

Connect BI Tools to Your Data Warehouse

Last Modified on 05/12/2022 11:48 am EDT

This article provides instructions for connecting BI Tools with your organization's Data Warehouse on a Windows 10 machine.

Prerequisites

Before following the steps below, ensure you have:

- Purchased and activated the Data Warehouse feature.
- Reviewed the [Data Warehouse Overview](#) article.
- A Core user account with admin privileges enabled for the organization you wish to connect to Power BI.
- Access to your Data Warehouse domain URL, which you can find in your User Profile by following the steps in the [Access Your Data Warehouse Settings](#) article.
- Contacted [Resolver Support](#) to obtain the Amazon certificate required to complete the steps in section 2 below.

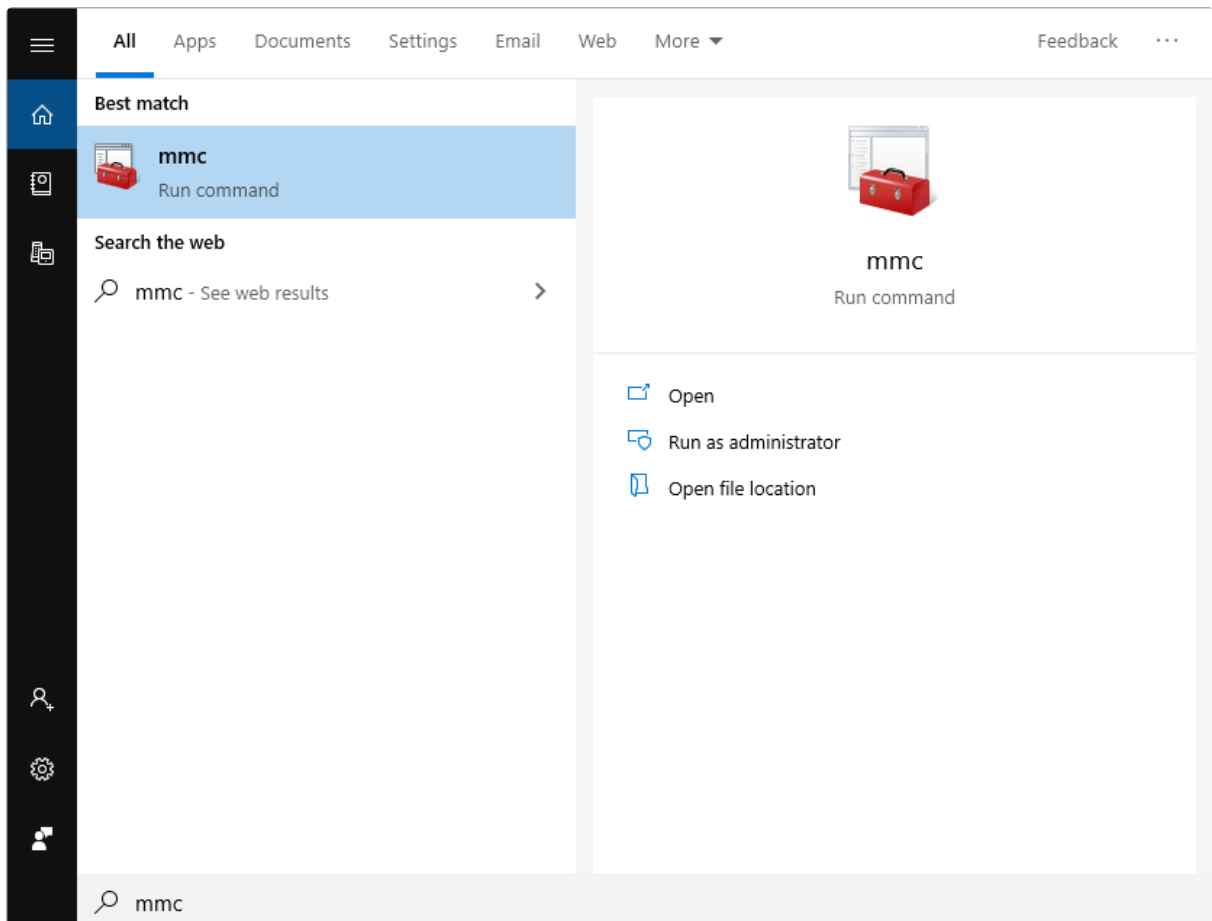


If you have trouble connecting to the Data Warehouse, speak to your IT department to allow outbound connections on TCP port 5432.

1. Import the Certificate

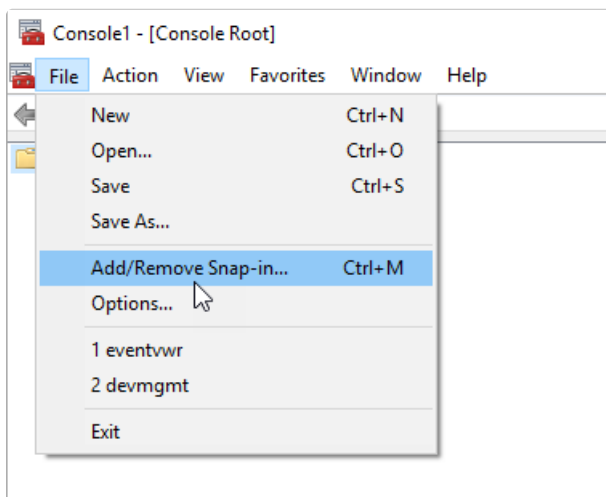
To import the Amazon certificate:

1. Once you have the required Amazon certificate from [Resolver Support](#), enter **mmc** in the Windows [search box](#), then click **Open** to open the Microsoft Management Console.



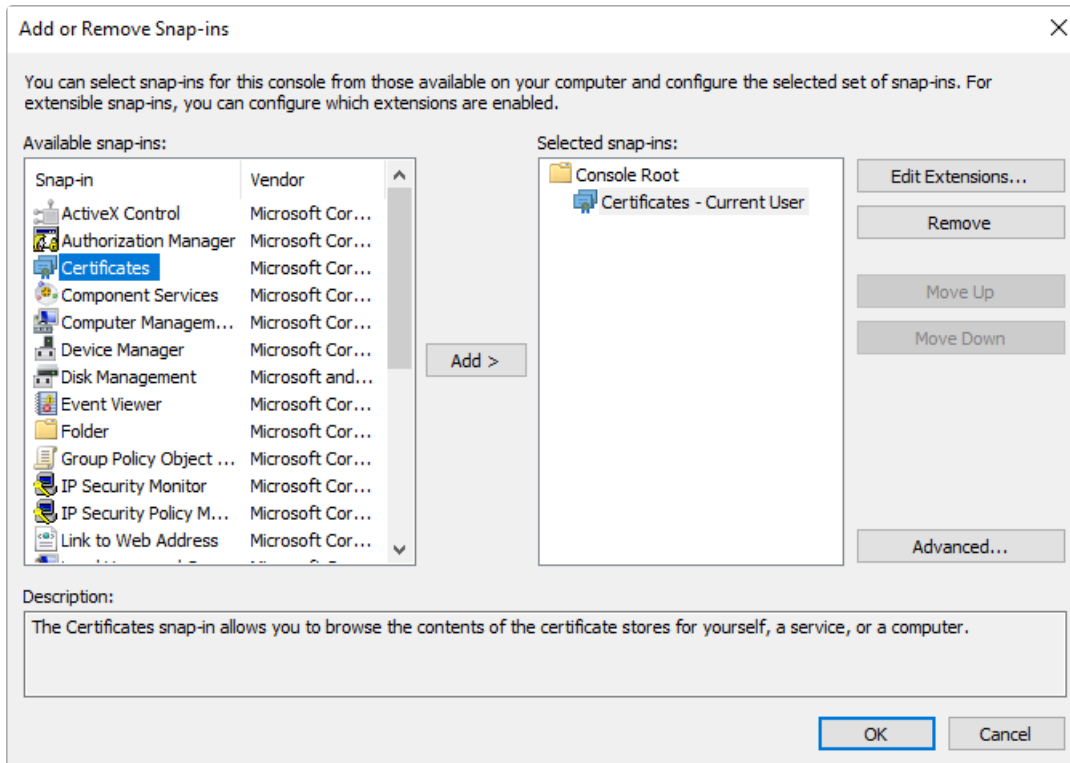
Microsoft Management Console in the search results.

2. Click File > Add/Remove Snap-in...



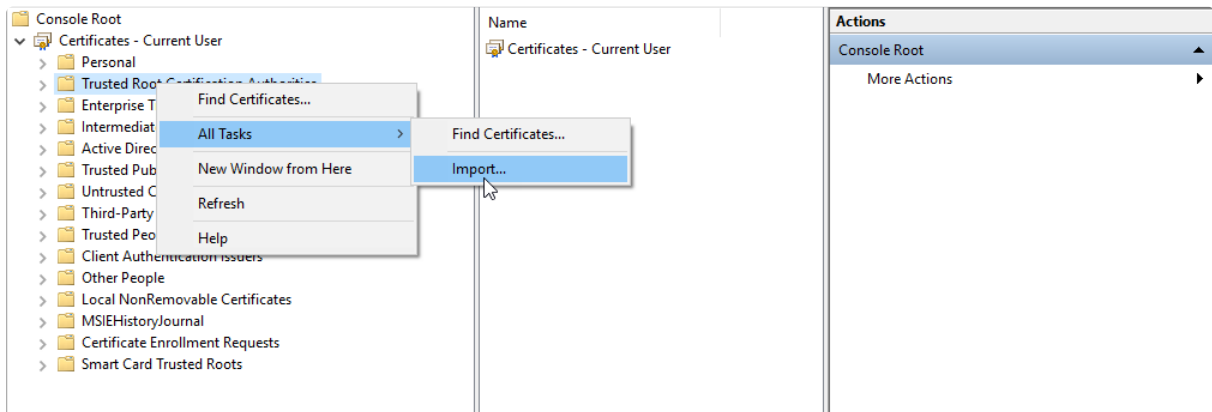
The Add/Remove Snap-in... option from the File menu.

3. Select Certificates from the Available snap-ins pane on the left, then click **Add** to move it to the Selected snap-ins pane on the right.



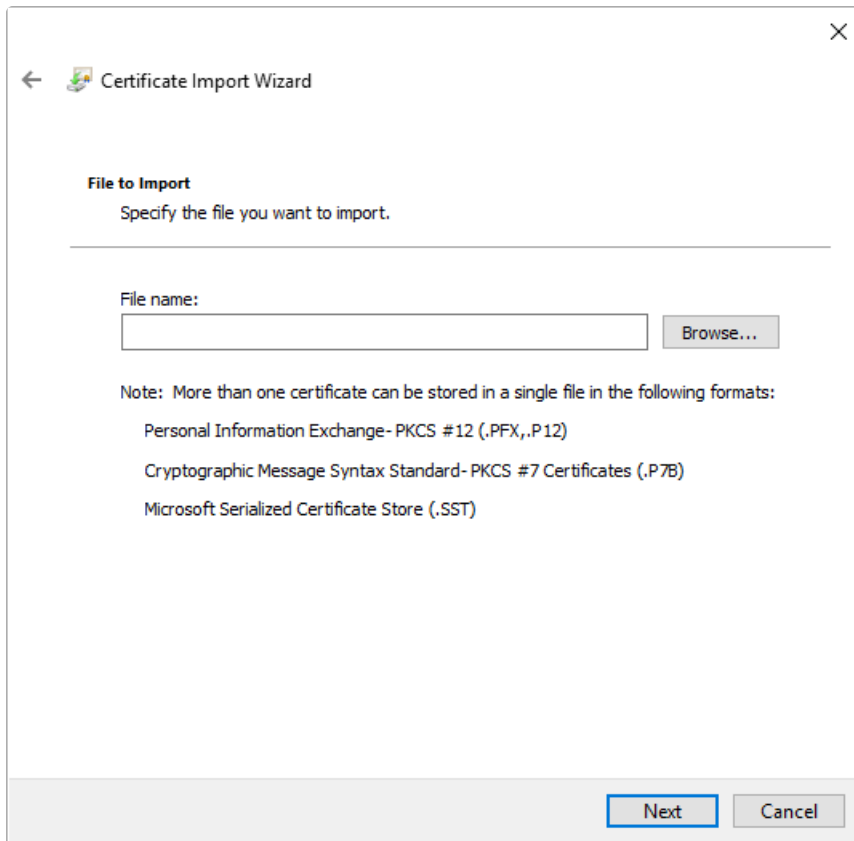
The Add or Remove Snap-ins window.

4. Click OK to close the window to return to the console.
5. Expand Certificates - Current User in the pane to the right.
6. Right-click Trusted Root Certification Authorities, then select All Tasks > Import to open the Certificate Import Wizard window.



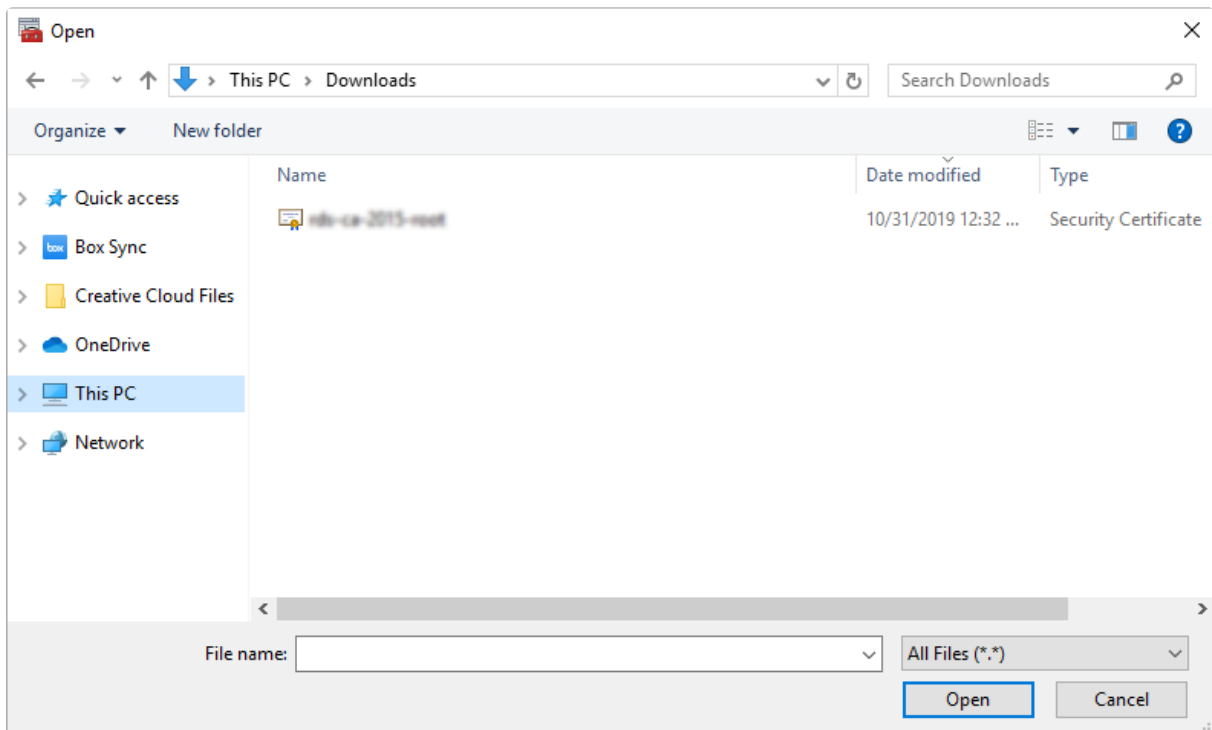
The Import option in the console.

7. From the second screen of the installer, click Browse.



The Certificate Import wizard.

8. Navigate to the saved location of the Amazon certificate, then click **Open**.



Selecting the certificate file after clicking Browse.




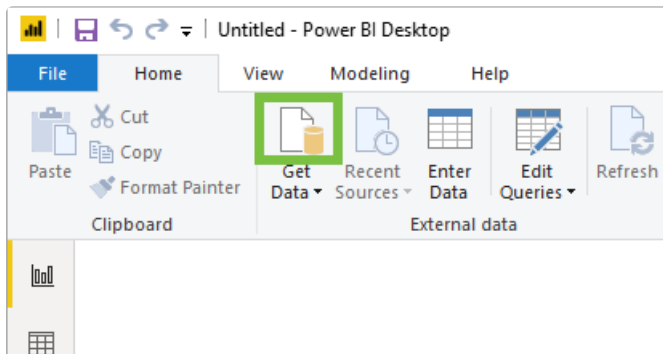
If you can't see the certificate file after clicking **Browse**, select **All Files (*.*)** from the dropdown menu at the bottom-right of the window.

9. Complete the steps in the wizard, then close the console. It's not necessary to click **Save** when prompted.

2. Connect the Warehouse with Power BI

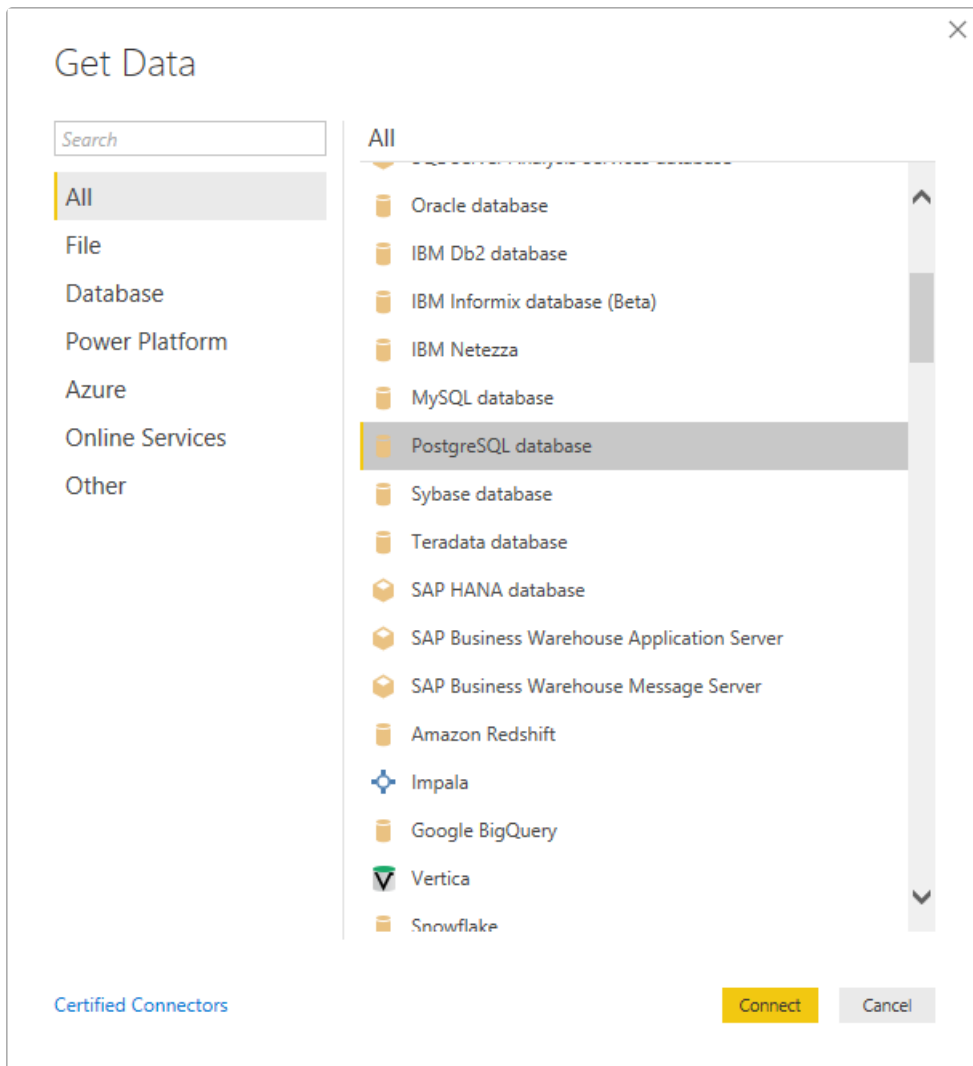
To establish a connection between the data warehouse and Power BI:

1. Open Power BI.
2. Click the  **Get Data** icon.



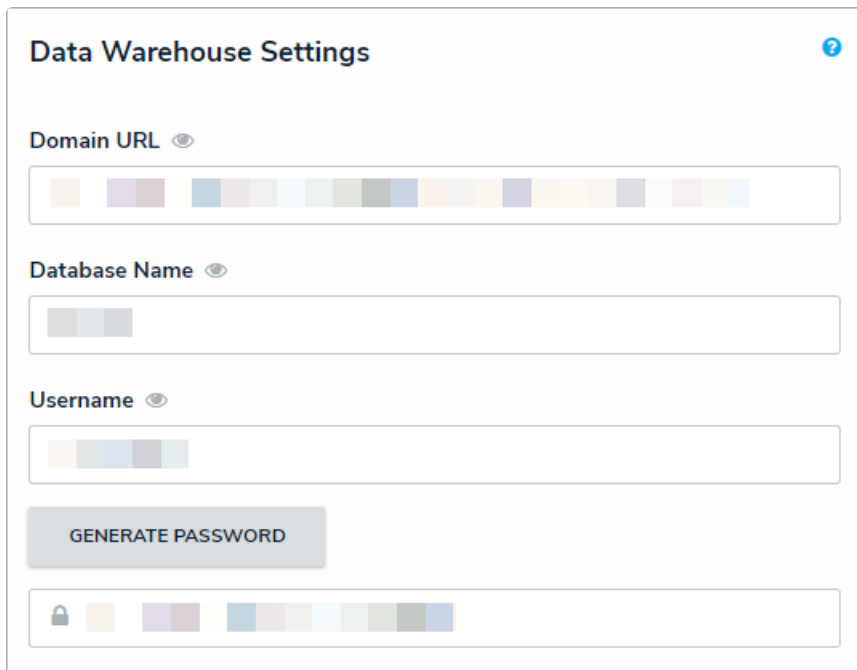
The Get Data icon in Power BI

3. Select PostgreSQL database in the pane to the right, then click **Connect**.



The Get Data window in Power BI.

4. Follow the instructions in the [Access Your Data Warehouse Settings](#) article to access the data warehouse details from your Core user account page.



Data Warehouse Settings ?

Domain URL 👁

Database Name 👁

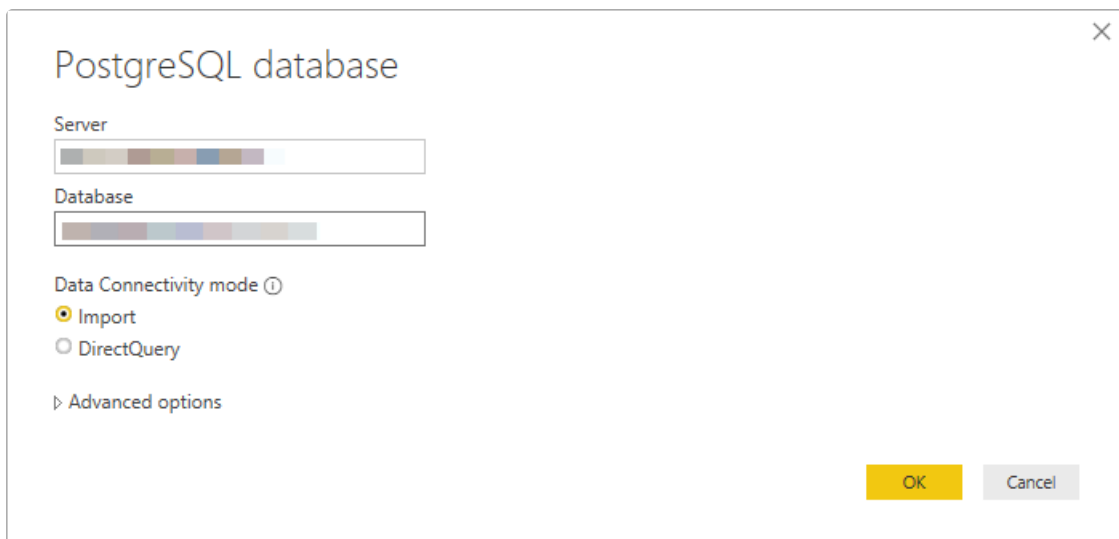
Username 👁

GENERATE PASSWORD

🔒

The Data Warehouse settings accessible from your Core admin user page.

5. Paste the Domain URL from your Core user page in the Server field.
6. Paste the Database Name from your Core user page in the Database field.



PostgreSQL database ×

Server

Database

Data Connectivity mode ⓘ

Import

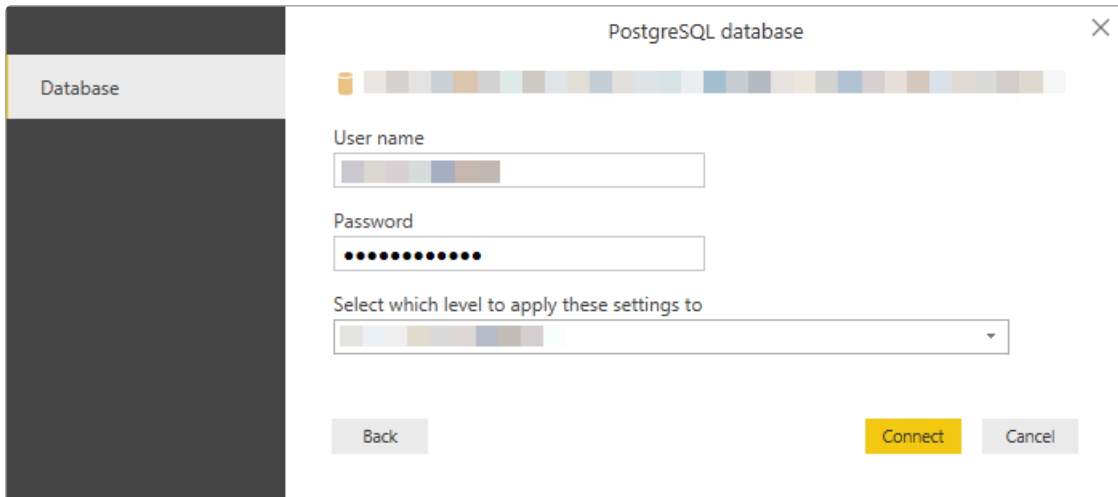
DirectQuery

▸ Advanced options

OK Cancel

The Server and Database fields in Power BI.

7. Click OK.
8. Paste the username and password from your Core user page in the User name and Password fields.



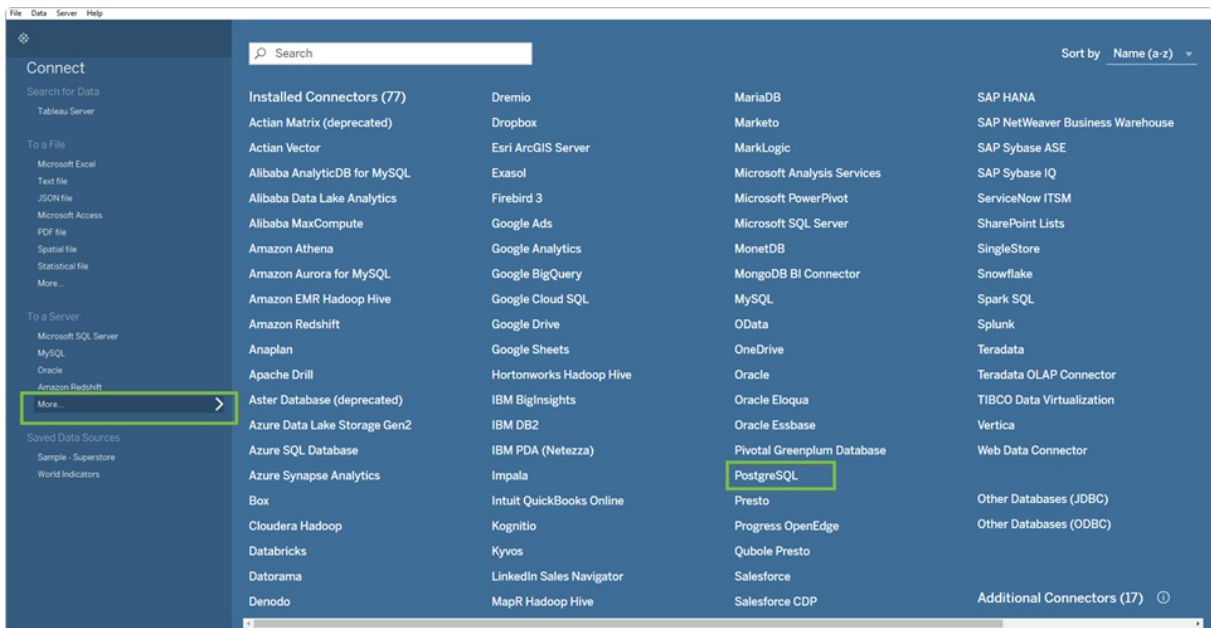
The User name and Password fields in Power BI.

9. Click Connect to complete the process.

3. Connect to Tableau

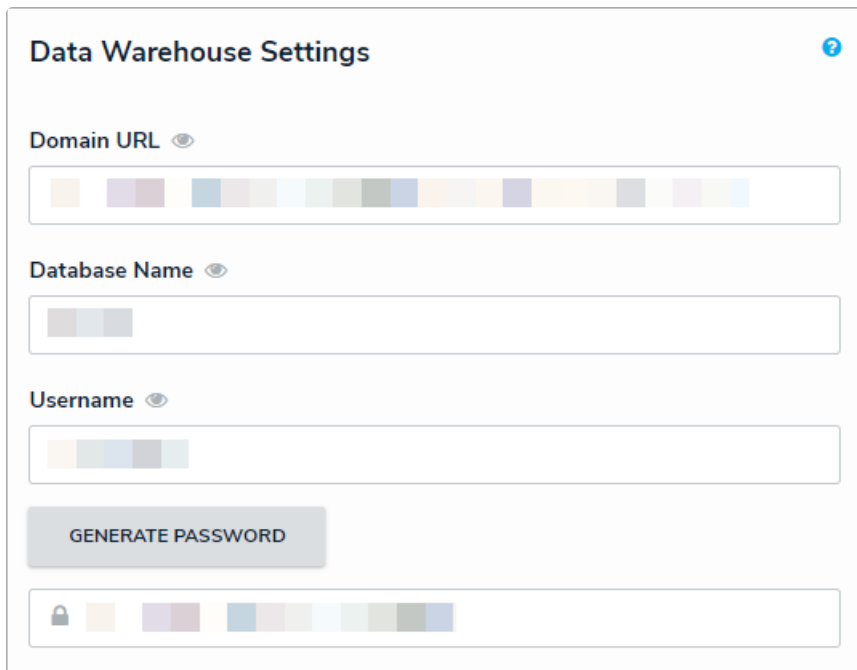
To establish a connection between Data Warehouse and Tableau:

1. Open Tableau.
2. Select Connect - To a Server > More > PostgreSQL.



Tableau's Connect menu.

3. Follow the instructions in the [Access Your Data Warehouse Settings](#) article to access the data warehouse details from your Core user account page.



The screenshot shows a 'Data Warehouse Settings' form with the following fields and controls:

- Domain URL**: A text input field with a help icon (question mark) to its right. The field contains a blurred, multi-colored string.
- Database Name**: A text input field with a help icon to its right. The field contains a blurred, multi-colored string.
- Username**: A text input field with a help icon to its right. The field contains a blurred, multi-colored string.
- GENERATE PASSWORD**: A grey button with white text, positioned below the Username field.
- Password**: A text input field with a lock icon on the left, indicating it is a password field. The field contains a blurred, multi-colored string.

The Data Warehouse settings accessible from your Core admin user page.

4. Paste the Domain URL from your Core user page in the **Server** field.
5. Paste the **Database Name** from your Core user page in the **Database** field.
6. Paste the username and password from your Core user page in the **Username** and **Password** fields.

PostgreSQL ×

General Initial SQL

Server

Port
5432

Database

Authentication
Username and Password ▼

Username

Password
Optional

Require SSL

Sign In

The Username and Password fields in Tableau.

7. Click Sign In.