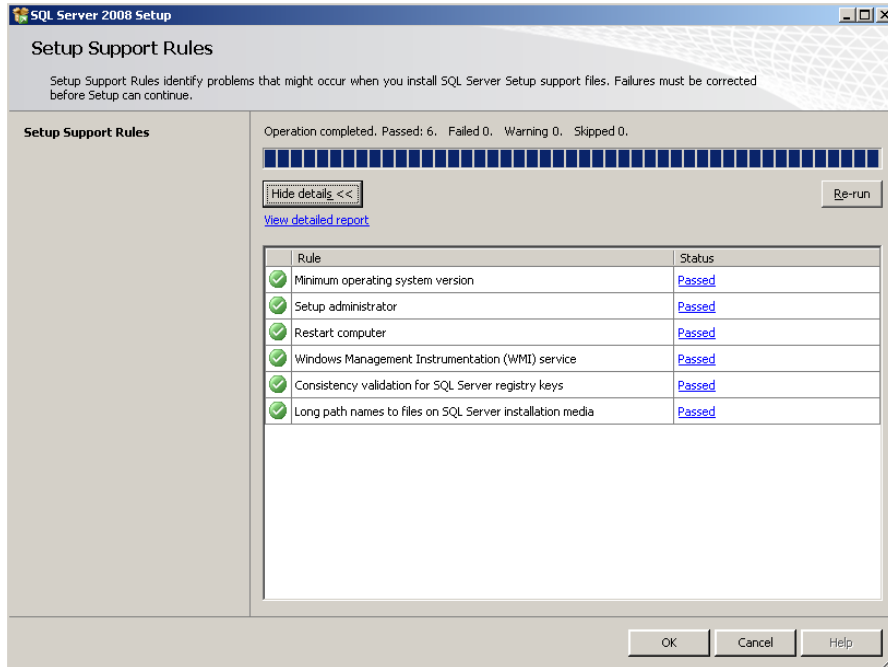
7. Review the available documentation in the Planning section, then click on Installation.

8. Choose **New installation or add features to an existing installation** to begin the installation.

9. The Setup Support Rules screen should appear. Click on View Details to verify that all tests passed. Once all applicable tests have passed click OK to continue. (does not display if not error)
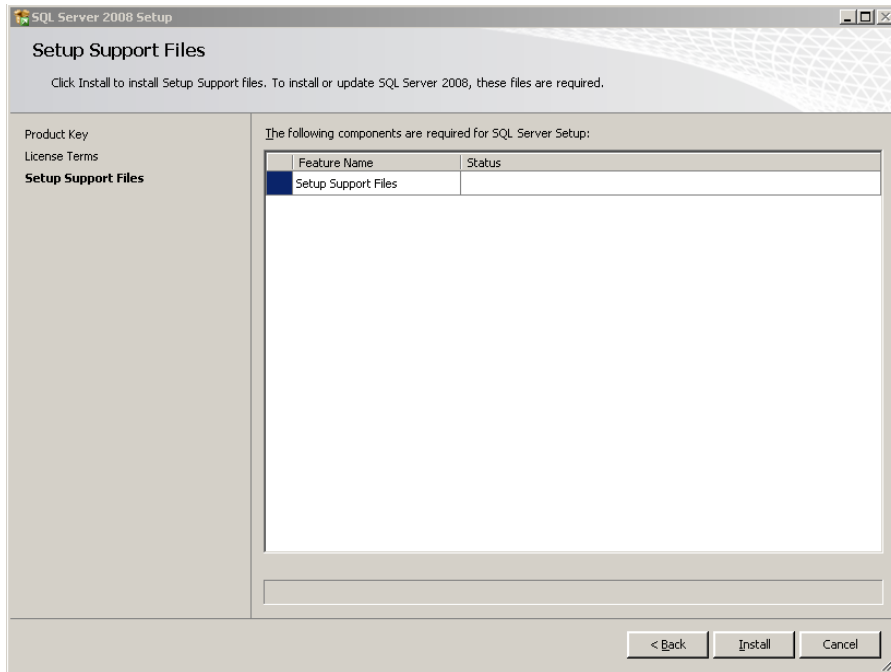
10. The Product Key screen should appear.

11. This screen should be grayed out and the Specify a free edition should be automatically selected. Click **Next** to continue. (did not appear)

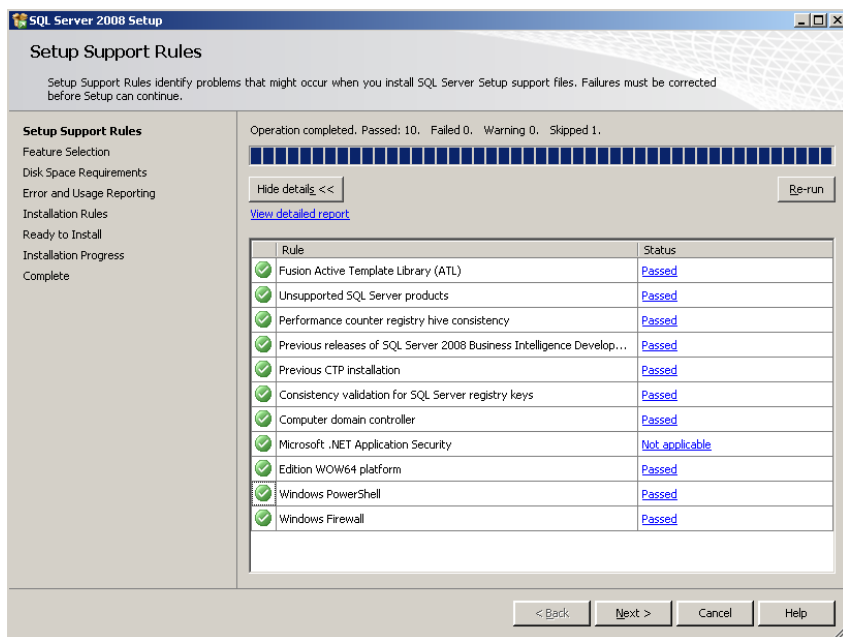12. The License Terms screen should appear.

13. Review and accept the Terms and click **Next** to continue.

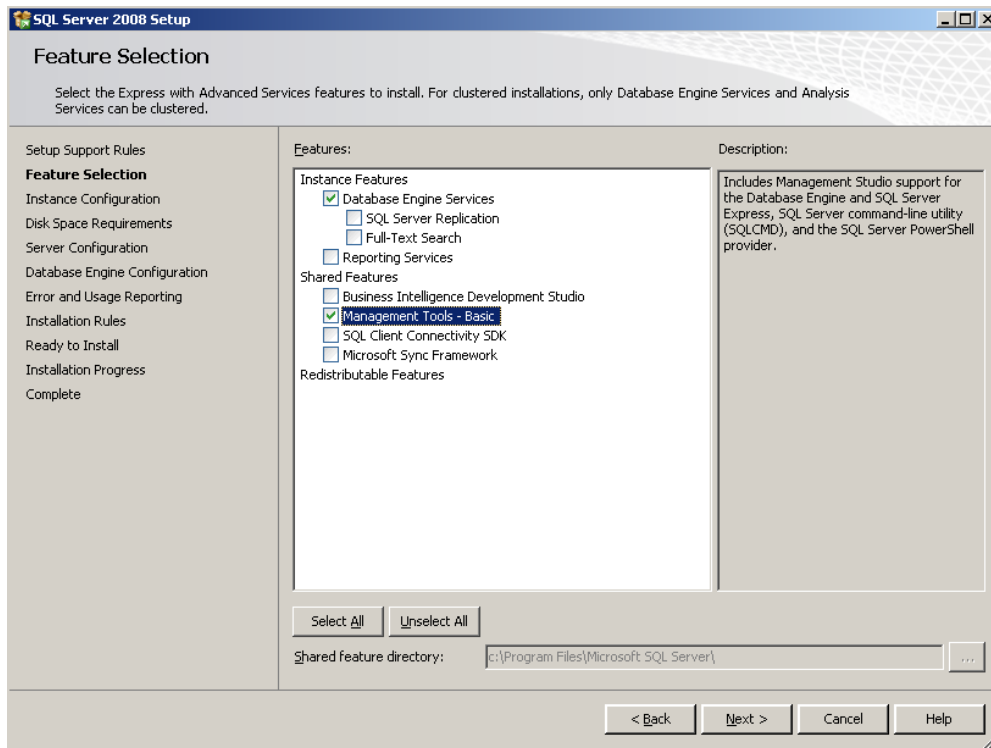14. The Setup Support Files screen appears.

15. Click on **Install** to continue the installation.
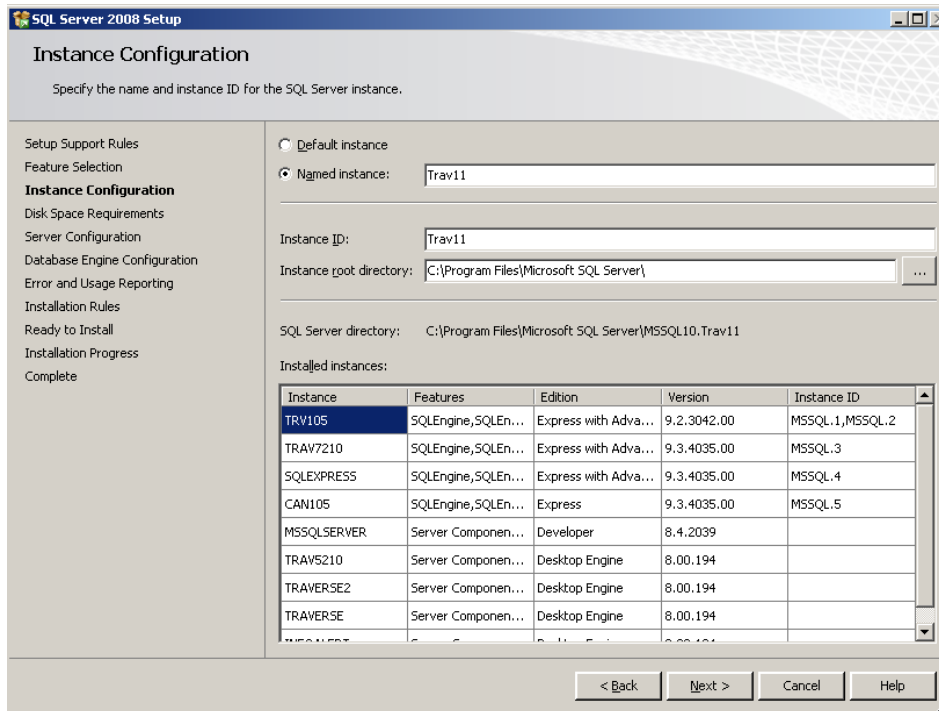
16. The Setup Support Rules screen appears.

17. Review the details and verify that all tests have passed. If there are failing tests, then consult the Microsoft Knowledgebase to get more information on how to correct the failures. Once all applicable tests have passed,

click **Next** to continue the installation. The Feature Selection screen appears.
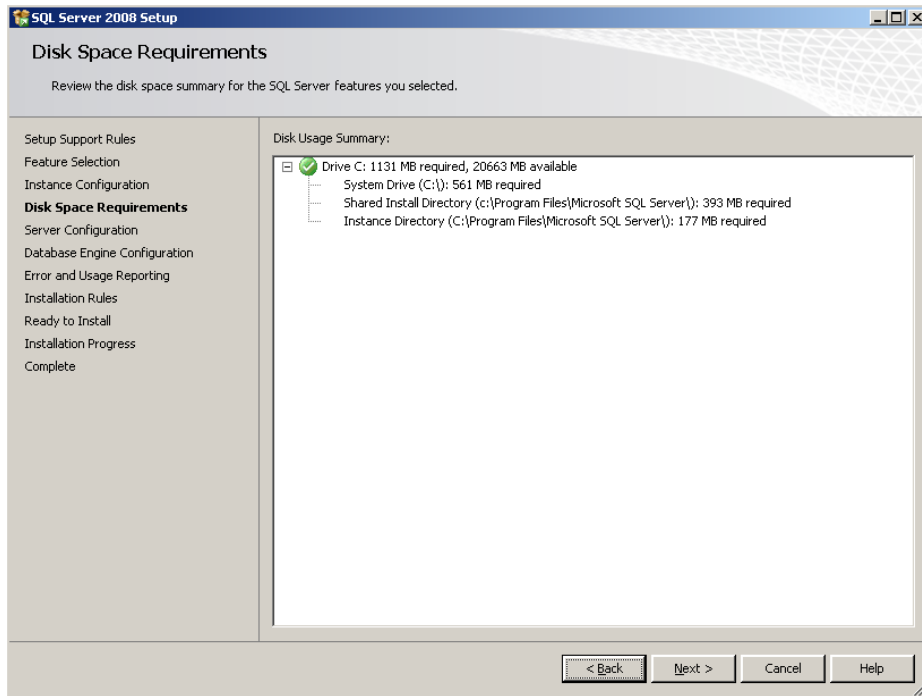

18. Check the Database Engine Services option. The Database Engine is the actual SQL install and is required if installing a new instance of SQL Express.

19. It is also advised to select the Management Tools-Basic option, as that will install the SQL Server Management Studio tool. This is not required, but it can be a useful tool as it allows a user interface for SQL Server management. It also allows access to the databases and the data within them, as well as offering a utility for managing SQL users, backups and security.

20. If you have IIS services installed, you may also want to install Reporting Services if you plan on creating reports using SQL Reporting services.

21. The other options are advanced SQL tools and should only be selected if you are sure they are going to be required for your installation. SQL administrator knowledge could be required to use these tools. Each option will also use more resources on the server. Consult the Microsoft knowledgebase for more information on these options.

22. Click **Next** to continue.
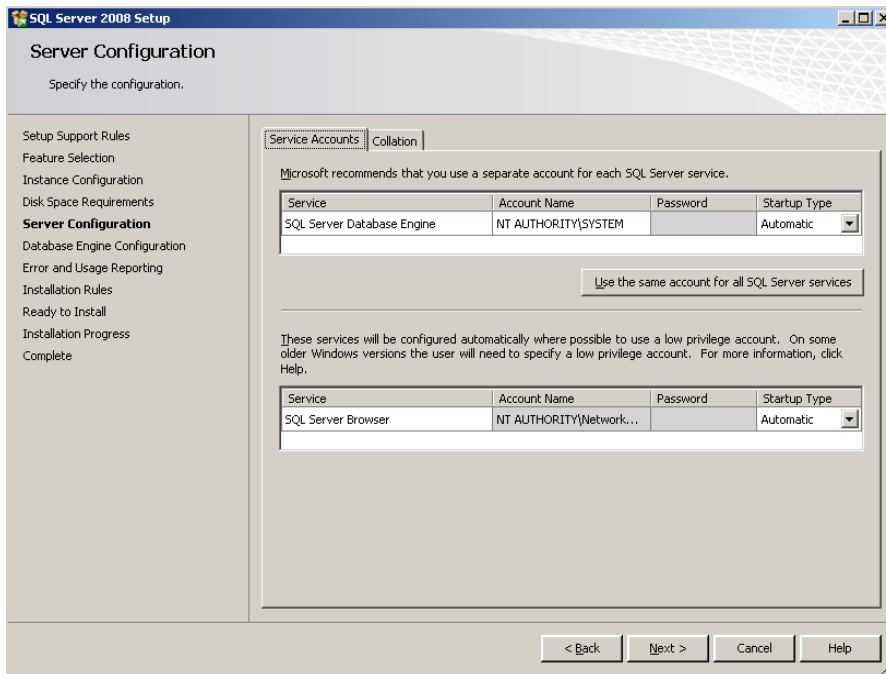
23. The Instance Configuration screen appears.

24. If using the Default instance, the SQL server name when logging into TRAVERSE will be the Windows Server Name\SqlExpress. If using a Named Instance(recommended), the SQL server name when logging into TRAVERSE will be the Windows Server Name\Named instance, e.g. Server\Trav11.

25. The Disk Space Requirements screen appears.

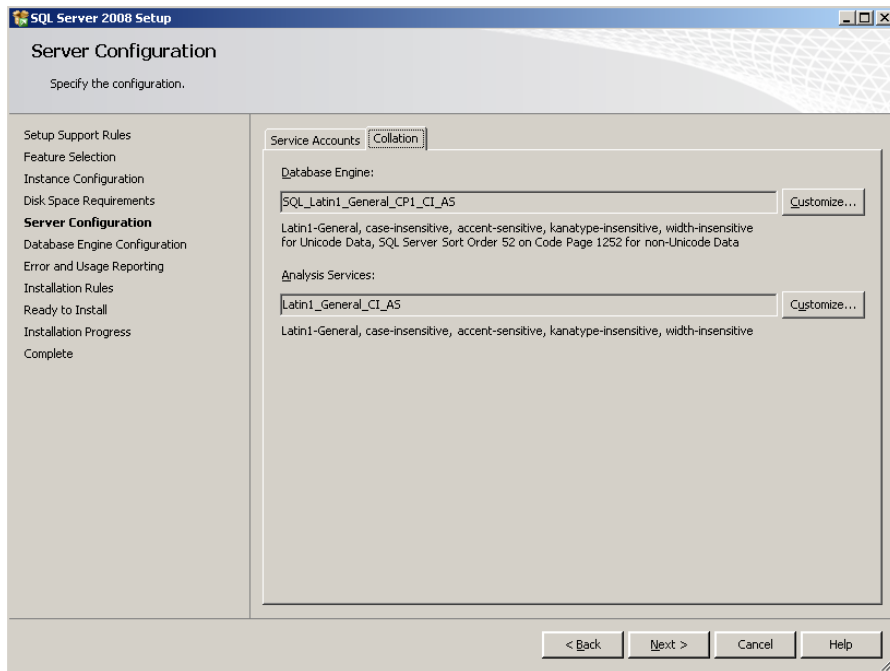26. Verify there is enough disk space and click **Next** to continue.

27. The Server Configuration Screen appears.

28. Choose the Account Name and Startup Type. NT Authority\System and Automatic should be acceptable for most installations. Choose Automatic for the SQL Server Browser service.
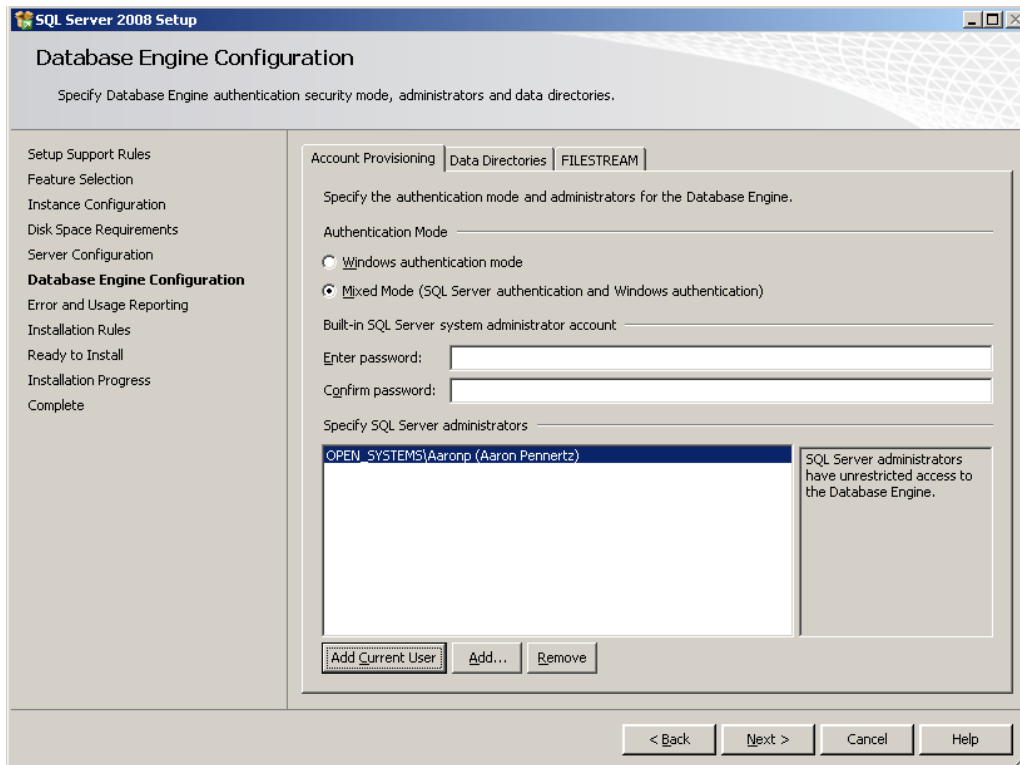
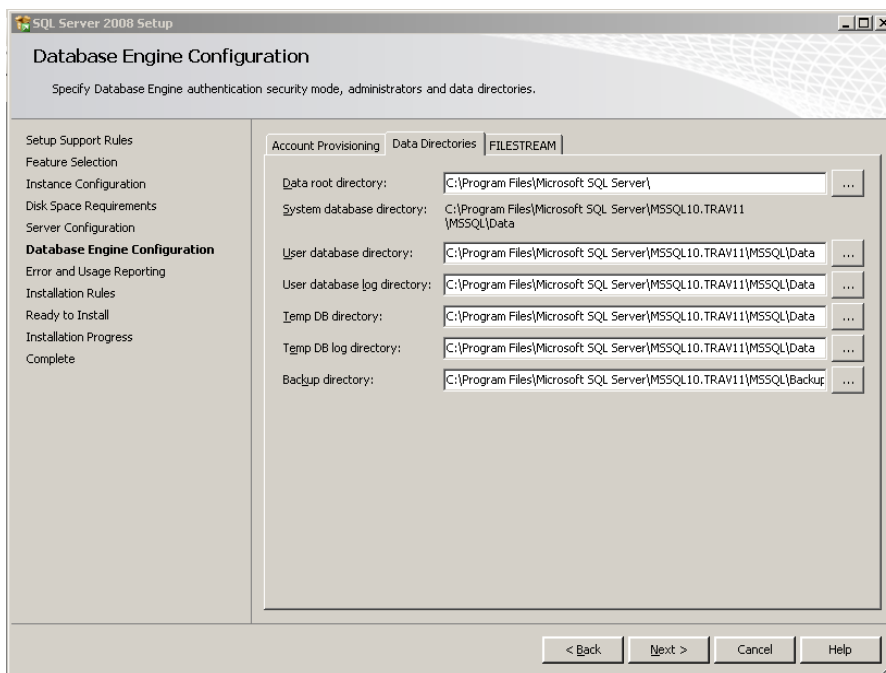29. Click on the Collation tab to verify that information is correct.

30. If SQL_Latin1_General_CP1_CI_AS is not set for the engine by default, click on **Customize** and choose it. Click **Next** to continue.
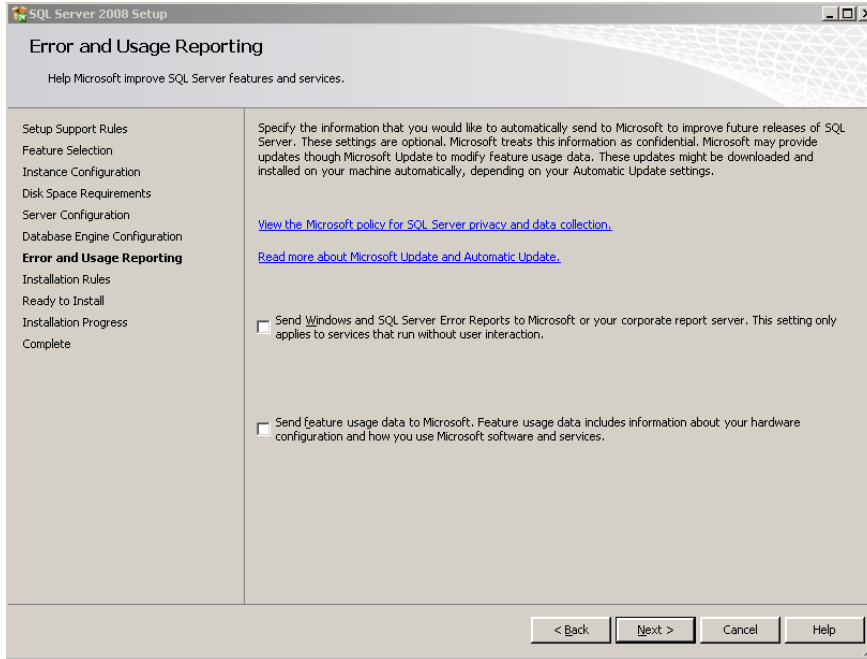
31. The Database Engine Configuration screen appears.

32. Choose **Windows authentication mode** to use only Windows logins for SQL access or Choose **Mixed Mode** to use both Windows and SQL logins. If you choose Mixed Mode, enter an SA password in the Enter password and Confirm password areas. Note this for future use and also note that these passwords may need to conform to your networks password rules. The Master Login created in TRAVERSE Server Manager uses a SQL login by default, so Mixed Mode should be selected if you will be using this instance for a v11 installation.

33. Click on the **Add Current User** button to add the current Windows user as an administrator. Windows administrators are not considered SQL administrators by default on Windows Vista, Windows 7, Server 2003 or Server 2008 operating systems. If installing on one of these operating systems then you should click on the **Add Current User** button, and also add any other administrative users that should have SQL admin rights. This would be recommended for any users that are going to be responsible for SQL backups, SQL security setup, etc.
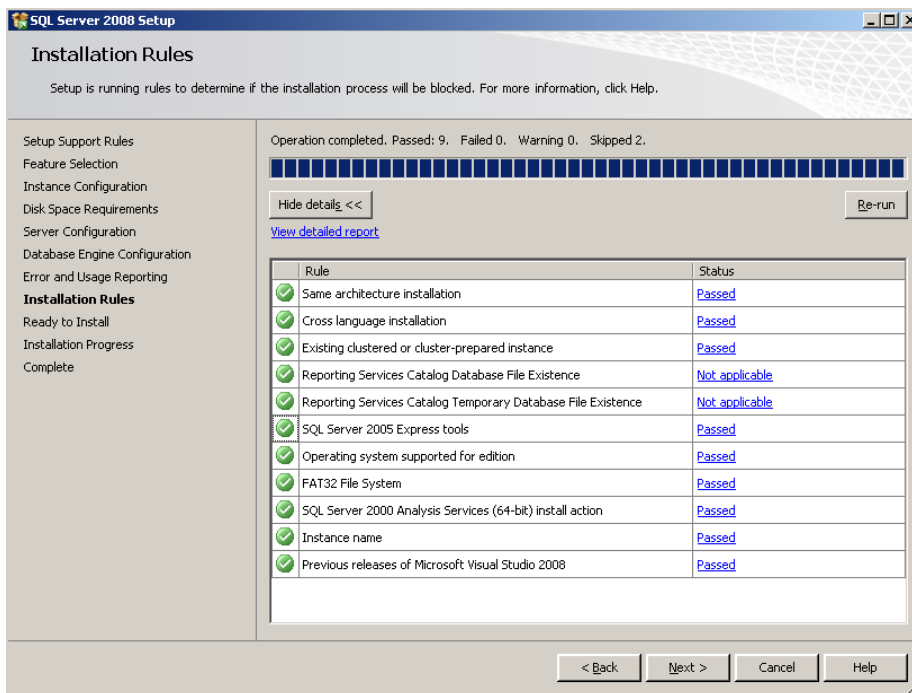
34. Click on the **Data Directories** tab.

35. Setup the Database Directory information. The default should be acceptable in most cases, however you may want to change this if you want to store the data on a drive other than C:\. The **FILESTREAM** tab should not need to have any changes made to it in most installations. See http://msdn.microsoft.com/en-us/library/cc949109.aspx for more information on the Filestream option. Click **Next** to continue.

36. The Error and usage Reporting screen appears.

37. Here you can choose to information to Microsoft about your SQL instance.

38. Click **Next** to continue.

39. The Installation Rules screen appears.

40. Verify that all applicable rules passed their test. If a test failed, consult the Microsoft Knowledgebase for more information on how to fix. Once all applicable tests have passed, click **Next** to continue.
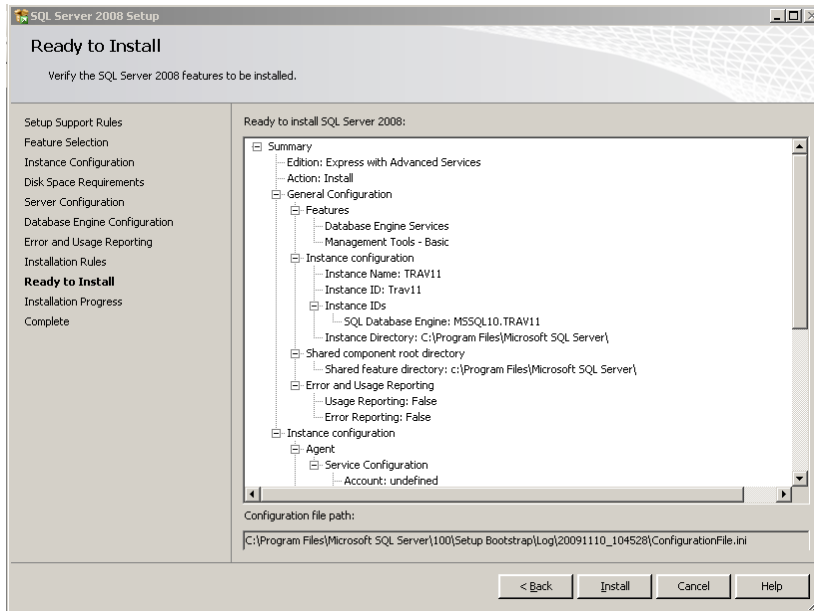
NOTE: If you are installing the 2008 Management Tools on a server that also has 2005 SQL Management Studio
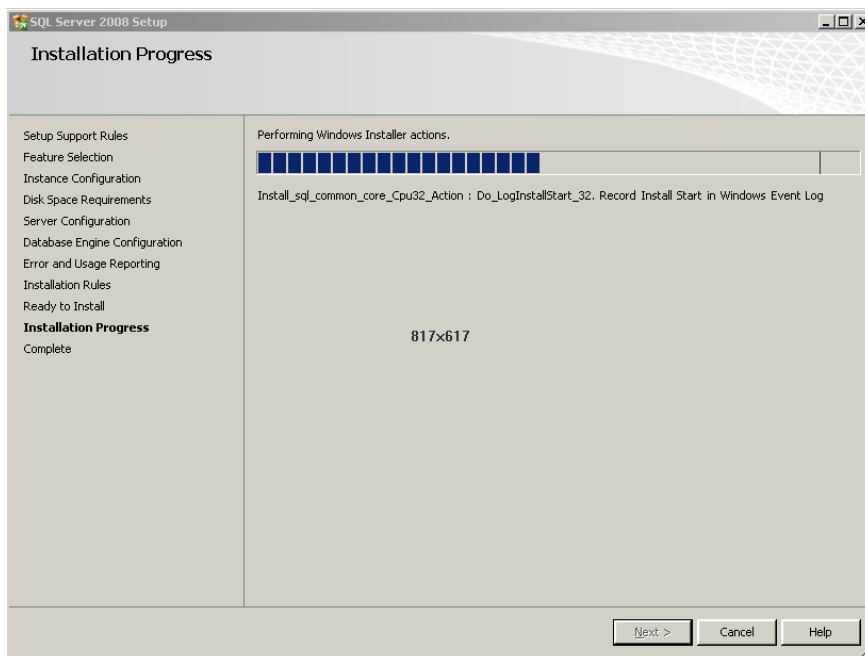
installed, you must remove 2005 Management Studio prior to continuing on in the installation.

41. The Ready to Install screen appears.

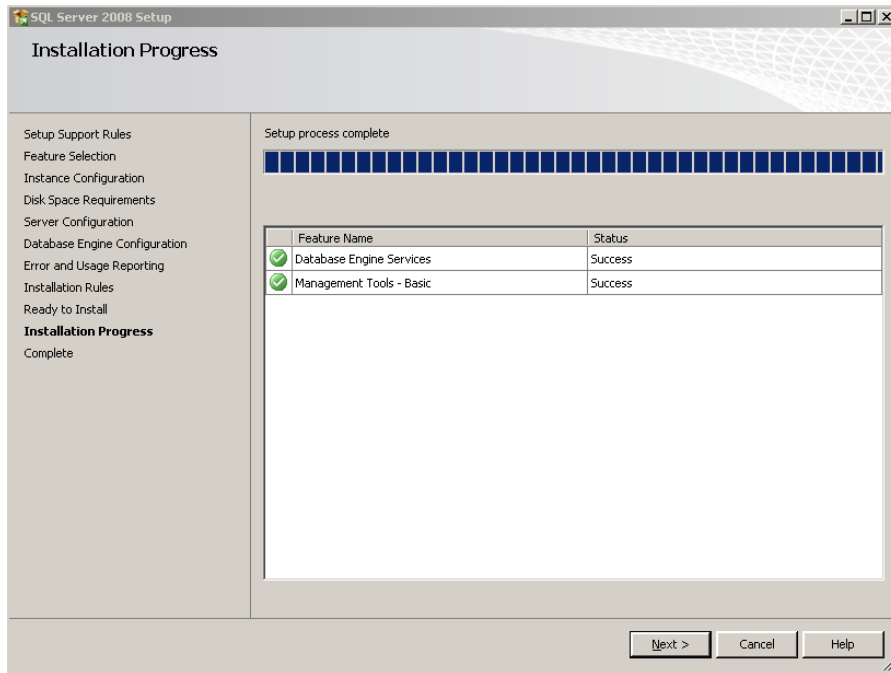42. Verify all of the information is correct. Click **Back** to go back and make necessary changes or click **Install** to continue.

43. The Installation Progress screen appears while the installation is in progress. This may take a long time to complete.
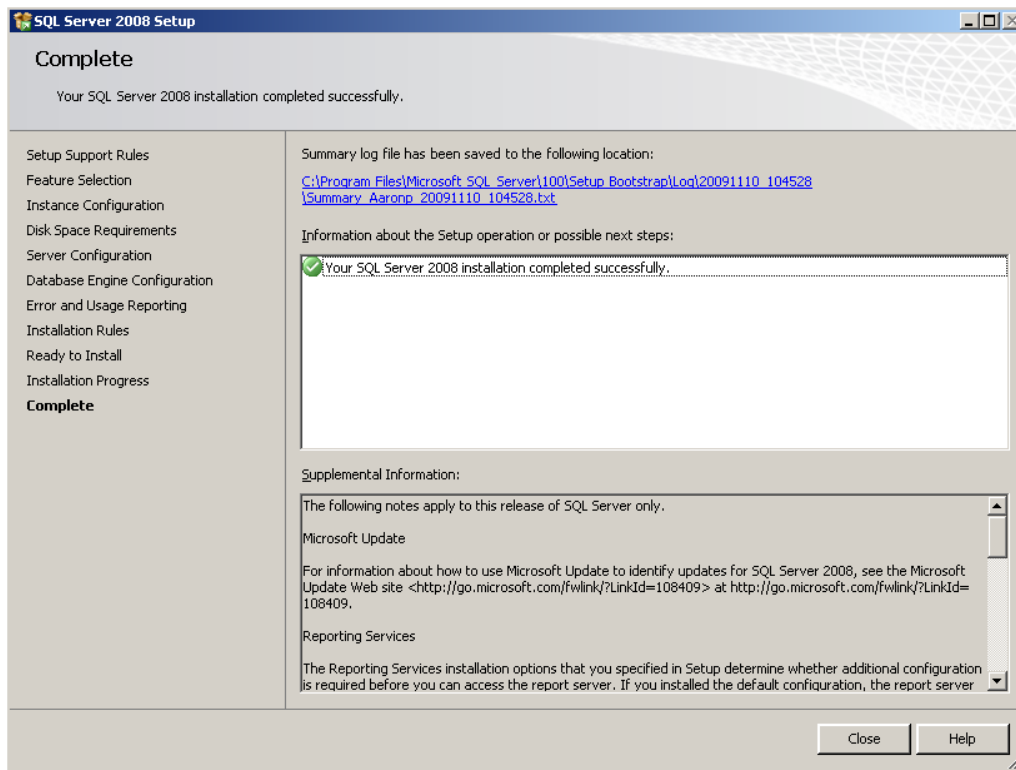
44. When the progress is complete, verify that all features were successfully installed.

45. Click **Next** to continue.

46. The Complete screen should appear.

47. Verify the installation was completed successfully and review the supplemental information. Close to finish the installation. You can now install TRAVERSE 11 using this instance.

Troubleshooting connection issues:

If having problems logging into the client on a TRAVERSE 11 install, check the following:

Required SQL Server Settings (10.5 and 11)

- ✓ TCP\IP and Named Pipes protocols are enabled in SQL Server Configuration Manager – SQL Server Network Configuration (requires SQL Server service restart after enabling).

- ✓ SQL Browser service is running in SQL Server Configuration Manager – SQL Server Services.

- ✓ SQL Server is configured to use SQL Server and Windows authentication. Check this in SQL Server Management studio by right clicking on the server name and choosing properties and go to the security section (requires SQL Server service restart after changing).

Required TRAVERSE Server Manager Settings (v11)

- ✓ Master Login is updated for all databases under Tools.

- ✓ TRAVERSE login is setup and configured correctly.
    - o Is Active is checked.
    - o Trusted checked for trusted Windows user and setup correctly (user name only, no domain).
    - o Trusted not checked for non-trusted user

- ✓ Group(s) is setup under the company and have the proper menu permissions and users added.

Required TRAVERSE License Manager Settings (v11)

- ✓ The Login and Password information entered in the TRAVERSE and Membership Database areas match the login and password information set for the Master Login information set in Server Manager.

- ✓ The License Manager service is listening on the assigned port (2113 by default). To check this, use the Windows Event Viewer – Windows Log – Application Log to verify that the TravLicenseServer is listening on the assigned port. This should be the most recent entry for the TravLicenseServer. You will not be able to connect to the client until this entry is listed.

Required TRAVERSE Client Settings (v11)

- ✓ The LicensePort value in the Traverse.exe.config file is the machine name where the License Server is installed, not the SQL Server instance name or localhost.

- ✓ The login and password is setup in Server Manager – Security. Cannot use the master or SA login to login to the client.