

Uploading Tableau Files (dashboards) to the Cornell Tableau Server (in progress)

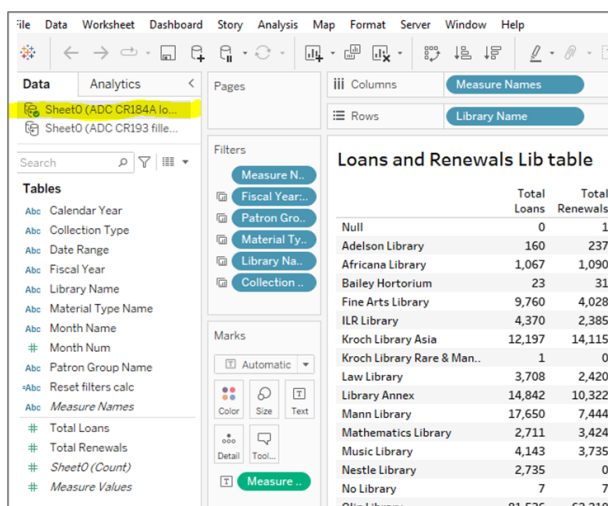
The method of uploading your Tableau files to the Cornell server depends on how the Tableau file is connecting to its underlying data.

- If you are using an SQL query embedded in your Tableau file, then it helps to create a Tableau data extract. Using data extracts is a recommendation, but not a requirement. When data files are large, extracts run faster, and dashboards don't 'spin' as much when users access them. Also, in cases when the underlying query is complex as well as goes through large volumes of data, using an extract that is refreshed daily has many advantages. If multiple users access the dashboards, they won't all hit the LDP at the same time via the query.
- If you are connecting to data that are in EXCEL files on the BOX drive, where the EXCEL files are being updated via automated reports, then there is an additional step involved. In this case, you have to extract your data, else you cannot publish your file to the server.

Extracting Data for Tableau Server Files

You need an extract for each data source, whether it is data generated via an SQL query, or a connection to a data file.

- Go to a sheet that is using data from a query, right click on the active data connection that's under the heading DATA on the far left of the Tableau screen. The active data source is the one that the current sheet is using, as indicated by a tick mark on the source).



- In the drop-down menu, click on 'Extract data'.

