



Navicat Cloud Portal

User Guide

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Chapter 1 - Introduction

About Navicat Cloud Portal

[Navicat Cloud Portal](#) is a web portal allows you to update your Navicat Cloud account, and manage the objects (connections, queries, snippets, aggregation pipelines, model workspaces, BI workspaces and virtual groups) that are synchronized to Navicat Cloud.

Here are some highlights of Navicat Cloud Portal:

- Edit your user profile.
- Enable two-step verification.
- Upgrade Navicat Cloud Plan.
- Manage projects.
- Download / Preview objects.
- Check recent activities.

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Chapter 2 - Getting Started

Requirements

Supported Web Browsers

- Firefox (Latest Version)
- Chrome (Latest Version)
- Microsoft Edge (Latest Version)
- Safari (Latest Version)

Create Navicat Cloud Account

You can create Navicat Cloud accounts in Navicat Cloud Portal or Navicat software that integrated with Navicat Cloud.

To create a new account

1. Open [Navicat Cloud Portal](#).
2. In the Login page, click **Sign Up**.
3. Enter the required information and click **Sign Up**. A verification email will send to your email address. If you don't get an email, please check your Spam or Bulk Mail folders.
4. Click the link in the email to verify the new account.

Sign In & Sign Out Navicat Cloud

Sign In Navicat Cloud

1. Open [Navicat Cloud Portal](#).
2. In the Login page, enter your **Navicat ID** and **Password**.
3. Click **Sign In**.
4. If you enabled two-step verification, a code will be sent to your phone via your mobile app. Enter the received code to sign in.

Hint: You can sign in with the same Navicat ID you use for the Navicat Customer Center.

Note: If you forget your password, you can follow the [Reset Your Password](#) steps to reset your password.

Sign Out Navicat Cloud

To sign out on your computer

1. At the top right, click your avatar.
2. Select **Sign Out**.

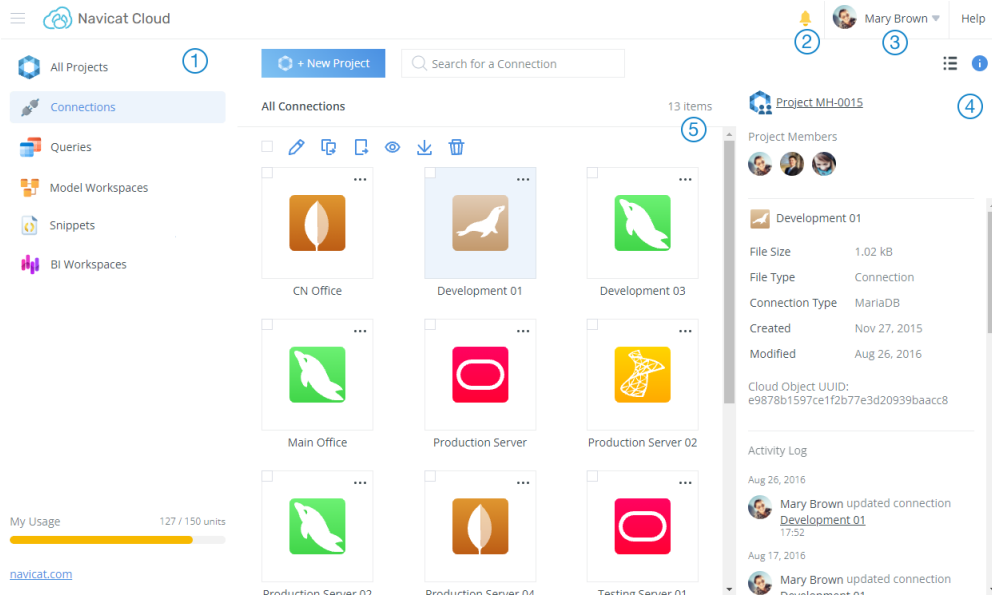
To sign out from another computer

If you forgot to sign out Navicat Cloud on another computer or Navicat software, you can remotely sign out or unlink it.


1. At the top right, click your avatar.
2. Select **Account Settings**.
3. Select the **Security** tab.
4. Under the **Sessions** or **Applications** section, click **X**.

Chapter 3 - User Interface

Main Page



1 Navigation Pane

The Navigation pane allows you to access projects, connections, queries, model workspaces, snippets and BI workspaces. Click the  icon to show or hide the pane.

2 Bell Icon

The bell icon tells you when there are project invitations, usage warnings, etc. Click the bell icon to view the notification.



3 User Menu

The User Menu allows you to open your account settings page, choose to adopt a light or dark appearance, change the UI language, and log out the current session.

4 Details Pane

The Details pane shows the detailed information of the selected item. Click the  icon to show or hide the pane.

5 Content Pane

The Content pane contains the items that are in the selected section of Navigation pane. Click the  or  icons to switch between Details View and Grid View.

Chapter 4 - Account Settings

Manage Account Information

Change Your Profile

1. At the top right, click your avatar.
2. Select **Account Settings**.
3. Select the **Profile** tab.
4. Edit your profile information.
5. Click **Save Changes**.

Change Your Picture

1. At the top right, click your avatar.
2. Select **Account Settings**.
3. Select the **Profile** tab.
4. Click **Upload Photo**.
5. Choose an image file.

Change Your Email

1. At the top right, click your avatar.
2. Select **Account Settings**.
3. Select the **Security** tab.
4. Under the **Security Summary** section, click **Change Email**.
5. For security reasons, you must re-enter your password.
6. Enter your new Navicat ID (Email), then click **Change Email**. A confirm email will be sent to your new email address. If you don't get an email, please check your Spam or Bulk Mail folders.
7. Follow the steps in the email to change your Navicat ID.

Change / Reset Password

Change Your Password

1. At the top right, click your avatar.
2. Select **Account Settings**.
3. Select the **Security** tab.
4. Under the **Security Summary** section, click **Change Password**.
5. For security reasons, you must re-enter your password.
6. Enter your new password, then click **Change Password**.

Reset Your Password

1. In the Login page, click **Forgot Password?**
2. Enter your Navicat ID and click **Send Reset Password Email**. An email will be sent to your email address. If you don't get an email, please check your Spam or Bulk Mail folders.
3. Follow the steps in the email to reset your password.

Note: If you change or reset your password, you will be signed out everywhere.

Enable / Disable Two-Step Verification

With two-step verification, your account is protected by both your password and your authentication method (Authenticator app). It adds an extra layer of security to your account in case your password is stolen.

Turn On Two-Step Verification

1. At the top right, click your avatar.
2. Select **Account Settings**.
3. Select the **Security** tab.
4. Under the **Two-step Verification** section, click **Enable Two-step Verification**.
5. Click **Next**.
6. For security reasons, you must re-enter your password.
7. Choose an authentication method and click **Next**.
8. Follow the remaining steps.

Note: Save the 16-digit backup code and keep it in a safe place.

Turn Off Two-Step Verification

1. At the top right, click your avatar.
2. Select **Account Settings**.
3. Select the **Security** tab.
4. Under the **Two-step Verification** section, click **Disable Two-step Verification**.
5. For security reasons, you must re-enter your password.
6. Follow the remaining steps.

Note: Destroy all the backup codes that you have saved for signing in to your account.

View Usage

Navicat Cloud comes with a 150 units storage Basic Plan and a 5000 units storage Pro Plan, and each entity (i.e. a connection, a query, a snippet, a model, a Charts workspace or a virtual group) occupies one unit.

If the storage limit is reached, you are only allowed to update and sync existing entities but not to add new entities to Navicat Cloud. You will not lose any files or any information, and your new entities will be synced again automatically when your storage space becomes available.

To view the cloud usage details

1. At the top right, click your avatar.
2. Select **Account Settings**.
3. Select the **Your Plan** tab.

Change Navicat Cloud Plan

Use Redeem Code

If you have purchased Navicat Cloud Pro Plan from Navicat Online Store, you will receive a redeem code. You can use the redeem code to activate your Navicat Cloud Pro Plan.

1. At the top right, click your avatar.
2. Select **Account Settings**.
3. Select the **Your Plan** tab.
4. Click **See purchase history / Enter my redeem code**.
5. Put your redeem code under **Redeem code** and click **Submit**.

View Purchase History

1. At the top right, click your avatar.
2. Select **Account Settings**.
3. Select the **Your Plan** tab.
4. Click **See purchase history / Enter my redeem code**.

Chapter 5 - Projects

Work with Projects

A project is a way to structure and organize Navicat objects. You can put related objects in one project, and then share the project with other user accounts for collaboration if necessary.


Create New Projects

1. Click **+ New Project**.
2. Enter the name of the new project.
3. Click **Create**.

Manage Existing Projects


You can view all your projects and the projects that you are collaborated with by selecting **All Projects**.

To rename a project

1. Under the **Projects** section, select a project.
2. Click the  icon.
3. Enter a new project name.
4. Click **OK**.


Note: Only the project owner and the members with the *Can Manage & Edit* right can rename the project.

To delete a project

1. Under the **Projects** section, select a project.
2. Click the  icon.
3. Click **Delete**.

Note: Only the project owner can delete the project.

To quit a project

1. Under the **Projects** section, select a project.
2. Click the  icon.
3. Click the **X** icon next to your name.
4. Click **Apply**.



Search Projects

If your account has many projects, you can find the projects you want easily by the search feature. Enter a search string in the **Search** text box. Projects will be filtered by the search string immediately.

Change Project Order

Click **Sort by** and select a sorting option. You can sort the projects in ascending or descending order.

Change Layout


By default, your projects and objects are displayed in Grid View. You can click the  or  to switch between List View and Grid View.

Manage Members

You can manage the project members and their rights.

Hint: You can also manage the members in the Project Details page.

Add Members

1. In the left pane, select **All Projects**.
2. Under the **Projects** section, select a project.
3. Click the  icon.
4. Click **+ Add Member**.
5. Enter the member's Navicat ID and press ENTER.
6. Select the member right.
7. Click **Add**.

Member Rights	Privileges
Can Manage & Edit	Read Objects, Write Objects, Manage Members and Rename Projects
Can Edit	Read Objects and Write Objects
Can View	Read Objects


Manage Existing Members

To edit the right of a member

1. In the left pane, select **All Projects**.
2. Under the **Projects** section, select a project.

3. Click the  icon.
4. Use the drop-down list next to the member to change the right.
5. Click **Apply**.

To remove a member from a project

1. In the left pane, select **All Projects**.
2. Under the **Projects** section, select a project.
3. Click the  icon.
4. Click the **X** icon next to the member.
5. Click **Apply**.

View Project Details

Click on a project name in the All Projects page to view its **Project Details** page. It shows all objects contained in the project. You can manage the project and its members and objects.

The right pane will show the project members and the activity log.


Manage Objects

You can perform actions like renaming, downloading, previewing or deleting an object, viewing the object details and moving or copying objects to another project.

To view the details of an object



1. Select an object.
2. The detailed object information displays in the right pane.

To rename an object

1. Select an object.
2. Click the  icon.
3. Enter a new object name.
4. Click **OK**.

To move / copy an object to another project


1. Select an object.

2. Click the  or  icon.
3. Select a project.
4. Click **OK**.


Hint: Moving / Copying multiple objects is supported.

Note: If you move or copy a connection to another project, all its query files and virtual groups will also be moved or copied.

To preview an object


1. Select an object.
2. Click the  icon.

To download an object

1. Select an object.
2. Click the  icon.

Hint: Downloading multiple objects is supported.

To delete an object

1. Select an object you want to delete.
2. Click the  icon.
3. Click **Delete**.

Hint: Deleting multiple objects is supported.

Search & Filter Objects



If you have many objects, you can find the objects you want easily by the search feature. Enter a search string in the **Search** text box. Objects will be filtered by the search string immediately.

You can also filter objects by type and group. Just click on the corresponding icon.

Change Object Order

Click **Sort by** and select a sorting option. You can sort the objects in ascending or descending order.

Change Layout

By default, your objects are displayed in Grid View. You can click the  or  to switch between List View and Grid View.

Chapter 6 - Navicat Objects

Connections

The **Connections** page displays all connections in your account.

You can perform the following actions in this page.

- View the connection details.
- Rename connections.
- Copy connections (including their queries and groups) to other projects.
- Move connections (including their queries and groups) to other projects.
- Download connection files (.json).
- Preview and copy the connection settings.
- Delete connections.

See the [Manage Objects](#) section for more information.

Queries

The **Queries** page displays all query files in your account.

You can perform the following actions in this page.

- View the query details.
- Rename queries.
- Copy queries to other connections.
- Move queries to other connections.
- Download query files.
- Preview and copy the SQL statements.
- Delete queries.

See the [Manage Objects](#) section for more information.

Model Workspaces

The **Model Workspaces** page displays all model workspace files in your account.

You can perform the following actions in this page.

- View the workspace details.
- Rename workspaces.
- Copy workspaces to other projects.
- Move workspaces to other projects.
- Download workspace files.
- Preview the last modified diagram in the workspace file.
- Delete workspaces.

See the [Manage Objects](#) section for more information.

Snippets

The **Snippets** page displays all snippet files in your account.

You can perform the following actions in this page.

- View the snippet details.
- Rename snippets.
- Copy snippets to other projects.
- Move snippets to other projects.
- Download snippet files.
- Preview and copy the code in the snippet.
- Delete snippets.

See the [Manage Objects](#) section for more information.

BI Workspaces

The **BI Workspaces** page displays all BI workspace files in your account.

You can perform the following actions in this page.

- View the workspace details.
- Rename workspaces.

- Copy workspaces to other projects.
- Move workspaces to other projects.
- Download workspace files.
- Preview the first page of the last modified dashboard in the workspace file.
- Delete workspaces.

See the [Manage Objects](#) section for more information.

Aggregation Pipelines

Each project's aggregation pipelines can be found in its **Project Details** page.

You can perform the following actions in this page.

- View the pipeline details.
- Rename pipelines.
- Copy pipelines to other connections.
- Move pipelines to other connections.
- Download pipeline files.
- Delete pipelines.

See the [Manage Objects](#) section for more information.

Virtual Groups

Each project's virtual groups can be found in its **Project Details** page.

You can perform the following actions in this page.

- View the group details.
- Rename groups.
- Delete groups.

See the [Manage Objects](#) section for more information.

Chapter 7 - Open Source Libraries

Open Source Libraries & Licensing

The following table lists the open source libraries used by Navicat Cloud Portal.

License	Libraries
Apache 2.0	<ul style="list-style-type: none">• github.com/aws/aws-sdk-go-v2• github.com/dgraph-io/badger• github.com/golang/mock• github.com/google/wire• github.com/pkg/errors• github.com/pquerna/otp• github.com/spf13/cobra
MIT	<ul style="list-style-type: none">• github.com/Konstantin8105/FreePort• github.com/fatih/structs• github.com/gin-contrib/cors• github.com/gin-contrib/gzip• github.com/gin-contrib/sessions• github.com/gin-gonic/gin• github.com/jinzhu/gorm• github.com/jmoiron/sqlx• github.com/kelindar/binary• github.com/korylprince/go-ad-auth• github.com/mutecomm/go-sqlcipher• github.com/natefinch/lumberjack• github.com/ttacon/libphonenumber• gopkg.in/gomail.v2

	<ul style="list-style-type: none"> • gopkg.in/gormigrate.v1 • gopkg.in/ldap.v2 • github.com/fingerprintjs/fingerprintjs • www.npmjs.com/package/axios • www.npmjs.com/package/click-outside-vue3 • www.npmjs.com/package/crypto-js • www.npmjs.com/package/element-plus • www.npmjs.com/package/moment-timezone • www.npmjs.com/package/normalize.css • www.npmjs.com/package/normalizr • www.npmjs.com/package/resize-observer-polyfill • www.npmjs.com/package/vue • www.npmjs.com/package/vue-hot-reload-api • www.npmjs.com/package/vue-i18n • www.npmjs.com/package/vue-router • www.npmjs.com/package/vuex • www.npmjs.com/package/workbox-sw
MPL 2.0	<ul style="list-style-type: none"> • github.com/go-sql-driver/mysql • github.com/tredoe/osutil
BSD 3-Clause	<ul style="list-style-type: none"> • github.com/denisenkom/go-mssqldb • github.com/google/uuid • github.com/googollee/go-socket.io • github.com/namsral/flag • github.com/shirou/gopsutil • golang.org/x/crypto

	<ul style="list-style-type: none"> • golang.org/x/image • www.npmjs.com/package/highlight.js
BSD 2-Clause	<ul style="list-style-type: none"> • github.com/go-redis/redis • github.com/sfreiberg/gotwilio • github.com/vmihailenco/msgpack • gopkg.in/guregu/null.v3
Freetype	<ul style="list-style-type: none"> • github.com/golang/freetype
ISC	<ul style="list-style-type: none"> • github.com/howeyc/gopass • github.com/oschwald/geoip2-golang • www.npmjs.com/package/https
CC0 1.0	<ul style="list-style-type: none"> • www.npmjs.com/package/randomcolor