

Toad® Intelligence Central 3.3

Quick Start 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 Quick Start Guide
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Welcome to Toad Intelligence Central

Toad® 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®.
- **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®.
- **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 use the Toad Intelligence Central Web interface to view and access objects and files in Toad Intelligence Central. This guide is intended for non-Administrator users and provides information about functionality that is available to any user.

For information about Administrator activities that are available only to a user with the Administrator role, see the *Toad Intelligence Central Deployment Guide*.

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.

URL	The address of Toad Intelligence Central is http://hostName/ 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 http://hostName:port/ .
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Log in	Toad Intelligence Central prompts you to login.
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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: **domainusername**. The computer you use to login to Toad Intelligence Central must be accessible to your Windows domain.

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](#)

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.

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.

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

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.

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. See the *Toad Intelligence Central Deployment Guide* to learn more about performing Administrator activities through the Web interface.

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.

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.

Parameter	Description
-----------	-------------

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.
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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 data_owner . 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

Home Page

The Home page is displayed by default when you access Intelligence Central through a Web browser. The Home page allows you to view and access the objects in Intelligence Central that have been shared with you.

Objects and Files Displayed

The **Home** page of the Web interface displays the objects and files published to Intelligence Central. The objects you see are the objects that have been shared with you. The types of objects/files you see depends on what Toad application/applications are being used to publish to Intelligence Central.

For example, Toad Data Point users can publish data objects (views, snapshots, and datasets), Toad documents, Automation scripts, and other resources created in Toad Data Point. Toad for Oracle users can publish Automation apps, .sql files, as well as other resources created in Toad for Oracle.

i | **NOTE:** A Toad Intelligence Central Data Connectivity license is required to enable data connectivity functionality in Intelligence Central.

Web Users

If you are using the Web interface to view and access objects/files published from one or more Toad applications, see the following for more information about the objects and the actions available to you.

- [Toad Data Point](#)
- [Toad for Oracle](#)
- [Toad Data Modeler](#)

Toad Application Users

If your primary method to view and access Intelligence Central objects is through one of the Toad applications, see the application's online Help for more-detailed information about the full range of functionality that is available through the application.

- To learn how to location objects in Intelligence Central, see [Find Objects](#).
- To learn how to view object information, see [Object Details](#).

Click a folder to expand it. Select an object to view more information in the Details pane.

Toad Data Point

Toad Data Point


Toad Data Point allows users to publish data objects (views, snapshots, and datasets), Toad documents (Query Builder, SQL Editor), Automation scripts, database connections, Project Manager projects, and other resources created in Toad Data Point to Intelligence Central.

If you are a Toad Data Point user, your primary method to view and access Intelligence Central objects is through the Toad Data Point application. However, both Toad Data Point users and non-users can view and perform limited operations on Intelligence Central objects using the Web interface.


i | **NOTE:** A Toad Intelligence Central Data Connectivity license is required to enable data connectivity functionality in Intelligence Central.

Download Objects

Users of Toad Intelligence Central can log in through a web browser and download Toad Data Point objects that have been shared with them.

1. Log in through a web browser. See [Log In From a Web Browser](#).
2. Click **Home**.
3. Locate the object. See [Find Objects](#).
4. Select the object to show details. See [Object Details](#).
5. **Download object.** Click  in the Details pane to download the object. The location of the downloaded object is determined by your Web-browser settings.
 - **Enter Variables**—For views containing a variable, Intelligence Central prompts you for a variable value. Enter a new value or use the default. The new value applies to this download only. The default value is specified when the view is published from Toad Data Point and can be modified through Toad Data Point.
 - **Data objects**—For data objects (view, snapshot, or dataset), Intelligence Central prepares the object and displays a Success message when the object is ready to download. Click **Download** in the Success message to download the result set. For more information about data objects, see [Data Connectivity](#).

i **NOTE:** If authentication is required, the data object is not downloaded/accessed and an error message is displayed. You must authenticate through Toad Data Point before you can download this data object. For example, you might be required to authenticate the first time you access a View that was published with a personal key, instead of a shared key.

6. **Filter data.** For data objects, you can filter the data before downloading. Click  in the Details pane to filter data. See [Filter Data to Download](#) for more information.

Automation Scripts

The Intelligence Central Web interface allows you to view and execute Automation scripts that have been shared with you.

i **NOTE:** 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 create an Excel spreadsheet then Microsoft® Excel® must be installed on the Toad Intelligence Central host computer for the Excel spreadsheet to be created. Refer to your Toad Intelligence Central Administrator for more information.


View Script Details

Select a script to view script details in the Details pane. See [Object Details](#) for a description of the Details fields. For Automation scripts, the following additional details are provided.

- **Logs tab**—Displays script execution history. Click **Expand** to expand the Logs tab. This action allows you to view run duration, results, and exit code. Select a run (in the expanded tab) to view the individual execution log.

Run Automation Scripts

You can execute an Automation script from the Web interface. You can execute scripts that you own or that have been shared with you.

1. Log in through a web browser. See [Log In From a Web Browser](#)
2. Click **Home**.
3. Select the Automation script to execute.
4. Click  in the Details pane.
 - **Enter Variables**—If the Automation script executes SQL containing a variable, Intelligence Central prompts you for a variable value. Enter a new value or use the default. The new value applies to this run only. The default value is specified when the script is published from Toad Data Point and can be modified through Toad Data Point.
5. To cancel script execution, click the down arrow in the progress message (located in the page header). Then click **Cancel** in the Background Tasks pane.
6. In the Success (or Error) message, click **View Log** to display the execution log.

For more-detailed information about publishing, using, creating, and managing Automation scripts, see the Toad Data Point online Help.

Snapshots

In the Web interface, you can view and refresh Toad Data Point snapshots. You can view snapshots you own or that have been shared with you. You can refresh snapshots you own or those to which you have Manage privileges.


View Snapshot Details

Select a snapshot to view snapshot information in the Details pane. See [Object Details](#) for a description of the Details fields. For snapshots, the following additional details are also provided.

- **Columns tab**—Displays columns included in the snapshot. Select the **Columns** tab and click **Expand** to view more details.
- **Query tab**—Displays the snapshot's query.

Refresh Snapshots

You can refresh a Toad Data Point snapshot from the Web interface.


1. Log in through a web browser. See [Log In From a Web Browser](#)
2. Click **Home**.
3. Select the snapshot to refresh.
4. Click  in the Details pane.
5. You can view the refresh progress in the Background Tasks pane. Click the down arrow in the progress message (located in the page header) to open the Background Tasks pane.

For more-detailed information about creating, publishing, using, scheduling, and automating snapshots, see the Toad Data Point online Help.

Filter Data to Download

You can filter the data in a view, snapshot, or dataset before downloading the data. This is useful for large data sets as it allows you to download only the data you need, instead of the entire data set.


To filter data before download

1. In the Web interface, select an object to download on the Home page. See [Toad Data Point](#) for more information.
2. In the object's Details pane, click  to filter the data.

- **Enter Variables**—For views containing a variable, Intelligence Central prompts you for a variable value. Enter a new value or use the default. The new value applies to this download only. The default value is specified when the view is published from Toad Data Point and can be modified through Toad Data Point.
- **Download pane**—A data grid opens displaying a preview of the data. In this window you can quickly filter a column or you can create a filter in the filter editor.



i | **NOTE:** If authentication is required, the data object is not downloaded/accessed and an error message is displayed. You must authenticate through Toad Data Point before you can download this data object. For example, you might be required to authenticate the first time you access a View that was published with a personal key, instead of a shared key.

3. To quickly filter a column, do the following:

- Enter a value in the text box below the column header. For date/time columns, click the down-arrow to select a date.
- Then click  beside the text box to change the operator.
- Press **Enter** to apply the filter.
- The text of your filter displays in the upper-left, above the data grid. Click the filter text to open the filter editor and modify the filter further.

i | **TIP:** Filter one or more columns to quickly create the framework for your filter. Then refine it in the filter editor.

4. To create/edit a filter in the filter editor, click **Create Filter** or click the filter text if you already started a filter.

- In the filter editor, click  to add an initial condition. The **And** operator is used by default. To use a different Boolean operation, click **And** and select a different operator.
- To modify an existing condition, click the operator or the value to edit it.
- To add another condition, click .
- To add another group of conditions, click the operator in the parent group and select **Add Group**.
- Click **Save** to save your changes and close the editor.

i | **TIP:** To create a complex filter, plan out your filter before building it in the filter editor. Identify grouped conditions (those in parentheses). Identify the Boolean operator for the main expression. Add parentheses to your expression if necessary to help clarify which conditions should be evaluated first.

5. The data grid displays a preview of the filtered data.

6. Click **Download** in the data grid window to begin the download process.

i | **NOTE:** This action closes the data grid window containing your filter and preview of filtered data.

Intelligence Central prepares the filtered data and displays a Success message when the data is ready.

7. Click **Download** in the Success message to download the filtered data as a .csv file. The location of the download is determined by your Web-browser settings.

Toad for Oracle

Toad for Oracle users can publish Automation Apps, scripts, files, test results, code analysis results, and other resources created in Toad for Oracle to Intelligence Central. For detailed information about how to use Intelligence Central from Toad, see the [Toad for Oracle documentation](#).

Review the following pages found in the Toad Intelligence Central Web interface.


Home

You can use the Home page of the Web interface to view and download Toad for Oracle objects that have been shared with you. In addition, you can manually run Toad for Oracle Automation Apps.

i | **NOTE:** For Toad for Oracle objects, the object's publisher can choose to share and update the object in a mandatory way on Toad Intelligence Central. This ensures consumers of the object always have the latest updates. See the Toad for Oracle documentation for more information.

Download Objects


To download objects

1. Log in through a web browser. See [Log In From a Web Browser](#).
2. Click **Home**.
3. Locate the object. See [Find Objects](#).
4. Select the object to show details. See [Object Details](#).
5. Click  in the Details pane to download the object. The location of the downloaded object is determined by your Web-browser settings.

Run Automation Apps

To manually run an Automation App

1. Log in through a web browser. See [Log In From a Web Browser](#).
2. Click **Home**.
3. Select the Automation App to run.

4. Click  in the Details pane to run the App. After execution starts, Intelligence Central displays a Success message to inform you.

For more information about creating, publishing, and running Automation Apps, see the [Toad for Oracle documentation](#).

Code Quality

The Code Quality page provides information from Code Analysis, Code Tester, and Team Coding. See the Toad for Oracle documentation for a breakdown of the information provided by each of these Toad for Oracle features.

To view Code Quality information for an object

1. Select **Toad for Oracle | Code Quality**.
2. On the Code Quality page, select a database, a schema, and then an object to view the detailed analysis, results, or status.

Code Analysis

Toad for Oracle allows you to publish Code Analysis results to Intelligence Central. Use the Code Analysis page to view Code Analysis reports. See the [Toad for Oracle documentation](#) for more information about using Code Analysis, as well as publishing and viewing Code Analysis data.

To view Code Analysis results

1. Select **Toad for Oracle | Code Analysis**.
2. On the Code Analysis page, select a database, a schema, and then a code analysis object.

Code Tester

Use the Code Tester page to view published test results from the Code Tester feature in Toad for Oracle. See the [Toad for Oracle documentation](#) for more information about using Code Tester.

To open the Code Tester page

- Select **Toad for Oracle | Code Tester**.

Team Coding

The Team Coding page allows you to view the status of all team coding objects.

To open the Team Coding page

- Select **Toad for Oracle | Team Coding**.

DB Health Check

Toad for Oracle allows you to publish the results of a DB Health Check to Intelligence Central. Use the **Database Health Check** page to view published health check results. To learn how to run a DB Health Check and store the results on Intelligence Central, see the [Toad for Oracle documentation](#).

To view a DB Health Check

1. Select **Toad for Oracle | DB Health Check**.
2. Expand a database node and select a health check to view results.


Toad Data Modeler

HTML Reports

HTML Reports are created in Toad Data Modeler.

HTML Reports can be published from Toad Data Modeler to Toad Intelligence Central. From Toad Data Modeler they can be shared with users of Toad Intelligence Central. Refer to your [Toad Data Modeler documentation](#) for more information.

Users of Toad Intelligence Central can log in to the web browser, view and download Toad Data Modeler HTML Reports that have been shared with them.

1. Log in to the web browser.
2. Click **Home**.
3. Locate the object ([Find Objects](#)).
4. Select the object to show details ([Object Details](#)).
5. Click **View** to view the HTML Report in your web browser.
6. Click  to download the HTML report. The location of the report on download will be as per your web browser settings.

i | **NOTE:** A Toad publisher can choose to share and update objects in a mandatory way on Toad Intelligence Central. This ensures consumers of the objects always have the latest updates. For more detail, refer to the Toad application used to publish.

Find Objects

Use your web browser to find objects on Toad Intelligence Central.

Method	Description
By folder	<p>Click Home to show objects in their folder structure.</p> <p>The folder tree is an organizational structure collectively managed by the users of Intelligence Central. The object will be accessible from the parent folder. The parent folder is (optionally) assigned when the object is published / created and can be changed by Managers of the object.</p> <p>The <i>No folder assigned</i> folder is a special folder.</p> <ul style="list-style-type: none"> • The No folder assigned folder holds all objects not yet moved (or assigned) to other folders. • The No folder assigned folder cannot be moved, renamed or deleted. • The No folder assigned folder cannot have sub folders.
By search	<p>Click Home. Use the search bar. The search highlights matching text in the object name, object owner, modified date and object type.</p>
List just the objects you own	<p>From your username, select My Profile. Alternatively, click Administration Users and select your username.</p> <p>The objects owned by you are listed in the Published Objects pane. Tabs show the number of objects that are Private (visible to you and the Administrator) and Shared (with other Toad Intelligence Central users). Click the Private / Shared tabs to show / hide these objects.</p>
List objects shared with you	<p>From your username, select My Profile. Alternatively, click Administration Users and select your username. The objects shared with you are listed in the Shared Objects pane.</p> <p>i TIP: Select a username other than your own. The objects this user has shared with you are listed in the Published Objects pane. The objects shared with both you and this user are listed in the Shared Objects pane.</p>
List objects shared with a group	<p>Click Administration Groups and select the group. Objects shared with this group are listed in the Shared Objects pane. If you are a member of this group then you will see all shared objects. If you are not a member of this group then you will only see the objects shared with you; there may be additional objects shared with this group that you do not have the right to see.</p>

Object Details

From a web browser, click **Home**. Select the object to show details.

Table 1: Object details

Detail	Description
Name	<p>The name of the object. Managers of the object can rename the object.</p> <p>The name of the object must be unique for the object type and owner (user). So an owner (user) cannot have two Dataset type objects with the same name.</p> <p>Objects of the same name and type can be organized into the same folder. Published objects of the same name and type are differentiated by owner name. Objects sourced from data sources with the same name are differentiated by data source name.</p> <p>i NOTE: Data Connectivity object types Tables and Mappable objects cannot be renamed.</p> <p>Data Connectivity object types sourced from data sources are Tables, Views and Snapshots. For a given data source no two objects can have the same name. So for example if a table called "tabledata" exists for a given data source then no other Table, View or Snapshot can be created called "tabledata" on Toad Intelligence Central for that data source. Note that it is possible for an object called "tabledata" to already exist without you being able to see it, since you can only see the objects that have been shared with you.</p>
Description	<p>The object's description. This is a short textual description of the object. The description is (optionally) written when the object is published / created and can be edited by Managers of the object.</p>
Tags	<p>Tags assigned to the object. Tag names are made up by the users of Intelligence Central. Typical examples of tag names are: the product name, the project name or version number. Tags are a textual indicator that help the users of Toad Intelligence Central locate or group similar objects. Tags are an organizational tool. Tags are collectively managed by the users of Toad Intelligence Central.</p> <p>Valid characters are letters, numbers, space (), dash (-), underscore (_) or dot (.). Letters entered in upper case are converted to lower case.</p>

Detail	Description
Folder	<p>The folder the object is in. The folder tree is an organizational structure collectively managed by the users of Intelligence Central. The object will be accessible from the parent folder. The parent folder is (optionally) assigned when the object is published / created and can be changed by Managers of the object.</p> <p>The <i>No folder assigned</i> folder is a special folder.</p> <ul style="list-style-type: none"> • The No folder assigned folder holds all objects not yet moved (or assigned) to other folders. • The No folder assigned folder cannot be moved, renamed or deleted. • The No folder assigned folder cannot have sub folders.
Object Type	<p>The object type relates to what you can do with the object and where the object came from. The object type is identifiable by icon.</p> <p>Toad artifacts are created in a Toad product then published to Toad Intelligence Central. There are many types of artifact. Each type is identifiable by icon.</p> <p>Data Connectivity object types are Tables, Views, Snapshots, Mappable Objects and Datasets. Use of Data Connectivity requires a Toad Intelligence Central Data Connectivity License.</p>
Database	<p>Database is the database the object is in. This may vary dependent on the application used to publish the object to Toad Intelligence Central.</p> <p>For example, Toad Data Point users can personalize the database when they publish the object to Toad Intelligence Central for all object types except Automation scripts. If the database is not personalized from Toad Data Point the object is stored in database published_objects or <folder name>. For Data Connectivity objects created in the Admin Console, Database is the display name of the data source in Toad Intelligence Central.</p>
Source	<p>For Data Connectivity objects, the Source is the actual name of the originating data source. In Automation scripts, this field displays the connections included in the script.</p>
Status	(Automation script and snapshot) Displays the last run or refresh time.
Schedule	(Automation script and snapshot) Displays the script or snapshot schedule.
Publisher	The user on Intelligence Central who created the object.
Created	The date and time the object was created.
Updated	<p>The date and time the object was last modified.</p> <ul style="list-style-type: none"> • by <user>—The user on Intelligence Central who last modified the object.

Detail	Description						
Visibility	<p>The object's visibility status. The visibility status can be changed by Managers of the object.</p> <hr/> <table border="0"> <tr> <td>Private</td> <td>The object can be seen by the owner and Administrator.</td> </tr> <tr> <td>Shared</td> <td>The object can be seen by the owner, Administrator and selected users and groups.</td> </tr> <tr> <td>Public</td> <td>The object can be seen by all Intelligence Central users.</td> </tr> </table> <hr/> <p>i NOTE: When visibility rights are assigned to a group (of users), any new member that is added to the group will automatically be granted the rights granted to the group. When the user is removed from the group, any rights associated with that group are removed for that user. A user is given the highest level of rights applied to them either individually or to the group(s) they are a member of.</p>	Private	The object can be seen by the owner and Administrator.	Shared	The object can be seen by the owner, Administrator and selected users and groups.	Public	The object can be seen by all Intelligence Central users.
Private	The object can be seen by the owner and Administrator.						
Shared	The object can be seen by the owner, Administrator and selected users and groups.						
Public	The object can be seen by all Intelligence Central users.						
Managers	<p>Managers of an object have privileges to do the following:</p> <ul style="list-style-type: none"> • Edit the object • Allow others to see and edit the object • Lock the object • Delete the object • Rename the object <p>Initially the Administrator and owner of the object are managers. More managers can be assigned when the object is created. Managers can assign manage rights to other Toad Intelligence Central users.</p> <p>i NOTE: When rights are assigned to a group (of users), any new member that is added to the group will automatically be granted the rights granted to the group. When the user is removed from the group, any rights associated with that group are removed for that user. A user is given the highest level of rights applied to them either individually or to the group(s) they are a member of.</p>						
Locked date	<p>If an object is locked then only the user who locked the object and the Administrator can manage the object.</p> <table border="1"> <thead> <tr> <th>Status</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>Locked</td> <td>The user that locked the object and the Administrator can manage the object (including unlock the object). All other Managers of the object (including the owner) will be able to see the object but not manage it.</td> </tr> <tr> <td>Unlocked</td> <td>All Managers of the object can manage the object.</td> </tr> </tbody> </table>	Status	Description	Locked	The user that locked the object and the Administrator can manage the object (including unlock the object). All other Managers of the object (including the owner) will be able to see the object but not manage it.	Unlocked	All Managers of the object can manage the object.
Status	Description						
Locked	The user that locked the object and the Administrator can manage the object (including unlock the object). All other Managers of the object (including the owner) will be able to see the object but not manage it.						
Unlocked	All Managers of the object can manage the object.						
Locked by	For locked objects, the user who locked the object.						
Row Count	(Dataset and snapshot) Displays the row count for the data object.						

Lower Pane

For some objects, additional information is displayed in the lower portion of the Details pane. For these objects, select a tab and click **Expand** to display the full contents of the tab.

i | **NOTE:** Object details can be modified in an appropriate application such as Toad Data Point. Object details cannot be modified through web browser access to Toad Intelligence Central.

Send Email from Details Pane

You can send an email to a user by clicking the user name in the Details pane.


1. In the Details pane, click a user name in, for example, the Visibility, Publisher, or Managers fields.
2. This action opens an email pre-populated with the user's address and the object name. Add a message and additional information before sending the email.

Data Connectivity

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.


Users of Toad Intelligence Central can log in to the web browser, view and download Data Connectivity objects that have been shared with them.

1. Log in to the web browser.
2. Click **Home**.
3. Locate the object. See [Find Objects](#) for more information.
4. Select the object to show details. See [Object Details](#) for more information.
5. Click  to download the object. The location of the object on download will be as per your web browser settings.

Object type **Download, view**

Table Tables are tables of data mapped from data source mappable objects.



Download Click  to prepare download of the table result set.

Data is retrieved direct from the data source. Some time may be required to prepare the data for download.

Track the preparation of the download on the web browser display. Success is an indicator that the table is ready for download.



Click **Download** in the Success message. The location of the table on download will be as per your web browser settings.

Your login to Toad Intelligence Central must be authenticated to retrieve raw data from the data source. Setup of this authentication cannot be done in a web browser. To setup authentication to the data source use Toad Data Point.

Source The source is one of the object details listed on the **Details** pane. Where the name of the data source is long, the web browser has the facility to expand/ contract your view. Table data is retrieved from this source.


Columns Show the table structure, column names, and data types.

Expand Click to expand and show column details: data type, data size and Not Null status.

Object type **Download, view**

View Views are saved SQL statements.



Download Click  to execute the SQL statement on the data source and prepare the result set for download. Some time may be required to prepare the data for download.

Track the preparation of the download on the web browser display. Success is an indicator that the result set is ready for download.



Click **Download** in the Success message. The location of the result set on download will be as per your web browser settings.


Your login to Toad Intelligence Central must be authenticated to retrieve raw data from the data source. Setup of this authentication cannot be done in a web browser. To setup or alter authentication to the data source for this view object, use Toad Data Point.


Source The source is one of the object details listed on the **Details** pane. The SQL statement is executed against this data source. Where the name of the data source is long, the web browser has the facility to expand/ contract your view.

Query Show the query that is executed to produce the result set.

Expand Click to expand and show column details: data type, data size and Not Null status.

Object type **Download, view**

Snapshot  Snapshots are the result set from an executed SQL statement (View) or table. Snapshots capture data at a specific point in time and can be scheduled to execute once or repeatedly. Snapshot data is stored in Intelligence Central so it is fast to load and does not require data source authentication to view.

Download Click  to prepare download of the snapshot result set. This converts the snapshot to a CSV file. Depending on the size of the snapshot, this can take some time.

Track the preparation of the download on the web browser display. Success is an indicator that the snapshot is ready for download.



Click **Download** in the Success message. The location of the snapshot on download will be as per your web browser settings.

Source The source is one of the object details listed on the **Details** pane. The SQL statement is executed against this data source. Where the name of the data source is long, the web browser has the facility to expand/ contract your view.

Status Status is an object detail that indicates the execution status of the snapshot. It may be success, error, running (currently taking the snapshot) or pending (where Toad Intelligence Central is waiting to take the snapshot). If there was an error taking the last snapshot then expand to see the error details.

Schedule When was the last snapshot taken? When will the next snapshot be taken? The snapshot is scheduled to refresh (the result set) at the given date and time.

Query Show the query that is executed to produce the result set.

Expand Click to expand and show column details: data type, data size and Not Null status.

Mappable Objects Mappable objects are objects from the data source that can be potentially mapped to tables. Mappable objects are not available for download and not visible from a web browser.




Object type **Download, view**

Datasets Datasets are tables of data published to Toad Intelligence Central.



From a web browser, click **Home**. Locate the dataset.

1. Select the dataset to show details.
2. Click  in the Details pane. This converts the dataset to a CSV file. Depending on the size of the dataset, this can take some time.
3. Track the preparation of the download on the web browser display. Success is an indicator that the dataset is ready for download.



4. Click **Download** in the Success message. The location of the dataset on download will be as per your web browser settings.

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**.

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. A user with the Administrator role can configure registration parameters through the Web interface. To learn how to configure new user registration, see the *Toad Intelligence Central Deployment Guide*.

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>Active Directory® Users</p> <p>To self register from a web browser, click Register as a new user 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, select Administration Users Add User Add Active Directory User. Your local configuration may require login with an Administrator role to add Active Directory users.</p>
	<p>Intelligence Central Users</p> <p>To self register from a web browser, click Register as a new user at the login prompt. Deselect the option to Use my Active Directory details. 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 Administration Users Add User Create Intelligence Central user. The availability of these steps depends on your Intelligence Central configuration.</p>

Types of Groups



Icon	Description
	Active Directory Groups Following login to Intelligence Central from a web browser, to add a group from Active Directory, select Administration Groups Add Group Add Active Directory Group . Your Intelligence Central configuration may require login with an Administrator role to add Active Directory groups.
	Intelligence Central Groups Any logged in user can create an Intelligence Central group.

View and Edit Users

In Toad Intelligence Central, new user accounts are created using one or both of the following methods:

- Add (import) accounts from Active Directory®
- Create accounts within Intelligence Central

Use the following icons to identify the source of a user account.

Icon	Description
	Active Directory® user (imported from Active Directory). This type of account uses Windows® credentials.
	Intelligence Central user (created on Toad Intelligence Central). This type of user account exists only on Toad Intelligence Central and uses Intelligence Central credentials.

View User Information

You can view a list of users, as well as user details (including objects associated with a user), on the Users page of the Web interface.

To view user information

1. In the Web interface, click **Administration | Users** to display the list of users on Toad Intelligence Central.
2. Select a user to view details in the right pane. The following useful information is available:
 - Account details, email address, and user role.
 - Groups in which the user is a member.

- Objects shared with the user.
- Objects published by the user.

i | **TIP:** You can see only the objects shared with you. When viewing a user other than yourself, this user may have objects shared with them that you cannot see.

User Roles

Each user is granted a role. By default, a new user is granted the Standard role. A user with the Administrator role can change the default role for new users and can change the role of any existing user. See the *Toad Intelligence Central Deployment Guide* 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.

Edit Your Account / Change Your Password

If your account is an Intelligence Central user account, you can edit some account details (profile) or change your password.

If your account was created by importing it from Active Directory, you cannot change the password through Toad Intelligence Central. However, Intelligence Central can be configured to synchronize with Active Directory. See the *Toad Intelligence Central Deployment Guide* for more information about synchronization.

To edit your Intelligence Central user details

1. In the Web interface, click **Administration | Users** to display the list the users on Toad Intelligence Central.
2. Select your user name.
3. Click **Edit** in the Details pane to change your full name or email address.
4. Click **Reset Password** to change your Intelligence Central account password.

Change Your Email Subscriptions

Intelligence Central can send activity reports and error alerts to users for objects they own or manage. Individual users can subscribe/unsubscribe to these email notifications through their user account details.

To modify your email subscriptions

1. In the Web interface, click **Administration | Users**.
2. Select your user name.



3. Click **Change subscription** and then select which email notifications to receive. See the *Toad Intelligence Central Deployment Guide* for more information about Email Notifications.

View and Edit Groups

In Toad Intelligence Central, new groups are created using one or both of the following methods:

- Add (import) groups from Active Directory®
- Create groups within Intelligence Central

Use the following icons to identify the source of a group.

Group	Description
	Active Directory group (imported from Active Directory).
	Intelligence Central group (created on Toad Intelligence Central). Groups with this icon exist only on Toad Intelligence Central.

Note that on Toad Intelligence Central, groups are a flat structure containing any number of users. A group on Toad Intelligence Central cannot contain sub-groups or nested groups.

View Group Information

You can view a list of groups, as well as group details, on the Groups page of the Web interface.

To view group information

1. In the Web interface, click **Administration | Groups** to display the list of groups on Toad Intelligence Central.
2. Select a group to display details in the right pane. The following useful information is displayed.
 - The group's source: local or Active Directory
 - A list of members in the group
 - Details of each member in the group: username, full name, and email address
 - A list of objects shared with the group

Edit an Intelligence Central Group

You can modify the list of members of an Intelligence Central group you own. You can remove an Intelligence Central group you own.

You cannot use Intelligence Central to modify a group imported from Active Directory. However, Intelligence Central can be configured to synchronize with Active Directory. See the *Toad Intelligence Central Deployment Guide* for more information about synchronization.

Administrator login is required to remove Active Directory groups.

To edit an Intelligence Central group

1. In the Web interface, click **Administration | Groups** to display the list the groups on Toad Intelligence Central.
2. Select a group.
3. Click **Edit** in the Details pane to modify the list of members in the group.
4. Click **Remove Group** to remove the group from Intelligence Central.

Share and Manage rights assigned to the group are removed with the group. The ability of individual members of the group to see/manage objects might be affected and is dependent on other rights assigned to them. A user is given the highest level of rights assigned to them, either as an individual or as a member of a group.

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 the *Toad Intelligence Central Deployment Guide* 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 6.
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"> • Forward slash (/) • Backward slash (\) • Left square bracket ([) • Right square bracket (]) • Colon (:) • Semicolon (;) • Vertical bar () • Equal sign (=) • Plus sign (+) • Asterisk (*) • Question mark (?) • Left angle bracket (<) • Right angle bracket (>) • Double quote (") • At symbol (@) • Comma (,)
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.
- 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.

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.

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. 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.

Field	Description
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 Users in this group 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 Group Members 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>

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.

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 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