



Free Training Transcript: Understanding Schedules

Welcome to this video on Schedules. You must have administrator access to Tableau Server to create a schedule. There are two types of schedules in Tableau Server, those used for extract refreshes, and those used for subscriptions.

Assigning an Extract to an Extract Schedule

Extracts can be assigned to refresh on a schedule during the publishing process or after the fact. To assign an extract schedule after publishing: Click on a data source or workbook, go to the Refresh Schedules tab, and click New Extract Refresh. From here, we can choose an existing schedule.

Subscription Schedules

Schedules are also used in subscriptions. When subscribing to content, a user is able to select a schedule from the dropdown menu. Administrators are able to see subscription details, such as the user, name of the workbook, and the selected schedule.

Creating New Schedules

Administrators may edit and create schedule. Keep in mind that schedules are not site specific and cannot have permissions assigned to them. So any schedule will be available for any user. To create a schedule: In the admin toolbar, click the Schedules tab then New Schedule. We'll name it and select the type of schedule we would like to create – Extract or Subscription. We cannot use a subscription schedule for an extract refresh, and vice versa. The priority of the schedule determines the order in which the schedules will execute. For example, if two schedules are set to run at 8am, the schedule with the higher priority will execute first. We can opt to run these in parallel or serially. Finally, we can specify time preferences for the schedule.

Best Practices

All schedules in Tableau Server are executed by the Backgrounder process. The number of Backgrounder processes in Tableau Server determines the maximum number of tasks that can run concurrently. The Backgrounder is also CPU intensive, so it is a best practice to schedule your Extract Refreshes to occur at off-peak hours, so as not to degrade performance for users. Subscription schedules typically complete in less time than Extract schedules, so consider scheduling them before Extracts to ensure they are

received on time.

In scenarios where Extracts must be run continuously throughout the day, it is often recommended to separate the Backgrounder process on to a dedicated worker machine. Refer to the administrator guide for more information on distributed environments.

Conclusion

Thank you for watching this Schedules training video. We invite you to continue with the Free Training videos to learn more about using Tableau.