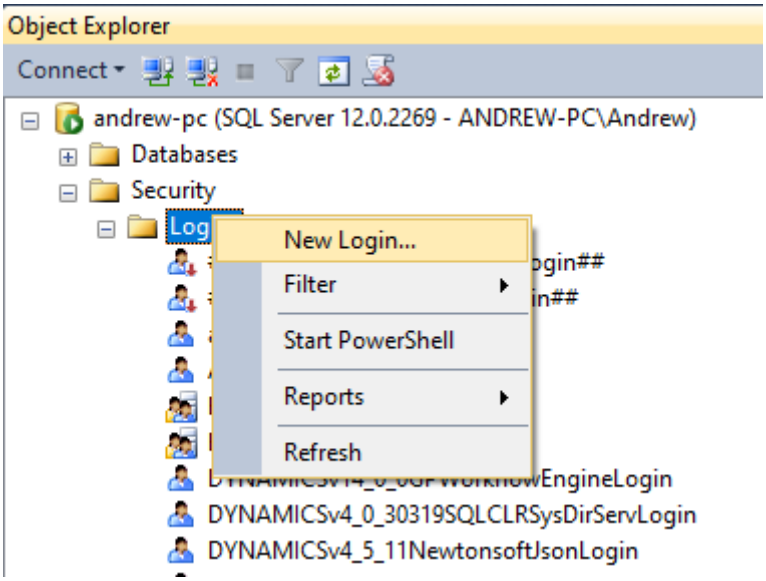
Creating an SQL Server Login for Streamline

Streamline's Database connection is designed to create a new project through a direct connection to the ERP's database. The connection requires entering login information such as user name and password. In this guide, we show how to create a database login with read-only permissions if your ERP runs Microsoft SQL Server.

To create the login, do the following:

1. Open Microsoft Management Studio.

2. In the **Object Explorer** window expand the **Root element** (your server) > **Security** > **Logins**. Then, right-click at the **Logins** node and select the **New Login...** command from the context menu (see figure below).



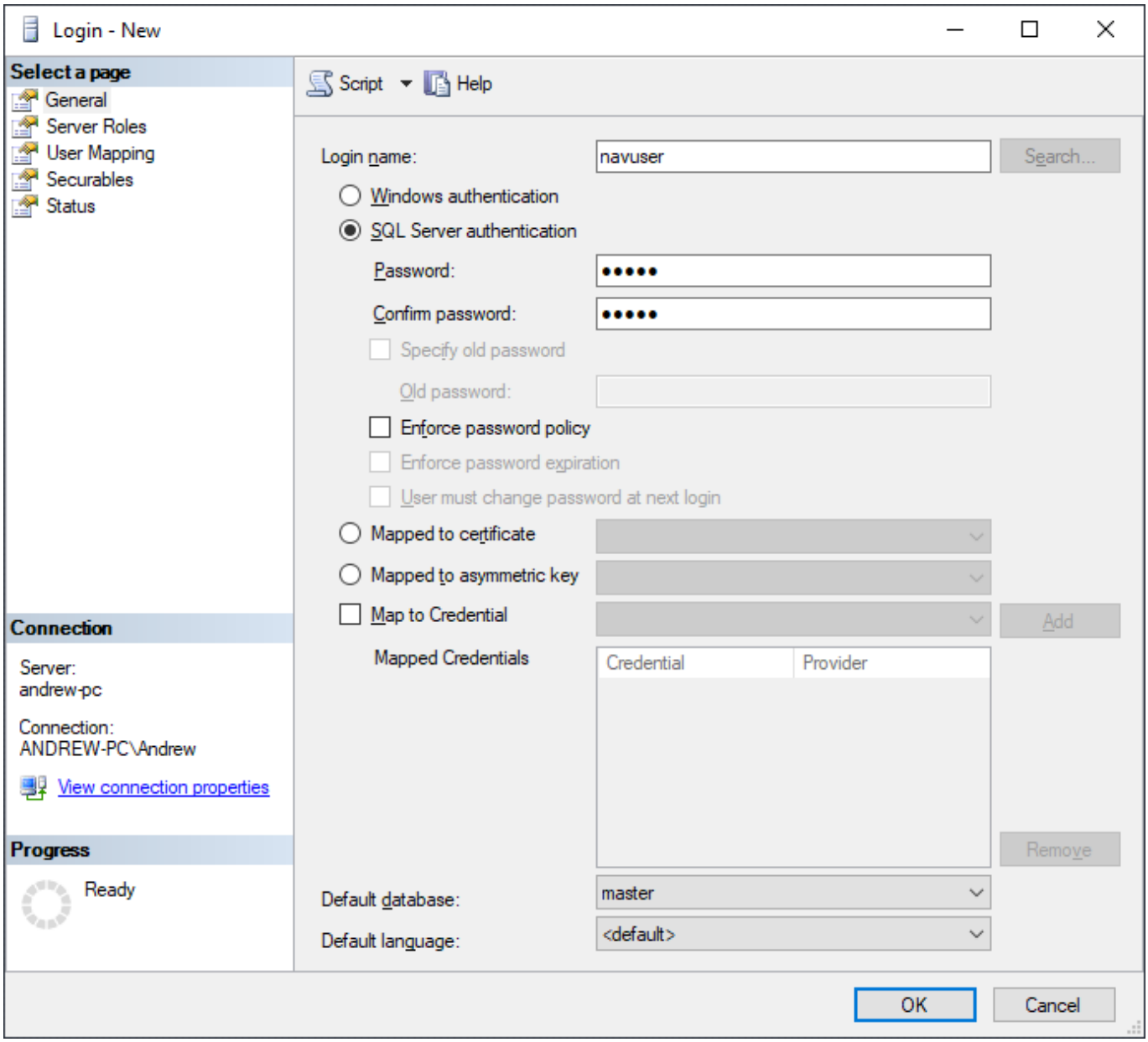
3. Set up the new login (see figure below).

3.1. Enter a name for the new login into the **Login name** field.

3.2. Choose the **SQL Server authentication** option.

3.3. Enter a password and confirm it.

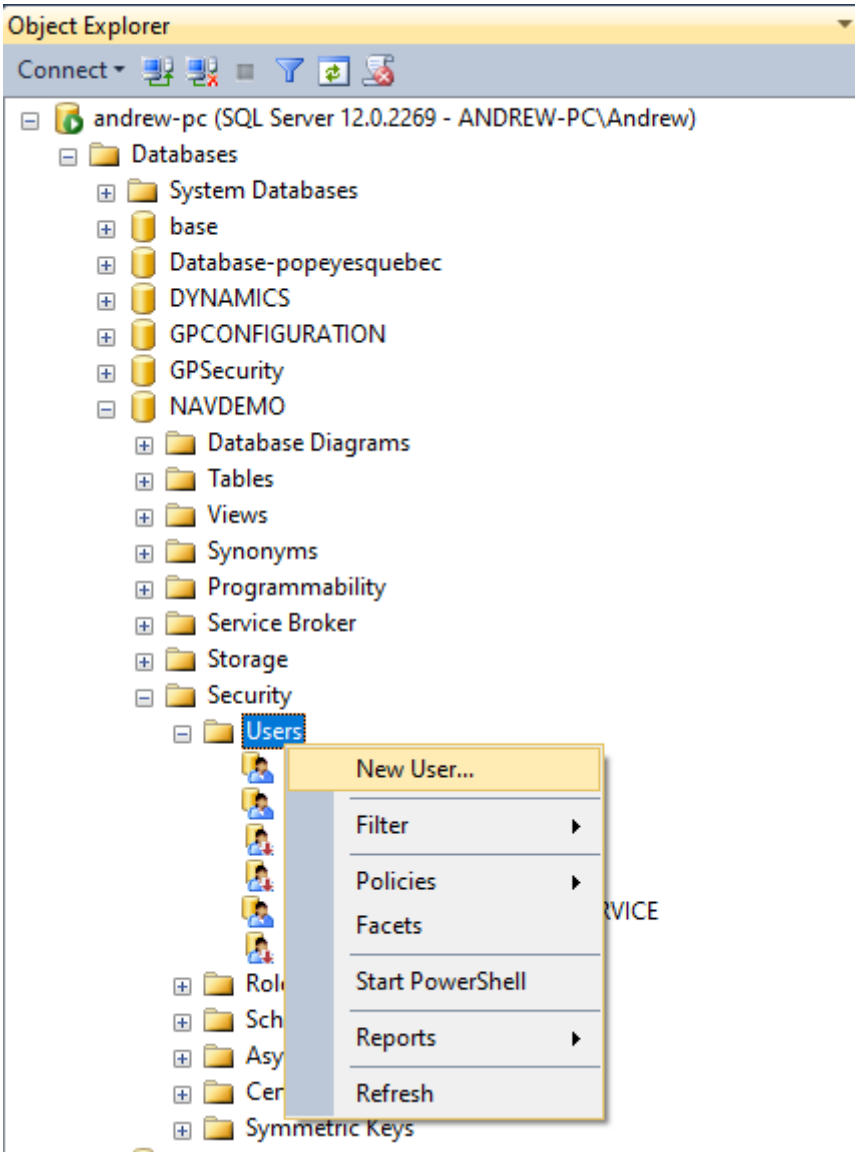
3.4. Uncheck the **Enforce password policy** option.



4. Add a new user to the database based on the newly created login. In our example, we are creating a new user for the Microsoft Dynamics NAV database.

4.1. Go to the **Object Explorer**. Expand **Databases** > <Your database name> > **Security** > **Users**.

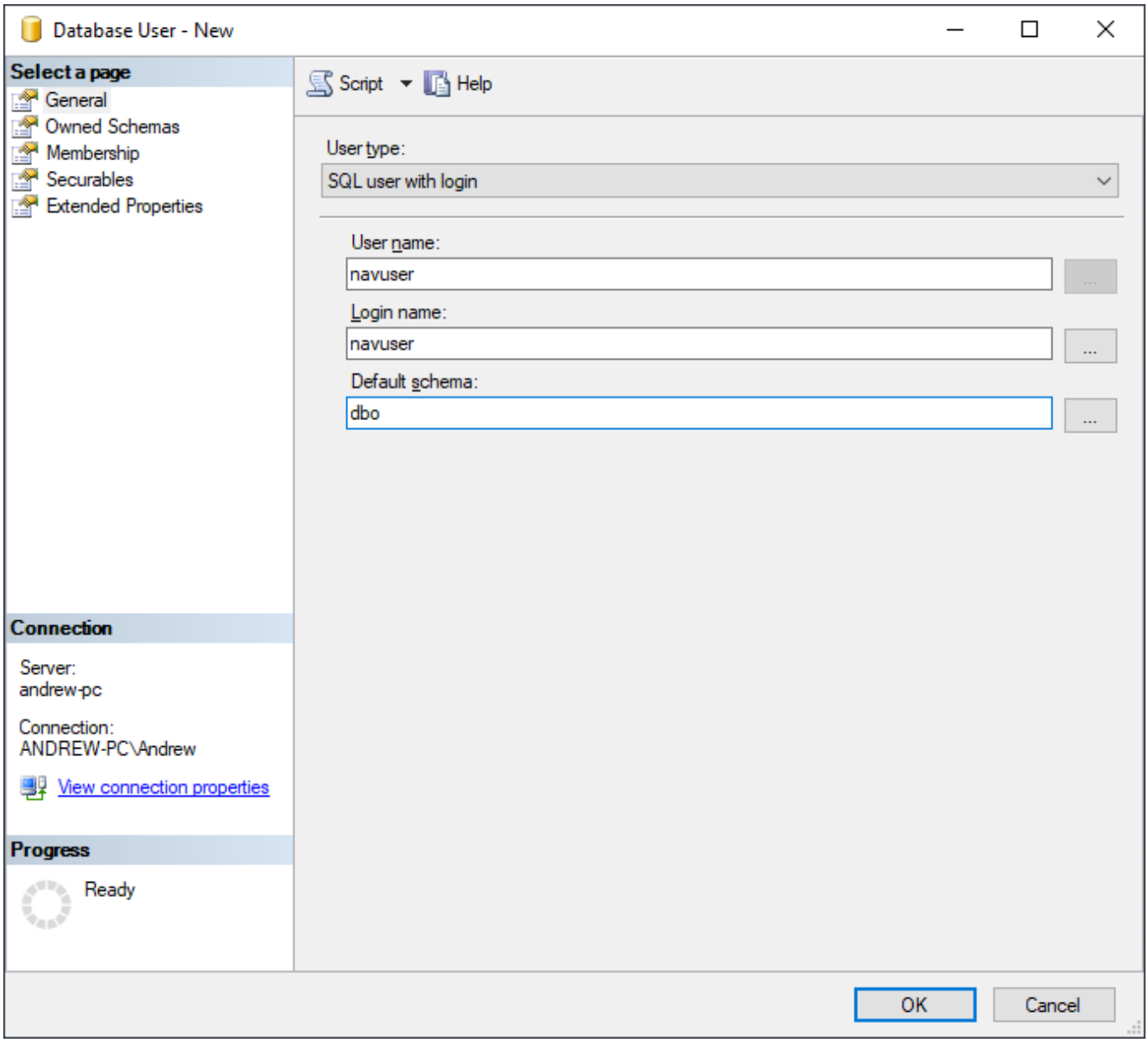
4.2. Right-click at the **Users** node and select the **New user...** command from the context menu (see figure below).



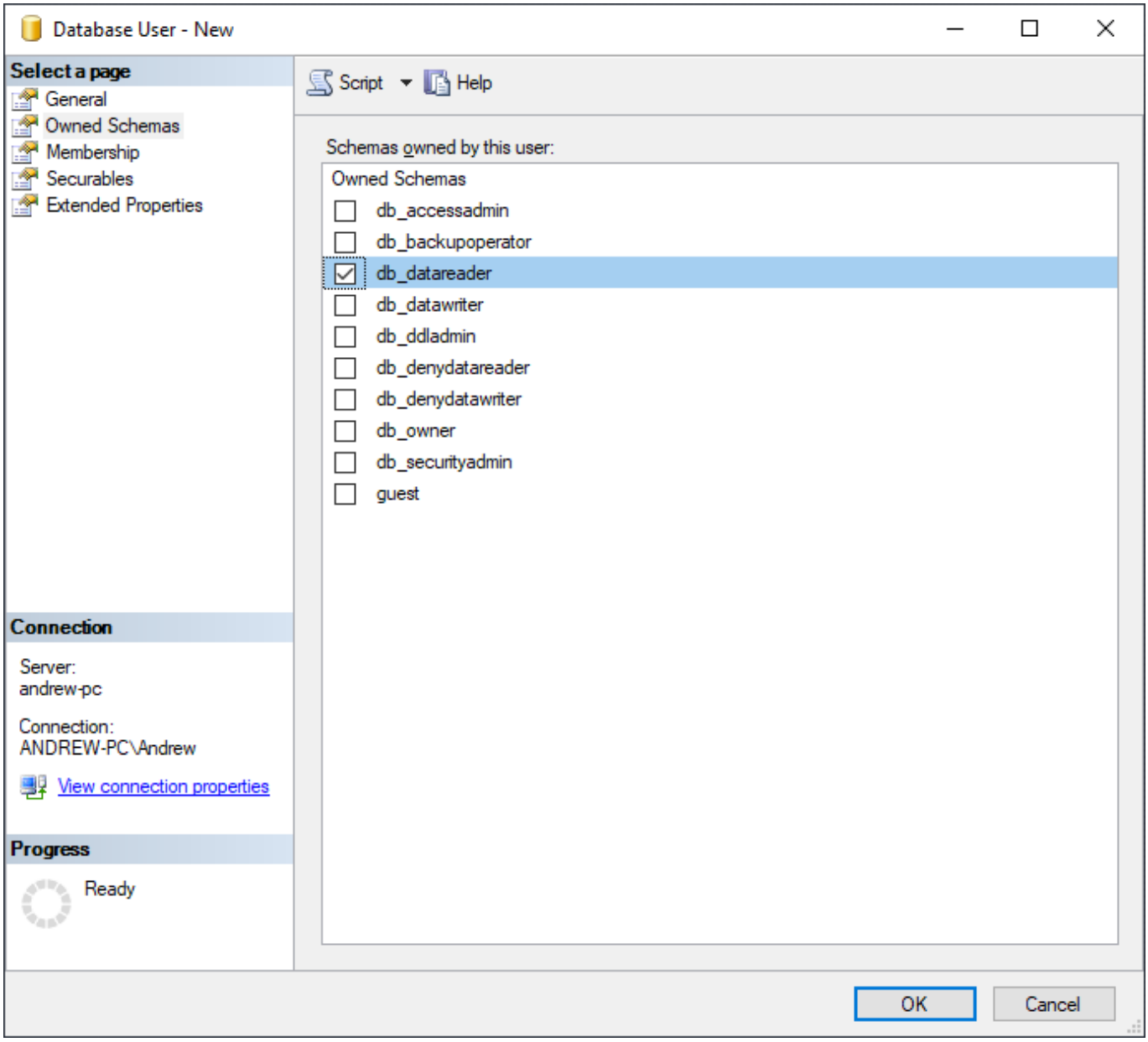
4.3. Select the **User type** as **SQL user with login**.

4.4. Enter a name for the new user into the **User name** field. In our example, it coincides with the login name.

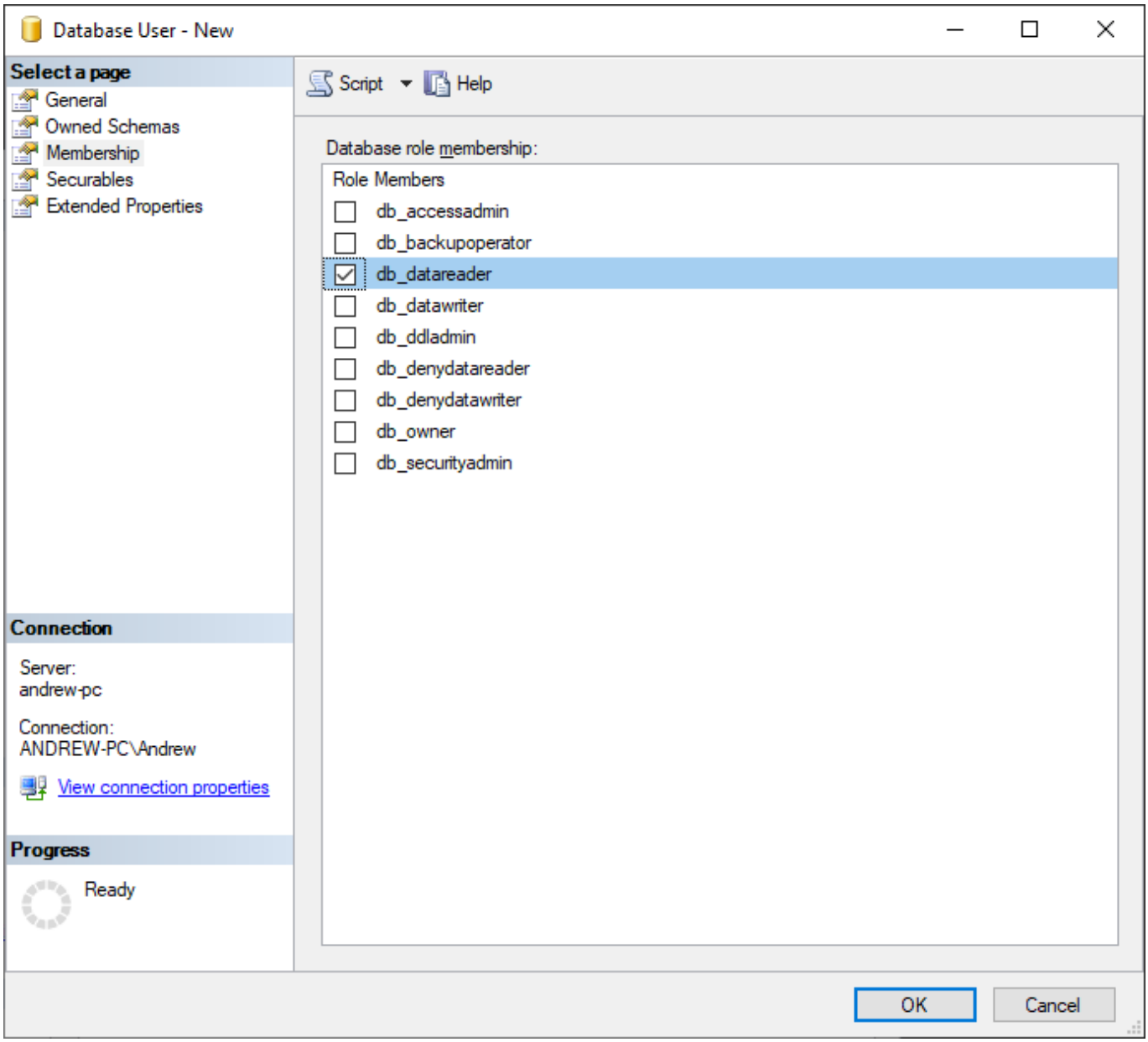
4.5. Enter the login name that we have created previously into the **Login name** field.



4.6. Go to the **Owned Schemas** page and select the **db_datareader** option (see figure below).



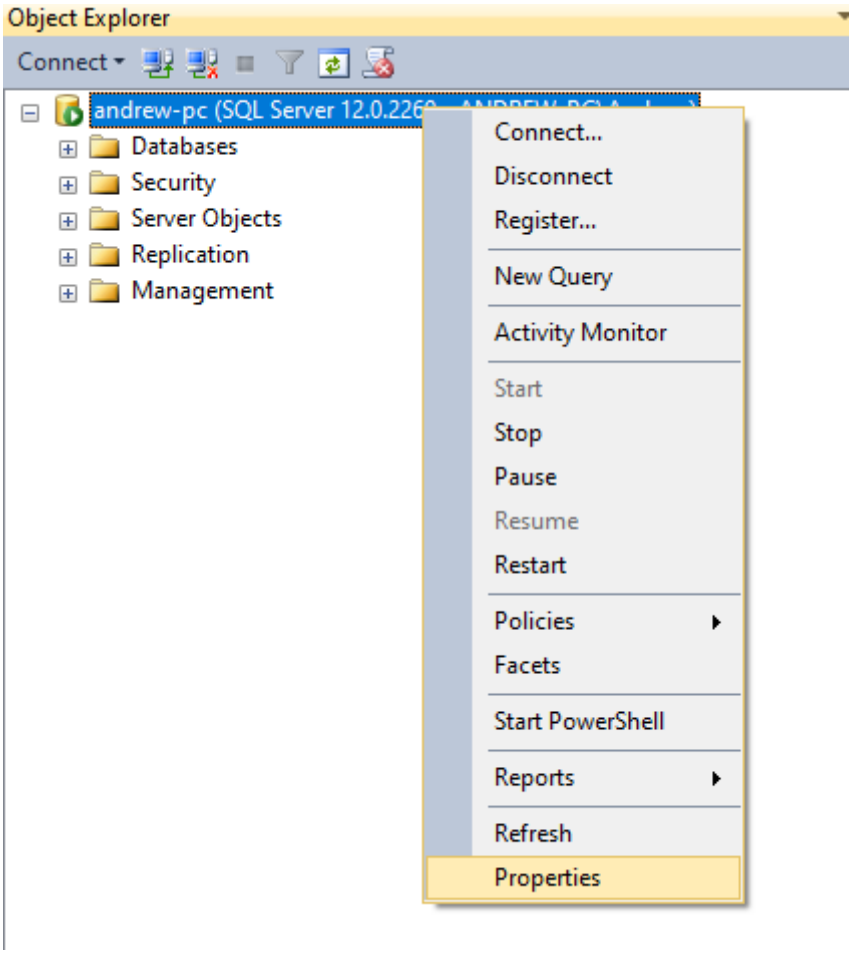
4.7. Go to the **Membership** page and select the **db_datareader** option (see figure below).



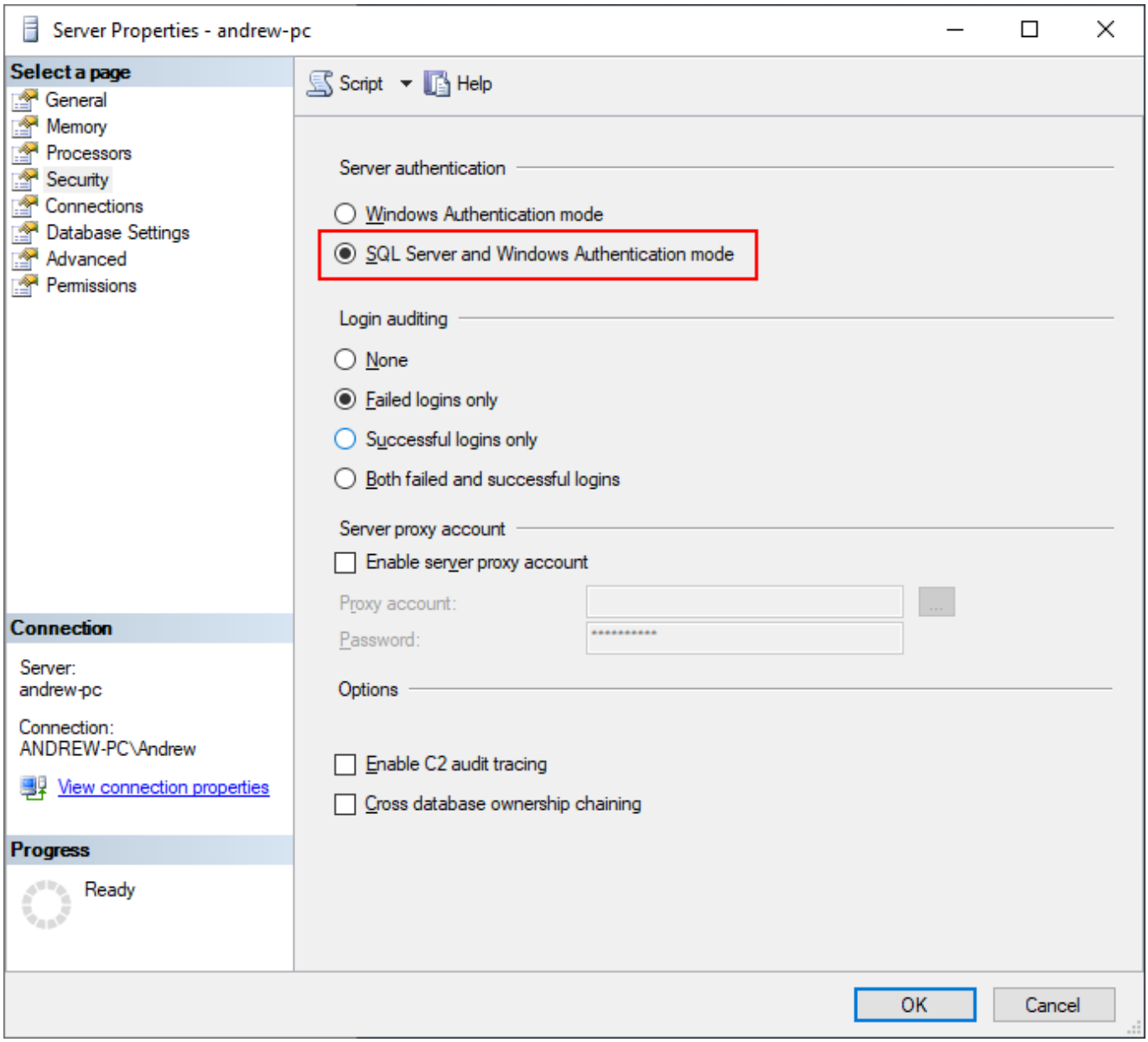
The last two options ensure that the user will have read-only access to the database.

5. Enable the SQL Server authentication mode.

5.1. Open Server properties (see figure below).

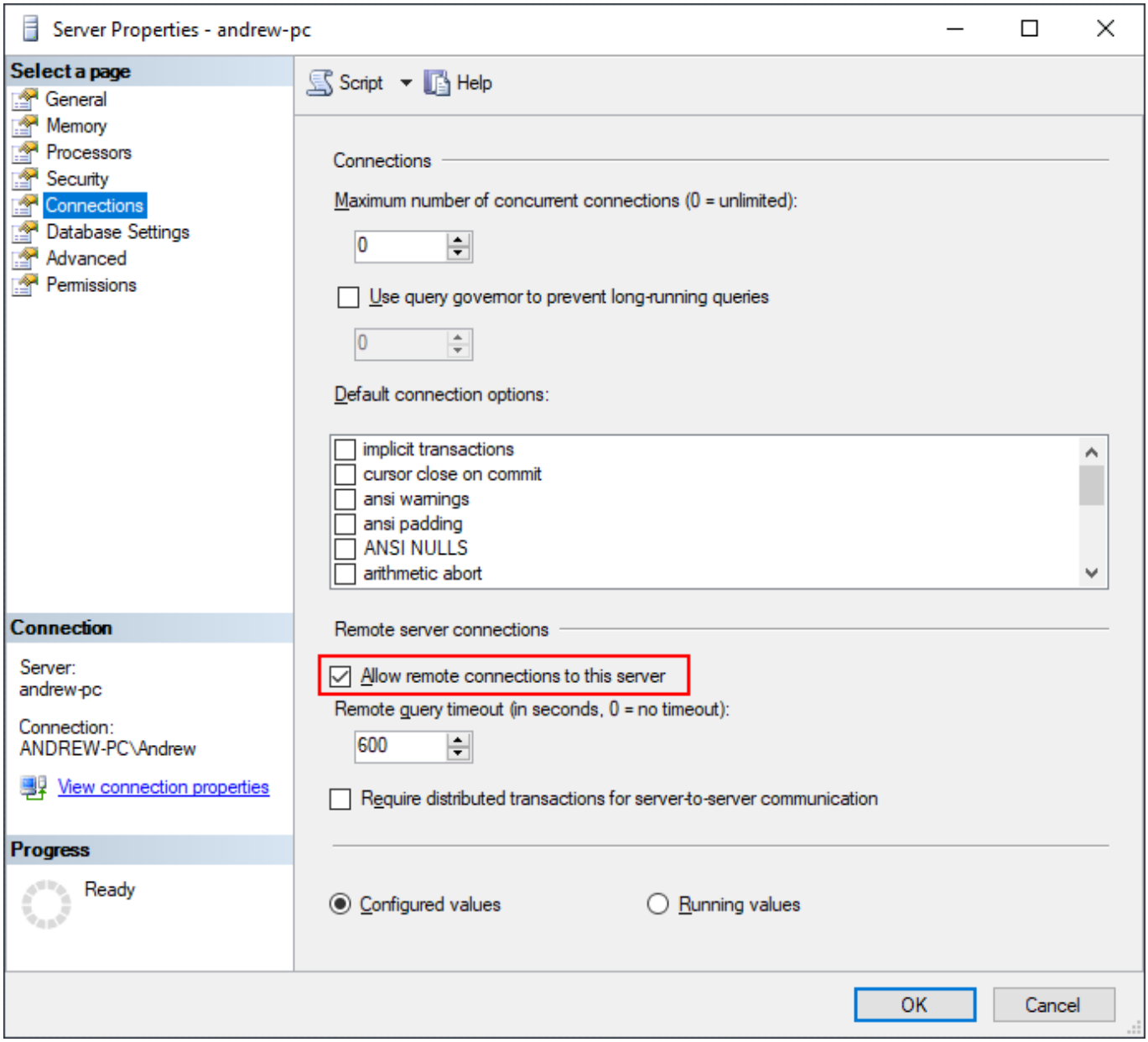


5.2. Go to the **Security** page and select the **SQL Server and Windows Authentication mode** (see figure below).



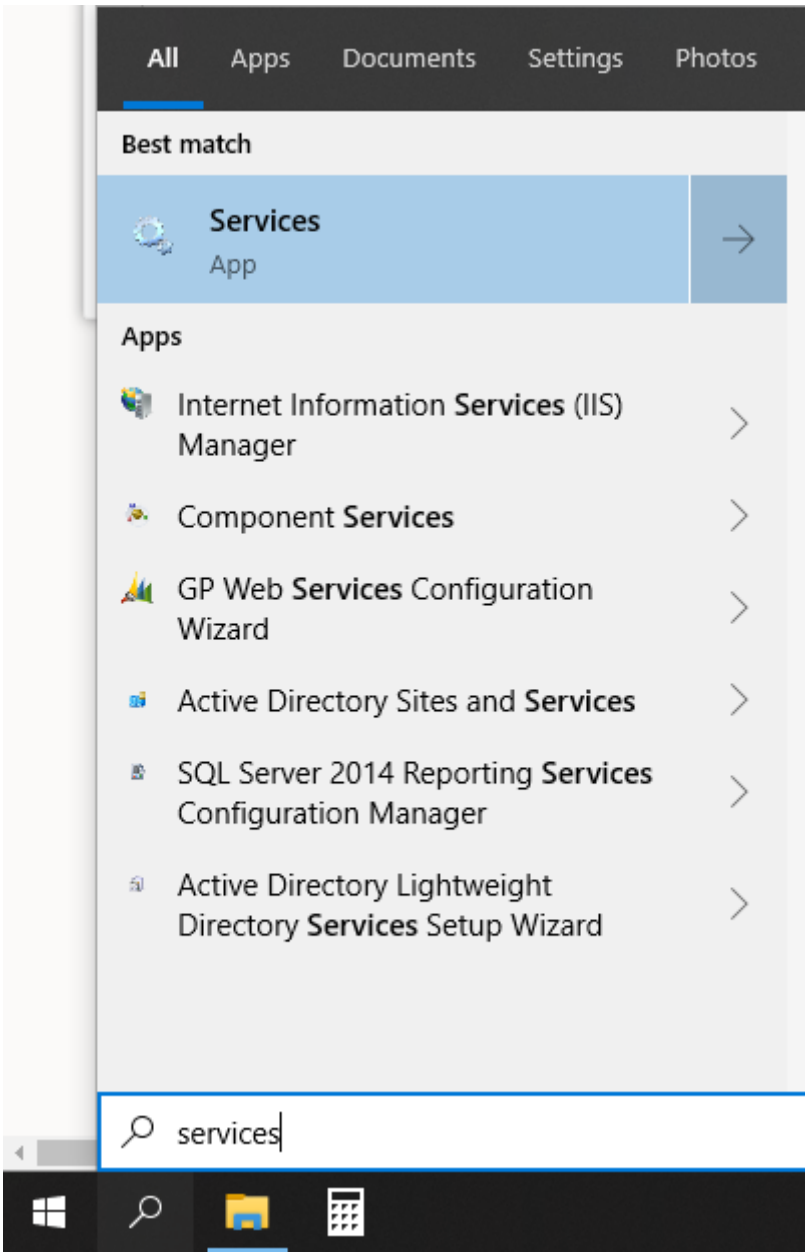
In the case you need to connect to the database remotely, you should allow remote connections to the server. To do this, perform the step shown below.

5.3. Go to the **Connections** page and check the **Allow remote connections to this server** option (see figure below).

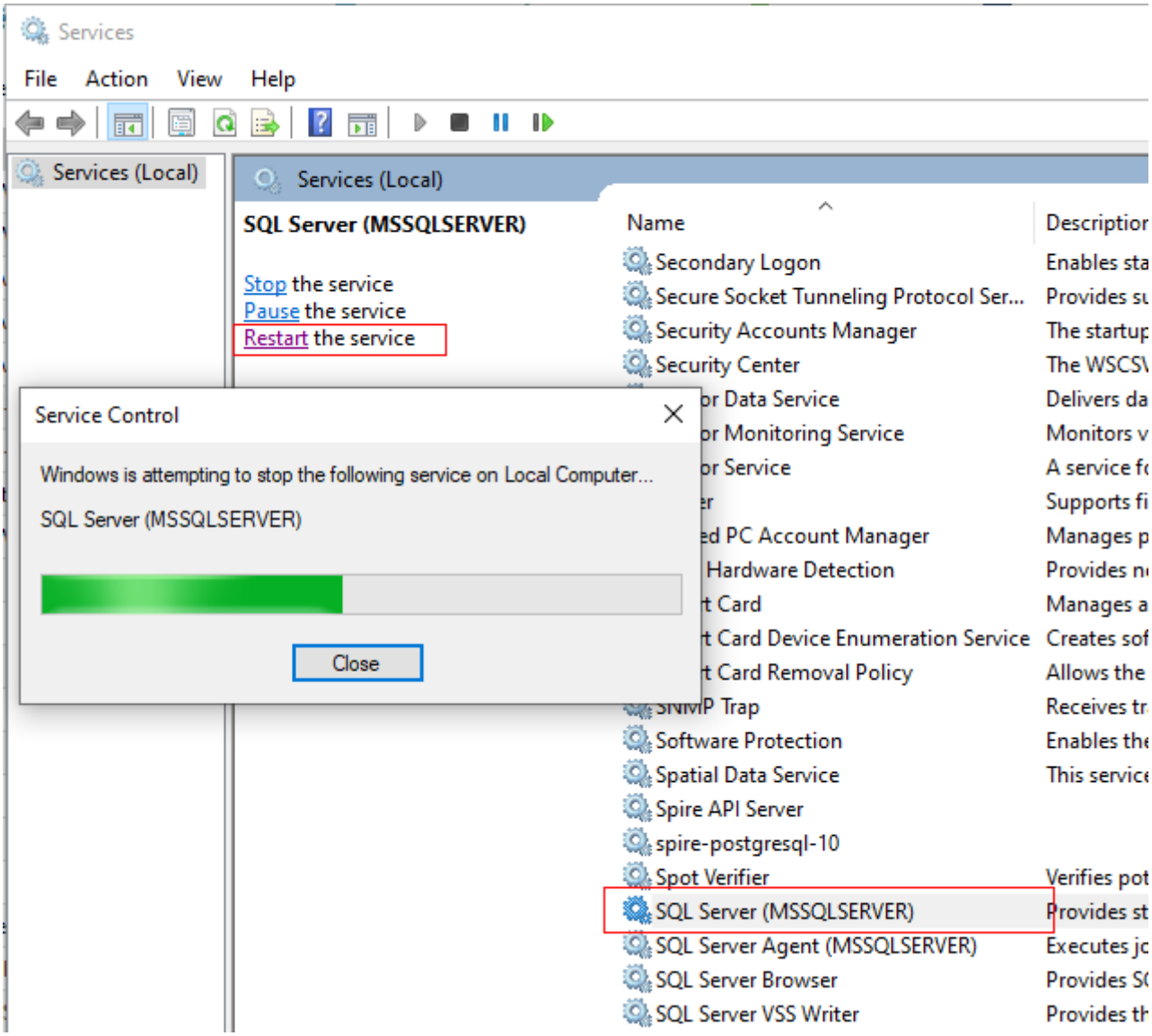


6. Restart your SQL Server.

6.1. Go to the Windows Taskbar, click the **Search** icon, type in 'Services', and press **Enter** (see figure below)



6.2. Find the **SQL Server** service and click the **Restart** link found in the left-top corner of the window (see figure below).



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