

# CMS - Manage CAST Management Studio Connections

## Manage CAST Management Studio Connections

Connection profiles are used to record a set of connection parameters - they are used when [launching the CAST Management Studio](#) and enable you to choose the Management Service (<prefix>\_MNGT) you would like to connect to.

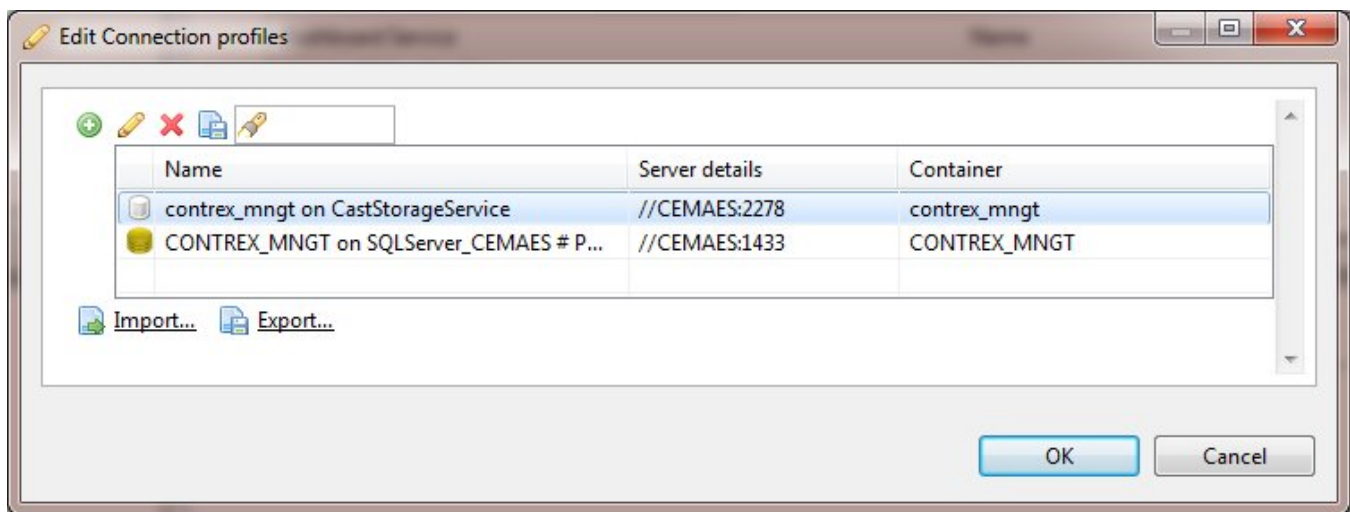
Please see [CAST Management Studio - Rights](#) for more information about how server access rights and permissions are handled in the CAST Management Studio.

During the installation process (if using a **Combined Install** option), **CAST Server Manager** will automatically create a connection profile to the CAST Management Studio database/schema (<prefix>\_MNGT) you have installed. This connection profile is stored in a proprietary XML file on your hard drive. When you first launch the CAST Management Studio, you will be prompted to check that the connection profile is correct (see [Launching the CAST Management Studio](#)).

Once connected, you can create new connection profiles, and view/modify existing connection profiles. Use the sections below to find out more.

### Managing connections

All connection profiles are managed in the **Edit Connection Profiles dialog box**:



This can be accessed as follows:

- Click the **Window > Manage CAST-MS Connections** option located on the toolbar

Each profile is displayed in this dialog box. Column headings and buttons are explained below:

<b>Icon</b>	Indicates the host server type: <ul style="list-style-type: none"><li>•  &gt; <b>Microsoft SQL Server</b></li><li>•  &gt; <b>Oracle Server</b></li><li>•  &gt; <b>CAST Storage Service</b></li></ul>
<b>Server details</b>	Indicates the host server name and connection port
<b>Name</b>	Displays the name of the connection profile
<b>Container</b>	Displays the name of the CAST Management Studio database/schema (<prefix>_MNGT) that will be used to connect to
	Use this button to add a new connection profile. See section below.
	Use this button to edit an existing connection profile
	Use this button to remove a profile
	Use this button to export ALL the displayed connection profiles to file. You will be prompted to choose a location and name for the file. The resulting file will be named <name>.pmx.



Use this button to import a connection profile or profiles. You will be prompted to choose the location of your **.pmx** file for import. Once imported the connection profile(s) will be displayed in the list.

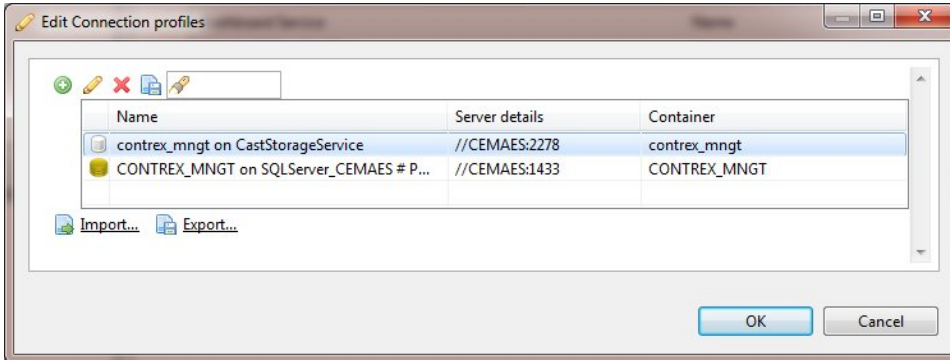
### Right click menu

You can also use the right click menu on a connection profile. Options are identical, except for the **Verify** option, which will test the connection to server defined in the connection profile (identical to the [Test connection](#) option).

### Add a new connection profile

To add a new connection profile:

- Click the **Window > Manage CAST-MS Connections** option
- The **Connection Profile dialog box** will be displayed - if this is the first time you have accessed this dialog box, then only one connection profile will be visible (the profile created during the installation process):



- Click the button. A floating dialog box will be displayed enabling you to choose the type of connection profile you require:

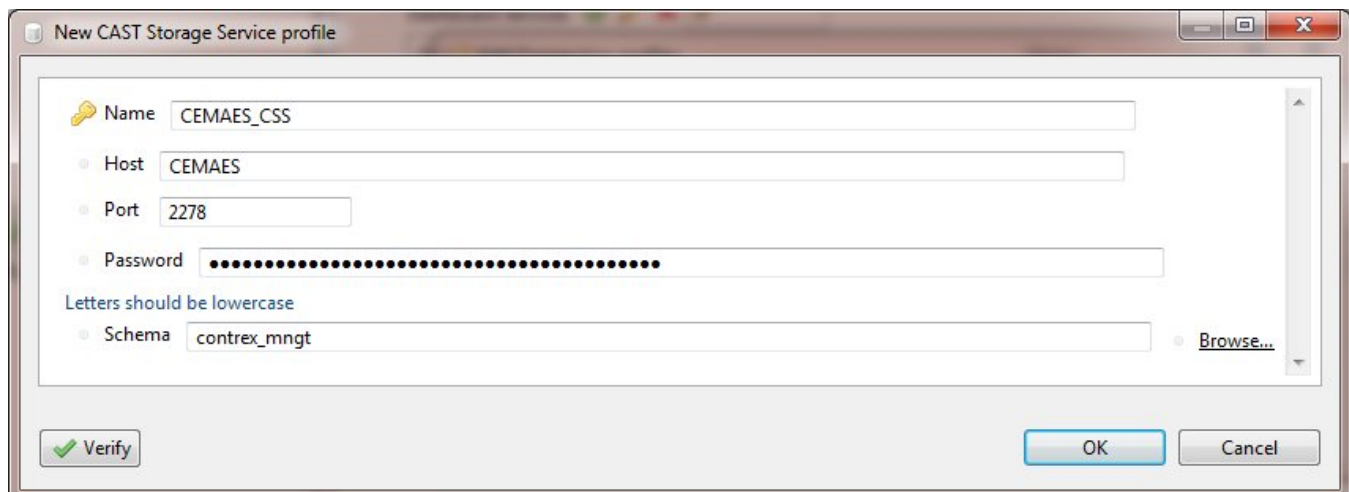


- A new dialog box will then be displayed enabling you to define the connection details. The fields differ slightly depending on the connection type you have chosen. Each is explained below.
- Once the connection parameters have been filled in, you can use the **Verify** option to check that the connection to the target server is successful (a message box will indicate the success or otherwise).
- Click **OK** to save the connection profile in the **Edit Connection Profiles dialog box**
- Next time you launch the CAST Management Studio, the new profile will be visible in the **Edit Connection Profiles dialog box**.


### Notes

- A connection profile is distinct from a connection defined in the [Services view](#). In the **Services view**, the connections do not specify a CAST Management Studio database and are thus only to connect to Analysis, Dashboard and Measurement Services.

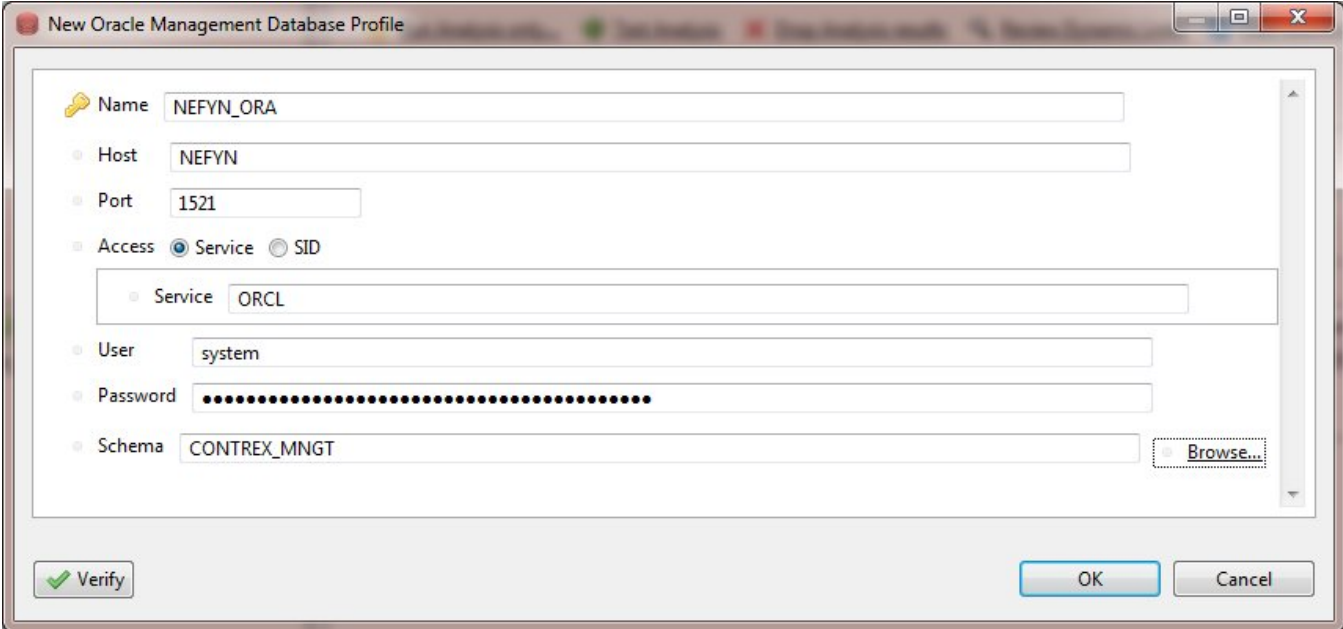
### CAST Storage Service



<b>Name</b>	Displays the name of your connection profile. Note that this name does not need to correspond to the host name of your server. However, for ease of recognition, CAST recommends using a naming convention which can be easily understood.
<b>Host</b>	Displays the host name of your database server. You can also enter an IP address if required. You can edit the field by selecting it and then modifying or replacing as appropriate.
<b>Port</b>	Displays the port number for accessing your database. You can edit the field by selecting it and then modifying or replacing as appropriate. Default port settings are as follows: <ul style="list-style-type: none"> <li>• <b>CAST Storage Service 4</b> &gt; 2284</li> <li>• <b>CAST Storage Service 3</b> &gt; 2282</li> <li>• <b>CAST Storage Service 2</b> &gt; 2280</li> </ul>
<b>Password</b>	Displays the password (in encrypted format) that corresponds to your <b>Operator</b> login.  You can edit the field by selecting it and then modifying or replacing as appropriate.  Please see <a href="#">CAST Management Studio - Rights</a> for more information about how server access rights and permissions are handled in the CAST Management Studio.
<b>Schema</b>	Displays the name of the target Management Service (<prefix>_mngt). You can edit the field by selecting it and then modifying or replacing as appropriate - or you can use the <b>Browse</b> button to select the Management Service you require.  Note that the schema name <b>MUST</b> be entered using lowercase.

 Note that a connection to a CAST Storage Service or PostgreSQL instance will always connect to the **postgres database** within the instance and expect that the CAST Management schema and associated CAST schemas are members of this database. It is not possible to choose a different database.

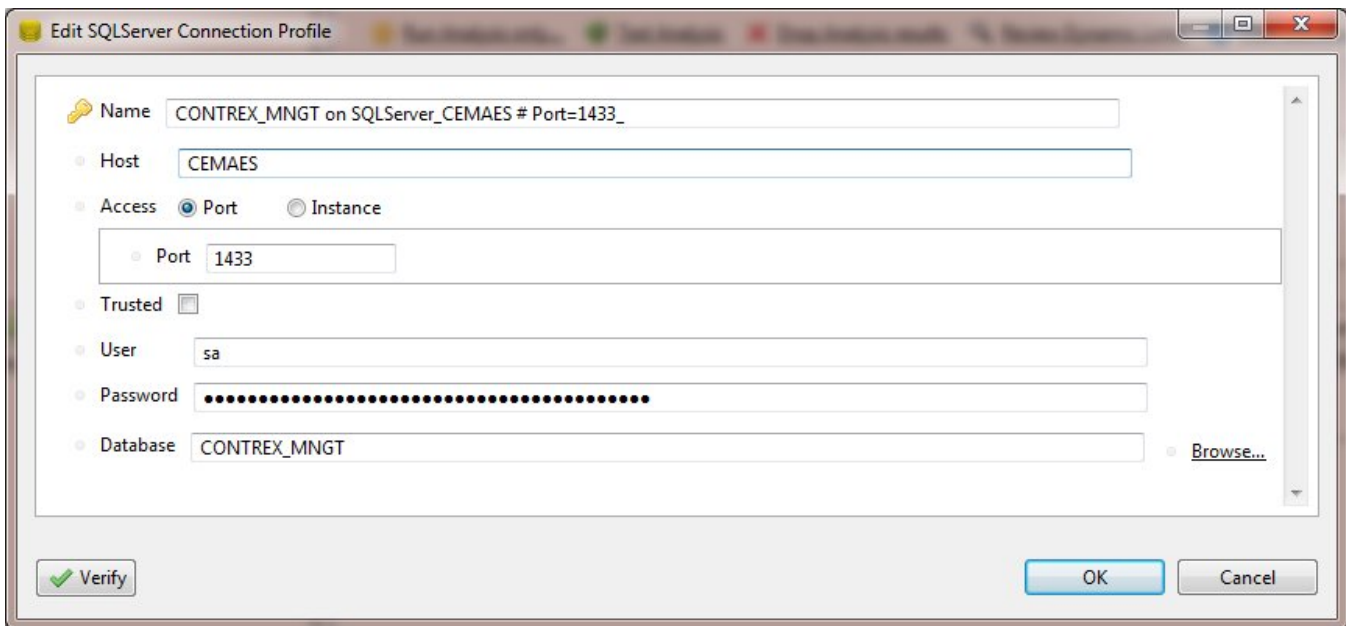
### Oracle Server



<b>Name</b>	Displays the name of your connection profile. Note that this name does not need to correspond to the host name of your server. However, for ease of recognition, CAST recommends using a naming convention which can be easily understood.
<b>Host</b>	Displays the host name of your database server. You can also enter an IP address if required. You can edit the field by selecting it and then modifying or replacing as appropriate.
<b>Port</b>	Displays the port number for accessing your database. You can edit the field by selecting it and then modifying or replacing as appropriate. Default RDBMS port settings are as follows: <ul style="list-style-type: none"> <li>• <b>Oracle</b> &gt; 1521</li> </ul>

<b>Access</b>	Displays the database server access mode type ( <b>SID</b> or <b>Service</b> ). Choose the appropriate option for your environment - the below option will then differ according to your choice.
<b>Service</b>	Displays the <b>Service</b> name for accessing your database. This field will only be displayed if you selected <b>Service</b> from the above <b>Access</b> option.  You can edit the field by selecting it and then modifying or replacing as appropriate.
<b>SID</b>	Displays the <b>SID</b> for accessing your database. This field will only be displayed if you selected <b>SID</b> from the above <b>Access</b> option.  You can edit the field by selecting it and then modifying or replacing as appropriate.
<b>User</b>	Displays the user login that has sufficient privileges to access the required Management Service on the selected database server. In the case of Oracle servers this is the schema name. You can edit the field by selecting it and then modifying or replacing as appropriate.  Please see <a href="#">CAST Management Studio - Rights</a> for more information about how server access rights and permissions are handled in the CAST Management Studio.
<b>Password</b>	Displays the password (in encrypted format) that corresponds to your User login. You can edit the field by selecting it and then modifying or replacing as appropriate.
<b>Schema</b>	Displays the name of the target Management Service (<prefix>_MNGT). You can edit the field by selecting it and then modifying or replacing as appropriate - or you can use the <b>Browse</b> button to select the Management Service you require.

### Microsoft SQL Server



<b>Name</b>	Displays the name of your connection profile. Note that this name does not need to correspond to the host name of your server. However, for ease of recognition, CAST recommends using a naming convention which can be easily understood.
<b>Host</b>	Displays the host name of your database server. You can also enter an IP address if required. You can edit the field by selecting it and then modifying or replacing as appropriate.
<b>Access</b>	Displays the database server access mode type ( <b>Port</b> or <b>Instance</b> ). Choose the appropriate option for your environment - the below option will then differ according to your choice.
<b>Port</b>	Displays the port number for accessing your database. This field will only be displayed if you selected <b>Port</b> from the above <b>Access</b> option.  You can edit the field by selecting it and then modifying or replacing as appropriate.  Default RDBMS port settings are as follows: <ul style="list-style-type: none"> <li>• <b>Microsoft SQL Server</b> &gt; 1433</li> </ul>

<b>Instance</b>	<p>Displays the instance name for accessing your database server. This field will only be displayed if you selected <b>Instance</b> from the above <b>Access</b> option.</p> <p>You can edit the field by selecting it and then modifying or replacing as appropriate.</p>
<b>Trusted</b>	<p>If selected, this flags the connection as trusted using your current Windows login credentials - there is then no need to enter a user or password (these fields will be disabled).</p>
<b>User</b>	<p>Displays the user login that has sufficient privileges to access the required Management Server on the selected database server. You can edit the field by selecting it and then modifying or replacing as appropriate.</p> <p>Please see <a href="#">CAST Management Studio - Rights</a> for more information about how server access rights and permissions are handled in the CAST Management Studio.</p>
<b>Password</b>	<p>Displays the password (in encrypted format) that corresponds to your User login. You can edit the field by selecting it and then modifying or replacing as appropriate.</p>
<b>Database</b>	<p>Displays the name of the target Management Service (<b>&lt;prefix&gt;_MNGT</b>). You can edit the field by selecting it and then modifying or replacing as appropriate - or you can use the <b>Browse</b> button to select the Management Service you require.</p>

See Also

[Services view](#) | [Preferences](#) | [CAST Management Studio - Rights](#)

