

SQL Server Based Imports for FUNDamentals

Database Administrator's Guide

Connecting to a SQL Server Database

This document outlines the steps required to establish a **read-only** connection to any SQL Server database identified as a source of import for the FUNDamentals/MyFUNDamentals software. The interface connection information is used by and maintained in the specific data import being used. These imports are used by foodservice to collect monthly site-based data such as:

- Point of Sale (meal counts, meal sales revenues, ala carte revenues, etc.)
- Inventory (monthly valuations of purchased food, commodities, and supplies)
- Receiving (receiving of invoices or warehouse shipments, transfers, etc.)
- Accounting
- Labor Hours

This process requires either an administrative level Windows login or a SQL Server login with Security privileges on the SQL Server hosting the target SQL Server database(s).

Create/Edit the SQL Login to be used for the import

If the target SQL Server database(s) exists on the same server/instance as the FUNDamentals SQL Server database and SQL Authentication is used for the FUNDamentals database, there is no need to create a new login. Expand the Security Folder and the Logins folder and double-click the existing login use used by the FUNDamentals database. Then, skip to step 9 below.

In the unlikely event that SQL Server Authentication is disabled on the target SQL Server/Instance, there is no need to create a new login. Expand the Security Folder and the Logins folder and double-click the existing Windows Login you want to use or create a new Windows Login for any user/group that will need to utilize the import. Then, skip to step 9 below.

With the SQL Server Management Studio loaded and connected to the SQL Server/Instance hosting the target database:

1. Expand the Security Folder
2. Right-click the Logins Folder and select 'New Login...'
3. Enter the new SQL Login Name in the 'Login name' area.
4. Select the 'SQL Server authentication' option.

5. Enter a password for the new SQL Server Login in the 'Password' area.
6. Re-Enter the password in the 'Confirm password' area. *Note: Depending on your choice of password, you may need to uncheck the 'Enforce password policy'.*
7. If you are enforcing a password policy, make sure you uncheck the checkboxes for 'Enforce password expiration' and 'User must change password at next login'.
8. Select the target database(s) in the 'Default database' area. (first one only if more than one)
9. Click the 'User Mapping' page.
10. Place a check in the Map column and place a checkmark in the **db_datareader** role for each target database.
11. Repeat step 10 for any other archived target databases that the user(s) may need access to.
12. Click OK to create the new SQL Login. If an error occurs, see the section below for 'Troubleshooting', otherwise, please provide the login credentials to the appropriate foodservice staff tasked with importing data into the FUNDamentals/MyFUNDamentals software.

Troubleshooting

Usually, an error while creating or modifying a sql login means that the login already exists in one of the databases, but it is orphaned This can happen when databases are migrated from another server. In this case, it will be necessary to expand the Security/Users tab under each database on the server to find the user/login causing the problem. Once found, simply delete the user from the database and try to re-add/configure using the steps above.