

Connect BI Tools to Your Data Warehouse

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Overview

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:

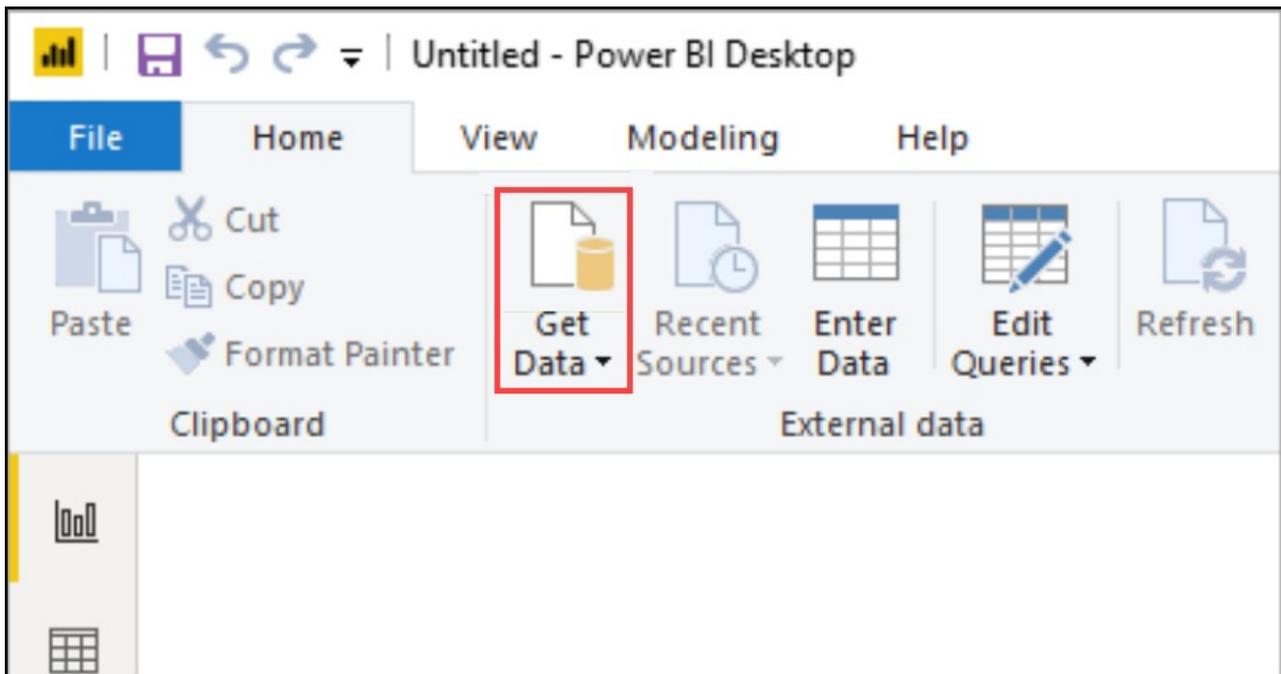
- Purchased and activated the Data Warehouse feature.
- Reviewed the [Data Warehouse Overview](#) article.
- A Core user account with admin privileges enabled for the organization you wish to connect to Power BI.
- Access to your Data Warehouse domain URL, which you can find in your User Profile by following the steps in the [Access Your Data Warehouse Settings](#) article.
- It is recommended that an SSL (Secure Sockets Layer) Protocol is used when connecting to the data warehouse.

If you have trouble connecting to the Data Warehouse, speak to your IT department to allow outbound connections on TCP port 5432 Contact [Resolver Support](#) for assistance.

If a connection to the BI tool fails, 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.

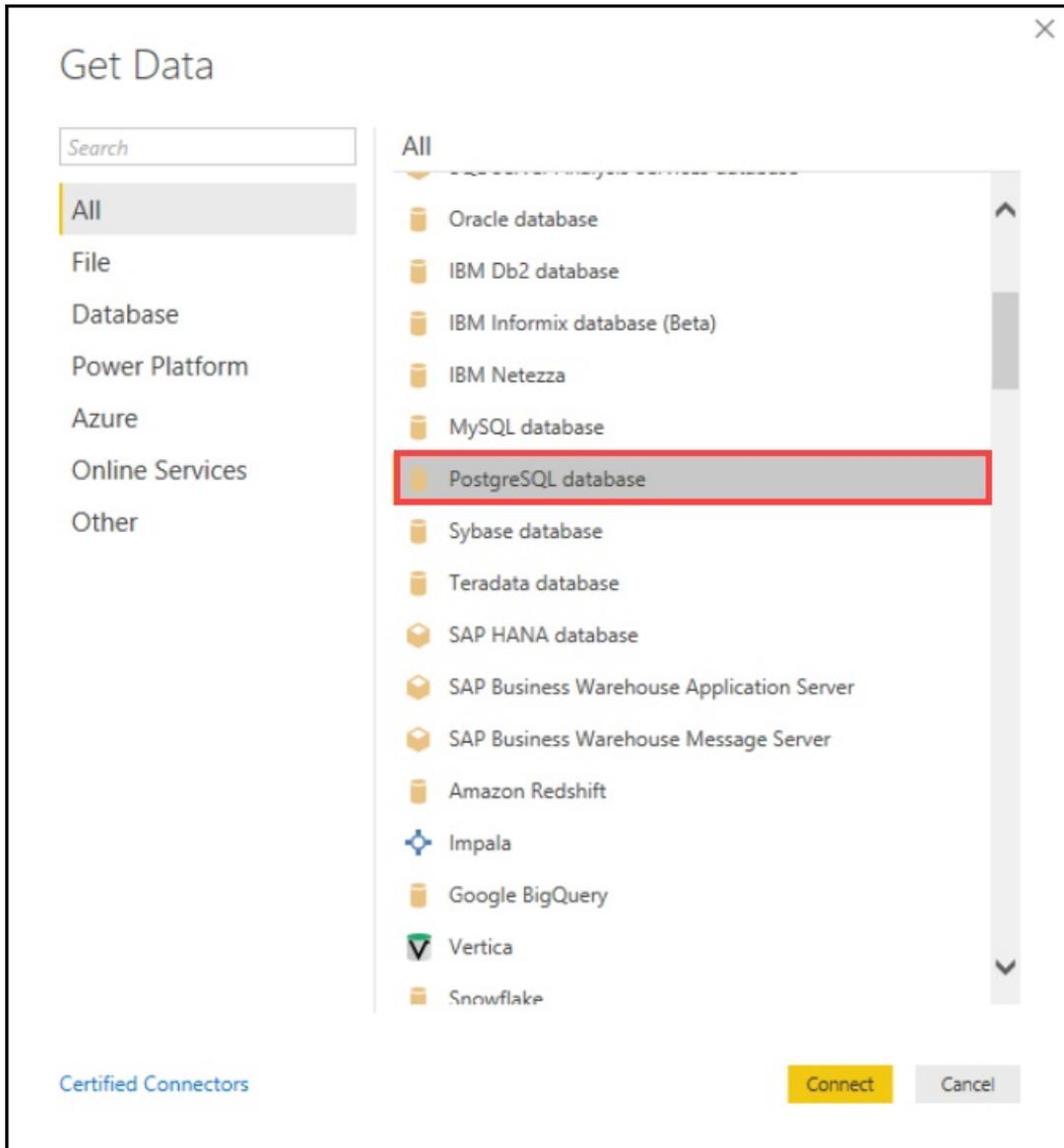
Connect to the Data Warehouse with Power BI

1. Open the Power BI application.
2. From the **File** menu, click the **Get Data** icon.



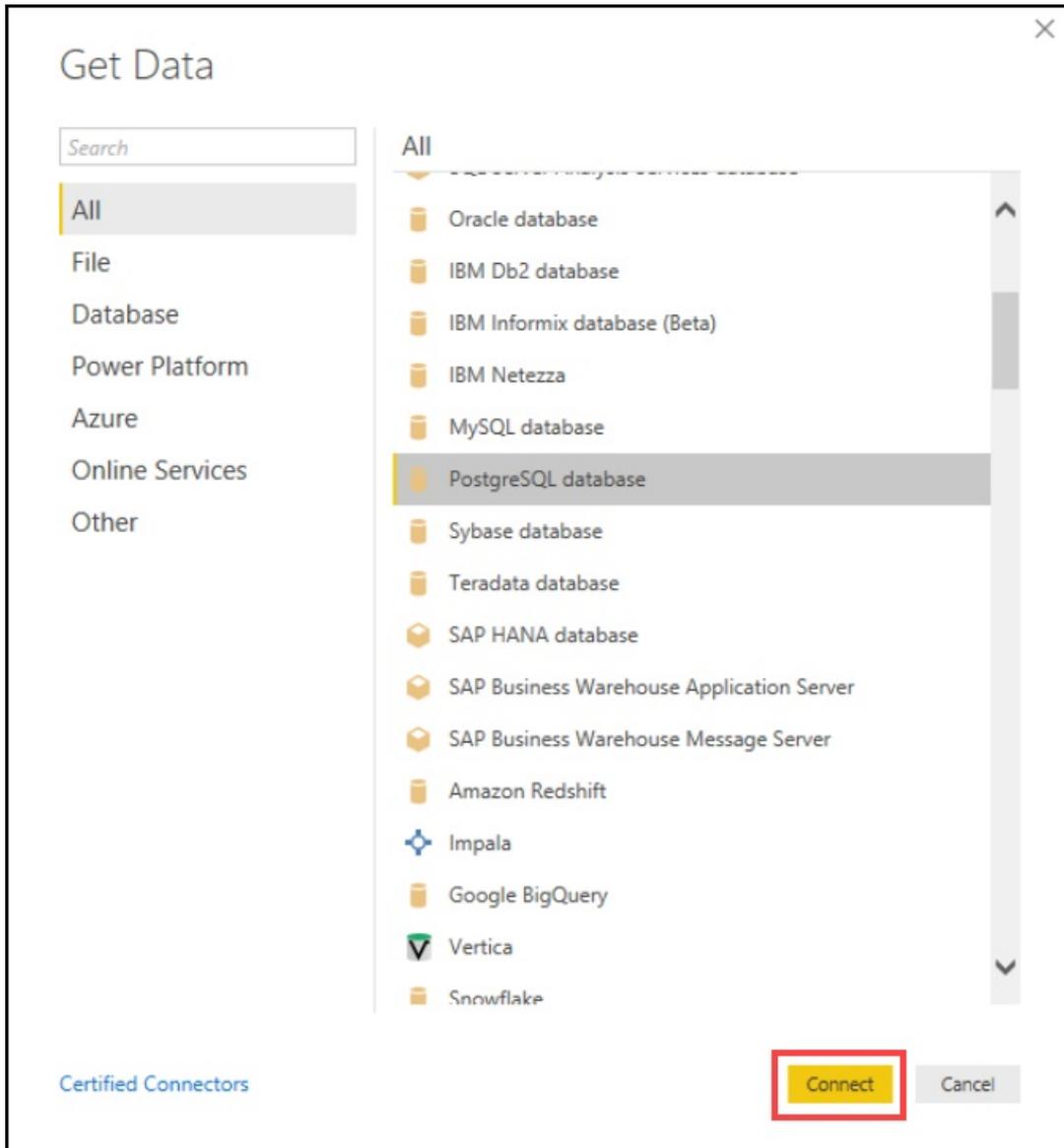
Get Data Icon

3. From the **Get Data** screen, click **PostgreSQL database** in the pane to the right.



Get Data Screen

4. Click the **Connect** button.



Connect Button

5. Follow the instructions in the [Access Your Data Warehouse Settings](#) article to access the data warehouse details.

Data Warehouse Settings ⓘ

Domain URL ⓘ

Database Name ⓘ

Username ⓘ

GENERATE PASSWORD

🔒

Data Warehouse Settings

6. Enter the **Domain URL** from the Resolver **User** screen in the **Server** field in Power BI.

PostgreSQL database ⓘ

Server

Database

Data Connectivity mode ⓘ

Import

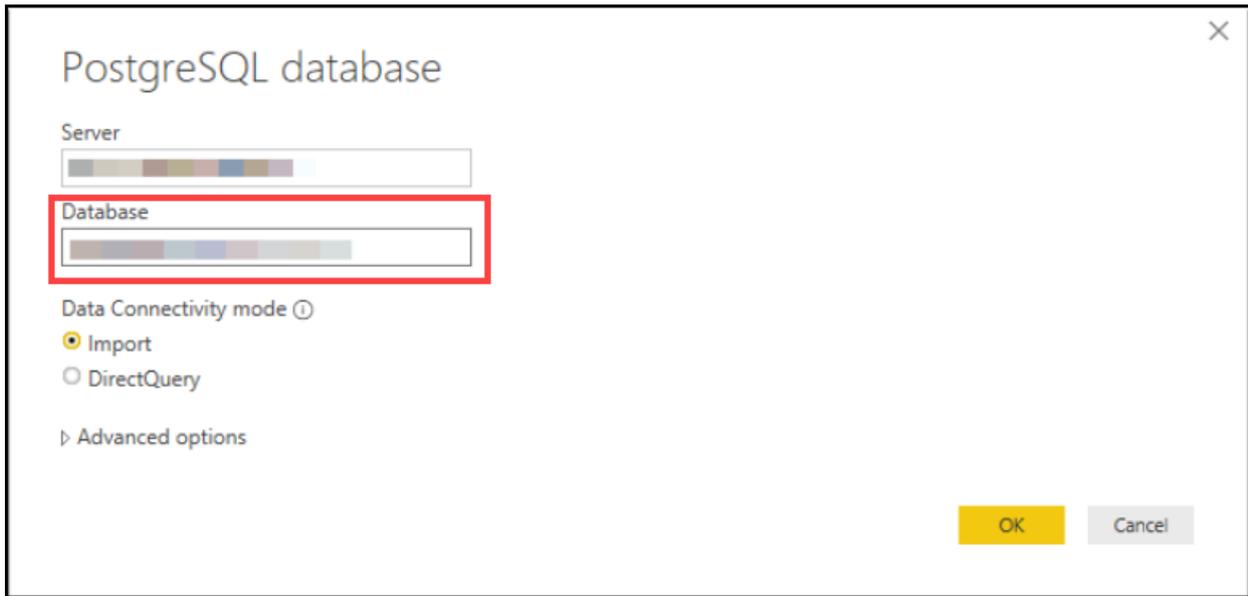
DirectQuery

▸ Advanced options

OK Cancel

Server Field

7. Enter the **Database Name** from the Resolver **User** screen in the **Database** field in Power BI.



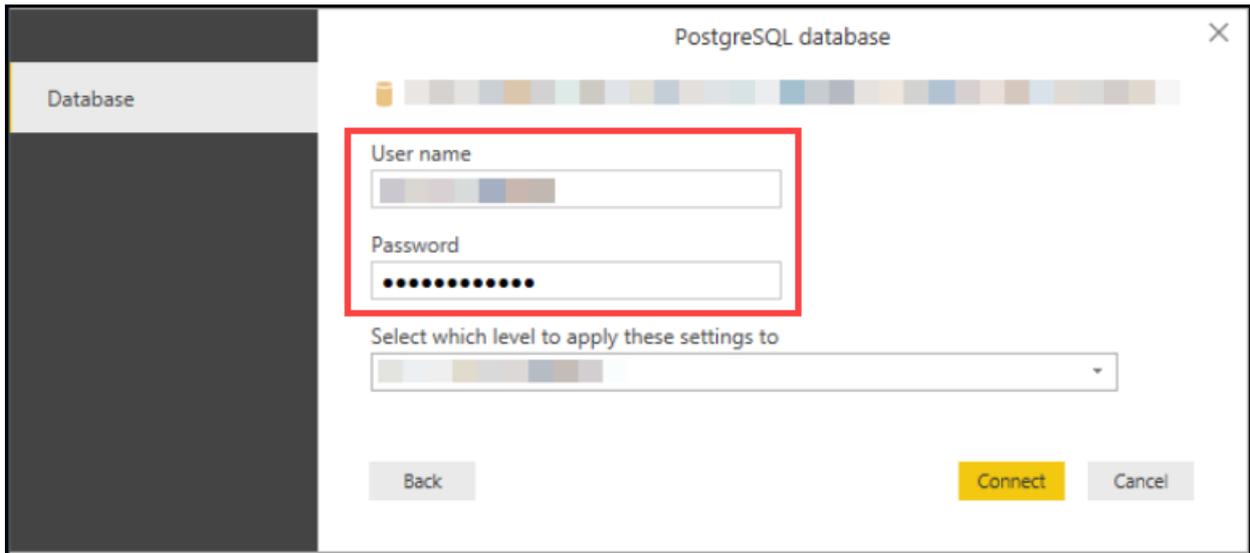
Database Field

8. Click the **OK** button.



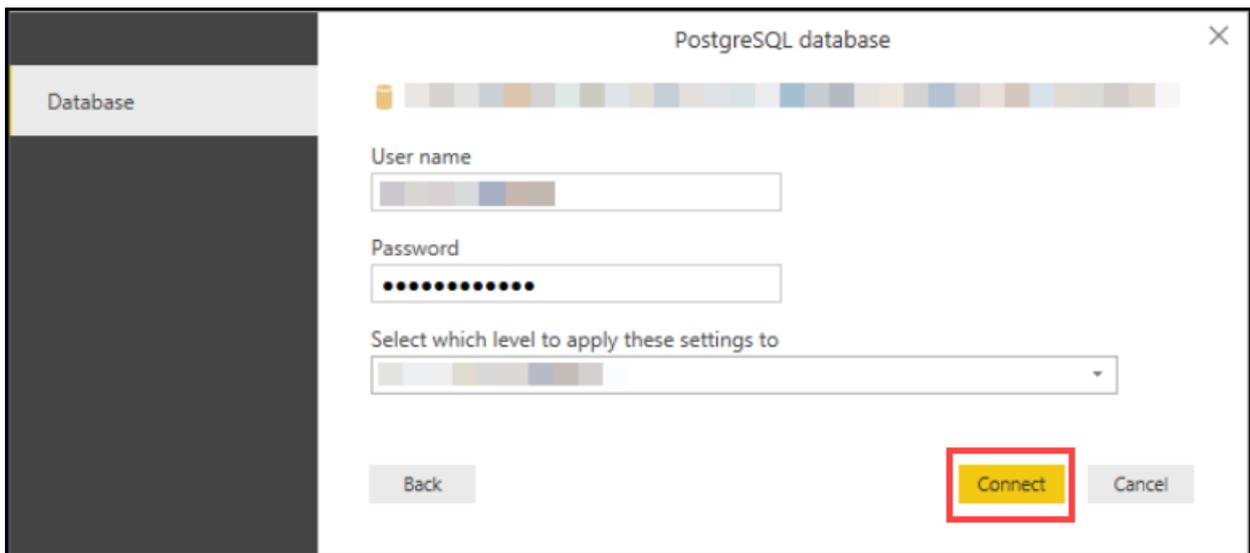
OK Button

9. From the **Database** screen, enter the **Username** and **Password** from the Resolver **User** screen in the **User name** and **Password** fields in Power BI.



Username and Password Fields

10. Click the **Connect** button to complete the process.



Connect Button

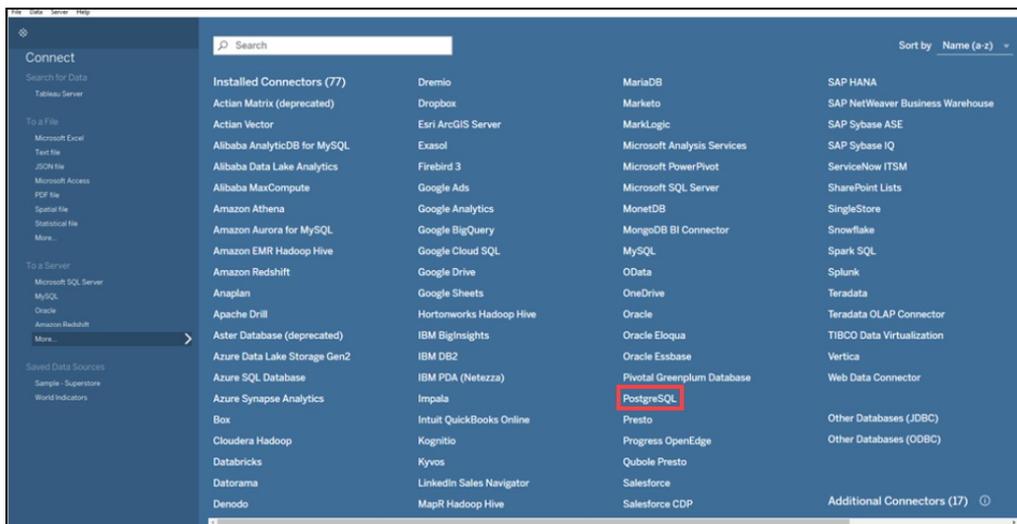
Connect to the Data Warehouse with Tableau

1. Open the Tableau application.
2. From the **Connect** menu, select the **More** link from under **To a Server** section.



More Link

3. Click the **PostgreSQL** link.



PostgreSQL Link

4. 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 elements:

- Domain URL**: A text input field with a color-coded background.
- Database Name**: A text input field with a color-coded background.
- Username**: A text input field with a color-coded background.
- GENERATE PASSWORD**: A button to generate a password.
- Password**: A text input field with a lock icon and a color-coded background.

Database Warehouse Settings

5. From the **PostgreSQL** screen, enter the **Domain URL** from the Resolver **User** screen in the **Server** field in Tableau.

The screenshot shows the 'PostgreSQL' configuration window in Tableau, with the 'General' tab selected. The 'Server' field is highlighted with a red box. The configuration includes:

- Server**: A text input field, highlighted with a red box.
- Port**: A text input field with the value '5432'.
- Database**: A text input field.
- Authentication**: A dropdown menu set to 'Username and Password'.
- Username**: A text input field.
- Password**: A text input field with the value 'Optional'.
- Require SSL**: A checkbox that is currently unchecked.
- Sign In**: A button at the bottom right.

Server Field

6. Enter the **Database Name** from the Resolver **User** screen in the **Database** field in Tableau.

The image shows a 'PostgreSQL' dialog box with two tabs: 'General' and 'Initial SQL'. The 'General' tab is active. The fields are as follows:

- Server: [Empty text box]
- Port: 5432
- Database: [Empty text box, highlighted with a red border]
- Authentication: Username and Password (dropdown menu)
- Username: [Empty text box]
- Password: Optional [Empty text box]
- Require SSL
- Sign In button

Database Field

7. Enter the **Username** and **Password** from the Resolver **User** screen in the **Username** and **Password** fields in Tableau.

The image shows a 'PostgreSQL' configuration window with two tabs: 'General' and 'Initial SQL'. The 'General' tab is active. The form contains the following fields and options:

- Server: [Empty text field]
- Port: 5432
- Database: [Empty text field]
- Authentication: Username and Password (dropdown menu)
- Username: [Empty text field]
- Password: Optional [Empty text field]
- Require SSL
- Sign In button

Username and Password Fields

8. Click the **Sign In** button.

PostgreSQL ×

General Initial SQL

Server

Port
5432

Database

Authentication
Username and Password ▼

Username

Password
Optional

Require SSL

Sign In

Sign In Button