

# TOAD<sup>®</sup> DATA POINT WORKBOOK FOR BEGINNERS

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Quest<sup>®</sup>



# Introduction

The focus on clean, accurate and accessible data for decision-making has never been more acute. From government to business to healthcare – the ability to quickly prepare data for analysis has become a critical function. Organizations that can afford it have made huge investments in the infrastructure and staff needed for business intelligence, often dedicating entire departments to data science operations. These teams have the ability to aggregate massive volumes of data from internal and external sources and perform complex statistical analyses to create models and predictions.

But not every organization has this capability, nor do they need it. They simply want answers about how the business is doing and what it should do next based on what's worked well. They're looking for data that validates past decisions and informs future actions. This is true at every level and every function – such as human resources, marketing, finance, manufacturing, customer service and more.

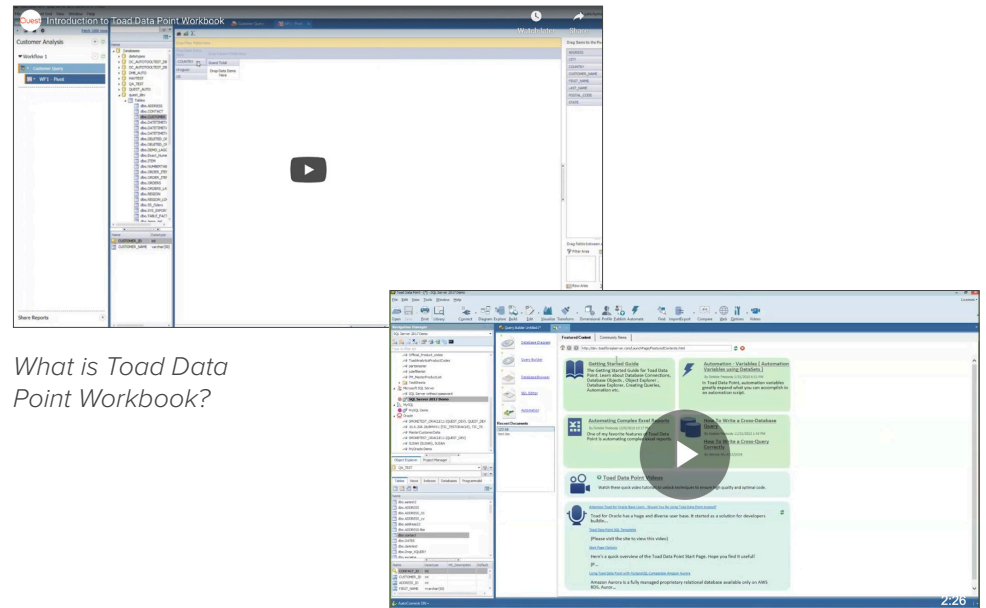
The data exists in these organizations, but it's often bottled up in silos across departments, applications and disparate databases. And, data that's hard to access isn't very useful. Short of expensive business intelligence platforms, there aren't many affordable solutions that enable both IT and data analysts to easily query and manipulate data.

That's exactly the reason that Quest® created Toad® Data Point Professional edition and its intuitive Workbook interface. Toad Data Point Workbook simplifies the process of finding and preparing data for analysis, so that time-strapped database professionals or departmental data analysts can do it.

In this e-book, we'll show you how to get started with Toad Data Point Workbook, and point you to valuable videos and other resources that will help with your data preparation needs.

To start, [here's a seven-minute expert video](#) that introduces how Toad Data Point Workbook can transform your work and your data. And, [a short video that shows how the Traditional interface is different from the Workbook interface.](#)

Read on to see how to quickly get started using Toad Data Point Workbook.



*What is Toad Data Point Workbook?*

*Understanding the Differences Between Traditional and Workbook Interfaces in Toad Data Point*

## CREATE AND NAME A WORKBOOK

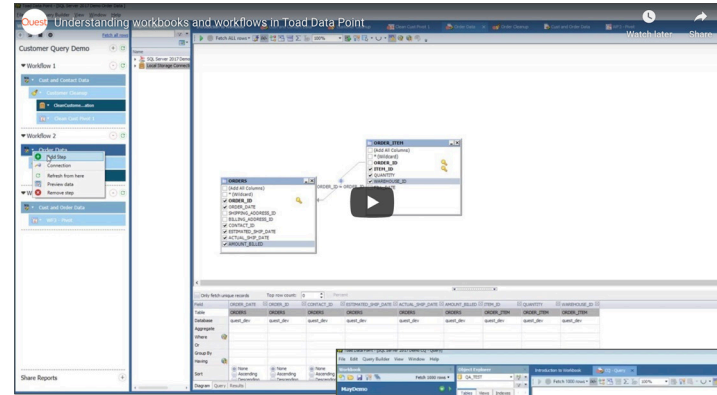
Within the Workbook product interface, a workbook is a container for the workflows you need for a data initiative. Each workflow is a series of steps that go from a query to results. [Watch this video](#) to better understand the hierarchical relationship of workbooks, workflows and the various actions that are executed within the workflow.

You'll want to start your data project by creating a workbook and giving it a meaningful name. At this point, the workbook is empty, and the next steps will show you how to create your first query.

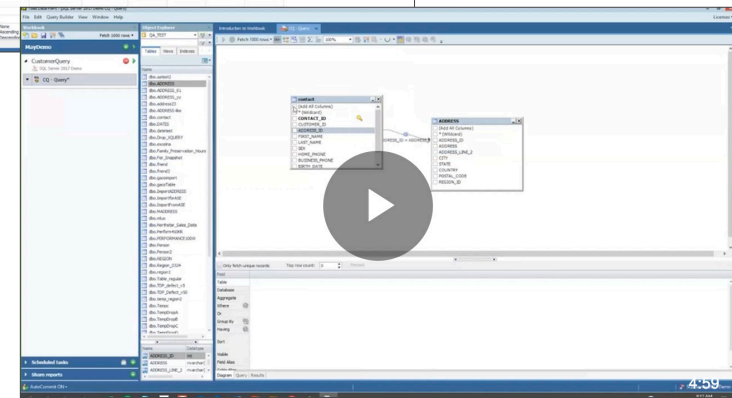
## CREATE AND RUN QUERIES

A query forms the basis of every workflow, and luckily, Toad Data Point has a Visual Query Builder that makes creating one straightforward. You could also choose to write your SQL by hand, but since Workbook is about making things easier, especially for people who don't know how to write SQL statements, it's probably better to choose the Visual Query Builder. You can also reuse a query file that was previously created in the Traditional interface, for example if someone wrote it for you there. [Here's a short video on how to use the Visual Query Builder from within the Workbook interface.](#)

Toad Data Point is completely agnostic when it comes to data sources. This means that you can connect to any number of databases that are on-premises or in the cloud. You can even use Excel worksheets as data sources.



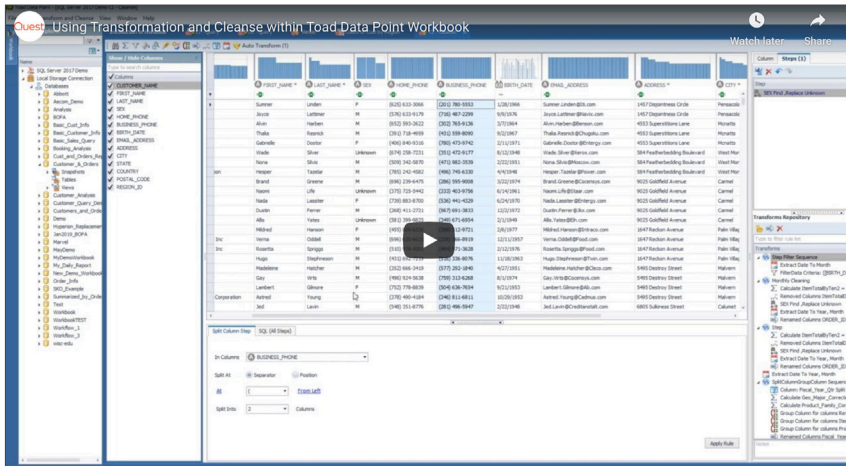
*Understanding Toad Data Point Workbooks and Workflows*



*Connecting to a Data Source and Building a Query in Toad Data Point Workbook*

I manage a multi-database data warehouse. Toad allows me to connect with all of them in one tool simultaneously.

– IT Manager, Medium Enterprise Beverage Company

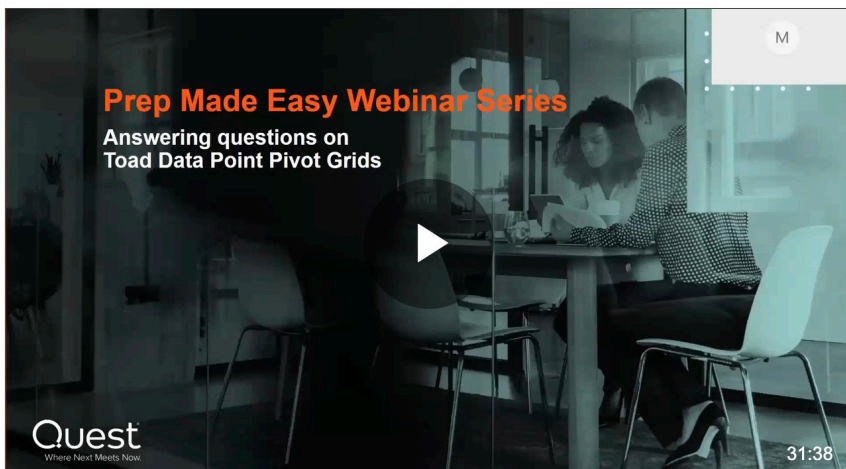


Using Transformation and Cleanse in Toad Data Point Workbook

## TRANSFORM AND CLEANSE DATA

Once you've run your query and generated the results set, you can transform and cleanse your data in preparation for analysis. This is done by adding a transformation step to your workflow, and you'll see your data within the Transformation and Cleanse window.

Transformation can involve finding and replacing values, splitting, renaming or grouping columns, filtering values and calculating values. As you go, you can apply and view the result of the cleansing rules on the data. If you don't like it, just undo it. Transformation and cleansing steps can also be saved and reused, which is handy if you find yourself doing the same cleanup tasks repeatedly. [Watch this video to see how to transform and cleanse your data sets.](#)



Answering Questions on Toad Data Point Pivot Grids

## GENERATE PIVOT GRIDS

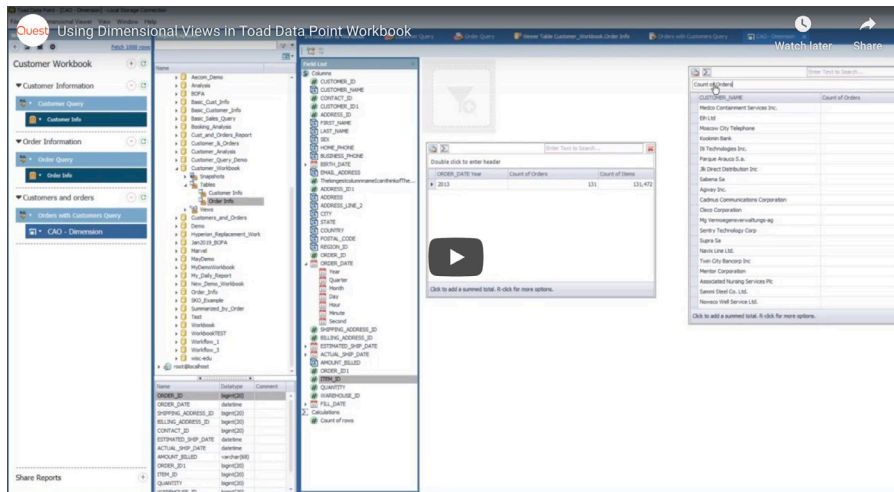
When the data looks clean, you can add a pivot grid to the workflow. A pivot grid, or pivot table, is a table of statistics about an underlying flat data set. These statistics help give you insight about your data using aggregating functions like sums and averages. Generally, it involves taking a single dimension (column) of data and flipping it so each value becomes a new column in the pivot grid. The aggregating function then yields measurement information. Toad Data Point Workbook makes it easy to generate pivot grids that you can use within the application or export to Microsoft Excel for further sharing and analysis.

Once you add a pivot grid to your workflow, any upstream changes to your query or transformation and cleanse operations will flow downstream to your pivot grid. This [short tutorial](#) explains the workings of pivot grids in Workbook.

## PERFORM DIMENSIONAL ANALYSIS

A dimensional analysis can be more convenient than a pivot grid, especially when you want a more condensed summation of data or when you want to see multiple views of the data in a single workspace. Using the dimensional analysis canvas, you can quickly drag and drop database fields into viewing containers, apply filters and perform aggregation functions.

Dimensional analysis enables you to quickly hone in on the kinds of answers you and your boss need about the business, such as how many widgets were sold this month, by region, by store except Store 91 – all by using drag and drop/point and click functionality. Here's a [short tutorial](#) on dimensional analysis.



Learn how to use Dimensional Views in Toad Data Point Workbook

Toad has helped me make a tremendous impact on our clinical trials program by allowing me to easily extract data for reporting purposes.

– IT Systems Analyst, State & Local Government

## EXPORT RESULTS

Toad Data Point Workbook gives you many ways to export your data, results sets and pivot grids, but the most common target is Microsoft Excel. Using the contextual right click menu, you can select Export to Excel from within a data set, pivot grid, etc. If your export step is part of your workflow, the export will occur each time you run the workflow.

When you export to Excel, you can choose to create a new worksheet, overwrite a worksheet or append an existing sheet. If you decide to go back to your original query and filter in more data or filter out data, the workflow will refresh all the way down to the pivots and Excel exports.

You can also create reports to share with colleagues on a one-time or regular basis. You can use the Share Reports feature to email your exported Excel spreadsheets as attachments. Or, you can create scheduled tasks for this. Toad Data Point will use the Windows scheduler on your desktop to execute your tasks according to the schedule you specify.

## TRY TOAD DATA POINT WORKBOOK

With so much uncertainty in today's economy, quick and easy access to organizational data is more important than ever for making informed decisions. Because we want everyone to have that access, we offer a 30-day trial of Toad Data Point. This gives you a great opportunity to try it out for your data preparation needs.



## ABOUT QUEST

Quest creates software solutions that make the benefits of new technology real in an increasingly complex IT landscape. From database and systems management, to Active Directory and Office 365 management, and cyber security resilience, Quest helps customers solve their next IT challenge now. Around the globe, more than 130,000 companies and 95% of the Fortune 500 count on Quest to deliver proactive management and monitoring for the next enterprise initiative, find the next solution for complex Microsoft challenges and stay ahead of the next threat. Quest Software. Where next meets now.

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