

BI Connectivity via the Data Warehouse

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BI Connectivity via the **Data Warehouse** is an optional paid feature. With the new warehouse in place, changes to objects (e.g., risks or incidents) are sent to the data warehouse, which stores a version of both current and historical data, making it possible to track trends and see changes over time through business intelligence tools.

Once purchased, data warehouse connection details are accessible from the **Edit User** page of the currently logged in administrator. Contact your Customer Success Manager should you wish to enable this feature.

The screenshot shows the 'Edit User' interface for 'Example User'. It features three main panels:

- User Profile:** Fields for 'First Name' (Example), 'Last Name' (User), and 'Email' (exampleuser@example.com).
- Account Status:** Checkboxes for 'User Enabled' and 'Admin' (both checked), and 'All Access' (unchecked). A 'Language' dropdown is set to 'English (United States)'.
- Data Warehouse Settings:** Fields for 'Domain URL', 'Database Name', and 'Username', a 'GENERATE PASSWORD' button, and a password field.

The Edit User page showing the Data Warehouse Settings.

Important Notes


- Up to 200 fields, formula values, and roles per object type are stored in the warehouse. Data is updated every 2 to 5 minutes, depending on the data load.
- This feature does not:
 - Store attachments (image or file) or text formatting (Markdown or rich text);
 - Transfer role permissions. This means that any user with access to the BI tool will be able to view object data their role permissions would otherwise restrict; or
 - Automatically transfer field, formula, or object type name changes into the data

warehouse. A manual update in the tool is required to reflect these changes, but note that amendments of this nature may negatively affect your BI reports.

- Following initial activation, it may take 30 minutes or more before the data warehouse is fully functional. Additionally, significant changes to your organization (e.g., a data import) can take 30 minutes or more to transfer successfully.
- If your organization was recently imported into Core, wait a minimum of 30 minutes before transferring data into the warehouse.
- Data warehouse passwords are not stored in Core. If you need to log into the BI tool, but you've misplaced the original password, another password must be generated.
- If the user account that generated the password entered into the BI tool is deleted, disabled, or loses its admin privileges, the current warehouse session will be terminated. To once again gain access, a new password must be generated from another admin account and entered into the tool.
- Resolver's data warehouse uses Postgres protocol to communicate with Transport Layer Security (TLS) over TCP port 5432, which some organizations' firewalls may block. If you have trouble connecting to the data warehouse, speak to your IT department to allow outbound connections on TCP port 5432.
- Some BI tools, such as Microsoft Power BI, may have additional requirements before a connection can be established. If a connection to the BI tool failed due to a certificate error, contact [Resolver Support](#) for assistance.

Instructions

To access the data warehouse settings:

1. Click the  icon in the top bar > **Users** in the **People** section.
2. Click your name to view the **Edit User** page for your account.
3. Click **Generate Password** in the **Data Warehouse Settings** section.

Data Warehouse Settings ?

Domain URL 👁

Database Name 👁

Username 👁

GENERATE PASSWORD

The Data Warehouse Settings section.



Newly activated data warehouses may take 30 minutes or more before they're fully functional. If a **warehouse unavailable** message is displayed when **Generate Password** is clicked, try again after 30 minutes has passed.

4. Copy and paste the values of the **Domain URL**, **Database Name**, **Username**, and password fields into your business intelligence tool to establish a connection. Depending on your BI tool, the **Domain URL** may be referred to as a **Server URL**, **Host URL**, or similar.



If a connection to the BI tool failed, additional requirements (e.g., a new domain URL and/or file downloads) may need to be met before a connection can be established. Contact [Resolver Support](#) for assistance.