



## Dynamic Budgets User Guide for Manage Servers



# User Guide for Manage Servers



System Management, Manage Servers: Module Purpose To build a link to the SQL server(s) where the ERP system(s) are located. Dynamic Budgets (DB) can be installed in a single SQL instance or distributed across multiple linked SQL servers.



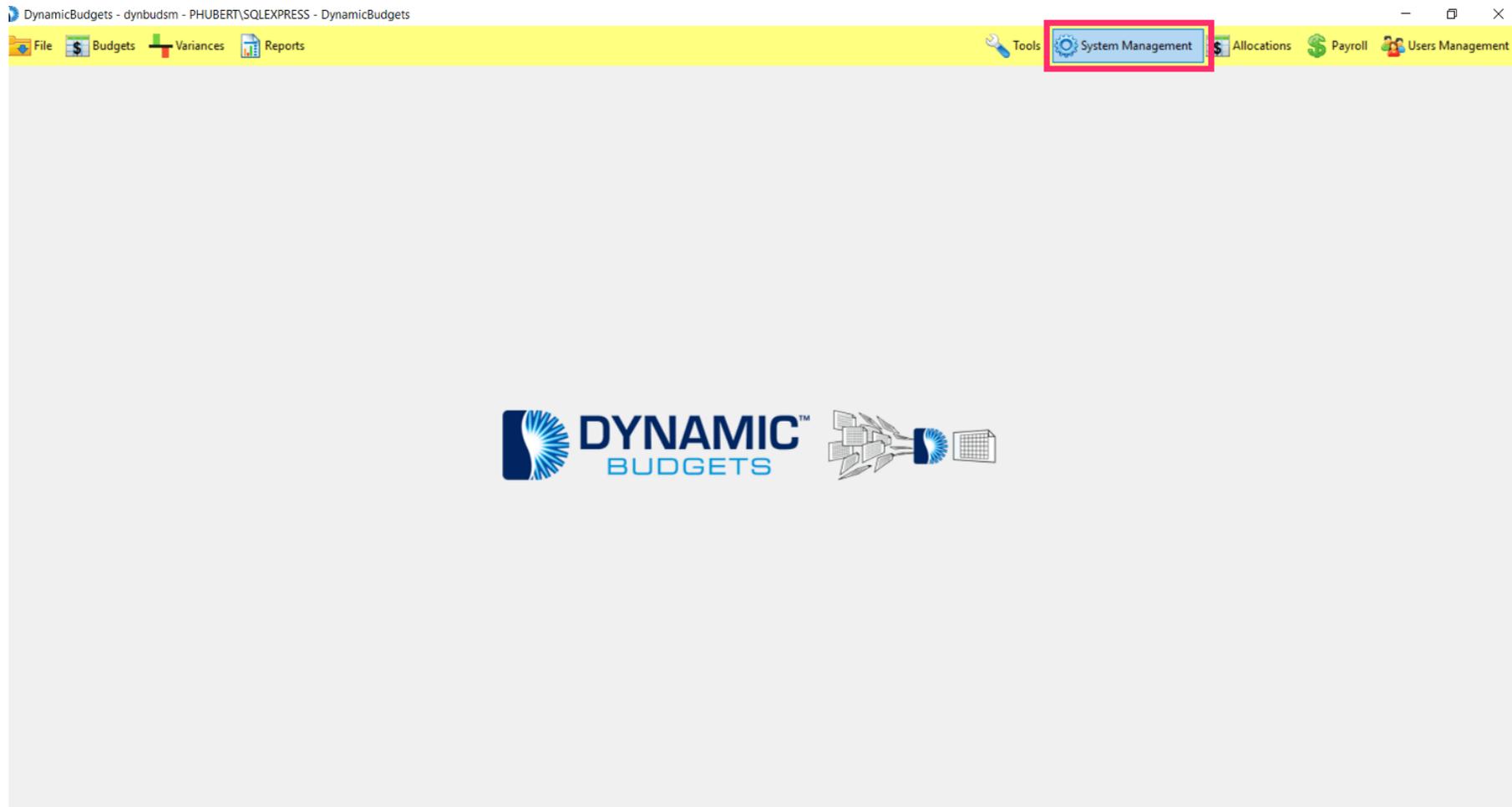
## System Management, Manage Servers

Purpose: To build a link to the SQL server(s) where the ERP system(s) are located.

Dynamic Budgets can be installed in a single SQL instance or distributed across multiple linked SQL servers.

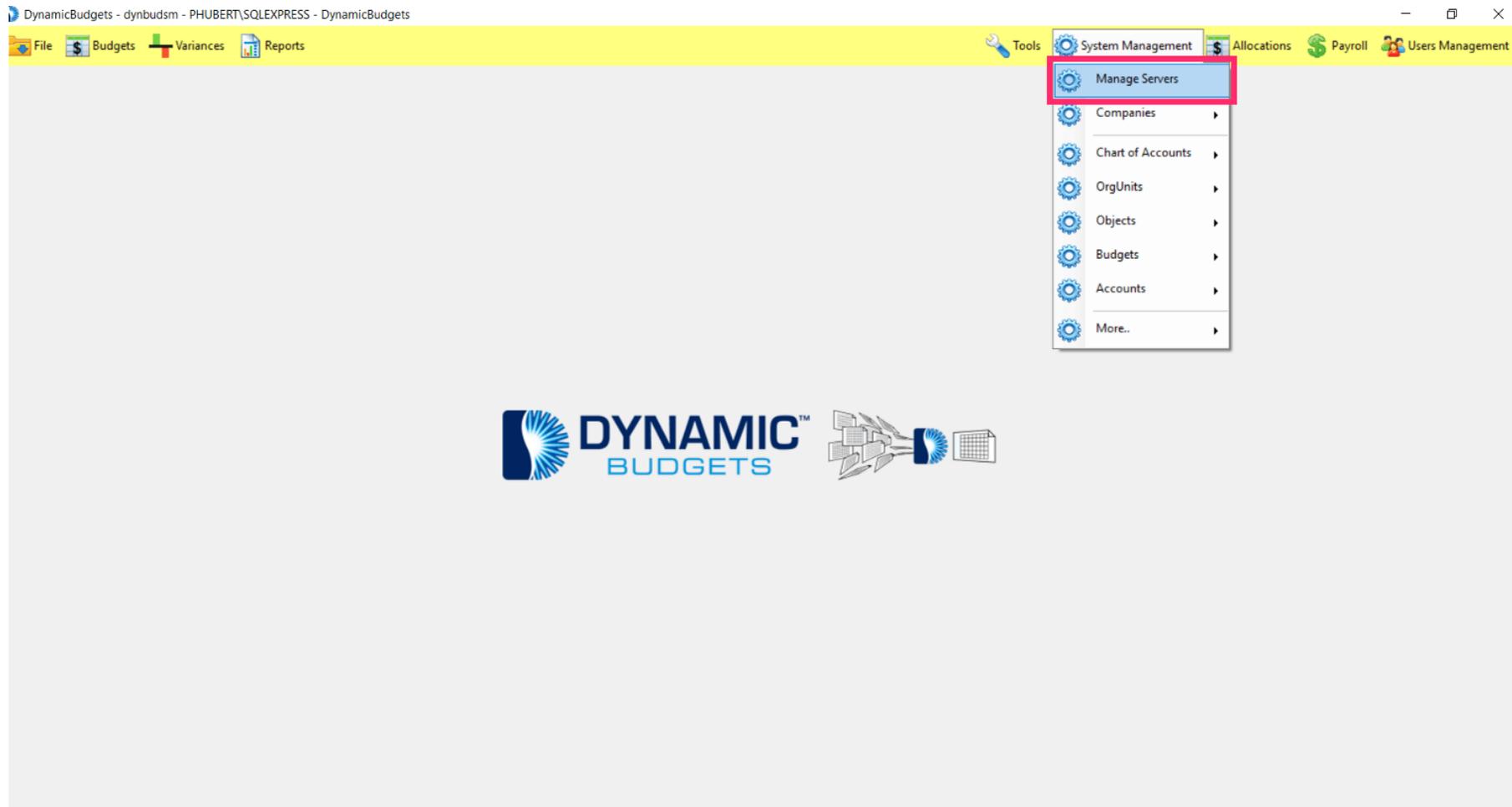


Click **System Management**.





Click **Manage Servers**.







Click in cell **\*Linked Server Database Server** to update "local" to the name of the SQL Server \Instance. Note: In Single server installs, the Dynamic Budgets database is typically co-located on the same SQL server as the production instance of the ERP.

Dynamic Budgets Linked Servers | Configured SQL Linked Servers

*Linked Server Alias (5)	*Linked Server Database Server (IP/Servername)	SystemDatabase	ERP	Test Connection
PRIMR	local	DYNAMICS	DynamicsGP	Test Connection
				Test Connection





Now **Type the name of the SQL Server\Instance.** Note: In this example, you would type PHUBERT\SQLEXPRESS. It is the 3rd breadcrumb in the app header in the upper left corner.

The screenshot shows the 'Manage Servers' application window. The title bar reads 'DynamicBudgets - dynbudsm - PHUBERT\SQLEXPRESS - DynamicBudgets'. The menu bar includes 'File', 'Budgets', 'Variances', and 'Reports'. The right side of the menu bar has icons for 'Tools', 'System Management', 'Allocations', 'Payroll', and 'Users Management'. Below the menu bar is a 'Manage Servers' header with a help icon and window controls. A yellow banner contains the following text: 'Linked Servers will need to be created in SQL Server Management Studio before you register the budgeting instance of Company database in Dynamic Budgets. These linked servers must have access to the same database user with same credentials as of the hosting server of Dynamic Budgets database. \*\*Define ERP databases with Alias = PRIMR'. Below this is a tabbed interface with 'Dynamic Budgets Linked Servers' and 'Configured SQL Linked Servers'. The 'Configured SQL Linked Servers' tab is active, showing a table with columns: '\*Linked Server Alias (5)', '\*Linked Server Database Server (IP/Servename)', 'SystemDatabase', 'ERP', and 'Test Connection'. The first row has 'PRIMR' in the first column, 'local' in the second column (highlighted with a red box), 'DYNAMICS' in the third column, 'DynamicsGP' in the fourth column, and a 'Test Connection' button in the fifth column. There are 15 rows in total, each with a 'Test Connection' button.

*Linked Server Alias (5)	*Linked Server Database Server (IP/Servename)	SystemDatabase	ERP	Test Connection
PRIMR	local	DYNAMICS	DynamicsGP	Test Connection
		DYNAMICS		Test Connection
				Test Connection











Now click on the Configured SQL Linked Servers tab.

server_id	name	Server	product	provider	catalog	Local Login	Remote Login Name	RPC Out Enabled	Data Access Enabled	modify_date
0	PHUBERT\SQLEXPRESS	Current Server	SQL Server	SQLNCLI		Uses Self Credentials		True	False	10/2/2017 2:39 PM



Note: The Configured SQL Linked Servers tab lists all of the SQL Servers installed.

Dynamic Budgets Linked Servers | Configured SQL Linked Servers

server_id	name	Server	product	provider	catalog	Local Login	Remote Login Name	RPC Out Enabled	Data Access Enabled	modify_date
0	PHUBERT\SQLEXPRESS	Current Server	SQL Server	SQLNCLI		Uses Self Credentials		True	False	10/2/2017 2:39 PM



Now **Click on the X** to close.

Dynamic Budgets Linked Servers | Configured SQL Linked Servers

server_id	name	Server	product	provider	catalog	Local Login	Remote Login Name	RPC Out Enabled	Data Access Enabled	modify_date
0	PHUBERT\SQLEXPRESS	Current Server	SQL Server	SQLNCLI		Uses Self Credentials		True	False	10/2/2017 2:39 PM



That's It. You're Done.



 **DYNAMIC™**  
BUDGETS  

**That's It. You're Done.**