



On-Demand Training: Data Connections with Tableau Online Transcript

Welcome to this video on data connections with Tableau Online.

Tableau Online Data Connections Overview

Tableau Online is a hosted version of Tableau Server. Since Tableau Online is hosted in the cloud, it treats data sources differently than Tableau Server.

In Tableau Desktop, you can connect to your data source live, or you can take an extract. When you're ready to share via Tableau Online, you will need to take an extract of your data. The only exceptions to this rule is with Amazon Redshift, Google BigQuery, and cloud-hosted data sources. Since these data sources are hosted in the cloud they are able to establish a live cloud to cloud connection with Tableau Online. If you plan on using a cloud-hosted data source, as of 9.0 it must be a Microsoft SQL Server, a PostgreSQL Server, or a MySQL Server.

Salesforce and Google Analytics, despite being in the cloud, are extract only data sources. However, with Salesforce and Google Analytics, you are able to schedule automated refreshes to Tableau Online.

Refreshing Extracts on Tableau Online

To refresh your extract, you will need to republish your data manually using Tableau Desktop or automate the process using a script with the Tableau Desktop Command Line Utility.

Let's run through an example of publishing and refreshing an extract on Tableau Online. The documentation for the Tableau Desktop Command Line Utility can be found here: http://onlinehelp.tableausoftware.com/current/pro/online/windows/en-us/extracting_TDE.html

You will need:

- A Windows computer with Tableau Desktop – Tableau's Command line utility does not support the MacOS yet
- Access to your data source
- A Tableau Online Account
- Take an extract of your data
- Right click your data source and Publish to Server
- Enter your Tableau Online credentials
- Name your data source and publish to Tableau Online

Now that we have a data source on Tableau Online, let's set up the refresh. Here, we'll use Tabcmd to automate the process

- Open a blank text file
- Write the command to navigate to the Tableau Desktop bin folder in the text file:
- CD "C:\Program Files\Tableau\Tableau 9.0\bin"

- Your path may differ based on your install location and version
- Hit Return to create a new line, then type the command to refresh the extract on Tableau Online:
- `"Tableau refreshextract -s https://demo.tableausoftware.com -u Jane -p admin --datasource FruitTable --source-username tableau --source-password admin"`
- Save the text file with a .bat extension to create the batch file.
- Double click the batch file to ensure it works. A command prompt should appear with the commands you entered in the batch file
- The prompt should end with "Data Source refresh completed"
- Automating the execution of the batch file
- Open the Start menu and in the search box type "Task Scheduler"
- Open the Task Scheduler and create a Basic Task
- Name the task, set the trigger to the desired time of refresh

In order for the extract to successfully refresh, the computer that the task was scheduled on must be on at the time of refresh.

Conclusion

Thank you for watching the Data Connections with Tableau Online training video. We invite you to continue with the On-Demand Training videos to learn more about using Tableau.