
Using SQL Server Express with Policy Patrol

This document describes how you use and configure SQL Server 2005 for use with Policy Patrol archiving and reporting.

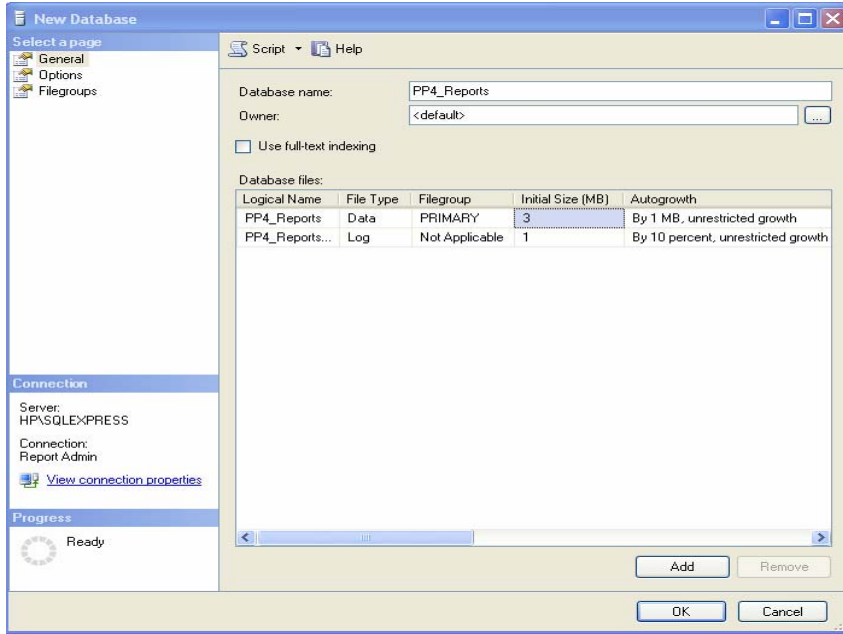
Create a SQL Database

In order to run reports and archiving, you must first create a SQL database. The same database can be used for Policy Patrol Reporting as well as Archiving. To create the database, follow the next steps:

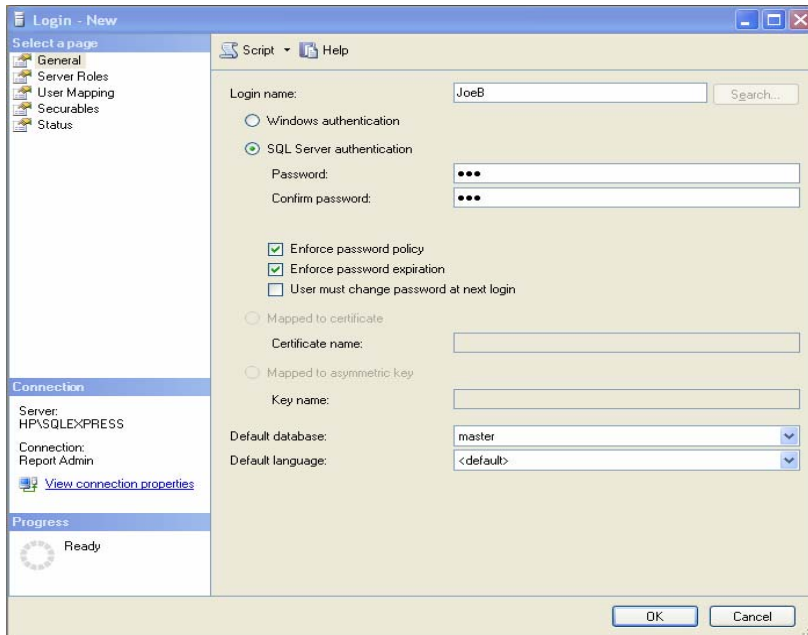
1. Create a database in Microsoft SQL Server by going to **Start > Programs > Microsoft SQL Server 2005 > SQL Server Management Studio Express**. The following dialog will appear. Specify your method of authentication and click **Connect**.



2. Expand **Servers > <your server name>**. Right click on **Databases** and select **New Database**. Enter a name for the new database, for instance **PP4_Reports** and click **OK**.

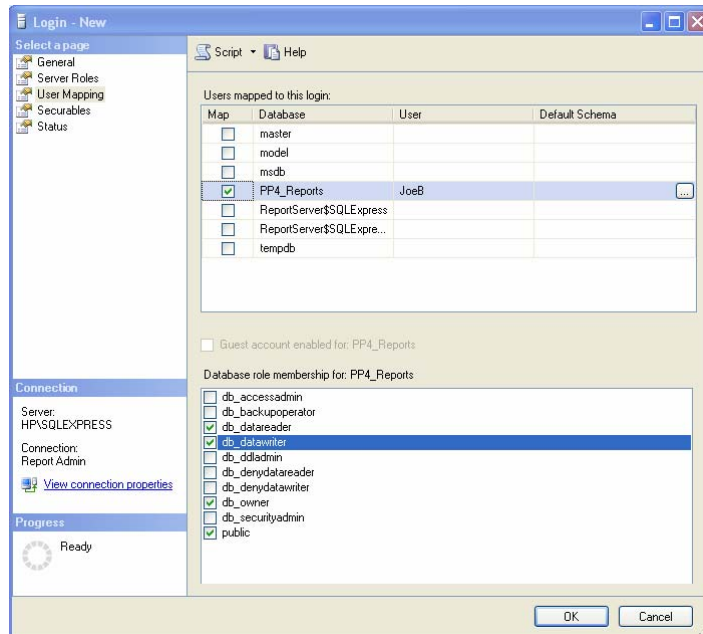


3. In the left hand pane go to **Security > Logins**. Right-click and select **New Login**. Enter the username in the Login Name field, select **SQL Server Authentication** and enter the password to be used. Click **OK**.



4. Now we will set the appropriate permissions for the new login. In the left pane click on **User Mapping**. In the right pane select the newly created Report database and then select at least the following permissions in the pane below:

- public
- db_owner
- db_datareader
- db_datawriter

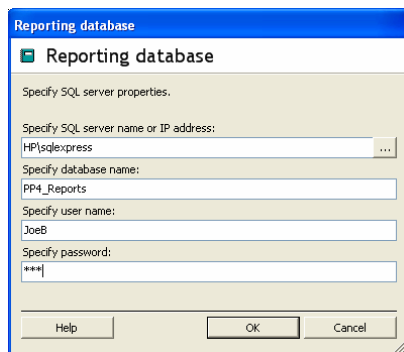


Click **OK**. You are now ready to enable reporting and/or archiving in Policy Patrol.

Enable Reporting

To enable Reporting in Policy Patrol follow the next steps:

1. Go to **Policy Patrol Administration > Reporting**.
2. Select the option **Enable Reporting**. In the 'SQL Server name' field, enter the server name and instance of the SQL Server in the following format: server name or IP address\SQL server named instance, for example SQLServer\sqlexpress. Enter the database name, user name and password as configured in SQL Server Management.

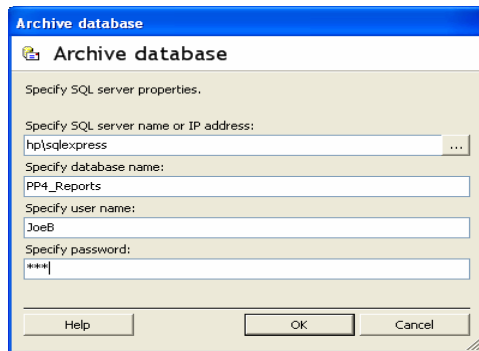


Click **OK**. Each message that is sent and received will now be included in the reports.

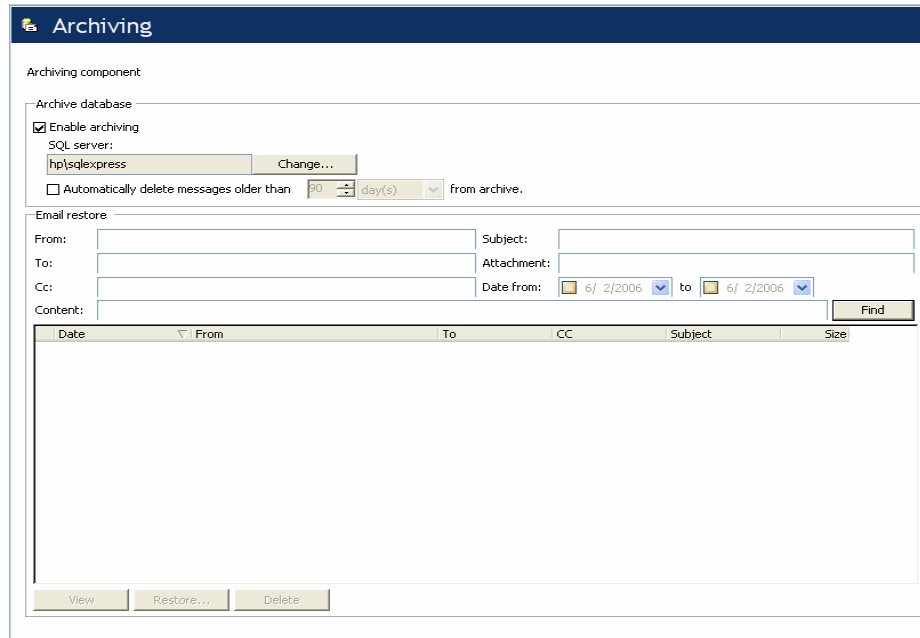
Enable Archiving

To enable Archiving in Policy Patrol follow the next steps:

1. Go to **Policy Patrol Administration > Additional Tools > Archiving**.
2. Select the option **Enable Archiving**. In the 'SQL Server name' field, enter the server name and instance of the SQL Server in the following format: SQL server name\SQL server named instance, for example SQLServer\sqlexpress. Enter the database name, user name and password as configured in SQL Server Management. Click **OK**.



The screenshot shows a dialog box titled "Archive database" with a blue header. Below the title bar, there is a section titled "Archive database" with a folder icon. The main area contains the text "Specify SQL server properties." followed by four input fields: "Specify SQL server name or IP address:" with the value "hp\sqlexpress" and a browse button "..."; "Specify database name:" with the value "PP4_Reports"; "Specify user name:" with the value "JoeB"; and "Specify password:" with the value "****". At the bottom, there are three buttons: "Help", "OK", and "Cancel".



The screenshot shows a window titled "Archiving" with a dark blue header. Below the title bar, there is a section titled "Archiving component". Underneath, there is a section titled "Archive database" containing a checked checkbox "Enable archiving". Below this, there is a "SQL server:" field with the value "hp\sqlexpress" and a "Change..." button. A checkbox "Automatically delete messages older than" is followed by a spinner box set to "90" and the text "(day(s))" and "from archive.". Below this is an "Email restore" section with fields for "From:", "To:", "Cc:", "Subject:", "Attachment:", and "Date from:" (set to "6/ 2/2006") and "to" (set to "6/ 2/2006"). A "Find" button is at the bottom right of this section. Below the fields is a table with columns: "Date", "From", "To", "CC", "Subject", and "Size". At the bottom of the window, there are three buttons: "View", "Restore...", and "Delete".

Each message that is sent and received will now be archived into the database.

More information

- ⇒ For more information on how to configure Policy Patrol, please consult the program help or download the product manual from:
<http://www.policypatrol.com/download.htm>.
- ⇒ If you still have questions after reading this document, please consult our online knowledge base at <http://www.redearthsoftware.com/kb.asp>, or send an email to support@redearthsoftware.com.

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