

Toad® Intelligence Central 3.3  
**Deployment Guide**



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#### Legend

-  **IMPORTANT, NOTE, TIP, MOBILE, or VIDEO:** An information icon indicates supporting information.
-  **CAUTION:** A CAUTION icon indicates potential damage to hardware or loss of data if instructions are not followed.
-  **WARNING:** A WARNING icon indicates a potential for property damage, personal injury, or death.

Toad Intelligence Central Deployment Guide  
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# Welcome to Toad Intelligence Central

Toad<sup>®</sup> Intelligence Central enables enterprise users to be far more productive with their tools including Toad Data Point by centralizing automation workflows, accessing data directly, collaborating and sharing on datasets, queries and Toad files and providing a secure and established way to manage your data sprawl.

- AUTOMATE - Toad users can schedule the regular automated execution of Toad Data Point automation scripts on Toad Intelligence Central.
- ACCESS - Toad users can access Toad files and basic data files published to Toad Intelligence Central that have been shared with them. An additional data connectivity license extends Toad Intelligence Central to work across a wide range of data stores including relational database models, data warehouses, No SQL and Business Intelligence data sources like OBIEE and SAP<sup>®</sup>.
- SHARE - Objects can be shared amongst users and groups and organized collectively in a familiar folder structure, assigned tags and given a description for easy search retrieval. Administration of users and groups can be managed locally or users and groups can be imported from Active Directory<sup>®</sup>.
- SECURE - Toad Intelligence Central provides a centrally managed, secure, stable and accessible system.

Distributions of Toad Intelligence Central include a Web Server and Admin Console for administrative and general user access. In addition, Toad Data Point and other collaborative Toad products can directly access Toad Intelligence Central. Data on Toad Intelligence Central can be accessed via a third party product such as Tableau for further data processing and visualization.

## About This Guide

This guide provides information about how to install Toad Intelligence Central and how to configure server options. It also provides information about managing users and objects, as well as other Administrator activities.

This guide describes procedures that can be performed by users with the Administrator role, including the Administrator (root) user. The Standard user (a user with the Standard role) should refer to the *Toad Intelligence Central Quick Start Guide* for procedures applicable to that role.

# Install Toad Intelligence Central

The components of Toad Intelligence Central are as follows.

Component	Description
Intelligence Central server	<p>The Toad Intelligence Central server stores objects published to Toad Intelligence Central and account information for users of Intelligence Central.</p> <p>Follow the steps to <a href="#">Install the Intelligence Central server</a>.</p> <p>See also <a href="#">Install Toad Data Point and ODBC Drivers</a> and <a href="#">Install Toad for Oracle</a>.</p>
Web Server	<p>The Toad Intelligence Central Web Server is used for administrative and general user access. It also hosts Web-based applications for collaborative Toad products.</p> <p>The Toad Intelligence Central Web Server is installed on the same computer as the Intelligence Central server. For more information, see <a href="#">Install the Web Server</a> on page 11.</p>
Admin Console	<p>The administrative functionality of the Admin Console is now superseded by the Web Server. The activity of mapping/editing data objects is best performed through Toad Data Point. Install the Admin Console only if required.</p>

## Install the Intelligence Central server

Use the Toad Intelligence Central Server Installer.

### *To install the Toad Intelligence Central server*

1. Run the Toad Intelligence Central Server Installer.
2. Select to install **Toad Intelligence Central**.
3. Agree to the license agreement.
4. Provide details if connections to data sources outside your organization need to go through a proxy server.

Field	Description
Proxy host address	Type the DNS or IP address of the proxy server within your organization. HTTP and HTTPS secure proxy servers are supported.



Field	Description
Proxy port number	Type the port on which the proxy server operates. The standard proxy port number is 8080. Sometimes port 80 is used. Less commonly an entirely different port may be used.

5. Make a note of the port numbers.

**i** **NOTE:** These port numbers can be modified during installation to resolve port conflicts on the target host. However, all three port numbers are reserved for Toad with the Internet Assigned Numbers Authority and the default values should be valid for most installations.

Field	Description	Default
Intelligence Central server Port number	This port can be used by third party applications to connect to Toad Intelligence Central. All other applications should use the <i>Application server port number</i> to connect to Toad Intelligence Central.	3566
Internal port number	This is an internal port used by Toad Intelligence Central and should only be changed in the case of port number conflicts.	2166
Application server port number	Client applications use this port to connect to Toad Intelligence Central. Make sure you note down this port number. You will be required to enter this port number to connect Toad Data Point and the Toad Intelligence Central Admin Console to Toad Intelligence Central.	8066

6. Create a password to connect to Toad Intelligence Central. This is the administrator (root) password to the Intelligence Central server.
7. Accept or change the installation folder (C:\Program Files\Quest Software\Toad Intelligence Central).  
If you change the installation folder be sure to document the new location. This folder is referred to in server maintenance.
8. Accept or change the Data Files Folder (C:\ProgramData\Quest Software\Toad Intelligence Central).

**i** **TIP:** Ensure this folder has room to grow. All Toad Intelligence Central data will be stored in the ProgramData\Quest Software\Toad Intelligence Central\ folder and its subfolders. This folder will potentially grow quite large if lots of users publish lots of objects and take snapshots. You may choose to change the default folder location. For example, you may choose to direct the data files folder to a separate drive. If you do change the location of the data files folder be sure to document this as the data files folder is referred to in server maintenance. See [Toad Intelligence Central Data Folder](#) for more information.

9. Help improve Toad Intelligence Central. Optionally, select to provide anonymous user experience feedback. Refer also to the [Privacy Statement](#).

Upon successful installation, the Intelligence Central server will run as three services that start automatically when Windows® starts. For more information, see [Toad Intelligence Central services](#) on page 44.

# Install Toad Data Point and ODBC Drivers

When Toad Data Point is used to publish objects and Automation scripts to Toad Intelligence Central, ensure the following requirement is met.

## ***Install Toad Data Point on the same host computer as Toad Intelligence Central.***

Beginning with Intelligence Central 3.0, if the Toad Intelligence Central Server Installer is used, Toad Data Point and applicable ODBC drivers are automatically installed immediately following the Intelligence Central installation. This ensures compatibility of features and drivers for objects published through Toad Data Point and is required in order for Toad Data Point Automation Scripts to execute on Toad Intelligence Central.

**i** | **NOTE:** Following installation of Toad Data Point on the Toad Intelligence Central host computer, start the Toad Data Point application and add your Toad Data Point Professional license key. Adding your license key to Toad Data Point is required, however Toad Data Point installed via the Toad Intelligence Central installer is not counted in the Toad Data Point license count.

In addition, if Toad Data Point is used to publish Automation scripts to Intelligence Central, ensure the following requirements are met (if applicable).

## ***Does the Toad Intelligence Central server have access to an email SMTP port?***

If an Automation Script scheduled to execute on the Toad Intelligence Central server includes an instruction to send an email then in order for that email to be sent, the Toad Intelligence Central server must have access to an email SMTP port.

## ***Is Microsoft® Excel® installed on the Toad Intelligence Central host computer?***

If an Automation Script scheduled to execute on the Toad Intelligence Central server includes an instruction to run a macro in an Excel spreadsheet, then Microsoft Excel must be installed on the Toad Intelligence Central host computer. Other Automation script uses of Excel do not have this requirement. For example, Excel is not required to execute an Automation script that *exports* to Excel.

# Install Toad for Oracle

In order for Toad for Oracle users to successfully execute Toad actions on Intelligence Central, the Intelligence Central server must have Toad for Oracle and an Oracle client installed.

## ***Install Toad for Oracle on the same host computer as Toad Intelligence Central.***

Beginning with Intelligence Central 3.0, if the Toad Intelligence Central Server Installer is used, Toad for Oracle is automatically installed immediately following the Intelligence Central installation. This is necessary if you plan to schedule and execute SQL scripts and Toad Actions on Intelligence Central.

## ***Enter license key***

After Toad for Oracle is installed, start Toad for Oracle and enter a license key.

### Install other necessary client files

To prepare the Intelligence Central server to schedule and execute SQL scripts and Toad Actions when connected to an Oracle database, please ensure the following are installed on the Intelligence Central server:

- A corresponding Oracle Client: If Toad for Oracle 64-bit is installed, install the 64-bit Oracle Client.

**i** | **NOTE:** The 64-bit version of Toad for Oracle is automatically installed when the Intelligence Central Server Installer is used.

- A tnsnames.ora file.

## Install the Web Server

Use the Toad Intelligence Central installer to install the Web Server on the same computer as the Intelligence Central server.

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IIS Express	The Web Server requires Microsoft® IIS Express be installed. Installation of IIS Express is included in the installer and will run only if required and by your agreement.
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Web Server Port Number	Port 80 is reserved for the web port. During installation, you can change this if required.
------------------------	---

**i** | **NOTE:**

- The installer will let you know if there is a conflict in using the default port 80.
- It is not advisable to install other web servers on the Toad Intelligence Central server host.
- A port number other than 80 must be included in the web browser address as per **http://hostName:port/**.
- Ensure the port is open for TCP inbound connection. Ensure the Windows® firewall and any other firewalls affecting the Toad Intelligence Central server host allow access to the Web Server.

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## Authenticated proxy server connections

The following is required if the host on which the Toad Intelligence Central server is installed connects to the Internet via a proxy server and the proxy server is authenticated. Execute this SQL statement after the Toad Intelligence Central server is installed. You can execute this statement in the Admin Console.

```
INSERT INTO hub_information_schema.hub_proxies VALUES ('http', 'http://proxyAddress:proxyPort', 'username', 'password');
```

Variable	Value
http	The protocol under which the proxy server operates. The protocol may be http or https or both http and https. If both http and https are used then execute the SQL statement twice, once per protocol.

<b>Variable</b>	<b>Value</b>
proxyAddress	The IP address of the proxy server.
proxyPort	The port on which the proxy server operates.
username	The username to the proxy server.
password	The password to the proxy server.

---

# Access Toad Intelligence Central

You can access Toad Intelligence Central using one or more of the following methods:

- The Web interface (Web server)
- A Toad application, such as Toad Data Point or Toad for Oracle
- A third-party tool, such as Tableau or a MySQL command line interface

**i** | **NOTE:** Toad Intelligence Central is a server that runs as three services that start automatically when Windows starts. For more information, see [Toad Intelligence Central services](#) on page 44.

## Web Interface

The Web interface (Web server) provides Standard users with the ability to view and perform limited operations on objects published to Intelligence Central from other Toad applications. To use the Web interface, the Web server must be installed on the same computer as Intelligence Central. The *Toad Intelligence Central Quick Start Guide* provides the Standard user with information on how to use the Web interface.

See [Log In From a Web Browser](#) for more information about accessing Intelligence Central through the Web interface.

The Web interface allows users with the Administrator role to perform advanced activities such as the management of users, groups, and objects, as well as Intelligence Central server configuration and maintenance.

## Toad Applications

Toad Data Point users can publish data objects, Automation scripts, Toad documents, and other resources created in Toad Data Point to Intelligence Central. Toad for Oracle users can publish Automation apps, files, and other resources created in Toad for Oracle. For these users, their primary method to view, access, manage, and edit Intelligence Central objects is through their Toad application.

## Third-Party Tool

A Toad Intelligence Central user can create a MySQL connection to Toad Intelligence Central through a third party tool such as Tableau, MySQL command line interface, or MySQL Workbench. This connection can be used to query Data Connectivity objects stored in Toad Intelligence Central. See [Third Party Connection to Toad Intelligence Central](#) for more information.

## Log In From a Web Browser

When the Web server is installed along with the Intelligence Central server, users can access Intelligence

Central through a Web-based interface using a Web browser.

### **To log in to Toad Intelligence Central using a web browser**

- In a Web browser, enter the URL to the server hosting Intelligence Central. Review the following for additional information.

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URL	The address of Toad Intelligence Central is <b>http://hostName/</b> where <i>hostName</i> is the name of the computer hosting the Web Server and Toad Intelligence Central. If the Web Server has been installed on a port other than port 80 then the address is <b>http://hostName:port/</b> .
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Log in	Toad Intelligence Central prompts you to login.  If you login to Toad Intelligence Central using Windows credentials then enter your login name at the login prompt. If necessary, include your Windows domain: <b>domain\username</b> . The computer you use to login to Toad Intelligence Central must be accessible to your Windows domain.
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To login to Toad Intelligence Central as the Administrator (root), in the username field type **root**. In the password field type your Administrator password. The initial Administrator password is as per the password you entered when you installed the Intelligence Central server.

**i** | **NOTE:** The login screen may include an option to **Register as a new user**. If you do not have a login to Toad Intelligence Central then click this link to add yourself as a new user. The availability of this link is dependent on local configuration. For more information on this feature, see [Users and Groups](#) To set local configuration, see [Configure New User Registration](#).

**i** | **NOTE:** Toad Intelligence Central encrypts your login credentials when transmitted over the network. Refer to your local Toad Intelligence Central Administrator for more information.

## **Third Party Connection to Toad Intelligence Central**

A Toad Intelligence Central user can create a MySQL connection to Toad Intelligence Central through a third-party tool, such as one of the following:

- Tableau
- MySQL command line interface
- MySQL Workbench

This connection can be used to query tables, views, snapshots and datasets stored in Toad Intelligence Central.

## Requirements / Limitations

Third party tool	Ensure the authentication method you use to connect to Toad Intelligence Central is supported by the third party tool. This is straightforward if you login to Toad Intelligence Central using credentials local to Toad Intelligence Central. If you login to Toad Intelligence Central using Windows credentials then the third party tool must also support MySQL connection via Windows credentials.
Computer where the third party tool is installed	Ensure a MySQL driver is installed appropriate to the third party tool and Toad Intelligence Central. Ensure the default character set is UTF8.
Toad Intelligence Central Share / Manage rights	To see an object that you did not create yourself you must have Share or Manage rights to that object. These rights can be granted by any Toad Intelligence Central user with Manage rights to the object using an application such as Toad Data Point or the Admin Console.
Data source authentication	Ensure the data source authentication you use to access the result set of a table or view is defined in Toad Intelligence Central. This can be done using an application such as Toad Data Point or the Admin Console. It cannot be done using the third party tool.

## Connection

Create the MySQL connection.

Parameter	Description
Host name	The name of the Toad Intelligence Central server host.
Port	The connection port to the Toad Intelligence Central server. This is the Port number set during installation of the Toad Intelligence Central server, by default 3566.
Username and Password	Your username and password to Toad Intelligence Central. Alternatively, if you use Windows credentials to connect to Toad Intelligence Central then select the option to connect via Windows credentials.

## MySQL database

Select the MySQL database where the object is stored. This is dependent on the application used to create the object.

Application	Description
Toad Data Point	The database is defined when the object is published to Toad Intelligence Central.
Admin Console	For a table, view or snapshot the MySQL database is the name of the data source. For a dataset the database is of the form <b>data_owner</b> . The owner is the user that created the dataset.

**i** | **NOTE:** Hidden, temporary and internal Toad Intelligence Central databases and MySQL databases may be visible.

## Queries

Query tables, views, snapshots and datasets.

**i** | **NOTE:** When querying tables and views, execution of SQL may fail under some circumstances. If the SQL used by the third party tool has a MySQL dialect, then that SQL may fail if the query is shipped to a non-MySQL relational database for remote execution. As a workaround, you could use Toad Data Point or the Admin Console to save the table or view as a snapshot and then access the snapshot via the third party tool.

## MySQL Views

You can use the following MySQL commands to verify the third party tool.

- SHOW [FULL] TABLES command
- DESC[RIBE] command
- EXPLAIN command
- SHOW [FULL] COLUMNS command
- SELECT query against information\_schema.views
- SELECT query against information\_schema.tables



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# License Toad Intelligence Central

Toad Intelligence Central is shipped with a trial key that enables a 90 day open trial license to Toad Intelligence Central. Use this key to evaluate Toad Intelligence Central. At the end of the 90 day trial, if a Data Connectivity license has not been entered, your Toad Intelligence Central functionality will be limited to that of the Toad Intelligence Central Community Edition.

## Data Connectivity License

A Data Connectivity license is required to use Toad Intelligence Central with Data Connectivity. Any Toad Intelligence Central license from a prior release can serve as a Data Connectivity license for this release.

### *To view / activate Toad Intelligence Central licenses*

1. From a web browser, log in to Toad Intelligence Central. Any Toad Intelligence Central user can add a license. Administrator credentials are required to remove a license.
2. Select **Administration | Licensing**.
3. If Toad Intelligence Central has multiple licenses assigned, select the license to view or click **Add License** to add a license.

After licensing Toad Intelligence Central, you can elect to provide anonymous user feedback to help influence the design of future releases. See [Enable User Experience Feedback](#) to learn how to easily enable this feature.



# Users and Groups

New users and groups can be added to Toad Intelligence Central. Which user role is required before adding new users is dependent on how Intelligence Central is configured.



To enable/disable self-registration, specify who can add new users, and configure other registration parameters, see [Configure New User Registration](#).

Use the following icons to identify the type of user or group wherever users/groups are displayed, for example the Users or Groups pages. Review the following descriptions.

## Types of Users

Icon	Description
	<p><b>Active Directory® Users</b></p> <p>To self register from a web browser, click <b>Register as a new user</b> at the login prompt. The computer you use to login to Toad Intelligence Central must be accessible to your Windows® domain. This option is visible only if your local configuration allows self registration via a web browser.</p> <p>To register new users post login, see <a href="#">Add Active Directory Users and Groups</a>. Your local configuration may require login with an Administrator role to add Active Directory users. See <a href="#">Configure New User Registration</a>.</p>
	<p><b>Intelligence Central Users</b></p> <p>To self register from a web browser, click <b>Register as a new user</b> at the login prompt. Deselect the option to <b>Use my Active Directory details</b>. Fill in your user details. The options in this procedure may not be visible or selectable, depending on your local configuration. Your local configuration may not allow self registration from a web browser or registration of new Intelligence Central users.</p> <p>Following login to Intelligence Central from a web browser, to add users, select <b>Administration   Users   Add User   Create Intelligence Central user</b>. The availability of these steps depends on your Intelligence Central configuration.</p>

# Types of Groups

Icon	Description
	<p><b>Active Directory Groups</b></p> <p>Following login to Intelligence Central from a web browser, to add a group from Active Directory, select <b>Administration   Groups   Add Group   Add Active Directory Group</b>. See <a href="#">Add Active Directory Users and Groups</a>.</p> <p>Your Intelligence Central configuration may require login with an Administrator role to add Active Directory groups. See <a href="#">Configure New User Registration</a>.</p>
	<p><b>Intelligence Central Groups</b></p> <p>Any logged in user can create an Intelligence Central group. For more information, see <a href="#">Create Intelligence Central Groups</a> on page 22.</p>

## Add Active Directory Users and Groups

Users with certain privileges can add new users and groups to Toad Intelligence Central by importing users/groups from Active Directory®. Which type of user (role) is allowed to add new users is dependent on how Intelligence Central is configured. See [Configure New User Registration](#) for more information.

### *To add Active Directory User or Group using the Web interface*

1. Use a web browser to log in to Intelligence Central. For more information, see [Log In From a Web Browser](#) on page 13.
2. Click **Administration** and then select either **Users** or **Groups**.
3. Then select **Add User | Add Active Directory User** or **Add Group | Add Active Directory Group**.
  - If the Authenticate to Active Directory dialog opens, enter the credentials for your Active Directory account (including the domain name) in order to access a list of domains and users. See [Authenticate to Active Directory](#) for more information.
4. In the Add Users and Groups from Active Directory dialog, select the users/groups to add to Intelligence Central. See [Add from Active Directory](#) for more information.

## Requirements

1. The Toad Intelligence Central server host must be in a valid Windows® domain.
2. If the Windows domain of the Toad Intelligence Central host and the Windows domain of the user are different then a two-way trust relationship must exist between the Windows domains.

# Known issues and Limitations

Users and groups imported from Active Directory are given the same name in Intelligence Central.

Review the following known issues and limitations.

Issue	More information
Duplicate names	If an Active Directory name already exists on Toad Intelligence Central then that Active Directory name is not imported. You will be notified of any users and groups who cannot be imported.
Long Active Directory usernames	For Active Directory usernames longer than 16 characters, the Intelligence Central username will be a truncated form of the Active Directory name.  If the Active Directory username has a numeric suffix then up to three digits of that numeric suffix is preserved. For example, Active Directory username very_long_username12 transforms to Intelligence Central username very_long_user12.
Active Directory names containing characters not allowed by Toad Intelligence Central	Active Directory names containing the following characters cannot be imported to Intelligence Central. You will be notified of any users and groups who cannot be imported. <ul style="list-style-type: none"><li>• Forward slash (/)</li><li>• Backward slash (\)</li><li>• Left square bracket ([)</li><li>• Right square bracket (])</li><li>• Colon (:)</li><li>• Semicolon (;)</li><li>• Vertical bar ( )</li><li>• Equal sign (=)</li><li>• Plus sign (+)</li><li>• Asterisk (*)</li><li>• Question mark (?)</li><li>• Left angle bracket (&lt;)</li><li>• Right angle bracket (&gt;)</li><li>• Double quote (")</li><li>• At symbol (@)</li><li>• Comma (,)</li></ul>
Active Directory supports sub groups (groups within groups). Intelligence Central does not.	When importing an Active Directory group with sub groups the sub groups and users in sub groups are not imported to Intelligence Central.

# Authenticate to Active Directory

Use the Authenticate to Active Directory dialog to enter your Active Directory credentials in order to access a list of domains and users when attempting to add Active Directory users (or groups) to Intelligence Central.

## To authenticate to Active Directory

- In the Authenticate dialog, enter the following information:

Field	Description
Domain	A domain in the Active Directory forest.
Username	Your username to that domain.
Password	Your password to that domain.

**Remember these credentials on server for future Active Directory access and synchronization—** Select this option to instruct Intelligence Central to do the following:

- Automatically and regularly synchronize imported Active Directory users and groups. For more information, see [Synchronize Active Directory](#) on page 31.
- Cache Active Directory user and group data on Toad Intelligence Central. This has the potential to improve performance of Toad Intelligence Central when looking up Active Directory users and groups.

If you do not select this option, the list of imported users and groups might not be kept in sync with Active Directory.

To view a list of domains configured for Active Directory synchronization, in the Web interface go to **Administration | Server | Users**. Log in with Administrator role is required to view this information. You can also change the credentials used for synchronization from this page. See [Synchronize Active Directory](#) for more information.

# Add from Active Directory

This dialog is used to add users and groups from Active Directory® to Toad Intelligence Central.

## To add users/groups from Active Directory

1. In the Add Users/Groups from Active Directory dialog, select a domain from the drop-down list. Intelligence Central retrieves the list of users in that domain.
2. You can filter the list by entering a partial text string in the text box.
3. To refresh the list, click **Refresh**. The refresh option is available only for domains that are selected for synchronization in Intelligence Central. See [Synchronize Active Directory](#) for more information.

**i | NOTE:** This process could take several minutes, depending on the size of the domain.

4. If the domain you want to view is not listed, click **Add Domain**.
  - Enter the name of the domain to add. Then enter credentials for an account in that domain. Click **Authenticate**. See [Authenticate to Active Directory](#) for more information.

5. Select available Active Directory users/groups and move them to the **users/groups to be added** list.

**i** | **TIPS:**


- Use SHIFT to select multiple users/groups in sequence. Use CTRL to select multiple users/groups not in sequence.
- The number of Active Directory users displayed is limited to 10,000. For domains containing more than 10,000 users, a message informs the user that the list is not displayed in full. To find users not displayed, use the search box.
- Enter a name or partial text string in the search box to filter the list of users and groups. Intelligence Central returns users that contain matching text in the username or full name fields. Clear the search box to clear this filter.

6. Click **Add Users** to add the users/groups to Intelligence Central.

When a group is added, an Active Directory user account is created on Toad Intelligence Central for anyone in the group who does not already have an account on Toad Intelligence Central (in addition to the group account).

7. A Success message displays if the users were successfully added.

## Create Intelligence Central Groups

Intelligence Central allows you to create a group from existing users. You can include user accounts from both Active Directory and Intelligence Central in one group. Intelligence Central groups are identified by the following icon: .

The user creating the group is the owner of the group. The owner and users with an Administrator role are able to remove the group and edit group properties. See [User Roles](#) for more information. If the owner is deleted, then the Administrator (root) becomes the group owner.

**i** | **NOTE:** Intelligence Central groups use a flat structure and contain any number of users. A group cannot contain sub-groups or nested groups.

### To create an Intelligence Central group

1. Using a web browser, select **Administration | Groups | Add Group | Create Intelligence Central Group**.
2. In the Create Group dialog, enter a name and add users. Review the following for additional information.

Field	Description
Group name	Give the group a name. A group name can be up to 128 characters: letters, numbers, space ( ), hyphen (-), underscore (_), period (.). The name is case insensitive.
Description	(Optional) Enter a description.

<b>Field</b>	<b>Description</b>
Group members	<p>Any enabled user on Toad Intelligence Central can potentially be a group member. Select the Intelligence Central users to add to the group. Move these users to the <b>Users in this group</b> list. You (the user creating the group) are added to this list by default and can be removed.</p> <p>The number in brackets following <b>Group Members</b> indicates the number of users in the group.</p> <p>If the number of users on Toad Intelligence Central is extensive then you may like to filter the list of potential users. You can do this by typing text in the <i>Start typing to find available users</i> box. Remove the text to remove the filter.</p>

# Manage Users and Groups





The Toad Intelligence Central Administrator (root) user account is created during the installation of the Toad Intelligence Central server. This Administrator user account has access to all administrative privileges. In the Web interface, other users can be granted an Administrator role with the same privileges for managing users and groups. See [User Roles](#) for more information.

## View User and Group Information

Use a web browser to view users and groups on Toad Intelligence Central. Users and groups are listed alphabetically by username. Disabled users are listed in italics. Properties of a user include the user's name and email address.

### To view user/group information

1. In the Web interface, click **Administration | Users** or **Administration | Groups**.
2. Select a user or group to display details in the right pane.
3. Use the following icons to identify the source of a user account or group.

Users	Groups	Description
		Active Directory® users and groups.  Log in to a web browser to view the properties of Active Directory users and groups. Use Active Directory to edit the properties of Active Directory users and groups. Users with an Administrator role ( <a href="#">User Roles</a> ) manage that Intelligence Central is synchronized with Active Directory user and group information. For more information, see <a href="#">Synchronize Active Directory</a> on page 31.
		Intelligence Central users and groups.  The properties of an Intelligence Central user can be edited by the user themselves and by any user with an Administrator role ( <a href="#">User Roles</a> ). The properties of an Intelligence Central group can be edited by the owner (creator) of the group and by any user with an Administrator role.

Following login from a web browser, click **Administration | Users** or **Administration | Groups**. Select a user or group to show properties.




**i** | **TIP:** Show / hide Active Directory users and Intelligence Central users using the on screen options. Search for users using the search bar.



# Edit User and Group Information

Use a web browser to edit user and group information on Toad Intelligence Central.

## Reset User Password

Users	Description
	The Toad Intelligence Central Administrator cannot reset the password for Active Directory users. The user should follow the standard procedure in their Active Directory environment to reset their Active Directory password.
	<p>Users with an Administrator role (<a href="#">User Roles</a>) can reset the password for Intelligence Central users (authentication by Intelligence Central).</p> <ul style="list-style-type: none"><li>• A new password is randomly generated for the user.</li><li>• The Administrator can see the password.</li><li>• The Administrator can copy the password to the clipboard.</li><li>• If an email client is installed, the Administrator can email the password to the user.</li></ul> <p>Following log in from a web browser, select <b>Administration   Users</b> to list the users of Toad Intelligence Central. Select the user and in the <b>Details</b> pane click <b>Reset Password</b>.</p>
	The Administrator (root) password cannot be reset. If the Administrator password is lost then the procedure is to uninstall and reinstall the Intelligence Central server. During reinstall the Administrator is prompted to enter their password (they can enter a new password).

## Change a User's Role

Users with an Administrator role ([User Roles](#)) can change a user's role. Following log in from a web browser, click **Administration | Users** to list the users of Toad Intelligence Central. Select the user whose role you want to change so their details are visible on screen. In the **Details** pane click **Edit** to change their role.

For more information on each of the user roles, see [User Roles](#).

**i** | **NOTE:** The Administrator (root) role cannot be changed.

## Change User's Email Subscriptions

Intelligence Central can send email notifications to users to provide information about object activities, as well as error reports. Users can select which types of email notifications they want to receive. See [Email Notifications](#) for more information.

### To change a user's email subscriptions

1. Log in using a Web browser and select **Administration | Users**.
2. Select a user name.
3. Click **Change subscription** and then select which email notifications this user should receive.

## Disable/Enable a User

Users with an Administrator role ([User Roles](#)) can disable users from Intelligence Central. Disabled users cannot login to Toad Intelligence Central until an Administrator chooses to enable them. Objects owned by the disabled user remain on Toad Intelligence Central and can be used by users with rights to those objects.



#### NOTE:

- The Administrator (root) cannot be disabled.
- The Administrator cannot disable a user while that user is connected to Toad Intelligence Central.

Following log in from a web browser click **Administration | Users** to list the users of Toad Intelligence Central. Select the user to disable so their details are visible on screen and click **Disable User**.

### Enable a Disabled User

Users with an Administrator role ([User Roles](#)) can enable disabled users. When the user is enabled all their data (objects and authentication, sharing and manage rights) are as before.

#### Users Password when enabled



When the Active Directory user is enabled their password is as per their current Active Directory password.



When the Intelligence Central user is enabled their password is randomly generated. The Administrator can see the password. It is up to the Administrator to notify the user of their new password. The Administrator can copy the password to the clipboard. If an email client is installed, the Administrator can email the password to the user.

Following log in from a web browser click **Administration | Users** to list the users of Toad Intelligence Central. Select the user so their details are visible on screen and click **Enable User**.

## Remove a User



Users with an Administrator role ([User Roles](#)) can remove users from Intelligence Central.

**NOTE:**

- The Administrator (root) cannot be removed.
- The Administrator cannot remove a user while that user is connected to Toad Intelligence Central.
- When the user is removed their objects are also removed. Other Intelligence Central users who may have had access rights to those objects will no longer be able to access those objects.

Following log in from a web browser click **Administration | Users** to list the users of Toad Intelligence Central. Select the user to remove so their details are visible on screen and click **Remove User**.

## Remove a Group

Groups	Description
	Users with an Administrator role ( <a href="#">User Roles</a> ) can remove Active Directory groups. Users in the group who are inactive on Toad Intelligence Central are automatically deleted when the group is deleted. Inactive users are users who have no published objects, no objects shared with them and are part of no other group.
	Intelligence Central groups can be removed by any user with an Administrator role or the owner (creator) of the group.

Following log in from a web browser click **Administration | Groups** to list the groups on Toad Intelligence Central. Select the group so the group details are visible on screen and click **Remove Group**.



**NOTE:** When the group is removed, Share and Manage rights assigned to the group are also removed. The ability for members of the group to see / manage objects may be affected dependent on the other rights assigned to them. A user is given the highest level of rights applied to them either individually or to the group(s) they are a member of.

## User Roles

There are three user roles available in Toad Intelligence Central: Standard user, Power user, and Administrator. During installation of the Toad Intelligence Central server, the Toad Intelligence Central Administrator (root) user account is created. This account has access to all administrative privileges.

The root Administrator account (or any account with the Administrator role) can grant/edit the role for another user account. This can be done when creating a new account or when editing an existing account. See [Users and Groups](#) and [Manage Users and Groups](#) for more information.

Review the following role descriptions.

- **Administrator**—Users with an Administrator role are granted all privileges in the administration of users, groups and objects. They are also granted some server and licensing privileges. The role of the Administrator (root user) cannot be changed.
- **Power User**—Power users have all the privileges of the Standard user. In addition, Power users can force consumers to take a shared object that is published or managed by the Power user.
- **Standard User**—All new users are granted the Standard role, by default.

## Privileges by Role

Review the following privileges for each role.

### User Management Privileges

The following table lists the user management privileges that are provided by each role. See [Manage Users and Groups](#) for more information.

Privilege/Action	Administrator	Power user	Standard user
Add users. This privilege is configuration dependent. See <a href="#">Configure New User Registration</a> .	Y	configuration dependent	configuration dependent
View users and groups	Y	Y	Y
Change a user's role to Administrator, Power user, or Standard user. See <a href="#">Manage Users and Groups</a> .	Y	N	N
Change a user's email subscriptions. See <a href="#">Specify User Email Subscriptions</a> .	Y	user's profile only	user's profile only
Disable/enable a user	Y	N	N
Remove a user	Y	N	N
Edit Intelligence Central users	any user	user's profile only	user's profile only
Reset the password of Intelligence Central users	any Intelligence Central user	user's password only	user's password only
Create Intelligence Central groups	Y	Y	Y
Edit/remove Intelligence Central group	any group	groups owned by user	groups owned by user
Remove an Active Directory group	Y	N	N
<a href="#">Synchronize Active Directory</a>	Y	N	N

### Object Management Privileges

The following table lists the object management privileges that are provided by each role.

Privilege/Action	Administrator	Power user	Standard user
Publish objects	Y	Y	Y
View an object and open it to view its contents	all objects	objects owned by or shared with the user	objects owned by or shared with the user

Privilege/Action	Administrator	Power user	Standard user
Edit an object, grant/revoke access rights to the object, lock the object, delete the object, rename the object	all objects	objects owned by or managed by the user	objects owned by or managed by the user
Force consumers to take a shared object published or managed by the user	Y	Y	N
Publish Toad for Oracle analysis results to Toad Intelligence Central	Y	Y	Y
Access Toad for Oracle analysis Web Modules	Y	Y	Y

## Misc Privileges

Only a user with the Administrator role can view and access the Server page (**Administration | Server**) in the Web interface. The Server page contains the following miscellaneous features:

- [Configure New User Registration](#)
- [Synchronize Active Directory](#)
- Download the [Download Audit Log](#)
- Configure [Enable User Experience Feedback](#)
- Enable/disable email notifications on server. See [Server-Level Configuration for Notifications](#).
- Enable/disable email notification for a user (subscribe/unsubscribe a user). See [Server-Level Configuration for Notifications](#).

Privilege/Action	Administrator	Power user	Standard user
View/access <b>Administration   Server</b>	Y	N	N

## Licensing Privileges

The following table lists the licensing privileges provided by each role. See [License Toad Intelligence Central](#) for more information.

Privilege/Action	Administrator	Power user	Standard user
View licenses	Y	Y	Y
Enter new licenses	Y	Y	Y
Delete licenses	Y	N	N

## Configure New User Registration

The root Administrator account (or any account with the Administrator role) can place some restrictions on how new users are registered and how accounts are created in Intelligence Central.

# Enable/Disable Add Users and Self-Registration

By default anyone can self-register and add users to Toad Intelligence Central. Any user with an Administrator role can disable self-registration.

## *To enable/disable add users and self-registration*

1. Use a web browser to log in to Intelligence Central as a user with the Administrator role.
2. Select **Administration | Server | Users**.
3. In the **New User Registration** section, select one of the following options.

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<b>Only the Administrator can add users</b>	Select this option to allow only users with an Administrator role to add users to Intelligence Central.
<b>Anyone can self-register and add users</b>	Select this option to allow anyone to self-register and add users. A pre-existing account on Toad Intelligence Central will not be required when self-registering. <ul style="list-style-type: none"><li>• <b>Allow browser self-registration</b>—Select this option to allow self-registration through the Intelligence Central Web interface (browser).<p>This option is enabled by default. Depending on your security requirements, you may choose to disable this ability.</p></li></ul>

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For more information about Administrator privileges, see [User Roles](#).

# Specify Default User Role

You can specify a default role for new accounts.

## *To specify default user role*



1. Use a web browser to log in to Intelligence Central as a user with the Administrator role.
2. Select **Administration | Server | Users**.
3. In the **Default user role** field, select a role from the drop-down list.

# Restrict Registration to Active Directory Users

You can require that new accounts use only Active Directory credentials.

## *To restrict new accounts to Active Directory users*

1. Use a web browser to log in to Intelligence Central as a user with the Administrator role.
2. Select **Administration | Server | Users**.

3. Select **New users can register with Active Directory (Windows) credentials only**. When selected, only  Active Directory users can be added to Toad Intelligence Central. No new  Intelligence Central users can be added.

## Synchronize Active Directory

When a domain in the Active Directory® forest is synchronized with Intelligence Central, changes to users and groups in the domain are replicated on Intelligence Central. Any user with an Administrator role ([User Roles](#)) can manage synchronizing Toad Intelligence Central with Active Directory.

### Synchronize status

From a web browser login to Intelligence Central as a user with an Administrator role. Click **Administration | Server | Users**.

**Table 1: Domains in the Active Directory forest synchronized with Toad Intelligence Central**

Field / Action	Description
Domain	Show all domains in the Active Directory forest synchronized with Toad Intelligence Central.
Last synchronized	Show the time the domain was last synchronized with Toad Intelligence Central. If the last attempt was unsuccessful then the error is reported in red.
Edit	Click to Show / Change the username and password used to connect to the domain. This username / password pair is used to synchronize Toad Intelligence Central with Active Directory. The credentials are saved on Toad Intelligence Central.
Remove	Click to remove the domain from this list. The users and groups added from this domain will remain on Toad Intelligence Central, but will not be synchronized again. The Active Directory credentials saved on Toad Intelligence Central are removed.
Synch Now	Click to synchronize Toad Intelligence Central with the domain now. Note that if a Synchronization operation is already in progress then Toad Intelligence Central must wait till that is finished before it can synchronize again.
Add Domain	Click to add a domain to this list. You will be prompted for credentials to Active Directory. These credentials will be used to synchronize Toad Intelligence Central with the domain.

### Synchronize rules

Changes to users and groups in Active Directory are replicated on Intelligence Central according to the following rules.

Synchronization is scheduled for daily at 12:00 AM (Intelligence Central server time). The time of this automated synchronization schedule cannot be changed.

**Table 2: Synchronization rules**

<b>Active Directory</b>	<b>Toad Intelligence Central</b>
User details updated	Update the user details from Active Directory (name and email address).
User disabled	Disable the user in Intelligence Central
User deleted	Delete the user from Intelligence Central if the user is inactive. Inactive users have no published objects, no objects shared with them as an individual and are part of no other group.  Otherwise, disable the user in Intelligence Central. This is to ensure that if the user owns any objects that they will be kept.
User renamed	Delete or disable the old user in Intelligence Central (as above). A new user account is not automatically created in Toad Intelligence Central.
User enabled	Enable the user in Intelligence Central.
Group details updated	Update the group details in Intelligence Central (name and description).
Group deleted	Remove the group from Intelligence Central. Users in the group who are inactive on Toad Intelligence Central are automatically deleted. Inactive users are users who have no published objects, no objects shared with them and are part of no other group.
Group membership updated (User added to the group)	Add the user to the group in Intelligence Central. Create a the new Intelligence Central user account if the user does not already have one.
Group membership updated (User removed from the group)	Remove the user from the group in Intelligence Central. Delete the user if the user is inactive. Inactive users have no published objects, no objects shared with them as an individual and are part of no other group.



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# Email Notifications

Intelligence Central can send activity reports and error alerts to users for objects they own or manage. A user with the Administrator role can receive an additional report—the Daily or Weekly Digest—that summarizes activities relevant to the Administrator role.

## How to Configure Notifications

Email notification can be configured at three different levels.

- **Server level**—Enable/disable email service at the server. Only users with the Administrator role can perform this configuration. See [Server-Level Configuration for Notifications](#).
- **User level**—Subscribe/unsubscribe an individual user to the email notification service. Only users with the Administrator role can perform this configuration. See [Server-Level Configuration for Notifications](#).
- **Email notification level**—Select which email notifications each individual user receives. Users with the Administrator role can configure email notifications for other users. Each user can edit their own profile. See [Specify User Email Subscriptions](#).

## Types of Email Notifications

There are four types of email notifications.

- **Personal Digest**—Provides a summary of activity for the objects a user owns or manages.
- **Error Alerts**—Sent when an error occurs during script execution or snapshot refresh for objects a user owns or manages. Also available to Administrators.
- **Daily Admin Digest**—Provides a daily summary of activities relevant to the Administrator role. Available to Administrators only.
- **Weekly Admin Digest**—Provides a weekly summary of activities relevant to the Administrator role. Available to Administrators only.

# Server-Level Configuration for Notifications

Before Intelligence Central can start sending email notifications, the email notifications service must be enabled on the Intelligence Central server. In addition, the SMTP mail server must be configured. Both of these actions can be performed by a user with the Administrator role.

A user with the Administrator role can also subscribe/unsubscribe individual users to the email notification service.

## *To enable notifications and configure the SMTP mail server*

1. Select **Administration | Server | Notifications**.
2. Select *On* in the **Email notifications** field.
3. Click **Configure SMTP Mail Server**.
4. In the Configure SMTP Mail Server dialog, enter the mail server host name.
5. If your SMTP mail server supports TLS/SSL, select **Use TLS/SSL**. This will encrypt email communications between Intelligence Central and your SMTP mail server.
6. If the SMTP server requires authentication, select the check box and enter credentials.
7. **From address**—Enter an email address to use as the sender address in each email.
8. **Subject prefix**—Enter a prefix to use at the beginning of the Subject line of each email.
9. Click **Send Test Email** to test your email configuration.
10. Click **Save** to save your settings and close the dialog.

## *To subscribe/unsubscribe users*

- To unsubscribe a user, select the user name in the **Subscribers** list (left pane) and click the right arrow to move the user to the **Unsubscribed** list (right pane).
- To resubscribe a user, select the user name in the **Unsubscribed** list and move the user to the **Subscribers** list.

# Specify User Email Subscriptions

A user with the Administrator role can specify which types of email notifications each individual user can receive.

Any user can specify the email notification options for their own user account.

## *To change a user's email subscriptions*

1. Log in using a Web browser and select **Administration | Users**.
2. Select a user name.

3. Click **Change subscription** and then select which email notifications this user should receive. See [Email Notifications](#) for a description of each notification type.

**i** | **NOTE:** Email Notifications must be enabled on the Intelligence Central server before the Admin Digest can be sent. See [Server-Level Configuration for Notifications](#) for more information.

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## Misc Administrator Activities

In addition to the other server-related activities described elsewhere in this document, users with the Administrator role can also perform the following.

### Download Audit Log

The Audit Log allows you to download a log of activity on Toad Intelligence Central for a specific time period.

The log is a simple spreadsheet and includes the following information:

- Time of event
- Type of event
- Event description
- Object name or database name, if applicable

#### *To download the audit log*

1. From a web browser, log in to Toad Intelligence Central as a user with an Administrator role. For more information about the Administrator role, see [User Roles](#).
2. Click **Administration | Server | Logging**.
3. In the Audit Log section, select a time period.
4. Then click **Prepare Download**. This converts the log to a CSV file. The time to prepare the file for download depends on the time span selected and the usage volume during the time span.
5. Track the preparation of the download on the web browser display.
6. Intelligence Central displays a Success message when the object is ready to download. Click the link in the Success message to download the audit log. The location of the log file on download will be as per your web browser settings.

### Enable User Experience Feedback

You can influence the design of future versions of Toad Intelligence Central and help us improve its quality, reliability and performance.

### ***To enable/disable user experience feedback***

1. From a web browser, log in to Toad Intelligence Central as a user with the Administrator role. For more information about the Administrator role, see [User Roles](#).
2. Click **Administration | Server | Logging**.
3. Select or clear the **Provide anonymous user experience feedback to help improve Toad Intelligence Central** option.

Refer also to the [Privacy Statement](#).

## **Register Server-Side Application**

In the Web interface, you can register and manage server-side applications to be used in Automation. For example, register Toad for Oracle to run Automation Apps on an Intelligence Central server.

An Intelligence Central user with the Administrator role can register server-side applications.

**i** | **NOTE:** Toad for Oracle is automatically registered if installed from the Toad Intelligence Central Server Installer.

### ***To register a server-side application***

1. Install the application on the Intelligence Central server, if not already installed.
2. In the Intelligence Central Web server, select **Administration | Server | Toad for Oracle Automation**. The Automation Applications section displays the list of currently-registered applications.
3. To register the server-side application, click **Add Application**. Then enter a name and the full path to the application on the Intelligence Central server.
4. After the application is registered, when publishing Automation Apps, the client application requires only the name of the registered server-side application instead of the full path to the application on the Intelligence Central server. You can register an application, a program, or a script.

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# Manage Objects

Users with an Administrator role are automatically granted **Manage** privileges to all objects on Toad Intelligence Central. See [User Roles](#) for more information.

In addition to the following object-management activities, the Web interface provides object usage reports. See [View and Download Reports](#) for more information.

## View Objects

In the Web interface, use the Home page to view the objects in Intelligence Central. You can also view a list of objects per user (or group) on the Users page (or Groups page).

Users can see only the objects that they own or that have been shared with them, with the exception of the Administrator. The Administrator can view all objects on Intelligence Central.

### *To view objects and object details*

1. From a web browser, log in to Intelligence Central.
2. Click **Home** to show objects in their folder structure.
3. Enter a partial text string in the Search text box to filter objects.
4. Select an object to display details in the right pane.
5. To view objects associated with a user, go to **Administration | Users**. Select a user to display a list of objects shared with the user and a list of objects published by the user.
6. To view objects shared with a group, go to **Administration | Groups** and select a group.

## Objects, Users and Groups

When a user with an Administrator role generates a list of objects they see all objects on Toad Intelligence Central. When any other user generates a list of objects they see the objects for which they have **Share** or **Manage** rights. Another user may not see all the objects that the Administrator can see.

### *Show the objects owned by a particular user*

From a web browser with log in to Intelligence Central, click **Administration | Users** and select the user. The objects owned by that user are listed in the **Published Objects** pane. Tabs show the number of objects that are **Private** (to that user) and **Shared** (with other Toad Intelligence Central users). Click the Private / Shared tabs to show / hide these objects.

### **Show the objects shared with a particular user**

From a web browser with log in to Intelligence Central, click **Administration | Users** and select the user. The objects shared with that user are listed in the **Shared Objects** pane.

### **Show the objects shared with a particular group**

From a web browser with log in to Intelligence Central, click **Administration | Groups** and select the group. Objects shared with that group are listed in the **Shared Objects** pane.

## **Data Connectivity and Data Objects**

Data connectivity functionality allows Toad Data Point users to publish data objects (views, snapshots, and datasets) to Intelligence Central. Data objects are published to Intelligence Central as a way to store and share data from remote data sources.

**i** | **NOTE:** A Toad Intelligence Central Data Connectivity license is required to enable data connectivity functionality in Intelligence Central. See [License Toad Intelligence Central](#) for more information.

### **ODBC Connectivity**

When data is published from a remote data source by a Toad Data Point user, the connection information is stored on Intelligence Central. Intelligence Central uses ODBC connectivity to connect to relational database sources that have been defined by Toad Data Point.

**i** | **NOTE:** To connect to data sources using ODBC connectivity, supporting ODBC drivers and necessary client files must be installed on the Toad Intelligence Central server host. See [Install Toad Data Point and ODBC Drivers](#) for more information.





### **User Access to Remote Data Source - Authentication**

When a Toad Data Point user publishes a data object to Intelligence Central, the object is associated with a particular data source connection. This data source connection in Intelligence Central must have a login ID (or authentication key) to use when connecting to the remote data source. This ID / authentication key is created when the object is published and can be either shared or personal. A shared ID / authentication key can be used by any user when accessing the remote source. A personal ID / authentication key requires that each user log in using their own personal login credentials when accessing the remote source.

## **Authentication**

The ability of any user, including a user with an Administrator role, to download an object where data is sourced from a remote data source is dependent on the authentication granted to that user. The Administrator role is not automatically granted authentication to view data sourced directly from remote data sources.

The following table describes the origin of data and the authentication requirements for the data objects in Intelligence Central.

Icon	Object	Description
	Tables	Tables are tables of data mapped from data source mappable objects. The data is sourced direct from the data source. Authentication is required to view the contents of the object.
	Views	Views are saved SQL statements. When the SQL statement is executed, data is sourced direct from the data source. Authentication might be required to view the result set if the object was published with a personal key. Authentication is not required if published with a shared key.
	Snapshots	Snapshots are the result set of an executed SQL statement (View) or table. The data is stored on Toad Intelligence Central. Authentication is not required to view the result set.
	Mappable Objects	Mappable objects are data source objects that can be potentially mapped to tables. Authentication is required to list mappable objects and map tables.

## Toad Data Point Automation Script Execution

If the Automation Script scheduled to execute on the Toad Intelligence Central server includes an instruction to send an email, then in order for that email to be sent the Toad Intelligence Central server must have access to an email SMTP port.

If the Automation Script scheduled to execute on the Toad Intelligence Central server includes an instruction to run a macro in an Excel spreadsheet, then Microsoft Excel must be installed on the Toad Intelligence Central host computer for the macro to successfully execute.



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# View and Download Reports

The Web server provides a Reports section which allows you to view and create reports about Intelligence Central object usage. The Reports landing page provides a dashboard-type view that displays top-level usage statistics. The Reports feature is designed mainly for Administrators, but all users can view and export usage reports.

**i** | **NOTE:** Standard and Power users can view statistics for all objects. However, for these users, access to an object from a report page is limited to objects shared with or owned by the user.

## Dashboard View

The dashboard displays top-level usage statistics. Use the dashboard to drill down to more-detailed information or object details. The dashboard graphs group data into the following categories:

- Most-popular objects
- Percentage of objects used
- Most-often published objects

### *To Filter the Dashboard View*

- Select a time period from **What's happened over the**.

## What's popular?

This chart displays the most popular objects, i.e., the objects that have been downloaded or queried the most. You can click an object name to view object details.

1. Click an object name to open the **Home** page with the object selected.
2. In the **Home** page you can view the object details or perform additional actions on the object, such as download the object.



## What's been used?

This graph displays the percentage of objects used (downloaded or queried) in Intelligence Central. Click a graph data point to see the data broken down into usage statistics for the individual objects. Use filtering to narrow your results.

1. Click either the **Objects Used** or **Objects Not Used** section of the graph to view a breakdown of the data.
2. In the **Objects Used** or **Objects Not Used** page, you can filter results by selecting a different time period.
3. **Filter results by object.** (Objects Used) In the Object Downloads and Queries chart, click an object's bar or value to filter the data grid by that object.
4. **Filter results by date.** (Objects Used) In the Daily Downloads and Queries graph, click a data point to filter the data grid by that date.
5. To sort by a column in the data grid, click the column header.
6. To export the data in the data grid, click **Download CSV**.

## What's been published?

This graph shows what types of objects have been published during the selected time period, as well as the percentage for each object type. Click a graph section to view publishing statistics related to each object type.

1. Click a section of the graph to view a breakdown of the data for that object type.
2. In the object type page, you can filter results by selecting a different time period.
3. **Change object type.** To see results for a different object or for all objects simultaneously, select an option from the second drop-down list.
4. **Top 10 Publishers.** Click  to see data for the top 10 publishers. In the Top 10 Publishers chart, hover the cursor over a bar to see a breakdown by Sharing option. Click a bar to filter the data grid by that publisher. To clear the filter, click the highlighted bar again.
5. **All Publishers.** Click  to see data for all publishers. Click a publishers name to filter the data grid by that publisher. Click a value to filter the data grid by that criteria.
6. To sort by a column in the data grid, click the column header.
7. To export the data in the data grid, click **Download CSV**.

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# Support Bundle


A support bundle can assist in the diagnosis of issues such as data connectivity and query performance. To help troubleshoot these issues, you might want to generate a support bundle to send to Quest Software Technical Support. See the following for more information:

- [Create a Support Bundle](#)

## Create a Support Bundle

You can create a support bundle and send it to Quest Software Support. The support bundle contains information about the status, logs, and configuration of Toad Intelligence Central and the Toad Intelligence Central Web server. The support bundle provides information that is used to help troubleshoot problems.

### *To generate and send a support bundle*

1. In the Web interface, click  to open the **About** box.
2. In the About box, click **Contact** to open the Quest Software contact details tab.
3. Then click **Generate support bundle**.
4. A file of type ZIP will be created and then downloaded as per your web-browser settings. You can save this zip file and then attach it to an email to Quest Software Support.

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# Server Maintenance

## Toad Intelligence Central services

The Toad Intelligence Central server runs as three Windows® services that start automatically when the server host starts.

The Toad Intelligence Central server services are:

- Toad Application Server
- Toad Database Server
- Toad Optimization Server

The Toad Intelligence Central Web Server service is:

- Toad Web Server

## Stop the Toad Intelligence Central server

To stop the Toad Intelligence Central server (from the server host):

1. Open **Windows® Control Panel**.
2. Click **Administrative Tools | Services**.
3. Stop ALL of the following services. Right click on each service and select **Stop**.
  - Toad Application Server
  - Toad Database Server
  - Toad Optimization Server

**i** | **NOTE:** If an Automation Script is executing when services are stopped then execution of that script stops when the Toad Intelligence Central server is stopped.

# Restart the Toad Intelligence Central server

After the Toad Intelligence Central server has stopped ([Stop the Toad Intelligence Central server](#)), follow these instructions to restart the Toad Intelligence Central server.

On the server host:

1. Open **Windows® Control Panel**.
2. Click **Administrative Tools | Services**.
3. Start ALL of the following services. Right click on each service and select **Start**.
  - Toad Application Server
  - Toad Database Server
  - Toad Optimization Server

## Toad Intelligence Central Data Folder

ProgramData\Quest Software\Toad Intelligence Central\ stores all user information, data source connection information and mappings for the Toad Intelligence Central server. This folder will potentially grow quite large if there are lots of snapshots and published objects.

The location of this folder was defined when the Toad Intelligence Central server was installed. See [Install the Intelligence Central server](#) for more information.

The default location for the folder is **C:\ProgramData\Quest Software\Toad Intelligence Central\** however the actual location may be quite different. For instance, due to the nature of this folder a decision may have been made to locate this folder on a separate drive.

**i** | **NOTE:** If you upgraded from Intelligence Central 3.2 (or earlier), the location of this folder might be ProgramData\Dell\Toad Intelligence Central.

The folder has three sub folders. When making a copy of this folder ensure you copy all content (files and subfolders):

- ProgramData\Quest Software\Toad Intelligence Central\appserver
- ProgramData\Quest Software\Toad Intelligence Central\conf
- ProgramData\Quest Software\Toad Intelligence Central\data

**i** | **NOTE:** The C:\ProgramData folder is hidden by default. To see the folder, from Windows® Explorer click **Tools | Folder Options**, from the Folder Options dialog click **View | Show hidden files, folders, and drives**.

## Backup the Toad Intelligence Central server

All user information, data source connection information and mappings for the Toad Intelligence Central server are stored in ProgramData\Quest Software\Toad Intelligence Central\. A backup of the Toad Intelligence Central server is a backup of this folder including sub folders.

**i** | **NOTE:** If you upgraded from Intelligence Central 3.2 (or earlier), the location of this folder might be ProgramData\Dell\Toad Intelligence Central.

The Toad Intelligence Central server must be stopped while the backup is made. You may want to ensure the time of the backup does not conflict with tasks Toad Intelligence Central has been scheduled to do, such as refreshing a snapshot or executing a Toad Data Point automation script.

If a backup is taken while Toad Intelligence Central services are still running the backup will be corrupted; **you will not be able to restore or recover from the corrupted backup.**

If your standard backup procedure involves taking an image or full backup of the hard disk then use Windows® Scheduler as documented in this section to schedule the Toad Intelligence Central backup.

Note the Toad Intelligence Central version when you make the backup. The backup can only be restored to this version of Toad Intelligence Central. For example, a backup from Toad Intelligence Central3.2 can only be restored to Toad Intelligence Central3.2. It cannot be restored to Toad Intelligence Central3.3. If you need to restore the backup data, refer to [Restore Toad Intelligence Central](#).

## Manual backup

These steps illustrate what is involved in the backup process. Ensure Toad Intelligence Central server services have stopped. Restart Toad Intelligence Central server services once backup is complete.

1. [Stop the Toad Intelligence Central server](#)
2. Copy the entire ProgramData\Quest Software\Toad Intelligence Central\ folder including subfolders to an appropriate back up media.
3. [Restart the Toad Intelligence Central server](#)

## Executable backup

Toad Intelligence Central is distributed with an executable file that automatically follows the steps of the manual backup.

From the Windows Server® that hosts the Toad Intelligence Central server

1. Log in as Administrator.
2. Open a command prompt.
3. Change directory to the Toad Intelligence Central server bin folder (by default Program Files\Quest Software\Toad Intelligence Central\bin).
4. Execute the backup.bat command. For example: **backup.bat "c:\backup folder"**

Optionally, enclose the target folder for the backup in quotes. In the example the target folder is "c:\backup folder". If the target folder is not specified then the backup will be saved to: ProgramData\Quest Software\Toad Intelligence Central\backup

Verification:

- Open the backup folder to ensure Toad Intelligence Central data folders have been backed up. (See [Toad Intelligence Central Data Folder](#))
- Verify Toad Intelligence Central server services restart once the backup is complete.

## Scheduled backup

Use Windows Scheduler to schedule a local backup of the data files. Follow this procedure if your standard backup procedure involves taking an image or full backup of the hard disk.

1. Open the Windows Task Scheduler.

From the Windows server that hosts Toad Intelligence Central, log in as Administrator. Click **Start | Control Panel | System and Security | Administrative Tools | Task Scheduler**.

2. Click **Action | Create task**.

On the **General** tab, give the task a **Name** and select **Run with highest privileges**.

On the **Triggers** tab, click **New**. Set your required back up schedule. As a consideration, ensure this schedule does not conflict with the schedules set for Toad Intelligence Central such as snapshot refresh and Toad Data Point automation script execution. Ensure the schedule is set to complete prior to the full machine backup.

On the **Actions** tab, click **New**.

- The required action is to **Start a program**.
- The program is located in the bin folder in the Toad Intelligence Central server install folder (by default Program Files\Quest Software\Toad Intelligence Central\bin).
- The name of the program is **backup.bat**.
- Set the **Add arguments** field to the target folder for the backup.
- Set the **Start in** field to the bin folder in the Toad Intelligence Central server install folder (by default Program Files\Quest Software\Toad Intelligence Central\bin).

## Restore Toad Intelligence Central

Follow these instructions to restore a backup of the Toad Intelligence Central server. To backup the Toad Intelligence Central server see [Backup the Toad Intelligence Central server](#).

**i** | **NOTE:** Restore to the same version of Toad Intelligence Central as the backup. For example, a backup from Toad Intelligence Central 3.2 can only be restored to Toad Intelligence Central 3.2. It cannot be restored to Toad Intelligence Central 3.3.

1. [Stop the Toad Intelligence Central server](#)
2. Copy the entire backed up ProgramData\Quest Software\Toad Intelligence Central\ folder to the ProgramData\Quest Software\Toad Intelligence Central\ folder used by the installation.
  - Merge the files to keep both current and backed-up content.
  - Overwrite the files to replace content.
3. [Restart the Toad Intelligence Central server](#)

**i** | **NOTE:** If you upgraded from Intelligence Central 3.2 (or earlier), the location of this folder might be ProgramData\Dell\Toad Intelligence Central. See [Toad Intelligence Central Data Folder](#) for more information.

# Migrate Toad Intelligence Central

Copy ProgramData\Quest Software\Toad Intelligence Central\ from one Toad Intelligence Central server installation to another. ProgramData\Quest Software\Toad Intelligence Central\ stores all user information, data source connection information and mappings. See [Toad Intelligence Central Data Folder](#) for more information.

If you upgraded from Intelligence Central 3.2 (or earlier), the location of this folder might be ProgramData\Dell\Toad Intelligence Central.

## **i** NOTES:

- Ensure the version of Toad Intelligence Central is the same for both installations before migration. Upgrade one of the Toad Intelligence Central installations if necessary.
- In Toad Intelligence Central 2.7.2 (or earlier), attempting to run an Automation script after migration can result in a null password database error (for example, “ORA-01005: null password given; logon denied”). If you encounter this issue, contact Support or implement the following workaround.

*Workaround:* To prevent this issue, before migrating to another server, upgrade your current Toad Intelligence Central installation to version 3.0 (or later). Then perform the migration.

1. **For the Toad Intelligence Central server you are migrating from:**
  - a. [Stop the Toad Intelligence Central server](#)
  - b. Make a copy of ProgramData\Quest Software\Toad Intelligence Central\.
2. **For the Toad Intelligence Central server you are migrating to:**
  - a. [Stop the Toad Intelligence Central server](#)
  - b. Replace ProgramData\Quest Software\Toad Intelligence Central\ with the copy you made in **Step 1.b.**
    - Merge the files to keep both the current and backed up content.
    - Overwrite the files to replace the current content.
  - c. [Restart the Toad Intelligence Central server](#)
3. **For the Toad Intelligence Central server you are migrating from:**
  - a. Optionally, [Restart the Toad Intelligence Central server](#)
4. **The Administrator connects to Toad Intelligence Central via a web browser**
  - a. The Administrator password is the Administrator password for the Toad Intelligence Central server you migrated from.
  - b. Reenter the Toad Intelligence Central License.
  - c. Notify Toad Intelligence Central users of the change. If the host name or IP address of the Toad Intelligence Central server has changed then they will need to update their connection details as appropriate.



**i** | **NOTE:** A known issue on connecting to Toad Intelligence Central following migration is Error fetching build\_arch for Intelligence Central server. If you see this error then right click the **Data** folder in ProgramData\Quest Software\Toad Intelligence Central\ and select **Properties**. On the **General** tab in the **Attributes** section ensure **Read-only** is NOT selected.

#### 5. **Data connectivity**

Some data source connections make use of drivers installed on the Intelligence Central server. Ensure all drivers required by the Intelligence Central server data source connections are installed on the new Intelligence Central server.

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# Upgrade Toad Intelligence Central

To upgrade, run the Toad Intelligence Central installer.

This release of Toad Intelligence Central has been tested with and supports an upgrade from either of the two previous versions. For example, an upgrade to Intelligence Central 3.3 from version 3.2 or 3.1 has been tested and is supported.



## NOTES:

- The Toad Intelligence Central Data folder stores user information, data source connection information and mappings, snapshots and datasets. This folder is not affected by the upgrade. See [Toad Intelligence Central Data Folder](#) for more information.
- By default, the location of the Toad Intelligence Central Data folder is ProgramData\Quest Software\Toad Intelligence Central\. If you upgraded from Intelligence Central 3.2 (or earlier), the location of this folder might be ProgramData\Dell\Toad Intelligence Central.
- To upgrade Toad Intelligence Central from a deprecated operating system, refer to [Upgrade Toad Intelligence Central from a deprecated operating system](#).

## Upgrade Toad Intelligence Central from a deprecated operating system

Follow these instructions to upgrade Toad Intelligence Central from a deprecated operating system.

1. [Stop the Toad Intelligence Central server](#).
2. **Copy ProgramData\Quest Software\Toad Intelligence Central\ including subfolders to the location that will be used by Toad Intelligence Central 3.3**

The default location is (C:\ProgramData\Quest Software\Toad Intelligence Central\). This folder will potentially grow quite large if lots of users publish lots of objects and take snapshots. You may choose to change the default folder location. For example, you may choose to direct the data files folder to a separate drive. If you do change the location of the data files folder be sure to document it as this folder is frequently referred to during server maintenance.

If you upgraded from Intelligence Central 3.2 (or earlier), the location of this folder might be ProgramData\Dell\Toad Intelligence Central.

See [Toad Intelligence Central Data Folder](#) for more information.

3. [Install the Intelligence Central server 3.3](#) on a supported operating system.

During installation you will be prompted for the Data Files Folder. Ensure this location is set to the place you copied ProgramData\Quest Software\Toad Intelligence Central\.

4. **The Administrator connects to Toad Intelligence Central 3.3 via the Web Server**

- a. The Administrator password is the Administrator password for the original Toad Intelligence Central installation.
- b. Reenter the Toad Intelligence Central License.
- c. Notify Toad Intelligence Central users of the change. As the host name / IP address of the Toad Intelligence Central server has changed then they will need to update their connection details as appropriate.

**i** | **NOTE:** A known issue on connecting to Toad Intelligence Central 3.3 following this upgrade is Error fetching build\_arch for Intelligence Central server. If you see this error then right click the **Data** folder in ProgramData\Quest Software\Toad Intelligence Central\ and select **Properties**. On the **General** tab in the **Attributes** section ensure **Read-only** is NOT selected.

5. **Use Toad Intelligence Central 3.3 (Data Source Connections and Drivers)**

Some data source connections make use of drivers installed on the Intelligence Central server. Ensure all drivers required by the Intelligence Central server data source connections are installed on the new Intelligence Central server.

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# Uninstall Toad Intelligence Central

Use the Toad Intelligence Central installer to uninstall each component.

## Backup / Remove Data

Data from Toad Intelligence Central is stored in ProgramData\Quest Software\Toad Intelligence Central\ . This folder is not removed automatically on uninstall. Backup or remove it manually as required.

**i** | **NOTE:** If you upgraded from Intelligence Central 3.2 (or earlier), the location of this folder might be ProgramData\Dell\Toad Intelligence Central.

For more information see: [Backup the Toad Intelligence Central server](#) and [Toad Intelligence Central Data Folder](#).

## We are more than just a name

We are on a quest to make your information technology work harder for you. That is why we build community-driven software solutions that help you spend less time on IT administration and more time on business innovation. We help you modernize your data center, get you to the cloud quicker and provide the expertise, security and accessibility you need to grow your data-driven business. Combined with Quest's invitation to the global community to be a part of its innovation, and our firm commitment to ensuring customer satisfaction, we continue to deliver solutions that have a real impact on our customers today and leave a legacy we are proud of. We are challenging the status quo by transforming into a new software company. And as your partner, we work tirelessly to make sure your information technology is designed for you and by you. This is our mission, and we are in this together. Welcome to a new Quest. You are invited to Join the Innovation.

## Our brand, our vision. Together.

Our logo reflects our story: innovation, community and support. An important part of this story begins with the letter Q. It is a perfect circle, representing our commitment to technological precision and strength. The space in the Q itself symbolizes our need to add the missing piece—you—to the community, to the new Quest.

## Contact Quest

For sales or other inquiries, visit [www.quest.com/company/contact-us.aspx](http://www.quest.com/company/contact-us.aspx) or call 1-949-754-8000.

## Technical Support Resources

Technical support is available to Quest customers with a valid maintenance contract and customers who have trial versions. You can access the Quest Support Portal at <https://support.quest.com>.

The Support Portal provides self-help tools you can use to solve problems quickly and independently, 24 hours a day, 365 days a year. The Support Portal enables you to:

- Submit and manage a Service Request
- View Knowledge Base articles
- Sign up for product notifications
- Download software and technical documentation
- View how-to-videos

- Engage in community discussions
- Chat with support engineers online
- View services to assist you with your product