

# Establish Connectivity to Tableau Server

This article describes how to connect to **Tableau** in order to load data into Datasets and create Elements in Metric Insights.

## PREREQUISITES:

- Connectivity to Tableau server. Follow instructions in [Prerequisites for connecting to Tableau server](#)
- For embedding, verify that [Clickjack protection](#) is disabled on the Tableau side


## ALTERNATIVE APPROACHES:

- If Tableau is inaccessible because it is behind a firewall or for other reasons, then you will need to [Establish Connectivity to Tableau via a Remote Data Processor](#)

## VERSIONS SUPPORTED:

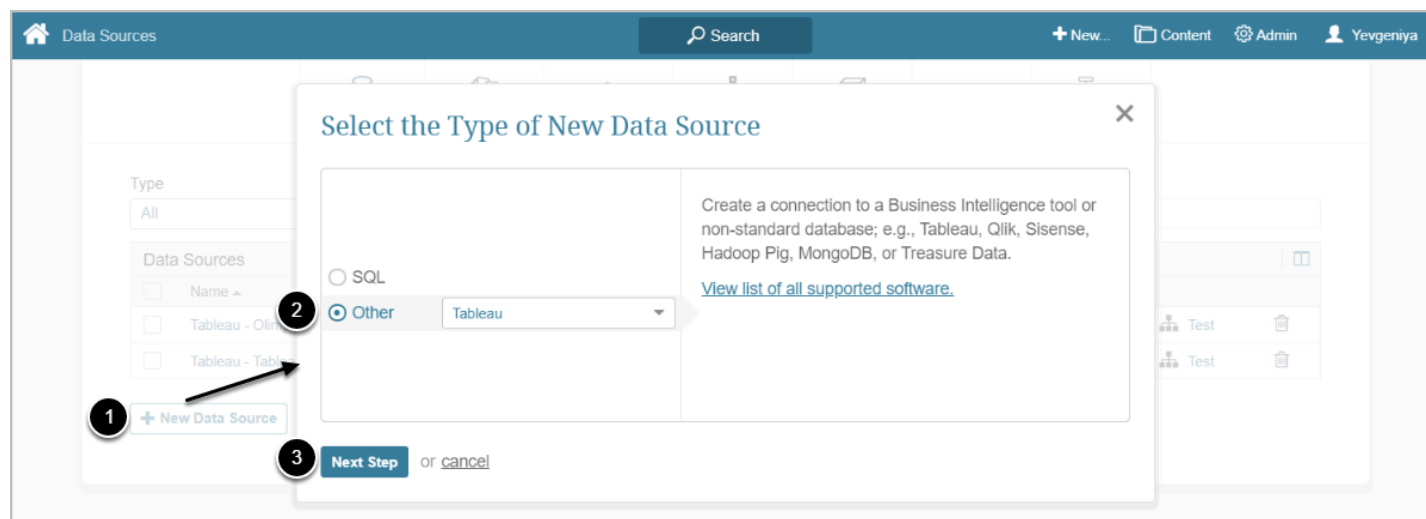
- The latest: Tableau 2022.1.2
- The oldest: Tableau 2020.1

**NOTE:** Versions outside of this list may be supported but are not actively tested. If you have an older or newer version, please work with [support@metricinsights.com](mailto:support@metricinsights.com) so that we understand your requirements.

-  For information on using trusted auth on Tableau server, refer to this [article](#).
- For general information on creating a plugin-based Data Source, refer to this [article](#).

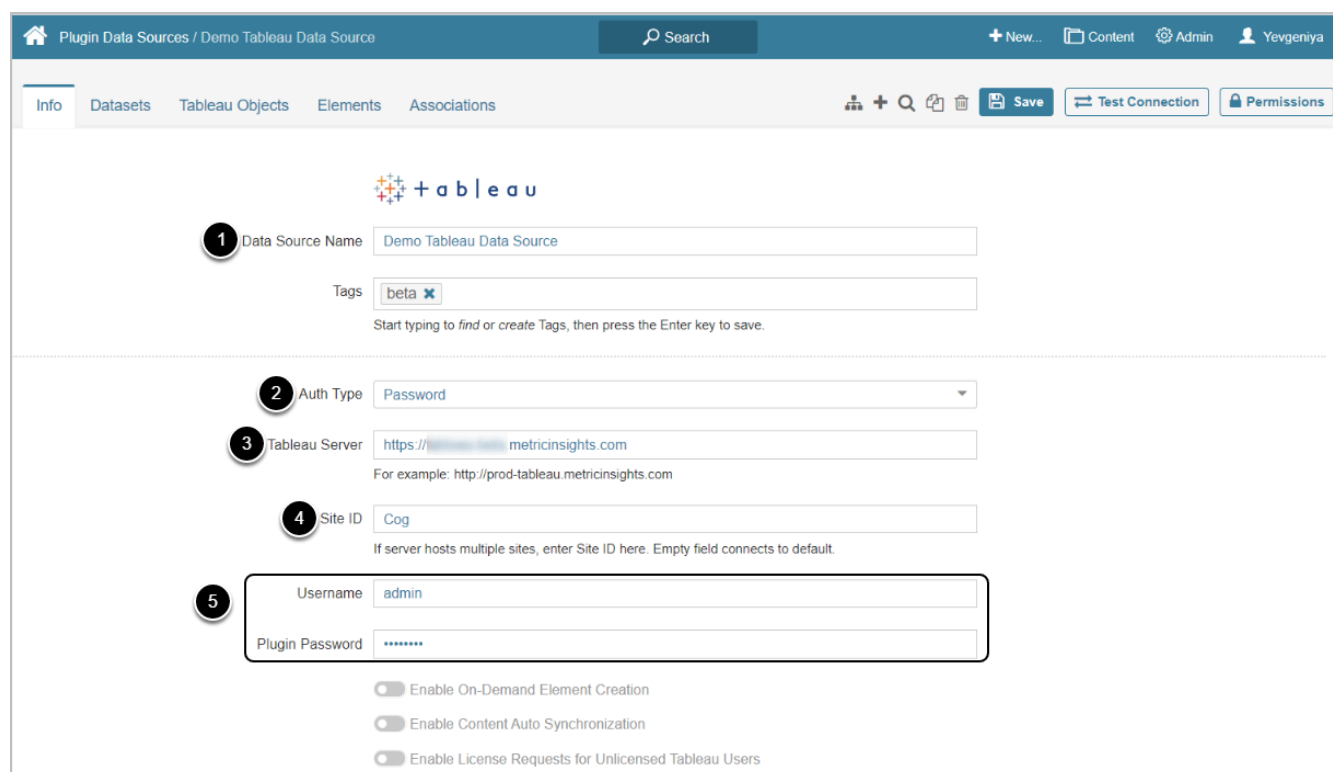
## 1. Create New Data Source

Access **Admin > Collection & Storage > Data Sources**



1. **[+New Data Source]**
2. Choose **Tableau** from the **Other** drop-down list
3. **[Next Step]**

## 2. Complete the Required Parameters



1. Input a descriptive phrase in **Data Source Name**
2. Select the required **Auth Type**
  - For **Password**, use the Tableau credentials as shown on the screen
  - For **Identity Profile**, select the existing [Identity Profile](#) in the **Identity Profile** field that will appear instead of Username and Plugin Password

- Specify the URL to the **Tableau Server**
- Provide the Tableau **Site ID**
- Enter **Username** and **Plugin Password** that you use to log in to the Tableau server (this must be a Local account)

Optionally, toggle on:

- [Enable On-Demand Element Creation](#)
- [Enable Content Auto Synchronization](#)
- [Enable License Requests for Unlicensed Tableau Users](#)

### 3. Define Optional Tableau Parameters

You can edit any values in the **Optional Tableau Parameters** grid by clicking the gear icon in the corresponding row:

▼ Optional Tableau Parameters			
Plugin Connection Profile Parameters			
Variable	Value	Description	
Base URL		When constructing the URL for a Tableau object, this parameter is used for the hostname portion. The full URL is c...	⚙
Attempts		Define the number of attempts to recollect data	⚙
Auth Method	default	Values can be 'default' (standard secure Tableau Auth), 'trusted' (advanced Tableau Trusted Auth) or 'token' (use P...	⚙
Private Key Passphrase		Passphrase for the private key for SSL authentication	⚙
Force refresh cache	false	If set to 'true', use the Tableau parameter '?refresh=yes' to force a fresh workbook data query instead of pulling the...	⚙
Data expiration	900	Expiration period for data in report. Used together with Force refresh cache, 900 seconds by default	⚙
Timeout		Set the timeout in milliseconds; requests will only be processed within this limit.	⚙
Include device layouts metadata	false	Collects device layouts created for the dashboard (Phone, Desktop, Tablet). It can take more time, cause of downlo...	⚙
Include metadata	true	If set to "true", refreshing objects will collect additional metadata as follows: Workbook description, Project name, O...	⚙
Include Update Time	true	Includes dataset last update time into workbook	⚙
Maximum iterations for single data fetch	200	Maximum iterations for single data fetch	⚙
Type of object		When left empty, all objects are returned. If 'Workbook' is specified, views are excluded from the object list and onl...	⚙
Primary Date Format		A java date format string used to parse date values from Tableau, for example "yyyy-MM-dd hh:mm:ss" for "2015-0...	⚙
Project List (Comma-Separated)		Limit the projects that can be seen and used in MI element creation from Tableau data source	⚙
Token		Parameter for Personal Token Auth	⚙
Token name		Parameter for Personal Token Auth	⚙
Use Custom Views	false	If set to 'true' Refresh Views will return customized views in addition to the views. See Tableau docs for 'custom vie...	⚙
Validate SSL Certificates	N	Whether or not to verify SSL server certificates.	⚙

To get the detailed description for each Parameter, see [Tableau Parameters \(Mandatory and Optional\)](#)

### 4. Configure Advanced Settings

Advanced Configuration settings can be set to default values unless Data Source requires more precise tuning. For more details on how to proceed, refer to [Advanced Data Source Configuration](#).

Click **[Test Connection]** in the upper right corner

## 5. What's next?

1. [Create Dataset Sourced from Tableau](#)
2. [Create an External Report from Tableau](#)