Toad™ Data Point 4.0
Getting Started Guide
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About Toad Data Point

Toad™ Data Point is a multi-platform database query tool built for anyone who needs to access data, understand data relationships, and quickly produce reports.

With Toad Data Point, you can:

• Connect to almost any database or ODBC data source
• Write SQL queries and join data across all platforms
• Automate and schedule frequent and repetitive tasks
• Streamline data collection
• Collaborate with team members
• Export data in a variety of file formats

Toad Data Point provides a full-featured Database Explorer, Query Builder, and Editor for the following databases:

• Oracle®
• SQL Server® and SQL Azure
• IBM® DB2® (LUW and z/OS)
• SAP® ASE, IQ, SQL Anywhere, and HANA
• Teradata®
• MySQL

Toad Data Point also provides querying and reporting functionality via the following provider types: ODBC, Business Intelligence and NoSQL, Microsoft® Excel®, and Microsoft Access®.

ODBC Connections

The purpose of the ODBC provider is to offer basic connection and querying capabilities to any database that supports an ODBC 3.0 or later driver. For a list of databases tested with the ODBC provider, see the System Requirements in the Release Notes. This form of connectivity allows connections to databases such as Netezza, IBM iSeries, Ingres, and Vertica™. Because this form of connectivity is generic, it is not full-featured and may not be as robust as the fully-exploited providers for the other databases.

Business Intelligence and NoSQL Data Sources

Toad Data Point provides users with the ability to connect to non-traditional data sources, such as Business Intelligence and NoSQL sources. You can connect to these data sources and explore data and objects, query data, report results, and automate tasks. The following data sources are supported:

<table>
<thead>
<tr>
<th>Business Intelligence</th>
<th>Oracle Business Intelligence Enterprise Edition (OBIEE), SAP Business Objects™, Salesforce®, Microsoft SQL Server Analysis Services, Azure DataMarket, Google Analytics™, OData, and SharePoint®</th>
</tr>
</thead>
<tbody>
<tr>
<td>NoSQL</td>
<td>Azure Table Services, Cassandra™, Cloudera Impala, DynamoDB, HBASE™, Hive™, MongoDB™</td>
</tr>
</tbody>
</table>
The Toad Data Point Workspace

Use the following diagram to get to know the primary user interface and default workspace for Toad Data Point. You can access many of Toad’s major tools by clicking the toolbar buttons (icons) in the main toolbar.

You can also access the tools you need for viewing, querying, and analyzing data, as well as for creating reports and automating tasks, by using the Tools and View menus in the Toad main toolbar.
Toad Data Point Tools

Toad provides tools that help you succeed in your database querying and reporting goals. The following table provides a list of the major tools and features available in Toad Data Point.

<table>
<thead>
<tr>
<th>Toad Tool / Feature</th>
<th>Benefit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Connection Manager and Navigation Manager</td>
<td>Connect to any database type for basic querying needs. Using one tool for all platforms makes it easier to learn and train others. Managers can create common files shared by all users. This ensures consistency for connections, queries, and reports. Easily share connections between users by importing or exporting them.</td>
</tr>
<tr>
<td>Import/Export Connections</td>
<td>Easily share connections between users by importing or exporting them.</td>
</tr>
</tbody>
</table>
| Database Diagram                     | Database schemas can be complex and difficult for new users to understand. The Database Diagram displays the database relationships between tables to reduce the learning curve. It also provides the following useful features:  
  • Add notes to help users learn more about specific tables and columns.  
  • Hide columns that are rarely used so users can focus on critical information.  
  • Add manual relationships to commonly used joins in queries.  
  • Save, share, or use Database Diagrams as a template for building queries. |
| Query Builder                        | Create complex queries visually using the Query Builder. You can also:  
  • Reverse engineer a query from the Editor.  
  • Create a cross-connection query between different database providers, such as Oracle and DB2.  
  • Add Lookup tables to a column for easy filtering.  
  • Use bind variables to optimize a query.  
  • Annotate tables, relationships, or the actual diagram with notes.  
  • Save or share the query for future use.  
  • Add Query Builder files to the Project Manager for easy access during your sessions. |
| Editor                               | Easily compose queries in the Editor using code completion. You can also drag and drop database objects into the editor window from the Object Explorer.                                                                 |
| Create Excel Reports                 | Build Excel reports and share them with colleagues. The One Click Export feature offers options for quickly building Excel reports, including pivot tables for data manipulation. If you want data in an exported report to reflect changes to the database, you can use the One Click Export feature to export the underlying query with the report so it can be refreshed with the latest updates. You can also use the Export Wizard to export data to a new or existing Excel file. |
| Project Management                   | Organize files and make them easily accessible to provide significant time savings. The Project Manager provides an easy way to group database diagrams, queries, and reports. It also provides the following useful features:  
  • Create multiple projects to manage and track related tasks.  
  • Double-click files in the project to quickly load them for review or execution. You can also add links to favorite web sites and directories.  
  • Email files to colleagues or send them to your local network share.  
  • Use the To-Do list to track items you need to complete.  
  • Add database connections to a project.  
  • Save and organize bind variable values. |
### Automation

Tasks that are frequently repeated can be automated and scheduled using Automation. You can schedule long running queries to execute during off-hours and can automatically export the results to Excel. You can also add these tasks to the Project Manager, and then double-click them to execute them. Automation allows you to extend your work day without being there.

### Share Files and Reports

Store files and reports in libraries that can be shared with colleagues. You can specify a directory on a network share to share files, reports, and even code snippets with others.

---

**Note:** Content in this document applies to the commercial version of Toad, and may contain information about features that are not available in the freeware version.
Connect to a Database

Toad Provides Native Database and ODBC Connections

Toad Data Point provides native database connections to the following database providers:

- Oracle
- SQL Server and SQL Azure
- IBM DB2 (LUW and z/OS)
- SAP ASE, IQ, SQL Anywhere, and HANA
- Teradata
- MySQL

Toad also allows you to create an ODBC connection to a database that supports an ODBC 3.0 (or later) driver. However, an ODBC connection may not be as full-featured as the native connection, so Toad recommends using the native connection whenever possible.

**Note:** See the Toad Data Point Release Notes for a list of tested ODBC connections.

About Database Connections

In Toad, a connection represents one or more actual connections to the database. Toad creates an initial database connection for general usage. It also creates a separate database connection for each Editor (the first time you execute a statement) and a separate database connection for each Data tab in the Database Explorer (the first time you select the tab and data is queried). The database connection for each Editor and each Data tab remains open until you close the associated window. However, the connections remain in an inactive state if a statement is not currently executing.

- To see detailed information about a database connection, place your cursor over the connection name in the Navigation Manager or Connection Manager pane.
**Switching Connections**

Use the connections drop-down list located in the Connections toolbar to switch to another connection.

![Connections Window](image)

To switch to another open connection, thereby making that connection the active one, do one of the following:

- Select the connection from the open connections drop-down list in the Connections toolbar.
- Double-click a connection in the Connection Manager or Navigation Manager.

**To Change the Connection for an Open Document**

To change the connection for a single open document, with the document window selected do one of the following:

**Note:** This is not the same as switching the active connection for your Toad session, as described above.

- Right-click the document/window tab, select **Change Connection**, and then select another connection.
- Select another connection from the drop-down list located in the Status bar at the bottom of the Toad window.

**Tips:**

- The open connections drop-down list displays all your open connections.
- The open connections drop-down list also lists the open document associated with the connection (in the Document column).
- If you open a new document, Toad opens the document window and automatically applies the currently active connection (the one displayed in the Connections toolbar) to it.
Create Database Connections

Database connections can be created and managed using the Connection Manager (View | Connection Manager) or the Navigation Manager (View | Navigation Manager).

To Create a Database Connection

1. In the Navigation Manager, click \( \text{\textbullet} \) to create a new connection.
   
   \textbf{Note:} If the Navigation Manager is not in view, select \textit{View | Navigation Manager}.

2. Select a connection group (for the type of connection you are creating).

3. Complete the information in the Login tab.

4. Click \textit{Save} to save the connection information in the Navigation Manager, or click \textit{Connect} to save the information and connect to the database.

Notes:

- In Toad, your password is saved as obfuscated text.
- If you plan to use this database connection in an Automation script, you must save your password.

To Use the Navigation Manager

- To open a connection in the Navigation Manager, double-click the database name, or select the database connection and click \( \text{\textbullet} \).

- To view the database connection's Properties, select the database name and click \( \text{\textbullet} \).

- To close a database connection, select the database connection and click \( \text{\textbullet} \).

To Import Connections

1. To import connections from an xml file, click \( \text{\textbullet} \) on the Connections Manager or Navigation Manager toolbar.

2. Browse to and select the xml file. Click \textit{Open}.

3. In the Import Connections dialog, select the connections to import and click \textit{Import}.
Create Oracle Connections

You can connect to your database using a native Oracle database provider in Toad by using one of the following methods:

<table>
<thead>
<tr>
<th>Connection Method</th>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
</table>
| Client connection (Client tab)—Uses an installed Oracle Client or Oracle Instant Client to establish a connection to the database from Toad. | Supports LDAP. See the online Help for more information about configuring the Oracle client to use LDAP. | Requires an Oracle client.  
**Note:** Toad supports Oracle clients and Oracle Instant clients using version 9i or later. |
| Direct connection (Direct Connect tab)—Uses TCP/IP to connect directly to the database. | Does not require the installation of an Oracle Client.  
Recommended for connecting to Oracle 8i databases. | Only supports common data types. Some advanced Oracle object types cannot be retrieved when connecting using this method.  
Does not support LDAP. (To connect using LDAP, use the Client Connection method instead.)  
Cannot be used in a cross-connection query. |

**Notes:**
- Dell recommends using one of the methods described in this table to connect to Oracle rather than an ODBC driver. Because ODBC connectivity is generic, it is not full-featured and may not be as robust as the fully exploited native database provider.
- In addition, Toad’s cross-connection query does not support Oracle Direct connection. If you plan to use the Oracle connection for cross-connection queries, you cannot use the Oracle Direct connection method.

To Configure an Oracle Instant Client

The Oracle Instant client installs only those files needed to connect to your database using OCI. Because this client does not write to the registry (no ORACLE_HOMES) or add to the environmental path, you must manually set environment variables so the client can be used with Toad

1. Save the Oracle Instant Client files in any location on the computer where Toad is installed.
2. On your Windows desktop, right-click My Computer and select **Properties**.
3. Select the Advanced tab and click **Environment Variables**.
4. Click **New** under System Variables and complete the following:

<table>
<thead>
<tr>
<th>Variable Name</th>
<th>Variable Value</th>
</tr>
</thead>
</table>
| PATH          | `<Path where Instant Client is installed>;%PATH%`  
For Example: C:\Program Files\OracleInstantClient;%PATH% |
| TNS_ADMIN     | `<Path where tnsnames.ora file is installed>`      |

5. To use the Oracle Instant Client connection in a cross-connection query, you must also install an Oracle ODBC driver. (While the Oracle Client full install includes an ODBC driver, the Oracle Instant Client does not.)

**Notes:** You cannot use Oracle Direct Connection in a cross-connection query.
To Create an Oracle Connection

1. In the Navigation Manager, click to create a new connection.
   
   **Note:** If the Navigation Manager is not in view, select View | Navigation Manager.

2. Select the Oracle group from the Group list.

3. Complete the information in the Create New Connection dialog. Review the following for additional information:

<table>
<thead>
<tr>
<th>Login Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Database name</td>
<td>Select the alias to use when connecting. This list displays aliases from LDAP as well as any local tnsnames.ora file. When you initially open the connection dialog, Toad retrieves the list of LDAP names from the LDAP server. Toad caches this list and displays it upon subsequent requests, within one Toad session. To refresh the list, click . <strong>Note:</strong> If you do not select a database, Toad uses the ORACLE_SID for the selected home. If an ORACLE_SID value does not exist and you do not specify a database, you cannot connect.</td>
</tr>
<tr>
<td>Password</td>
<td>Enter the password to use when connecting. <strong>Tip:</strong> After connecting, you can set a master password to further secure your connection in Tools</td>
</tr>
<tr>
<td>Connect as</td>
<td>Select whether to connect as either SYSDBA or SYSOPER if you have the appropriate permissions. Otherwise, use the default.</td>
</tr>
<tr>
<td>Schema</td>
<td>Select a schema if you frequently work in a different schema than the one associated with your user name.</td>
</tr>
<tr>
<td>Explain plan table</td>
<td>(Optional) Specify the location of an existing explain plan table to use instead of Toad automatically creating one for you when you execute a statement. This is useful if you do not have necessary permissions to create explain plan tables or want to use an existing table.</td>
</tr>
<tr>
<td>Category</td>
<td>Select or create a category if you want to color code Editor tabs for a specific connection. This can help differentiate between development and production databases. You can also set an option to color code the Object Explorer pane and object editor windows (Create, Alter, Drop, etc.).</td>
</tr>
</tbody>
</table>
| Save password | Select this checkbox if you want Toad to save your password. **Notes:**
   - In Toad, your password is saved encrypted.
   - If you plan to use this database connection in an Automation script, you must save your password. |

<table>
<thead>
<tr>
<th>Oracle Client Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current home</td>
<td>Select client.</td>
</tr>
<tr>
<td>TNSNames Editor</td>
<td>Click this button to edit your local TNSNames file. <strong>Tip:</strong> You can press CTRL+F to open the Find/Replace window to locate entries in the TNS Names Editor. Pressing F3 locates the next entry that matches your criteria.</td>
</tr>
</tbody>
</table>
Click this button to edit SQLNET.ORA parameters. Before editing this file, you should create a backup copy. See SQLNET.ORA Profile Parameters in the Oracle documentation for more information.

<table>
<thead>
<tr>
<th>Direct Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SID</td>
<td>Enter the ORACLE_SID value for the database. This value is specified in the registry under each installed home.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Advanced Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ODBC driver</td>
<td>If an Oracle Client is installed, the default is the Oracle ODBC driver. If an Oracle Client is not installed, the default is the Microsoft Access ODBC driver. Tip: You can specify the ODBC driver to use for all connections for this database provider in Tools</td>
</tr>
</tbody>
</table>

4. Click **Save** to save the connection information in the Navigation Manager, or click **Connect** to save the information and connect to the database.

**Tip:** Connections are stored in the connections.xml file and can be found by clicking the Application Data Directory link in Help | About.
View Database Objects

Toad Data Point provides two tools to let you view database objects:

- Object Explorer provides a list of database objects.
- Database Explorer allows you to view the details of database objects.

Object Explorer

Object Explorer displays the database objects for the currently open (and selected) database connection. You can use Object Explorer to drag and drop database objects and tables into an open Editor or Query Builder window to help you build or compose a query (see “Create Queries”).

To Use the Object Explorer

1. Open a database connection in the Connection/Navigation Manager (double-click the database name, or select a database and click ).
   
   Note: If the Object Explorer pane is not in view, select View | Object Explorer.

2. In the Object Explorer pane, click to select an option for displaying the database objects.
   
   Tip: Use Connection Treelist to view all objects for all currently open connections.

3. Use the first text box / drop-down list to select a schema or to filter by a schema (not available when using a Treelist display).

4. Use the second text box to filter database objects.

   Note: To learn how to use Object Explorer to easily build queries, see “Create Queries.”
Database Explorer

Use the Database Explorer to explore the details of a database or the details of a database object, including table properties, column attributes, indexing, keys, and data. You can also use the Database Explorer to modify database and object properties, as well as data.

To Use the Database Explorer

1. Open a database connection and display the database objects in the Object Explorer pane.
2. Select an object in the Object Explorer pane, then right click and select View Details, or select an object and go to Tools | Database Explorer.

   Note: You can also select a database connection in the Connection/Navigation Manager, then right click and select New DB Explorer.
Create Queries

Toad Data Point provides two ways to create a query:

- Build queries visually using Query Builder
- Compose queries using the Editor

To Build Queries Visually

The Query Builder enables you to create a query without writing or editing SQL statements. Even if you are familiar with SQL, the graphical interface makes it easy to create relationships and visualize the query.

1. Select Tools | Query Builder | Query Builder.
2. Drag tables and views from the Object Explorer to the Diagram pane.
3. Join columns by selecting a column in a table and dragging it to a column in another table. A connector line displays between the two objects to visually represent the relationship.

   Note: By default, all joins are initially created as Inner Joins. Right-click the join to modify the join type.

4. Add columns to the query using one of the following methods:
   
   - Select each column you want to add to the query.
   - To add all columns, select (Add All Columns).
   - To add all columns to the query using a SELECT * statement, select * (Wildcard). If selected, an asterisk displays for the Field name in the Criteria tab.

   The selected columns are displayed in the bottom portion of the Diagram window.
5. To select the type of statement you want to create, click (the default is the Select statement).

**Notes:**
- The CREATE statement is only available for Oracle, DB2, SQL Server, and MySQL.
- If you select an INSERT, UPDATE, or DELETE statement after adding a single table or view to the Query Builder, you cannot add another table or view because it can only apply to a single table or view. Also, if you add more than one table or view to the Query Builder, this action is disabled because it only applies to a SELECT or CREATE statement.
- You can click to remove a column from the query.

6. Complete the query options. Review the following for additional information:

<table>
<thead>
<tr>
<th>Query Builder Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Only fetch unique records</td>
<td>Select this checkbox to eliminate duplicate records from query results.</td>
</tr>
<tr>
<td>Top row count</td>
<td>Enter the number of records that you want to return that have the highest values. You can also select the Percent checkbox to select a percentage of records to return instead of an exact value. <strong>Note:</strong> (For Oracle only) If you select a top row count and attempt to reverse engineer the query, the resulting query does not populate this field. Instead, the original query is placed into a subquery and the workaround wrapping SELECT statement is placed in the main Diagram page. The WHERE ROWNUM condition is placed into the GlobalWhere clause.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Aggregate Function</th>
<th>Select one of the following functions to calculate column values:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avg—Returns the average of the values in a group.</td>
<td></td>
</tr>
<tr>
<td>Avg (Distinct)—Returns the average of the unique values in a group.</td>
<td></td>
</tr>
<tr>
<td>Count—Returns the total number of items in a column. This function does not ignore NULL values when calculating results.</td>
<td></td>
</tr>
<tr>
<td>Count (Distinct)—Returns the total number of unique values in a column.</td>
<td></td>
</tr>
<tr>
<td>Max—Returns the maximum value for the column.</td>
<td></td>
</tr>
<tr>
<td>Min—Returns the minimum value for the column.</td>
<td></td>
</tr>
<tr>
<td>Stdev—Returns the sample standard deviation of a numeric expression evaluated over a set.</td>
<td></td>
</tr>
<tr>
<td>Sum—Returns the sum of all the values in the expression.</td>
<td></td>
</tr>
<tr>
<td>Sum (Distinct)—Returns the sum of all the unique values in the expression.</td>
<td></td>
</tr>
<tr>
<td>Variance—Returns a statistical measure of how far a set of numbers are spread out from each other.</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** If you add a Group By clause, you must specify an aggregate function for any remaining columns.
### Query Builder Options

<table>
<thead>
<tr>
<th>Where Condition</th>
<th>Use to compose a Where clause or to add a subquery.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Options</td>
<td></td>
</tr>
<tr>
<td>1. Select the <strong>Where</strong> field in the column and click [ ]</td>
<td></td>
</tr>
<tr>
<td>2. In the Where Condition editor, then do one of the following:</td>
<td></td>
</tr>
<tr>
<td>• Use the Where Condition editor to compose the clause. See “Set Where Conditions” in the online Help.</td>
<td></td>
</tr>
<tr>
<td>• Click <strong>Subquery</strong> in the editor to add a subquery. See “Add Subqueries” in the online Help.</td>
<td></td>
</tr>
<tr>
<td>3. To learn about adding date ranges, see “Set Date Ranges” in the online Help.</td>
<td></td>
</tr>
<tr>
<td><strong>Notes:</strong></td>
<td></td>
</tr>
<tr>
<td>• If you reverse engineer a query that contains a Where condition from the Editor or edit it in the Query tab of the Query Builder, it displays in a Global Where clause bubble on the Diagram pane rather than the Where Condition field below the Diagram pane. You can double-click the bubble to edit the clause.</td>
<td></td>
</tr>
<tr>
<td>• You can also use the Where Condition to add the same column twice to the query.</td>
<td></td>
</tr>
</tbody>
</table>

Or

<table>
<thead>
<tr>
<th>Group By</th>
<th>Select the column you want to add the Group By clause to and click [+].</th>
</tr>
</thead>
<tbody>
<tr>
<td>Options</td>
<td>You can add a new Group By clause to any remaining columns to group them in sequence. Any remaining columns that do not have a Group By clause must include an aggregate function.</td>
</tr>
<tr>
<td><strong>Tip:</strong></td>
<td>You can add a Group By clause to all selected columns in each table/view, by right-clicking the Diagram pane and selecting <strong>Add Group By</strong>.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Having Condition</th>
<th>Select the operators, aggregate, and expressions to include in the Having condition. This option is disabled unless you have set a Group By clause.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Note:</strong></td>
<td>If you reverse engineer a query that contains a Having condition from the Editor or edit it in the Query tab of the Query Builder, it displays in a Global Having clause bubble (click here to see an example) on the Diagram pane rather than the <strong>Having Condition</strong> field below the Diagram pane. You can double-click the Global Having clause to edit it.</td>
</tr>
</tbody>
</table>

| Sort | Select an option to add this column to the Order By clause and specify a sort direction. |

| Visible | Select this checkbox to return this column in query results. This is useful if you need to include a column in the selection criteria, but do not need to display it in the query results. |

| Field Alias | Enter a name to use as an alias for the column name in the query results. This is useful if you have an ID or vague column name and want to easily identify that column in the query results. |

| Table Alias | Enter a name to use as an alias for the table name in the query results. For example, if there are multiple employee tables that you need to join for the query, you can rename the tables to permanent, contract, etc., to easily identify them. |
| **Note:** | If you selected **All Columns** for a table or created a column using the Edit Calculated Fields window, you cannot modify the table alias. |

7. Click [ ![Execl SQL](image) ] to execute the query.

8. To save the query, right-click the Query Builder tab and select **Save File**. If you save the file as a Query Builder file (.tsm), Toad saves the current connection with the file.
Notes:

- To create a cross-connection query, select Tools | Query Builder | Cross-Connection Query Builder.
- To view details for a table in the Diagram, press F4. If a table is not selected, details for the last selected table display.
- To create a data report, pivot grid, or chart from the data, right-click the data and select Send To | report_type.

To Use the Editor to Compose Queries

Toad Data Point includes a full-featured Editor for composing SQL statements.

1. To open an Editor window, select Tools | Edit | SQL Editor.
2. Type your statement text.
3. To invoke the code completion feature, press PERIOD at the location where you want to display a list of objects.
   
   Tip: You can specify the default options for using code completion in Tools | Options | Editor | Code Completion.
4. To format the code, select Editor | Format Code.
5. To validate the syntax, highlight the block of code in the editor and select Editor | Check Syntax.
6. To execute the SQL statement, click Run SQL.
7. To save the query, right-click the Editor tab and select Save File. If you save the file as a Toad Editor file (.tef), Toad saves the current connection with the file.

Note: To create a cross-connection query using the Editor, select Tools | Edit | Cross-Connection SQL Editor.
Automate Tasks

Toad Data Point provides an Automation tool that allows you to quickly create automation scripts that perform querying and reporting tasks, as well as a number of other activities. You can schedule querying tasks to run when database activity is light, save the results as Excel spreadsheets or Toad Reports, and then distribute the reports automatically.

**To Create an Automation Script**

1. Select **Tools | Automation**.

2. Before building your script, click **Settings** in the script design window and specify the script settings. Use the Activity details pane in the bottom portion of the Automation window to enter your settings. Review the following for additional information:

<table>
<thead>
<tr>
<th>Activity Input</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stop or continue on Error</td>
<td>Select <strong>Stop On Error</strong> to stop the script if an error occurs.</td>
</tr>
<tr>
<td>Send email when error occurs</td>
<td>Select this option to send an email on script error. If selected, you must also click <strong>Compose Email</strong> to compose the email message and to edit the <strong>Email Server Settings</strong>. <strong>Note:</strong> When you specify the error email settings, Toad saves your settings and uses them in all subsequent automation scripts.</td>
</tr>
<tr>
<td>Use relative path to find files</td>
<td>Select to use a relative path that does not include the drive or full path for all activities in the script. This is useful if you want to share your automation scripts with colleagues or place them on a shared network folder.</td>
</tr>
<tr>
<td>Embed files into Automation script</td>
<td>Embeds Toad input files into the script. This makes it easier to share the script with colleagues. <strong>Important:</strong> To use this option, <strong>deselect</strong> it, build your script, select input files, then <strong>re-select</strong> this option. This allows Toad to collect and save the input file paths. This option embeds Data Compare, Data Cleansing, Visualization, Pivot Grid, Toad Data Report, and Import/Export template files. Scripts used by the Run Automation Script activity are also embedded, as are SQL query files used as input by an Import/Export template. <strong>Important:</strong> Files linked using the <strong>Link to File</strong> option in the Select to File, Execute Script, and Select to Editor with Results activities are not embedded [.sql, Editor (.tef), and Query Builder (.tsm) files)]. Toad embeds the files the next time you run or save the script. If necessary, at a later time you can deselect this option and then re-establish links to the original files. <strong>Note:</strong> Toad selects this option when publishing a script to Intelligence Central.</td>
</tr>
<tr>
<td>Truncate log</td>
<td>Select to overwrite the log file each time the script runs.</td>
</tr>
</tbody>
</table>
Toad Data Point Page

Getting Started Guide

Selected environment

Select **Test** to run your script in test mode using the database connection and other settings specified under **Test environment**.

Select **Production** to run your script in production mode using the database connection and other settings specified under **Production environment**.

**Note:** The default connection is the currently active, open connection.

**Root path variable name**—Enter a variable name or use the default name. Then use this variable name in your script wherever you want to apply the path defined under **Root path** in the Test settings and the Production settings.

<table>
<thead>
<tr>
<th>Activity Info</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
</tr>
</tbody>
</table>

3. To build your script, click an activity in one of the Activity groups in the Toolbox, or drag an activity from the Toolbox to the Automation script design window. Repeat this process to add additional activities to your script.

**Note:** You must drag the activity to 📦. When you see the Activity icon replace 📦, then release the mouse button.

4. Select each activity in the design window and then specify the activity's properties in the tabbed Activity widows.

**Tip:** You can save an activity and its properties as a template to reuse in other scripts. Right-click the activity in the design window and select **Save As Template**. After you create the first template, a Templates toolbox displays.

**Note:** Click **Settings** in the design window at any time to go back and review the Automation script settings.
5. After you finish building your script, select one of the following actions from the Wizard bar:

<table>
<thead>
<tr>
<th>Click this...</th>
<th>To...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add to Project</td>
<td>Add an automation script to the current project in the Project Manager. The script is automatically placed in the project's Automation Scripts folder.</td>
</tr>
<tr>
<td>Save</td>
<td>Save an automation script (.tas) in a folder on a local or network drive.</td>
</tr>
</tbody>
</table>
| Run | Test an automation script before scheduling it. The script executes once and the execution log is displayed in the Log window. Resolve any problems that cause activities to fail or disable failed activities before scheduling the script.  
**Tips:**  
- Press F5 to run the automation script.  
- To view the script log, select the Log tab or select View | Output. |
| Publish | Publish script to Toad Intelligence Central. |
| Schedule | Schedule an automation script in the Job Manager. You can schedule a script to execute once or to run repeatedly at a specific interval. |
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- Obtain product notifications
- Download software. For trial software, go to Trial Downloads.
- View how-to videos
- Engage in community discussions
- Chat with a support engineer

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