

# FMS Query Tool on MS SQL Server

## 1. OVERVIEW

The SBCTC-ITD has created a new job, ZX2113J. This job will use DataExpress to create a binary file, e.g. .dbf files. Then, the extract is automatically FTP'd in binary mode to a remote server.

Schedule ZX2113J to run DataExpress procedures for the FMS Query extract. After the job runs at night, use a Data Transformation Services job to import the extracts into the FMS Query database in SQL Server.

Use the Access database, FMSquery, as the front end and dynamically link to the SQL Server tables in the back end.

The SBCTC-ITD has modified the Access FMS Query database to use SQL naming conventions. Also, we have gotten rid of all hard coding in Access for Fiscal Year and Year Quarter. Depending on how you are scheduling the parameters, colleges may need to change FYR and YRQ parameters in the jobs.

The main menus in this tool are the following forms:

- frm-Financial Reports Menu
- frm-FMS DATA MENU

These menus have button links to each other. You might want to put one of these in automatic startup when the tool is launched.

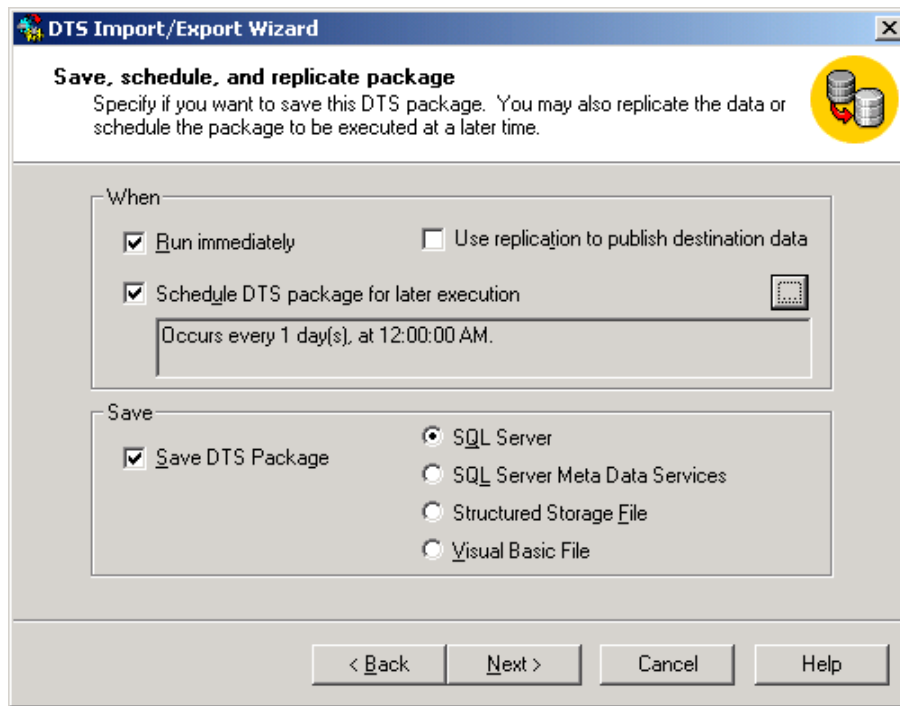
## 2. SET UP JOB SCHEDULING TO CREATE EXTRACT FILES AND FTP TO SERVER

- Install SQL Server
- Create a folder on a server just for fms query .dbf files
- Set up an FTP user id and give password, max characters for both are 8
- Give your job scheduler the following information:
  - The job scheduling documentation for FMSquery
  - Ask the scheduler to schedule these jobs with daily copyover
  - The FTP user id and password that goes with it
  - The IP address of the server to which the files will be FTP'd
  - The path to the directory to which the files will be FTPs

### 3. SET UP FMSQUERY IN SQL SERVER 7.0 OR HIGHER

- After these jobs have run successfully and all the extract files are on your server, do the following steps:
  - **Create a database container.**  
In Enterprise Manager, right click on databases folder ...select New Databases and follow all the defaults in the wizard to create a database container named FMSquery.
  - **Import the extract files into the FMSquery database.** (The first import will create the database structure.)
    - a) Right click on FMSquery...All Tasks...select Import Data.
    - b) For data source, select dBase IV and browse for the file folder containing extracts...select Next.
    - c) For destination, select OLE DB for SQL Server...select the server, windows authentication & FMSquery database...select Next.
    - d) Select copy tables from source database...select Next.
    - e) Select the tables...select Next.
    - f) Select run immediately...select Next...select Finish.
    - g) Will tell you if there are errors. If okay...select Done and proceed.
  - **Create a Data Transformation Services job and schedule to import files on the days of the week you want.**
    - a) Follow steps a) through d) above.
    - b) Select the tables and go to “Transform” column. On each row under Transform is a button with 3 dots. Click the first button. It brings up a “Column Mapping and Transformations” screen.

- c) Select the radio button with “Delete rows in destination table” and click OK.
- d) Do c) step for each table, then select Next.
- e) Select “Schedule DTS package for later execution.” Click the button with 3 dots to set up the schedule.
- f) After selecting job schedule, click OK.



- g) Click Next.
- h) Name the package. Select correct SQL Server and windows authentication. Click Next.
- i) Click Finish.

#### 4. SET UP ACCESS FRONT END

- Set up a System data source to the SQL Server FMSquery database.
- Open the Access FMSquery front end and link to SQL Server.
- Rename each linked table with a dbo\_ prefix. Remove that dbo\_ prefix. For example, dbo\_BDGT renames to BDGT
- Test the FMSquery Tool.