At Intelicode we want to provide the best user experience possible. To minimize customer wait time and prevent an increased load on our customer support team we are providing a complete SQL Server installation walkthrough document. SQL Server is utilized as our shared database solution. We provide this document as a courtesy to our customers to illustrate how to implement Microsoft SQL Server.

As SQL Server is a Microsoft product and not an Intelicode product there will be additional charges for SQL Server support. If after consulting this document you are still having issues, you can:

1. Contact Intelicode support. SQL Server installations performed by Intelicode staff or walked through by an Intelicode staff member will be billable. Advanced SQL Server troubleshooting and connectivity issues will also be billable. Current rates are available by contacting Intelicode at 800-786-4231.

2. Contact Microsoft at <u>http://support.microsoft.com/kb/319726</u> for assistance. Microsoft support is fee based.

3. Consult with your IT staff or an IT consultant for options.

#### SQL Server installation directions are as follows:

After you have successfully installed Intelicode you may begin the instillation of Microsoft SQL Server Express 2014. Go to <u>https://www.microsoft.com/en-us/download/details.aspx?id=42299</u> and click "*DOWNLOAD*".

| Select Language: English ~ Download | Microsoft® SC    | QL Server® 2014 Express | S        |  |
|-------------------------------------|------------------|-------------------------|----------|--|
|                                     | Select Language: | English                 | Download |  |

Look for "*ExpressAndTools 32BIT*\*SQLEXPRWT\_x86\_ENU.exe*", click the check box and then press the "*NEXT*" button on the bottom right and the download will begin. It's a large file so let it completely download.

|   | File Name   | Size     |   |
|---|---|----------|---|
| 2 | ExpressAndTools 32BIT/SQLEXPRINT_x86_ENU.exe      | 540.8 MB | Download Summary:<br>1. ExpressAndTools 328/T/SCLEXPRWT_x86_ENU.exe |
| 3 | ExpressiondYools 64807;SQLEXPROVT_x64_EP40.xxe    | 833.2 MB |   |
| 2 | LocaID8 335IT/Sql.ocaID8-mai                      | 36.6 MB  |   |
| 3 | LocalDB 648ITI.5qLocalD6.msi                      | 43.1 ME  | · · · · · · · · · · · · · · · · · · ·                               |
| - | MgmtShudio 328IT\SQLManagementShudio_x86_EN4J.exe | 673.0 MB |   |
| 3 | MgmtStudio 648/T/SQLManagementStudio_v64,£NiU.exe | 683.9 MB | Total Size: 840.8 M8  |

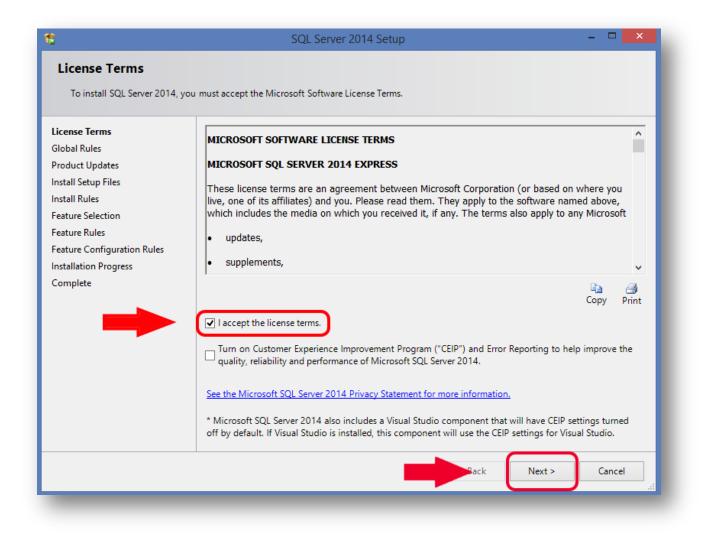
Find the downloaded file and double click it. Choose the directory you wish to install SQL Server in when the prompt comes up (default is recommended). Click the "*OK*" button and allow the program to run.

|                           | Choose Directory For Extracted Files  |
|---------------------------|---|
| SQLEXPRWT_<br>x86_ENU.exe | Choose Directory For Extracted Files C:\Users\VM8\Desktop\SQLEXPRWT_x86_ENU\ Ok Cancel Browse |

Click "New SQL Server stand-alone installation or add features to an existing installation".

| 3                                 | SQL Server Installation Center –  |
|-----------------------------------|---|
| Planning<br>Installation          | New SQL Server stand-alone installation or add features to an existing installation<br>Launch a wizard to install SQL Server 2014 in a non-clustered environment or to add<br>features to an existing SQL Server 2014 instance. |
| Maintenance<br>Tools<br>Resources | Upgrade from SQL Server 2005, SQL Server 2008, SQL Server 2008 R2 or SQL Server 2012<br>Launch a wizard to upgrade SQL Server 2005, SQL Server 2008, SQL Server 2008 R2 or SQL<br>Server 2012 to SQL Server 2014.               |
| Options                           |   |

License Terms – click the check box "*I accept the license terms*" (it's optional to turn on CEIP, not recommended). Then click "*NEXT*".



It will check for any potential problems that may pop up during instillation then click "NEXT".

| 1                                    | SQL Server 2014 Setup                                     | ×         |
|--------------------------------------|---|-----------|
| Product Updates                      |   |           |
| Always install the latest upda       | ates to enhance your SQL Server security and performance. |           |
| License Terms<br>Global Rules        | ✓ Include SQL Server product updates                      |           |
| Product Updates                      | Checking for updates                                      |           |
| Install Setup Files<br>Install Rules |   | Skip Scan |
| Feature Selection                    |   |           |
| Feature Rules                        |   |           |
| Feature Configuration Rules          |   |           |
| Installation Progress<br>Complete    |   |           |
| Complete                             |   |           |
|                                      |   |           |
|                                      |   |           |
|                                      |   |           |
|                                      |   |           |
|                                      |   |           |
|                                      | Read our privacy statement online                         |           |
|                                      | Learn more about SQL Server product updates               |           |
|                                      | < Back Next >   | Cancel    |

It will ask which features to install. Unless you are instructed to change anything, just click "NEXT".

| Feature Selection         Select the Express features to install.         License Terms         Global Rules         Product Updates         Install Setup Files         Install Rules         Feature Selection         Feature Rules         Instance Configuration         Server Configuration         Server Configuration         Feature Configuration         Feature Configuration         Feature Configuration         Server Configuration         Server Configuration         Server Configuration         Redistributable Features         SQL Client Tools Connectivity SDK         Redistributable Features         SQL Client Connectivity SDK         Redistributable Features         SQL Client Connectivity SDK         Redistributable Features         Drive C: 2359 MB required, 43339 MB a         Drive C: 2359 MB required, 43339 MB a |                              |
|--|------------------------------|
| Global Rules       Instance Configuration         Product Updates       Instance Features         Install Setup Files       Instance Features         Install Rules       Instance Features         Feature Selection       Instance Configuration         Server Configuration       Client Tools SDK         Instance Configuration       Management Tools - Basic         SQL Client Connectivity SDK       Management Tools - Complete         SQL Client Connectivity SDK       Disk Space Requirements         Disk Space Requirements       Disk Space Requirements         Drive C: 2359 MB required, 43339 MB a   |                              |
|  | ce is<br>es. SQL<br>ide on v |
| Instance root directory:       C:\Program Files (x86)\Microsoft SQL Server\         Shared feature directory:       C:\Program Files\Microsoft SQL Server\         Shared feature directory (x86):       C:\Program Files (x86)\Microsoft SQL Server\  | ····                         |

It will ask you to name the instance of SQL. You can change it but we recommend you leave it as SQLExpress and click "*NEXT*".

| 5                                    | :                          | SQL Server 2014     | Setup                 |                       | - 🗆 🗙    |
|--------------------------------------|----------------------------|---------------------|-----------------------|-----------------------|----------|
| Instance Configuratio                | n                          |                     |                       |                       |          |
| Specify the name and instanc         | e ID for the instance of S | QL Server. Instance | ID becomes part of ti | ne installation path. |          |
|                                      |                            |                     |                       |                       |          |
| License Terms                        | O Default instance         |                     |                       |                       |          |
| Global Rules                         | Named instance:            | SQLExpress          |                       |                       |          |
| Product Updates                      |                            |                     |                       |                       |          |
| Install Setup Files<br>Install Rules |                            |                     |                       |                       |          |
| Install Rules<br>Feature Selection   | Instance ID:               | SQLEXPRESS          |                       |                       |          |
| Feature Rules                        |                            |                     |                       |                       |          |
| Instance Configuration               | SQL Server directory:      | C:\Program Files (: | x86)\Microsoft SQL S  | erver\MSSQL12.SQLE    | XPRESS   |
| Server Configuration                 | Installed instances:       |                     |                       |                       |          |
| Database Engine Configuration        | Instance Name              | Instance ID         | Features              | Edition               | Version  |
| Feature Configuration Rules          | Instance Name              | instance iD         | reatures              | Edition               | version  |
| Installation Progress<br>Complete    |                            |                     |                       |                       |          |
| complete                             |                            |                     |                       |                       |          |
|                                      |                            |                     |                       |                       |          |
|                                      |                            |                     | _                     |                       |          |
|                                      |                            |                     |                       |                       |          |
|                                      |                            |                     |                       |                       |          |
|                                      |                            |                     |                       | •                     |          |
|                                      |                            |                     | < Back                | Next > Can            | cel Help |
|                                      |                            |                     |                       |                       |          |

Unless you are instructed to change anything, leave the Server Configuration as is and click "NEXT".

| 1                               | SQL Server 2                  | 2014 Setup                      |                 |              | × |
|---------------------------------|-------------------------------|---------------------------------|-----------------|--------------|---|
| Server Configuration            |                               |                                 |                 |              |   |
| Specify the service accounts an | d collation configuration.    |                                 |                 |              |   |
| License Terms                   | Service Accounts Collation    |                                 |                 |              |   |
| Global Rules<br>Product Updates | Microsoft recommends that you | use a separate account for each | SQL Server serv | ice.         |   |
| Install Setup Files             | Service                       | Account Name                    | Password        | Startup Type |   |
| Install Rules                   | SQL Server Database Engine    | NT Service\MSSQL\$SQL           |                 | Automatic    | ~ |
| Feature Selection               | SQL Server Browser            | NT AUTHORITY\LOCAL              |                 | Disabled     | ~ |
| Feature Rules                   |                               |                                 |                 |              |   |
| Instance Configuration          |                               |                                 |                 |              |   |
| Server Configuration            |                               |                                 |                 |              |   |
| Database Engine Configuration   |                               |                                 |                 |              |   |
| Feature Configuration Rules     |                               |                                 |                 |              |   |
| Installation Progress           |                               |                                 |                 |              |   |
| Complete                        |                               |                                 |                 |              |   |
|                                 |                               | -                               |                 |              |   |
|                                 |                               |                                 |                 |              |   |
|                                 |                               |                                 | L               |              |   |
|                                 |                               |                                 |                 |              |   |
|                                 |                               |                                 |                 |              |   |
|                                 |                               | •                               |                 |              |   |
|                                 |                               |                                 | _               |              |   |
|                                 |                               | < Back Next                     | > Can           | cel Help     | o |
|                                 |                               |                                 |                 |              |   |

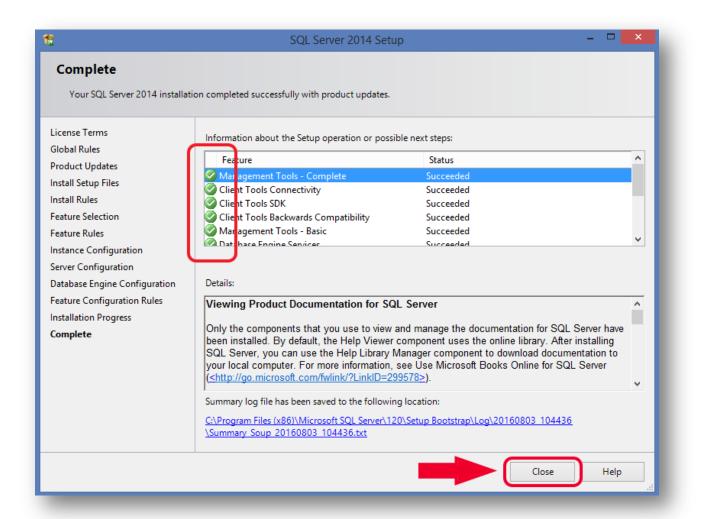
We recommend you use Windows Authentication instead of Mixed Mode, click "NEXT".

| 18  | SQL Server 2014 Setup – 🗖 🗙   |
|---|---|
| Database Engine Confi<br>Specify Database Engine auther   | guration<br>ntication security mode, administrators and data directories.   |
| License Terms<br>Global Rules<br>Product Updates<br>Install Setup Files<br>Install Rules<br>Feature Selection<br>Feature Rules<br>Instance Configuration<br>Server Configuration<br>Database Engine Configuration<br>Feature Configuration Rules<br>Installation Progress | Server Configuration       Data Directories       User Instances         Specify the authentication mode and administrators for the Database Engine.         Authentication Mode            • Windows authentication mode            • Mixed Mode (SQL Server authentication and Windows authentication)         Specify the password for the SQL Server system administrator (sa) account.         Enter password:         Confirm password:         Specify SQL Server administrators |
| Complete  | VM8 (VM8)     SQL Server administrators have unrestricted access to the Database Engine.       Add Current User     Add   |
|   | < Back Next > Cancel Help   |

Allow the program to install. This may take a few minutes.

| 1  | SQL Server 2014 Setup  | - 🗆  | ×           |
|--|--|------|-------------|
| Installation Progress  |  |      |             |
| License Terms<br>Global Rules<br>Product Updates<br>Install Setup Files<br>Install Rules<br>Feature Selection<br>Feature Rules<br>Instance Configuration<br>Server Configuration<br>Database Engine Configuration<br>Feature Configuration Rules<br><b>Installation Progress</b><br>Complete | Install_sqlls_Cpu64_Action : WriteRegistryValues. Writing system registry values |      |             |
|  | Next > Cancel  | Help | <b>&gt;</b> |

A window titled "*complete*" will show you everything that was installed. If everything has a green check next to it, it was a successful instillation! Click "*CLOSE*". Then click the red X at the top right to close the SQL Installation Center window.



By default there is no icon specifically for the desktop. To have one, click the windows start button, click in the search bar, and type in *SQL Server 2014 Management Studio*. Once you find it, create a desktop (or equally accessible) shortcut. Double click the newly created icon to open Management Studio.



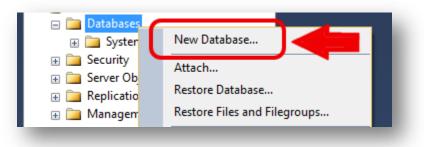
When the "*Connect to Server*" prompt pops up, enter your server name OR click the dropdown arrow on "*server name*". Click "*<browse for more>*", select which kind of server you use.

| €.              | Connect to Server                | ×          |
|-----------------|----------------------------------|------------|
| Microsoft S     | SQL Server 2014                  |            |
| Server type:    | Database Engine                  |            |
| Server name:    | WINDOWS8VM                       |            |
| Authentication: | WINDOWS8VM                       | 9          |
| User            | <browse for="" more=""></browse> |            |
| Password:       |                                  |            |
|                 | Remember password                |            |
| Conne           | ect Cancel Help                  | Options >> |

Click the little "+" next to Database Engine and find your user profile name. Click it and click "*OK*". Then once on the main login screen again, click "*connect*".

| 2 | Browse for Servers               |
|---|----------------------------------|
|   | Local Servers Network Servers    |
|   | Select the server to connect to: |
|   | OK Cancel Help                   |

If everything was successful, you should see your server folders on the left side of your screen! If not, an error dialog will pop up. Right click on "*Databases*" and click "*New Database*". Name it "*Office*" and click "*OK*". If everything was successful, you should see a folder named "*office*"! If not, an error dialog will pop up. Repeat the process, only this time name the folder "*Provided*".



| 5                          |                    | New       | Database            |                   | - • ×                    |
|----------------------------|--------------------|-----------|---------------------|-------------------|--------------------------|
| Select a page              | 🔄 Script 🔻 📭       | Help      |                     |                   |                          |
| Poptions Filegroups        | Database name:     | :         | Office              |                   |                          |
|                            | Owner:             |           | <default></default> |                   |                          |
|                            | ✔ Use full-text in | ndexing   |                     |                   |                          |
|                            | Database files:    |           |                     |                   |                          |
|                            | Logical Name       | File Type | Filegroup           | Initial Size (MB) | Autogrowth / Maxsize     |
|                            | Office             | ROWS      | PRIMARY             | 3                 | By 1 MB, Unlimited       |
|                            | Office_log         | LOG       | Not Applicable      | 1                 | By 10 percent, Unlimited |
| Connection                 |                    |           |                     |                   |                          |
| Server:<br>SQLEXPRESS      |                    |           |                     |                   |                          |
| Connection:<br>VM8         |                    |           |                     |                   |                          |
| View connection properties |                    |           |                     |                   |                          |
| Progress                   |                    |           |                     |                   |                          |
| Ready                      | <                  |           |                     | Add               | ><br>Remove              |
|                            |                    |           |                     |                   |                          |
|                            |                    |           |                     |                   | OK Cancel                |

Now you need to run the SQL scripts to make everything work! The SQL Scripts can be obtained from the Intelicode program itself. Open Intelicode. Since you are not connected to a database, you will be directed to the connection settings page. Enter your SQL server name. For office put "*Office*", and for provided put "*Provided*" Alternate names can be chosen but for the purpose of this documentation we will refer to them with the specified names. Click "*Generate SQL Script*" and select where to save the two scripts to. You may keep Intelicode open or close it once that step is completed.

| Conne          | ection Settings                   |
|----------------|-----------------------------------|
|                | D                                 |
| Server Address | Port (if blank, 1433 is assumed ) |
| VM8\SQLEXPRESS |                                   |
| Authentication | Office Database Name              |
| ○ Windows      | Office                            |
| Usemame        | Provided Database Name            |
|                | Provided                          |
| Password       |                                   |
|                | Generate SQL Script               |
| Cancel         | ОК                                |
|                |                                   |

Open SQL Server Management Studio and drag your *OFFICE* script to the middle of the Management Studio window. You should see a lot of code and above that you should see a button with an exclamation point followed by the word *EXECUTE*. Click the *EXECUTE* button.



If completed without error there should be a 'Messages' window displaying many instances of "(1 row(s) affected) and the final summary of 100% 'Query executed successfully'.

| (1 row(s) affected)          |
|------------------------------|
| (1 row(s) affected)          |
| (1 row(s) affected)          |
| 100 % 🔹 <                    |
| Query executed successfully. |
|                              |

Close the "office" tab and repeat the process with your PROVIDED script. If completed successfully, it should do the same.

Close SQL Server Management Studio and open Intelicode. If not already at connection settings, click "Options > Administrator Panel". If it asks you to create an Admin Password, do so and remember the password. In order for us to be able to reset your password should you lose or forget it, you will be charged \$50. Once in the Administrator Panel, click "File > Connection settings".

Once in the connection settings window, enter the server name. It should be the same as your SQL Server name. Enter *Office* in the office space and *Provided* in the provided space, select the correct authentication that you chose whilst installing the SQL (SQL or Windows). Press "*OK*".

| Connection Settings    |                                   |  |
|------------------------|-----------------------------------|--|
|                        | ۵                                 |  |
| Server Address         |                                   |  |
| VM8\SQLEXPRESS         | Port (if blank, 1433 is assumed ) |  |
| THE ISGLE AT THE SO    |                                   |  |
| Authentication         | Office Database Name              |  |
| ○ Windows ● SQL Server | Office                            |  |
| Usemame                | Provided Database Name            |  |
|                        | Provided                          |  |
| Password               |                                   |  |
|                        | Generate SQL Script               |  |
| Cancel                 | ОК                                |  |
|                        |                                   |  |

If everything was successful, you will be taken to the login screen and you are now ready to begin using Intelicode!

| 7               | Login   |                | ×    |
|-----------------|---|----------------|------|
| Options         |   |                | D    |
| Welcon          | ne to Intelicode. Plea  | ase log in.    |      |
| User Name       | Auditor, A  |                | ¥    |
| Password        |   |                |      |
| Cancel          | ]   | ОК             |      |
| Association. Al | copyright 2015, Ame<br>I Rights Reserved. C<br>the American Medic | PT is a regist | ered |

Intelicode is **not** responsible for the security policies or backups of any customer's SQL Server installations. Backups are recommended and should be conducted based on the customer's internal data retention policies. Data security is the responsibility of the customer, and if in doubt, a 3rd party security consulting service should be contacted.

It is estimated that you can store approximately 100,000 Intelicode audits per 1GB of disk space on the SQL Server instance. Actual usage may vary, and this figure is provided as a general guideline.

If you fail to connect, please verify the following:

1. Make sure there are tables in the Office and Provided databases. Running the scripts should have populated them.

2. Make sure your SQL Server TCP listening port (1433 by default) is not being blocked by a firewall.

3. If you are using Windows authentication, make sure the user attempting to connect is logged into the same domain as the server.

4. Verify the permissions for the databases on the SQL Server.

5. Restart the SQL Server Service from the Configuration Manager or from the Windows Services control panel in case a change made has not yet taken affect.