SQL Planner Pre-requisite and Installation

SQL Planner Self Installation Instruction

> **Important:** Please watch the installation video steps below. It is critical to follow the steps exactly as mentioned here or in the Installer document; ignoring them may cause setup failure.

1. **Install IIS:** Watch the step-by-step guide here: **How to Install IIS**

2. **Install Application with SA account:** Watch the guide here: **Installation with SA Account**

Software & Hardware Requirements

Requirement	Specification
OS	Windows Server 2012+ or Windows 8, 10, 11+
Disk	SSD or Equivalent IO speed disk
Memory	16 GB RAM or Higher (Trial: 6GB minimum)
CPU	4 Core or Higher (Trial: 1 Core minimum)
IIS	Configure IIS service (Follow **this link**)
SQL Server	SQL Server 2012+ for repository (Trial: SQL Express OK)

To configure on a remote machine or for advanced configuration, consider **taking a training here.*

Required Permissions

Host Machine

Administrative rights on the machine where SQL Planner will be installed.

SQL Server

Sys Admin or Control Server SQL Server user credentials.

Steps to Install SQL Planner

1. Download the setup file from: **Download SQL Planner**
2. Extract the Zip file and run **SQLPlanner_Setup.exe**
3. Agree with License Terms and click Next.
4. Enter your Local SQL Server name and SA Credentials to create the repository database and click install.
5. Watch the process walkthrough: **Installation Video**

Steps to Create a SQL Server Monitoring Job

Initial Login:

Navigate to SQL Planner. Use Default User ID: `Admin` & Password: `Admin`.

- Navigate to

  Menu > Click Create Monitoring

  or

  Health Analysis Job

  .

- Mention the SQL Server Name and credentials (SQL User Sys Admin or with Control Server Permission).
- Once connected, specify threshold definitions. (Note: SQL Planner has 100+ alerts; 15 are shown on the page, the rest are sent automatically).
- **Email Setup:**

  Add your user email ID. You must define your DB Email setting in SQL Planner. By default, it uses Elastic Email API (third party), which we do NOT recommend for production.

Watch instructions here: **Monitoring Setup Video**

Windows Server Monitoring Configuration

Download Guide: Click to download the file with post-installation details:
Server Monitor Configuration Guide