UG-Manage Servers iorad

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| Dynamic Budgets User Guide for Manage Servers | 1 | ELDGETS EVENTS |
|--|---|---|
| System Management, Manage Servers: Module PurposeTo 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. | 2 | System Management, Ma <u>Purpose:</u> To build a link to the SQL se system(s) are located. Dynamic Budgets can be installed in a distributed across multiple linked SQL |
| Click System Management. | 3 | Tools System Management Allocations |

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| | | | 1 | | | | | | |
|---|--|----------------------|--|-----------------|--|---------------|----------------|--|--|
| O | Click Manage Servers. | 4 | 🔾 Tools | <u>(</u>) S | ystem Management | \$ Alloca | itions | | |
| | | | | Ô | Manage Servers | | | | |
| | | | | Ô | Companies | • | | | |
| | | | | ٢ | Chart of Accounts | • | | | |
| | | | | Ô | OrgUnits | • | | | |
| | | 5 | Manage Servers | | | | | | |
| ۲ | Note: The system automatically defaults to the Dynamic Budgets Linked Servers tab. | | Linked Servers will ne These linked servers **Define ERP databa | | | | | | |
| | | | Dynamic Budgets L | inked Se | ervers Configured | SQL Linked Se | ervers | | |
| | | | 🛃 Save 🗙 Delete | | | | | | |
| | | | *Linked Se Alias (5) | erver | *Linked Server Server (IP/Server | | SystemDa | | |
| | | | PRIMR budgets Linked Serve | is (| (local) onfigured SQL Linked | (local) | DYNAMIC | | |
| | Click in cell *Linked Server Database Server to update " local" to the name of the SQL Server\Instance. Note: In Single | 6 | | | , | | | | |
| U | | | 🗙 Delete | | | | | | |
| | | | *Linked Server Alias (5) | | ed Server Database er (IP/Servername) | Syste | SystemDatabase | | |
| | server installs, the Dynamic Budgets database is typically | | RIMR | (local) | | DYNA | DYNAMICS | | |
| | co-located on the same SQL | | | | | | | | |
| | server as the production | | | | | | | | |
| | instance of the ERP. | | | | | | | | |
| | | | | | | | | | |
| | Note: The Linked Server Database Server name is the 3rd breadcrumb in the app | 7 | micBudgets - dynbudsm PHUBERT\SQLEXPRESS - DynamicBudgets | | | | | | |
| ۲ | | | Budgets Variances Reports | | | | | | |
| | header in the upper left corner. | | je Servers | | | | | | |
| | Hint: program - userid - <mark>SERVER</mark> - database | ked servers must hav | ed to be created in SQL Server Management Studio before you registe nust have access to the same database user with same credentials as ses with Alias = PRIMR | | | | | | |
| | | | nic Budgets Linked Se | rvers | Configured SQL Links | ed Servers | | | |
| | | | ve 🗙 Delete | | | | | | |
| | | | C Delete | | | | | | |

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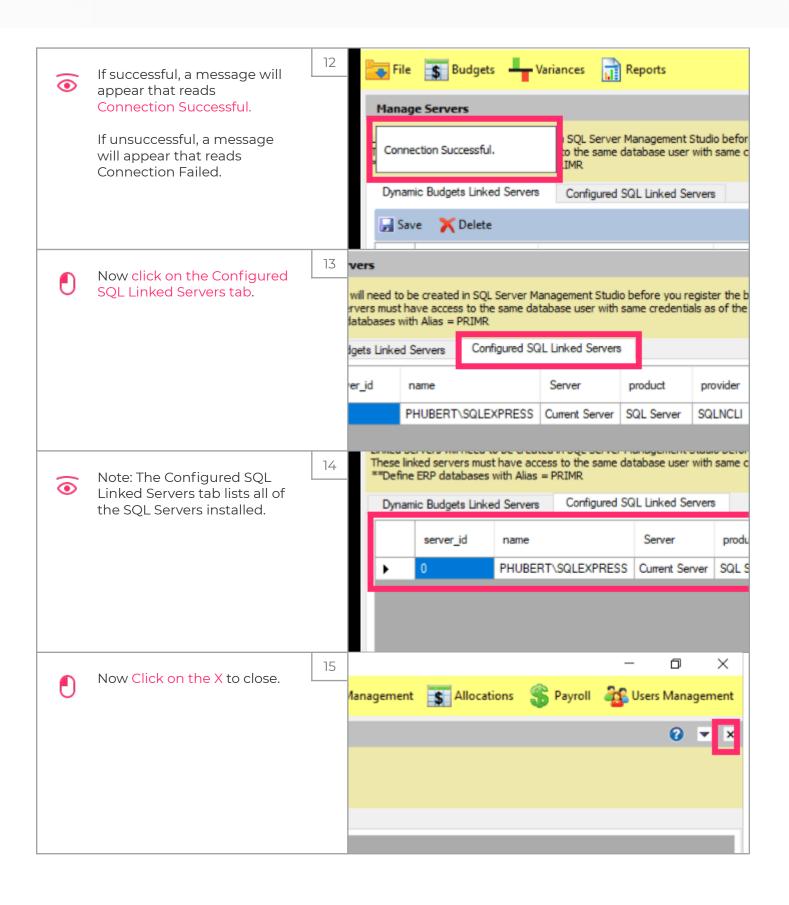
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| | | | Conligured SQL Linked Servers | | | | | | | | |
|---|---|----|---|---|---------|---------------------------|----------------|---------|----------|-----------------------------|--|
| Т | Now Type the name of the SQL Server\Instance. | 8 | × |)elete | | | | | | | |
| | Note: In this example, you would type PHUBERT \SQLEXPRESS. | | *Linked Alias (5) | ked Server *Linked Server Database s (5) Server (IP/Servemame) | | | SystemDatabase | | | | |
| | | | RIMR | | (local) | | | | DYNAMICS | | |
| | It is the 3rd breadcrumb in the | | | | | | | | | DYNAMICS | |
| | app header in the upper left corner. | | | | | | | | | | |
| | Click in the cell named System Database: Typically, the System Database is named DYNAMICS unless the client chose a different name. | 9 | onfigured SQL Linked Servers | | | | | | | | |
| Ð | | 9 | | | | | | | | | |
| | | | ed Server Database r (IP/Servername) | | | SystemDatabase ER | | | | Test Co | |
| | different flame. | | ERT\SQLEXPRESS | | | | | | MICS | Test Co | |
| | If the client chose another | | | | | | | - | | Test Co | |
| | name, type the name in the cell. | | | | | | | | | - Test Co | |
| | | | | | | | | | | Test Co | |
| | | | | | | | | | | - Test Co | |
| | Now Choose an ERP from the | 10 | | | | | | | | | |
| U | dropdown menu: Dynamics GP or Dynamics NAV. | | SystemDataba | | ise | ERP Test C | | Test Co | nnection | | |
| | Note: In this example, we will | | | DYNAMICS | | DynamicsGP | • | est Co | nnection | | |
| | choose Dynamics GP. | | | | | DynamicsGP DynamicsNAV | | est Co | nnection | | |
| | | | | | | Dynamicanty | • | est Co | nnection | | |
| | | | | | | | • | Test Co | nnection | | |
| | | | | | | | • | Test Co | nnection | | |
| | | | | | | | • | Test Co | nnection | | |
| • | Click Test Connection. | 11 | | | | | | | | | |
| | | | | | | | | | | | |
| | | | ibase | ERP | | Test Connecti | on | | | | |
| | | | | Dynamics | GP - | Test Connecti | on | est Co | nnection | | |
| | | | | | - | lest Connecti | on | | | - | |
| | | | | | - | Test Connecti | on | | | | |
| | | | | | - | Test Connecti | on | | | | |
| | | | | | - | Test Connecti | on | | | | |
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