

YELLAX.COM

TYPICAL  MANAGER[®]
POWERED BY YELLAX

Installation Guide



YELLAX
HANDS-ON IMPROVEMENT

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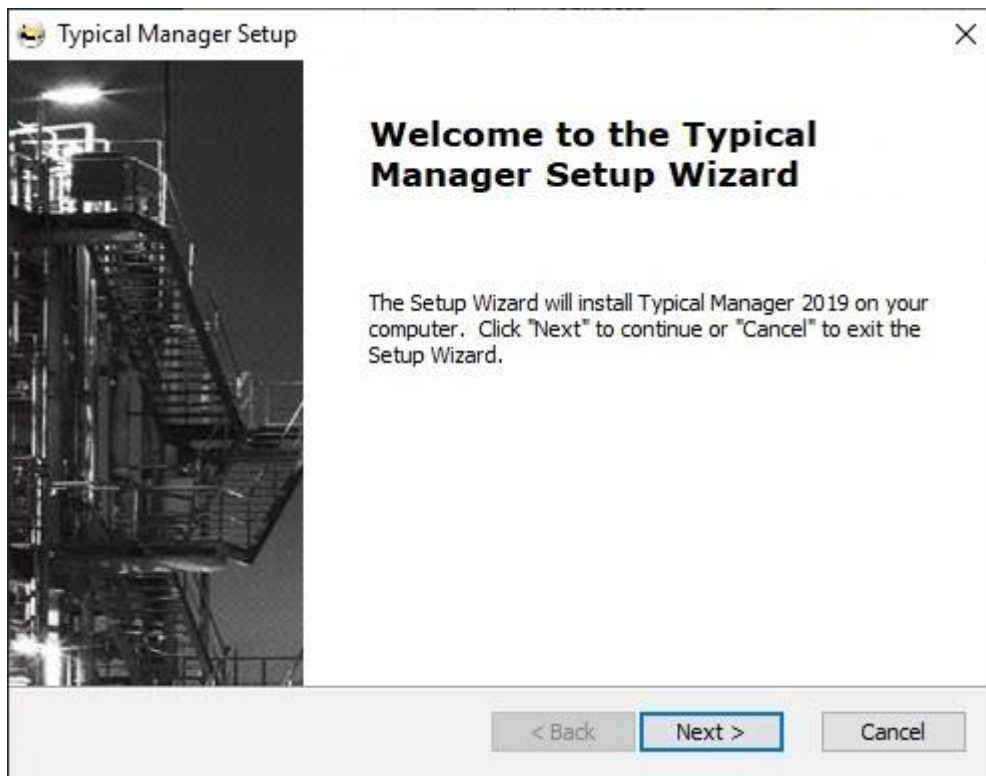


1 Introduction

The purpose of this document is to help a user with installing Typical Manager. For Typical Manager to work, some additional software has to be installed. The install is guided by the Typical Manager install wizard. This wizard contains helpful links for installing Typical Manager and the additional components.

For Typical Manager to run on your system, it needs to meet the system requirements. These can be found in a separate document: Typical Manager system requirements.

RUN THE SETUP WITH RIGHT MOUSE CLICK "RUN AS ADMINISTRATOR"



The following components are required to run Typical Manager successfully:

- SQL Server or SQL Express (Standalone and server installation).

Typical Manager can be installed in two ways:

- **Stand-alone**, both Typical Manager and the SQL database run from the same computer.

or

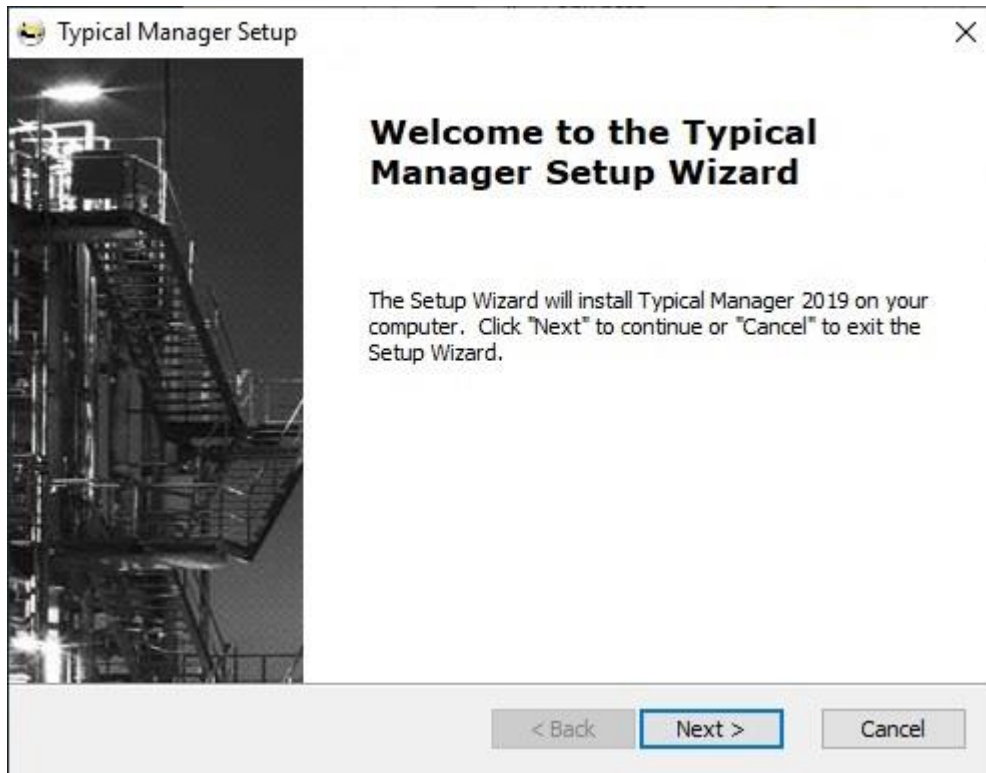
- **Server**, This computer holds the Typical Manager SQL database.
- **Client**, Typical manager connects to a SQL server in the network.

The user is free to change the installation options.

Typical Manager install wizard can be started by executing setup.exe from the installation folder. The installation wizard will first check if .Net framework 4.0 is installed. If this is not the case, Typical Manager install wizard will offer you to install it. After installation of .NET framework 4.0, a reboot is required.

2 Install Typical Manager

Step to step installation of Typical Manager and it's components.

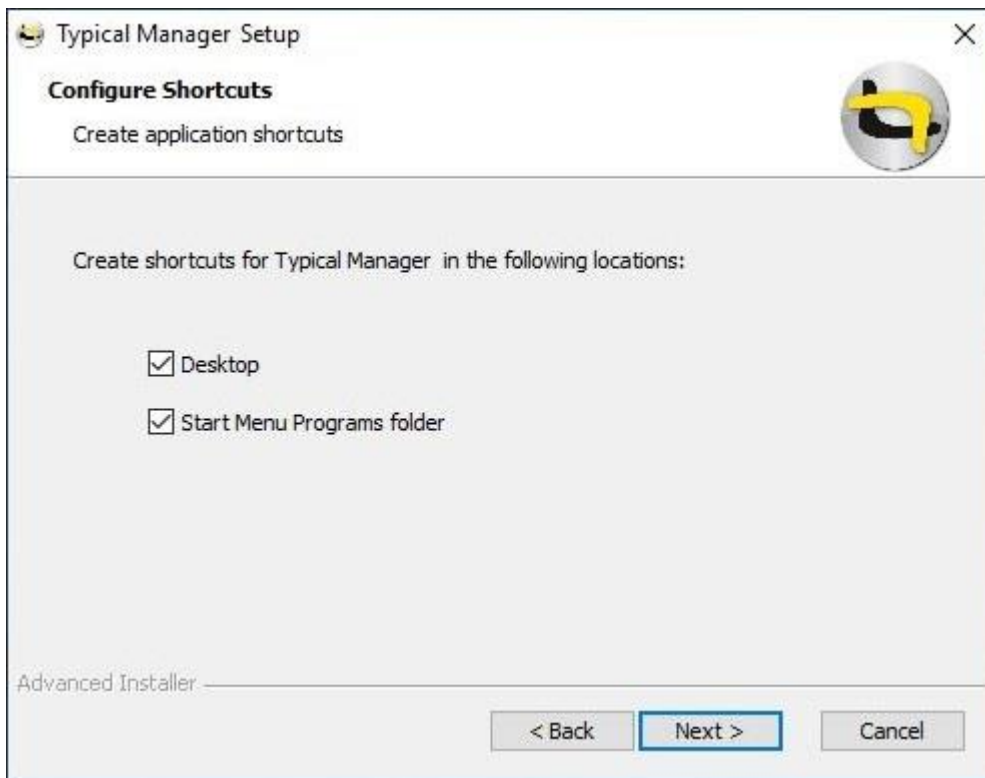


Click **Next**.

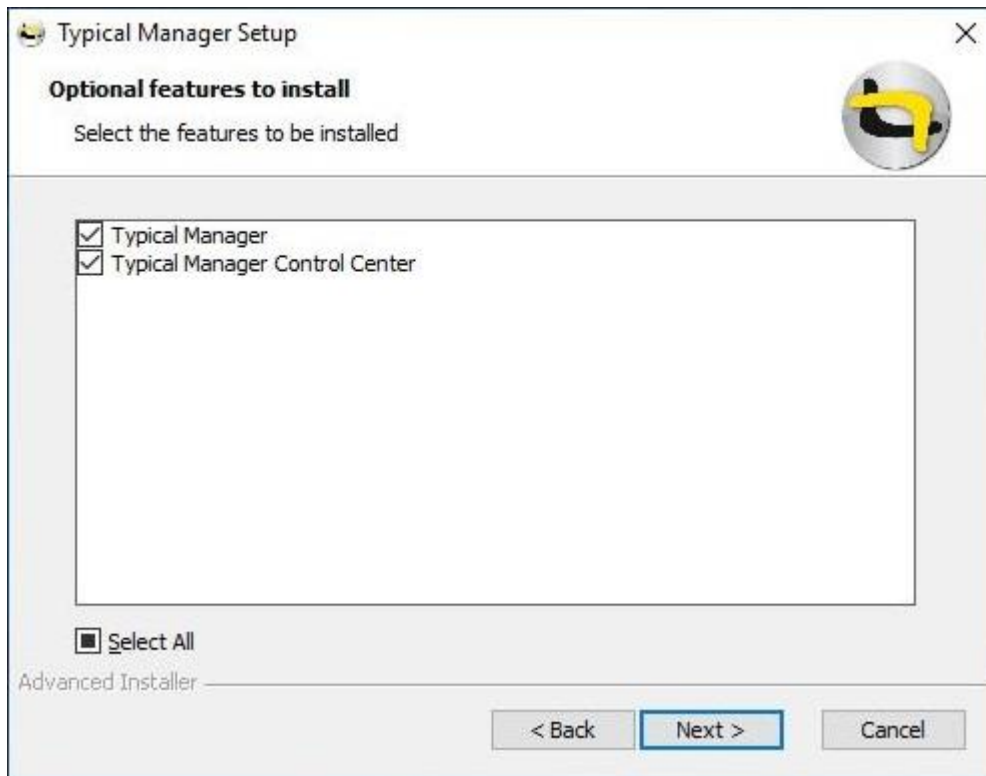


Read the software license agreement carefully.

Select **I accept the terms in the license agreement** and click **Next**.



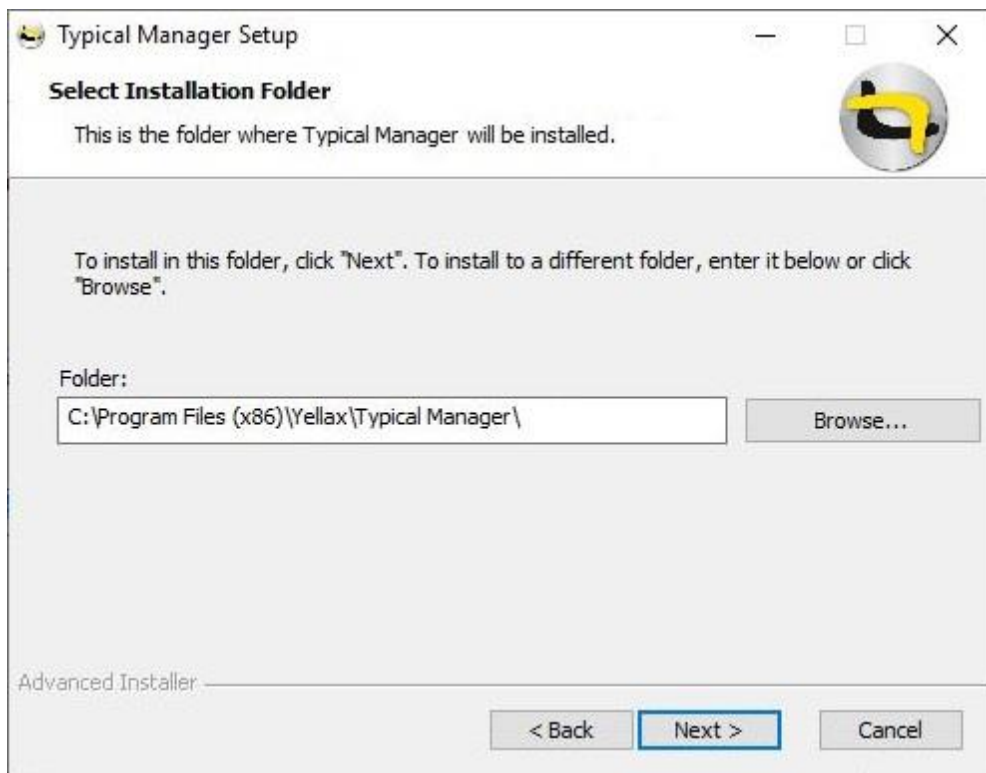
Choose which shortcuts you want to apply and Click **Next**



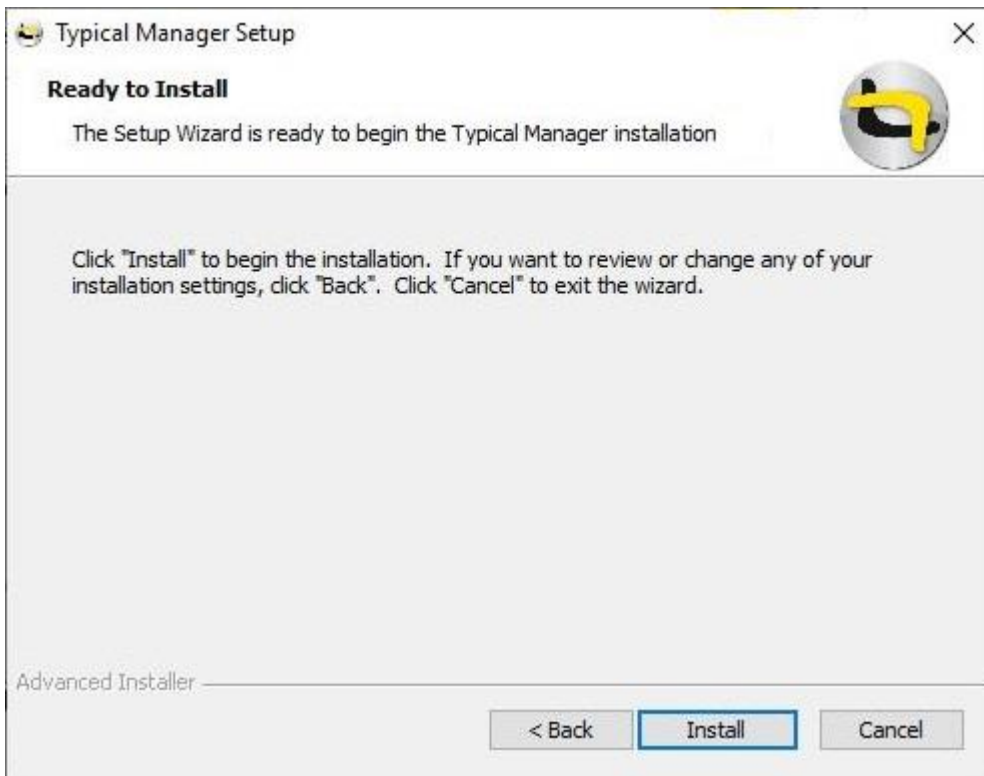
Select features to install

- **Typical Manager** Typical Manager application.
- **Typical Manager Control Center** Administrators tool to create/update and maintain Typical Manager databases.

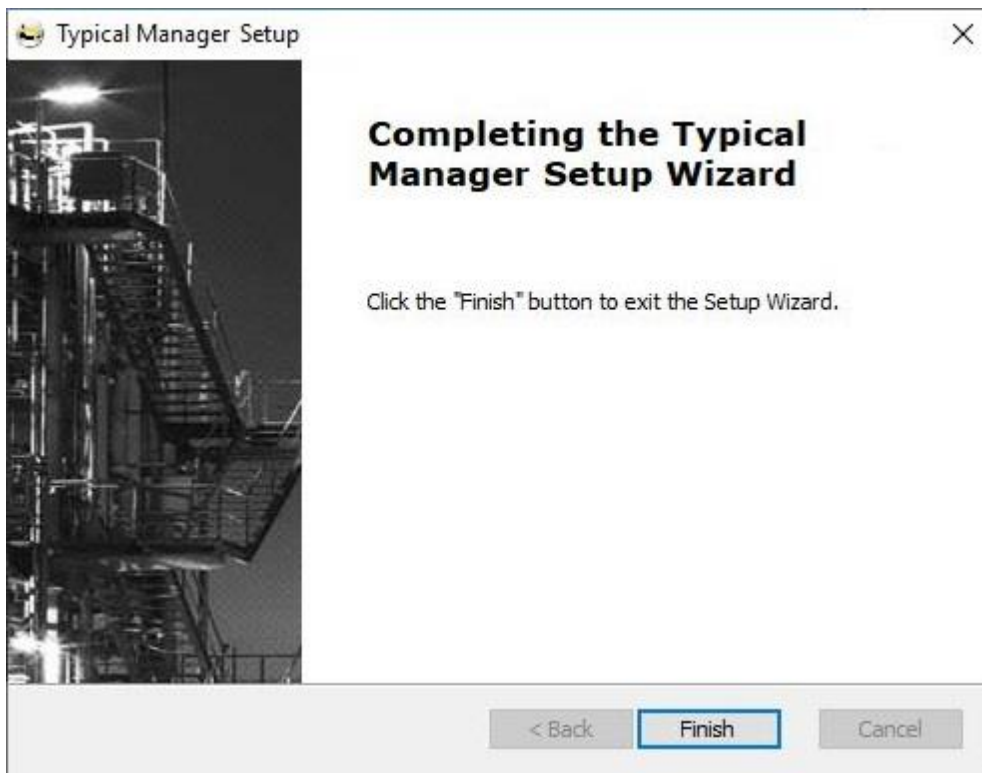
Click **Next**.



Click **Next**.



Click **Install**.



Click **Finish**.

2.1 Install License

*A working Internet connection is required to obtain a license.
This is required each time typical manager is started.*

A license key is given to the user/administrator by Yellax.

An activation code for the license key will look like: XXXX-XXXX-XXXX-XXX

This key can be used by multiple users (depending on the license configuration)

For each Typical Manager user the key must be set the first time they start Typical Manager.

It is important to keep this key secret within your organisation.

Copy or enter the License key in the corresponding field:

The screenshot shows the 'Login' dialog box for Typical Manager 2021. The dialog is titled 'Login' and features the Typical Manager logo and tagline. The main area contains a large 3D sphere with a yellow 'T' logo. To the right of the sphere are four input fields: 'Server', 'Database', 'User name', and 'Password'. At the bottom right of the main area, it says 'Alpha version' and 'Typical Manager 2021'. Below the main area is a section for advanced options, including 'Authentication' (set to 'Windows authentication'), 'SQL user name', 'SQL password', 'License server', and 'License Key'. The 'License Key' field is circled in red. At the bottom left is a 'Hide options' button, and at the bottom right are 'OK' and 'Cancel' buttons.

When a license is activated, the key is remembered for that user and device and the licence key is masked when starting Typical Manager.

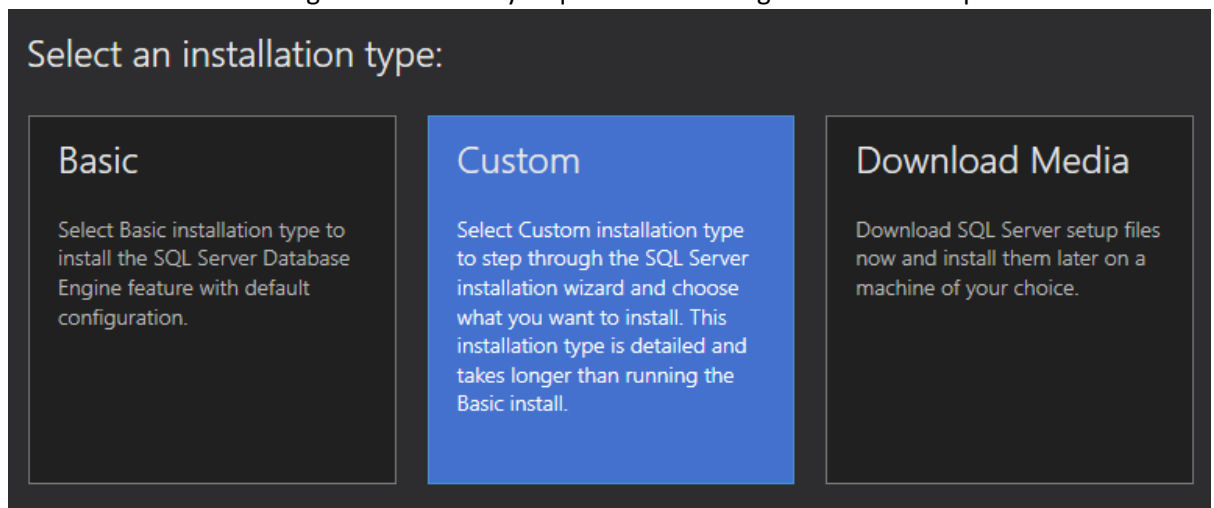
3 Install SQL Server

NOTE IF A VERSION OF MICROSOFT SQL SERVER IS ALREADY INSTALLED, DO NOT INSTALL SQL SERVER. MANUALLY CREATE A NEW SERVER INSTANCE AND CONTINUE WITH THE INSTALLATION OF TYPICAL MANAGER.

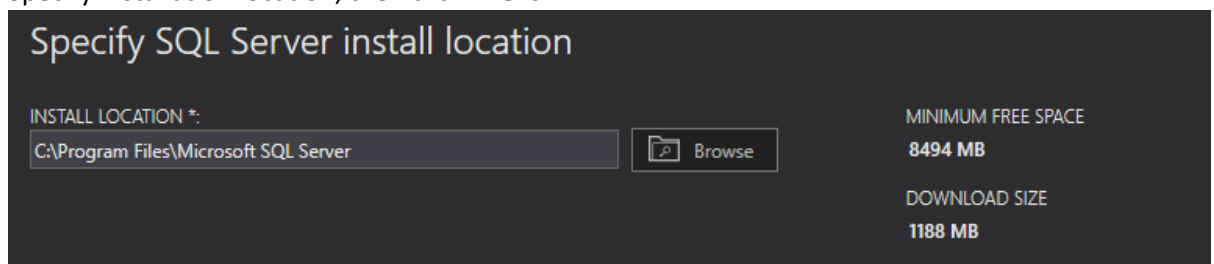
We recommend to use SQL Server 2019 or newer in a production environment.

Here's a step-by-step installation guide for SQL Server 2022:

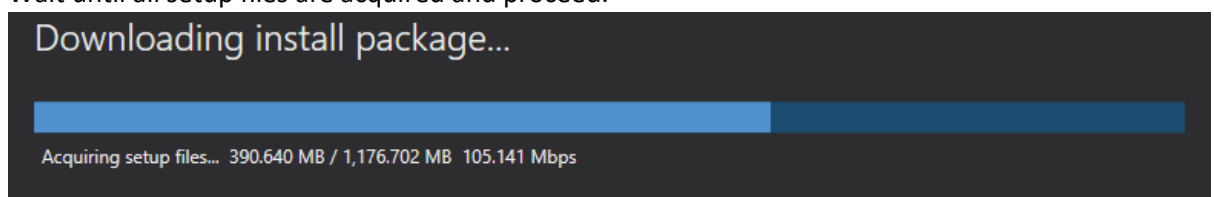
1. Download the SQL Server 2022 installation files from the official Microsoft website. Ensure that you have the appropriate edition (e.g., Express, Standard, Enterprise) based on your requirements.
<https://www.microsoft.com/en-us/sql-server/sql-server-downloads>
2. Double-click on the downloaded installation file to start the SQL Server Installation Center.
3. Choose 'Custom' to configure all necessary requirements during the installation process.



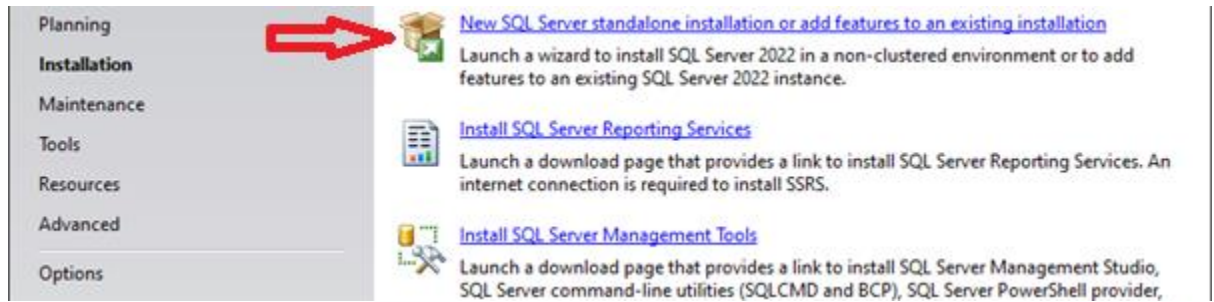
4. Specify installation location, then click "Next."



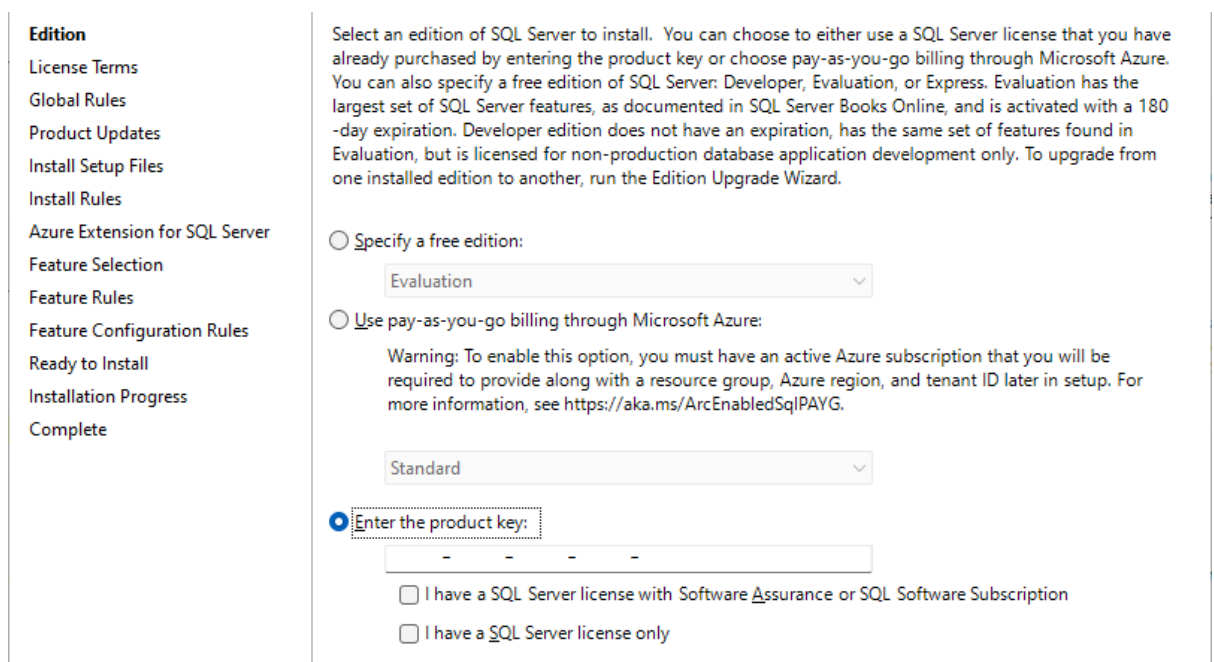
5. Wait until all setup files are acquired and proceed.



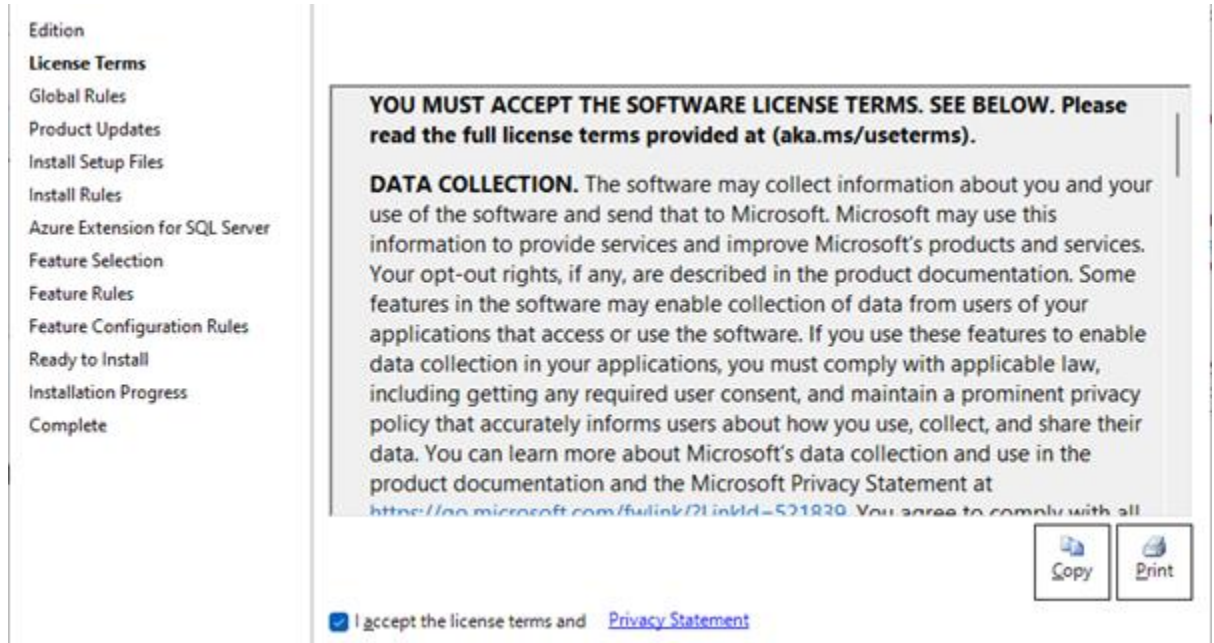
6. In the Installation Center, select "**Installation**" on the left-hand side and click on "**New SQL Server stand-alone installation or add feature to an existing installation.**"



7. The installation wizard will run a few checks on your system to ensure the prerequisites are met. If any issues are reported, resolve them before proceeding.
8. On the "**Product Key**" page, choose the appropriate option based on your license agreement with Microsoft. You can either enter the product key or select the "Evaluation" edition, which allows you to use SQL Server for a limited period.

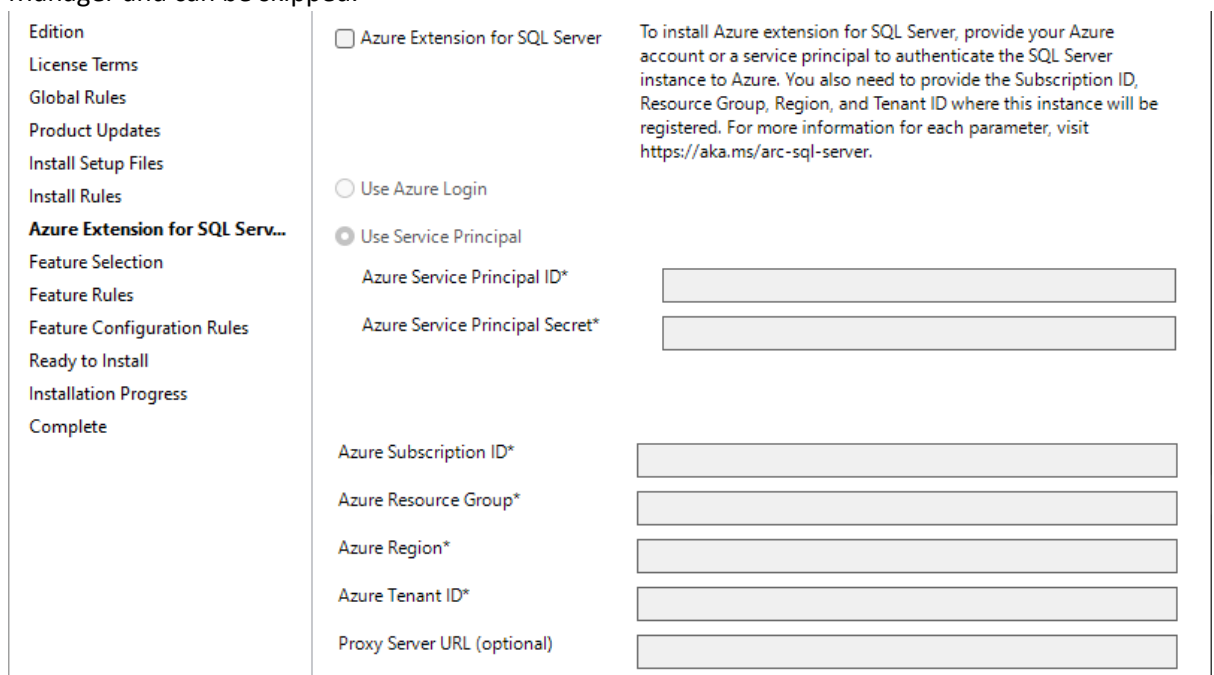


9. **Read and accept the license terms, then click "Next."**



The screenshot shows the 'License Terms' step in the installation wizard. On the left is a navigation pane with the following items: Edition, License Terms (highlighted), Global Rules, Product Updates, Install Setup Files, Install Rules, Azure Extension for SQL Server, Feature Selection, Feature Rules, Feature Configuration Rules, Ready to Install, Installation Progress, and Complete. The main content area contains a warning box with the text: 'YOU MUST ACCEPT THE SOFTWARE LICENSE TERMS. SEE BELOW. Please read the full license terms provided at (aka.ms/useterms). DATA COLLECTION. The software may collect information about you and your use of the software and send that to Microsoft. Microsoft may use this information to provide services and improve Microsoft's products and services. Your opt-out rights, if any, are described in the product documentation. Some features in the software may enable collection of data from users of your applications that access or use the software. If you use these features to enable data collection in your applications, you must comply with applicable law, including getting any required user consent, and maintain a prominent privacy policy that accurately informs users about how you use, collect, and share their data. You can learn more about Microsoft's data collection and use in the product documentation and the Microsoft Privacy Statement at <https://go.microsoft.com/fwlink/?linkid=521830>. You agree to comply with all'. Below the warning box are 'Copy' and 'Print' buttons. At the bottom, there is a checkbox labeled 'I accept the license terms and [Privacy Statement](#)'.

10. Azure Extension for SQL Server is an optional step and not necessary using Typical Manager and can be skipped.



The screenshot shows the 'Azure Extension for SQL Server' configuration step. The left navigation pane includes: Edition, License Terms, Global Rules, Product Updates, Install Setup Files, Install Rules, Azure Extension for SQL Serv... (highlighted), Feature Selection, Feature Rules, Feature Configuration Rules, Ready to Install, Installation Progress, and Complete. The main content area has a checkbox for 'Azure Extension for SQL Server'. Below it are two radio button options: 'Use Azure Login' and 'Use Service Principal' (which is selected). To the right of these options is a text box: 'To install Azure extension for SQL Server, provide your Azure account or a service principal to authenticate the SQL Server instance to Azure. You also need to provide the Subscription ID, Resource Group, Region, and Tenant ID where this instance will be registered. For more information for each parameter, visit <https://aka.ms/arc-sql-server>.' Below the radio buttons are five input fields: 'Azure Service Principal ID*', 'Azure Service Principal Secret*', 'Azure Subscription ID*', 'Azure Resource Group*', 'Azure Region*', 'Azure Tenant ID*', and 'Proxy Server URL (optional)'. Each field has a corresponding text input box.

11. On the "**Feature Selection**" page, select the features you want to install. For a typical installation, make sure "Database Engine Services" is checked. You can also select additional features like "SQL Server Replication" or "Full-Text and Semantic Extractions for Search" based on your requirements. Click "**Next**" to proceed.

Looking for Reporting Services? [Download it from the web](#)

Features:

Instance Features

- Database Engine Services
 - SQL Server Replication
 - Machine Learning Services and Language Ext
 - Full-Text and Semantic Extractions for Search
 - Data Quality Services
 - PolyBase Query Service for External Data
- Analysis Services

Shared Features

- Data Quality Client
- Integration Services
 - Scale Out Master
 - Scale Out Worker
- Master Data Services

Redistributable Features

Feature description:

The configuration and operation of each instance feature of a SQL Server instance is isolated from other SQL Server instances. SQL Server instances can operate side-by-side on the same computer.

Prerequisites for selected features:

Already installed:

- Windows PowerShell 3.0 or higher
- Microsoft Visual C++ 2017 Redistributable

Disk Space Requirements

Drive C: 994 MB required, 166552 MB available

Select All Unselect All

Instance root directory: C:\Program Files\Microsoft SQL Server\ ...

Shared feature directory: C:\Program Files\Microsoft SQL Server\ ...

Shared feature directory (x86): C:\Program Files (x86)\Microsoft SQL Server\ ...

12. On the "**Instance Configuration**" page, choose the instance type you prefer.
 - a. For a default installation, select "**Default instance.**"
 - b. If you want a named instance, select "**Named instance**"
 - i. provide a unique name for example 'TYPICALMANAGER'.
 - c. Click "**Next.**"

Default instance

Named instance: * TYPICALMANAGER

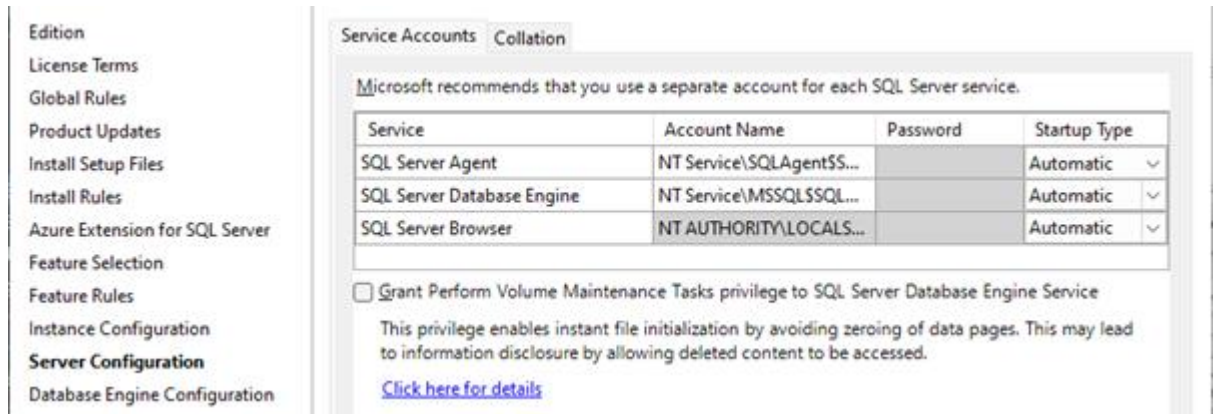
Instance ID: TYPICALMANAGER

SQL Server directory: C:\Program Files\Microsoft SQL Server\MSSQL16.TYPICALMANAGER

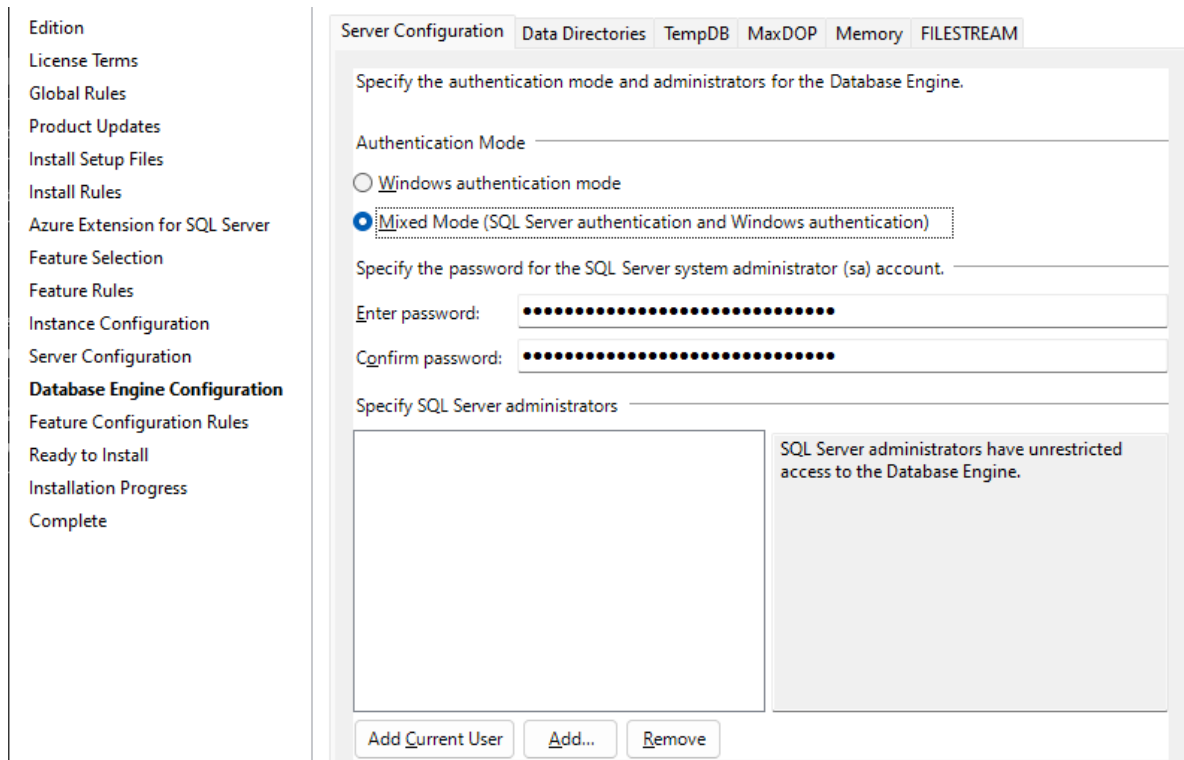
Installed instances:

Instance Name	Instance ID	Features	Edition	Version
<Shared Compone...		LocalDB		15.0.4153.1

13. Specify the service accounts and collation settings on the "**Server Configuration**" page. The service accounts define the Windows accounts under which the SQL Server services will run. You can use the default accounts or specify custom accounts based on your needs. Click "**Next.**"



14. On the "Database Engine Configuration" page, choose authentication mode. "Windows Authentication mode" allows users to connect using Windows accounts, while "Mixed Mode" enables both Windows and SQL Server authentication. Set up the SQL Server administrators by adding appropriate accounts.
- Choose "**Mixed mode**"
 - Enter an system administrator (SA) password
 - Click "**Next.**"



15. On the "**Ready to Install**" page, review your selections. You can also click on "**Installation**" to view the detailed installation process. Once ready, click "**Install.**"
16. The installation process will begin, and you can monitor the progress on the "Installation Progress" page.

The screenshot shows the 'Installation Progress' page. On the left, a vertical list of steps includes: Edition, License Terms, Global Rules, Product Updates, Install Setup Files, Install Rules, Azure Extension for SQL Server, Feature Selection, Feature Rules, Instance Configuration, Server Configuration, Database Engine Configuration, Feature Configuration Rules, Ready to Install, **Installation Progress**, and Complete. The main content area features a progress bar with a green segment on the left and the text 'Running package: conn_info_loc' below it.

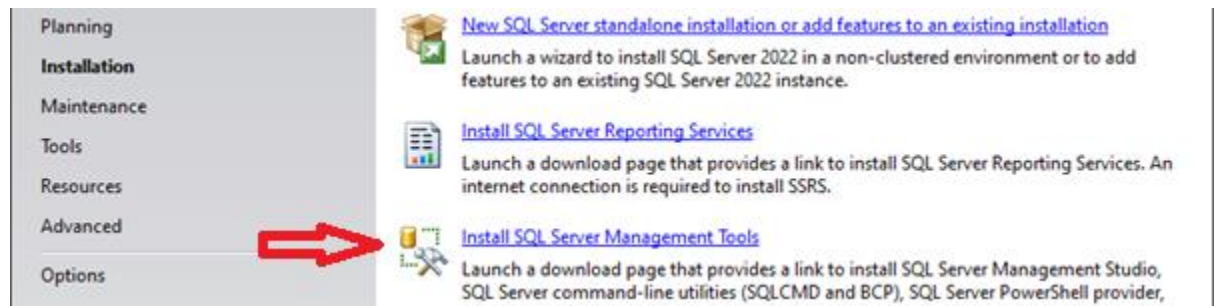
17. Once the installation completes successfully, the "**Complete**" page will appear. Review the summary and click "**Close.**"

The screenshot shows the 'Complete' page. The left sidebar lists the same steps as the previous page, with **Complete** highlighted. The main content area is titled 'Information about the Setup operation or possible next steps:' and contains a table with the following data:

Feature	Status
✓ Database Engine Services	Succeeded
✓ Setup Support Files	Succeeded

Below the table, there is a 'Details:' section with the text 'Install successful.'

18. Verify the SQL Server installation by installing and opening SQL Server Management Studio (SSMS) or any other database management tool and connecting to the installed instance using the appropriate credentials.



That's it! You have successfully installed SQL Server 2022. Remember to apply any necessary updates or service packs after the installation to ensure you have the latest features and security patches.

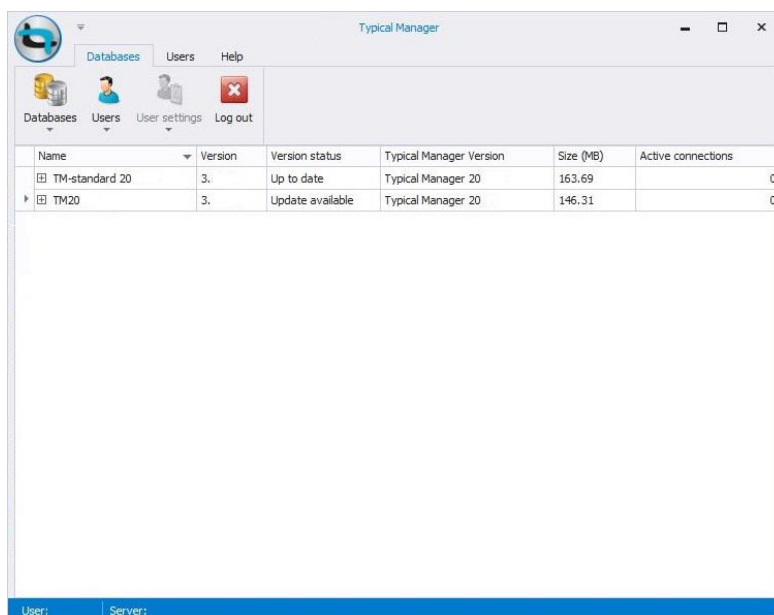
4 Use Typical Manager Control Center

With Typical Manager Control Center you can easily manage your Typical Manager databases and you don't need to use your default SQL database environment.

Every time a new version of Typical Manager is released, also a new version of Typical Manager Control Center is released.

The use of Typical Manager Control Center is explained in the Help of Typical Manager.

<https://help.typicalmanager.com>



5 Using Windows and SQL users to login Typical Manager

In Typical Manager it is possible to log in by.

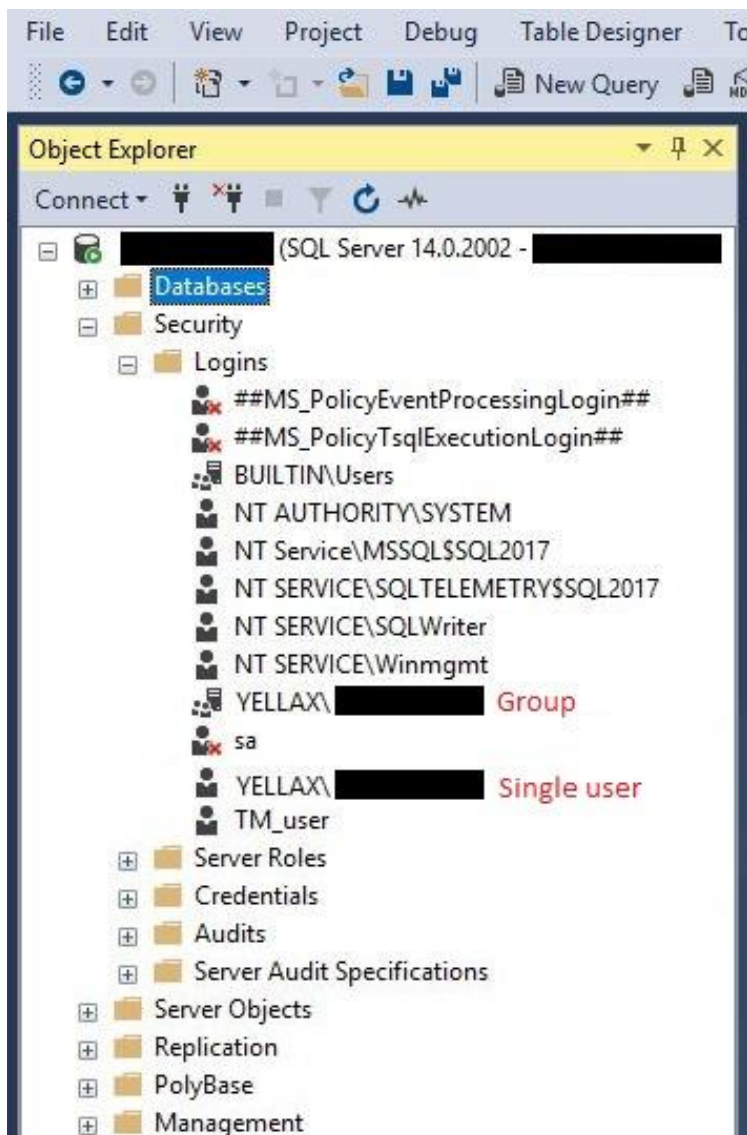
1. Windows authentication.
2. SQL Server authentication.

After installation of Typical Manager a default user is created like:

- **Login** : **Admin**
- **Password** : **1234**

All Typical Manager users must be defined in SQL server management studio because the user needs access to the SQL database that Typical Manager is using.

A single user or a group from your active directory can be added to the SQL server.



5.1 Create user with Windows Authentication

Creating a user that is able to logging by Windows authentication can be done by right mouse button on Logins and click **New login**.

Fill in the login name (this must be the exactly windows name of the user)

Login - New

Select a page

- General
- Server Roles
- User Mapping
- Securables
- Status

Connection

Server: [redacted] \SQL2017

Connection: YELLAX [redacted]

[View connection properties](#)

Progress

Ready

Script Help

Login name: [redacted] Search...

Windows authentication

SQL Server authentication

Password: [redacted]

Confirm password: [redacted]

Specify old password

Old password: [redacted]

Enforce password policy

Enforce password expiration

User must change password at next login

Mapped to certificate [redacted]

Mapped to asymmetric key [redacted]

Map to Credential [redacted] Add

Mapped Credentials

Credential	Provider
------------	----------

Remove

Default database: master

Default language: <default>

OK Cancel

switch to Server roles.

Login - New

Select a page

- General
- Server Roles
- User Mapping
- Securables
- Status

Connection

Server: [redacted] \SQL2017

Connection: YELLAX [redacted]

[View connection properties](#)

Progress

Ready

Script Help

Server role is used to grant server-wide security privileges to a user.

Server roles:

- bulkadmin
- dbcreator
- diskadmin
- processadmin
- public
- securityadmin
- serveradmin
- setupadmin
- sysadmin

OK Cancel

When the user may be able to connect to all databases and also login the SQL server management studio, select **Sysadmin**.

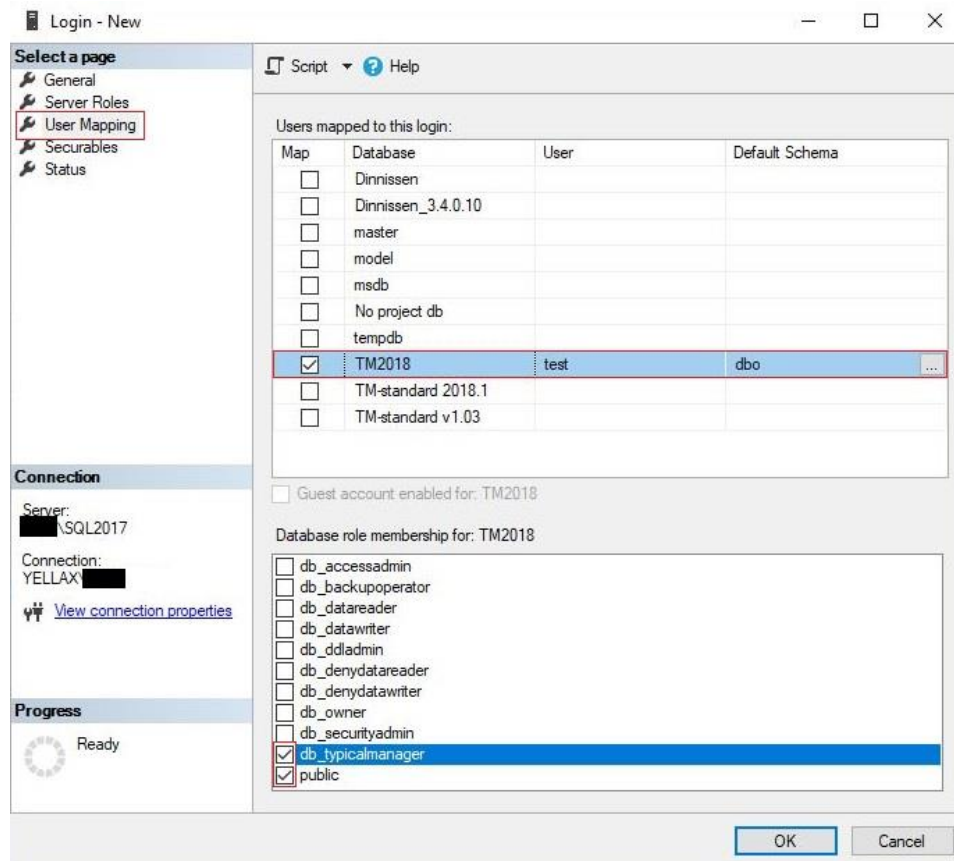
NOTE THE USERS WHICH DO NOT HAVE THE SERVER ROLE SYSADMIN ARE NOT ABLE TO BACKUP/RESTORE DATABASES AND CREATE NEW USERS.

When user can only access selected database(s) Switch to User Mapping.

Here you can select the databases the user may have access to.

And give them the Default Schema: **dbo**

Also select the Database role membership: **db_typicalmanager**



Now a user is created and has permission to one or more databases.

Now also a Typical Manager user must be created in Typical Manager.

How this can be done is explained in the Help of Typical Manager: <https://help.typicalmanager.com>

5.2 Create user with SQL Authentication

An SQL user is made in the same way as a Windows user:

- Fill in the Login name,
- Check the SQL Server authentication button,
- Fill in a password that will be used when login in Typical Manager,
- If no password policy is required deselect the Enforce password policy checkbox,

The screenshot shows the 'Login - New' dialog box with the following details:

- Select a page:** General (selected), Server Roles, User Mapping, Securables, Status.
- General:**
 - Login name: Example
 - Authentication: SQL Server authentication, Windows authentication
 - Password: [masked]
 - Confirm password: [masked]
 - Specify old password:
 - Old password: [empty]
 - Enforce password policy:
 - Enforce password expiration:
 - User must change password at next login:
 - Mapped to certificate: [dropdown]
 - Mapped to asymmetric key: [dropdown]
 - Map to Credential:
 - Mapped Credentials: [table with columns Credential and Provider]
- Connection:** Server: [redacted] \SQL2017, Connection: YELLAX [redacted]
- Progress:** Ready
- Default database:** master
- Default language:** <default>

And Switch to Server Roles.

The screenshot shows the 'Login - New' dialog box with the 'Server Roles' tab selected. The 'Server roles' list is as follows:

- bulkadmin
- dbcreator
- diskadmin
- processadmin
- public
- securityadmin
- serveradmin
- setupadmin
- sysadmin

When the user may be able to connect to all databases and also login the SQL server management studio, select Sysadmin.

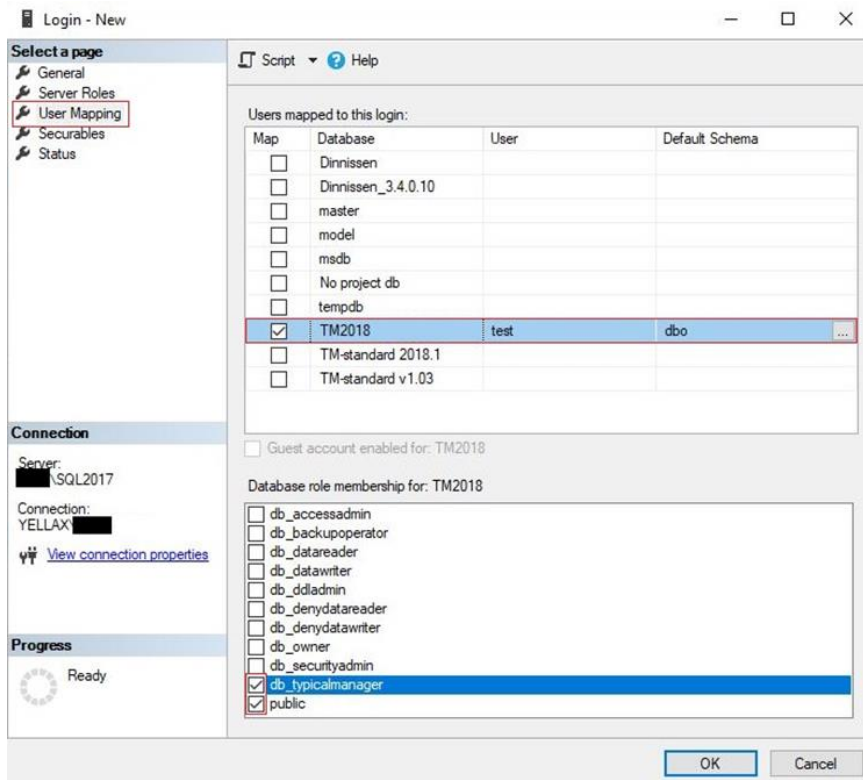
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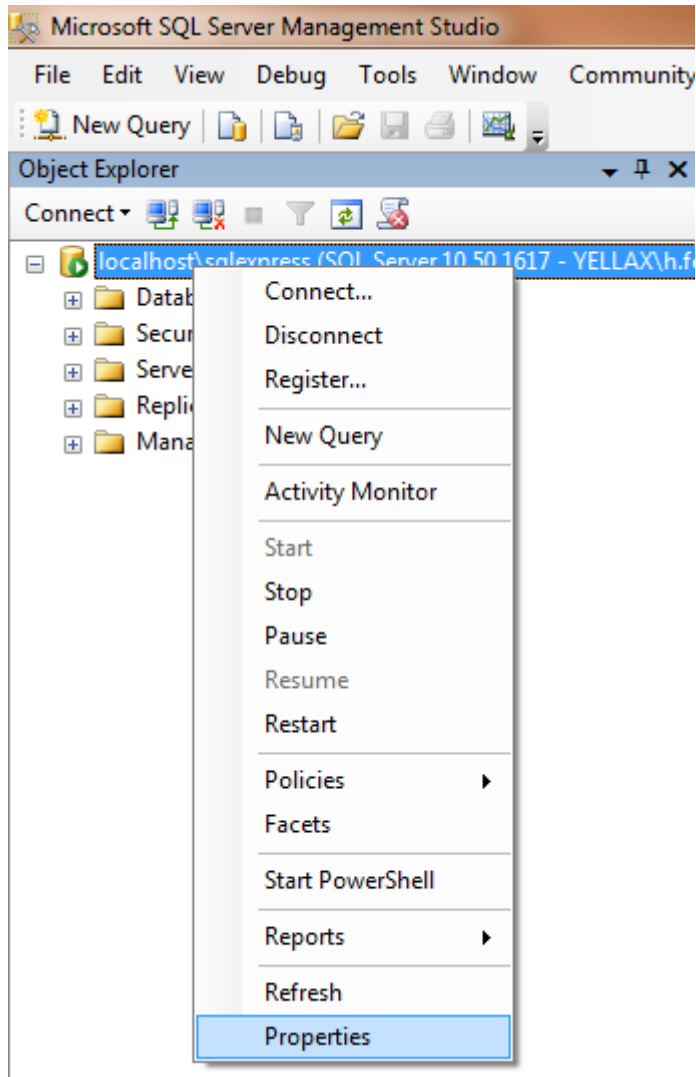
How this can be done is explained in the Help of Typical Manager: <https://help.typicalmanager.com>

6 Troubleshooting

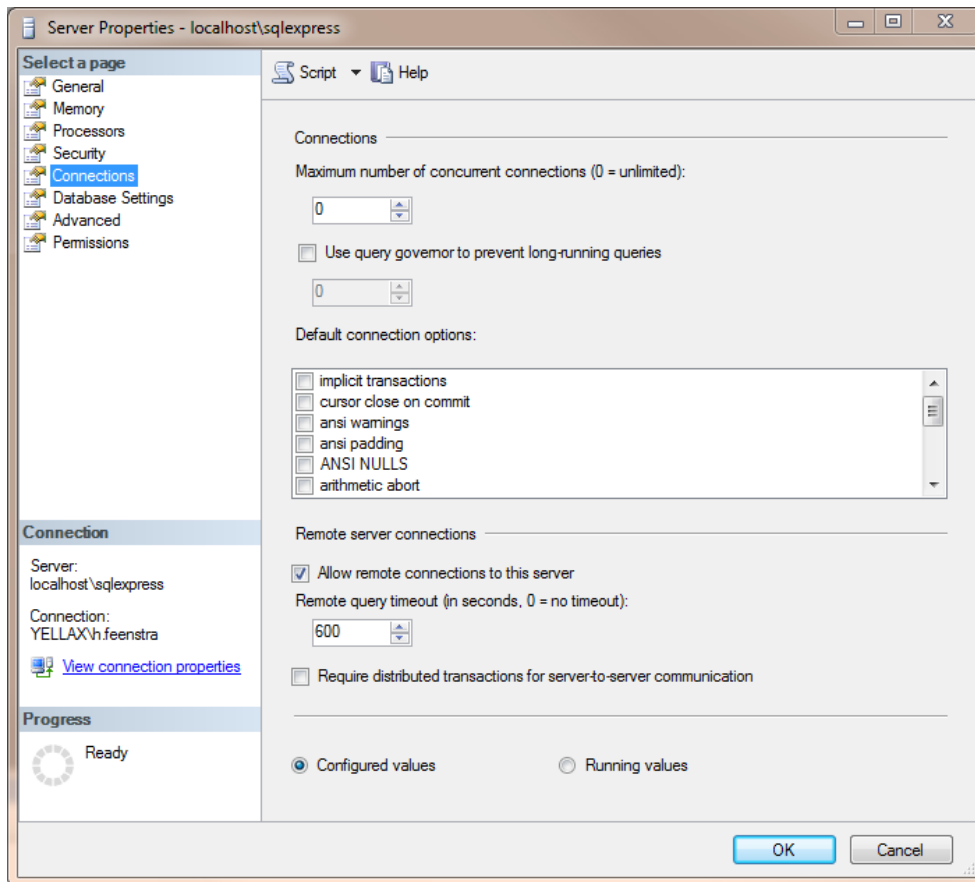
6.1 SQL server

Allow remote connections to the SQL server

The first thing to check is if Remote Connections are enabled on your SQL Server database. In SQL Server you do this by opening SQL Server Management Studio, connect to the server in question, right click the server...



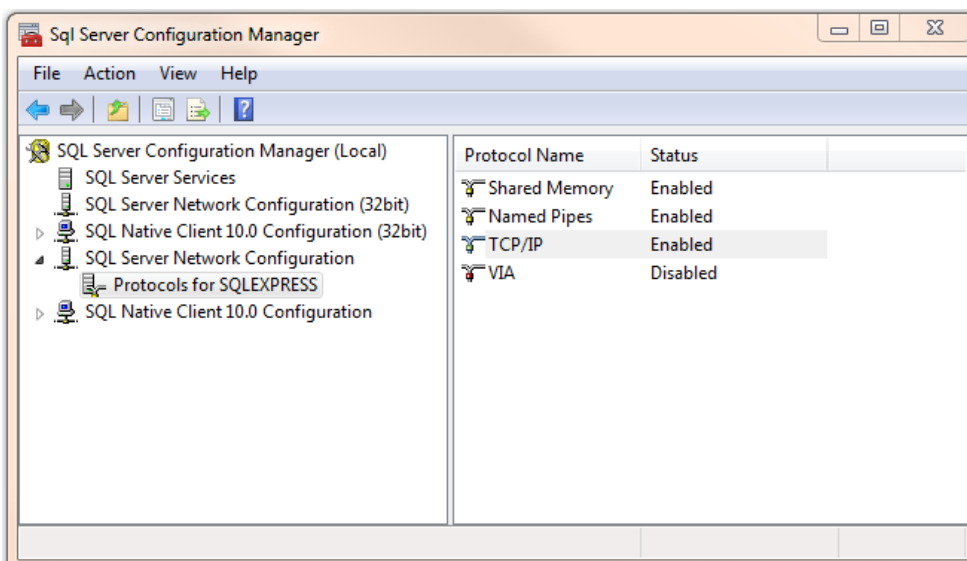
... and open the Server Properties.



Navigate to Connections and ensure that Allow remote connections to this server is checked. Check if this solves the problem. If it does, here you go, continue with whatever you were doing and have a nice day.

Protocols for MSSQLServer

If you're still running in issues let's dig a bit deeper. The next good thing to check is the SQL Server Network Configuration. Open the SQL Server Configuration Manager, unfold the node SQL Server Network Configuration and select Protocols for MSSQLServer (or whatever the name of your SQL Server instance is).



Make sure that TCP/IP is enabled and try again. Even though I hope that this resolved your problems there might still be an issue with...

The Firewall

If there is still no communication happening between your computer and the remote SQL Server you most likely need to configure your firewall settings.

The following Ports must be added to your inbound rules:

SQL Server default instance running over TCP	TCP port 1433	This is the most common port allowed through the firewall. It applies to routine connections to the default installation of the Database Engine, or a named instance that is the only instance running on the computer.
SQL Server Browser service	UDP port 1434	The SQL Server Browser service listens for incoming connections to a named instance and provides the client the TCP port number that corresponds to that named instance. Normally the SQL Server Browser service is started whenever named instances of the Database Engine are used. The SQL Server Browser service does not have to be started if the client is configured to connect to the specific port of the named instance.

Also the program itself:

On the Exceptions tab of the Windows Firewall item in Control Panel, click **Add a program**.

Browse to the location of the instance of SQL Server that you want to allow through the firewall, for example **C:\Program Files\Microsoft SQL Server\MSSQL14.<instance_name>\MSSQL\Binn,**

select **sqlservr.exe**, and then click **Open**.

Click **OK**.

More details: <http://msdn.microsoft.com/en-us/library/cc646023.aspx>

