

This is a Sample mail to help you gather connection details for connecting Spreadsheet Server to the system(s) you want to report from. You are welcome to modify the text as you see fit. You may need to copy and paste the 3 bullet points if you plan to connect to more than one database/system.

**Subject**: Request for connection details

Dear IT

We recently purchased Spreadsheet Server for improving our reporting. Spreadsheet Server is an Excel Add-in from [insightsoftware](https://insightsoftware.com/spreadsheet-server/) which connects to relational databases via an encrypted account that is configured in the administrator component of the product. It establishes a direct TCP/IP or ODBC connection which is used to pass read only select queries to retrieve the relevant data.

To get Spreadsheet Server configured, I would appreciate your help with the following details:

* System: <System Name e.g. Sage Production>
* Hostname or IP Address of the server where the database resides:
* Username & login credentials for the database:

**Additional information about the security in Spreadsheet Server**

When connecting and setting up connection information in Spreadsheet Server, the underlying connection can be via a shared database account (Oracle, SQL Server, SAP, iSeries or MS Access) or an assigned role-based database account. This setup can vary based on the type of database and the required security restrictions that need to be imposed.

When the shared option is selected, the specified application username that is mapped via the Windows username can dictate criteria when querying for security information. This can be set up based on account level security information stored within the database. In this scenario, when a Spreadsheet Server user connects via Excel, the Windows username is acquired, and the assigned username specified in the configurator can be used for security lookup. Spreadsheet Server queries the database to find the account level assignment for that user and retrieves the segment security. The logic appends to the query to limit the results that the user can retrieve from the database.