

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:

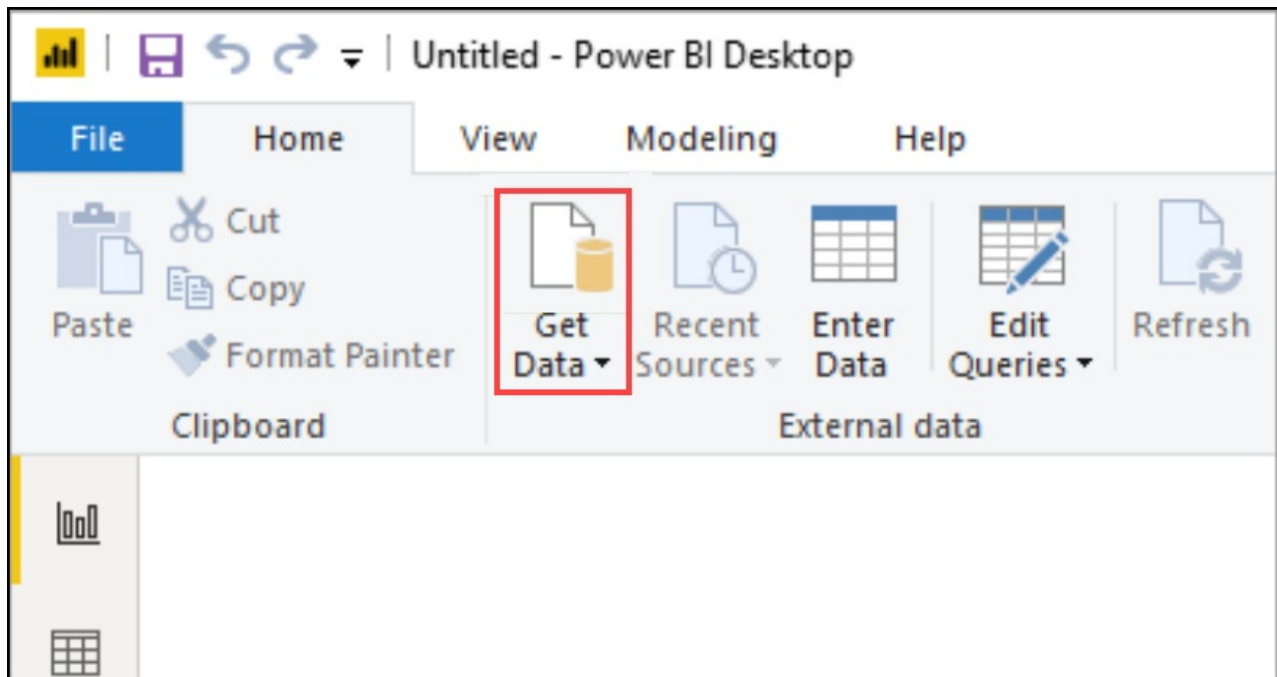
- Purchased and activated the Data Warehouse feature.
- Reviewed the [Data Warehouse Overview](#) article.
- A Core user account with admin privileges enabled for the organization you wish to connect to Power BI.
- Access to your Data Warehouse domain URL, which you can find in your User Profile by following 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.

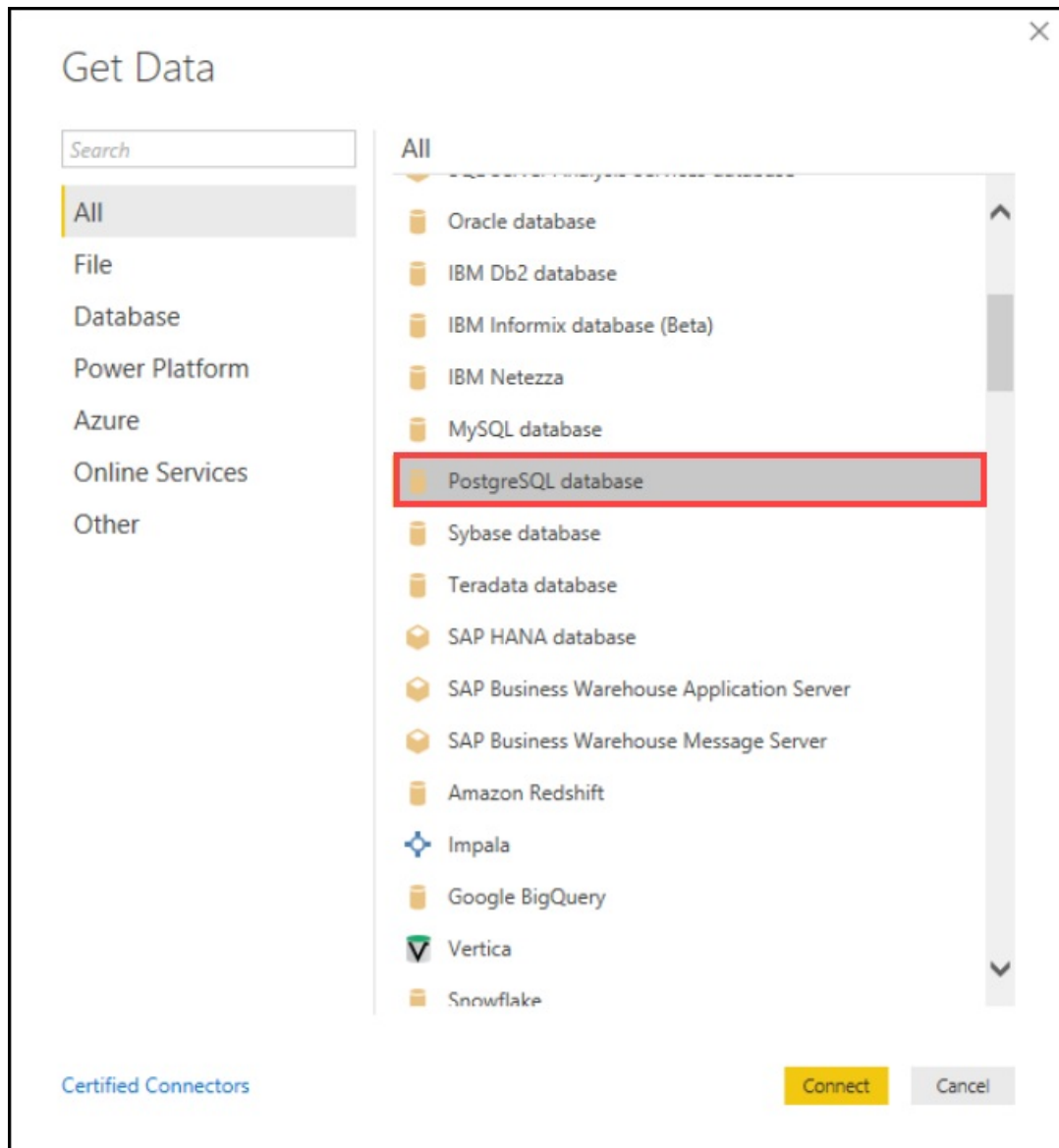
Connect to the Data Warehouse with Power BI

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



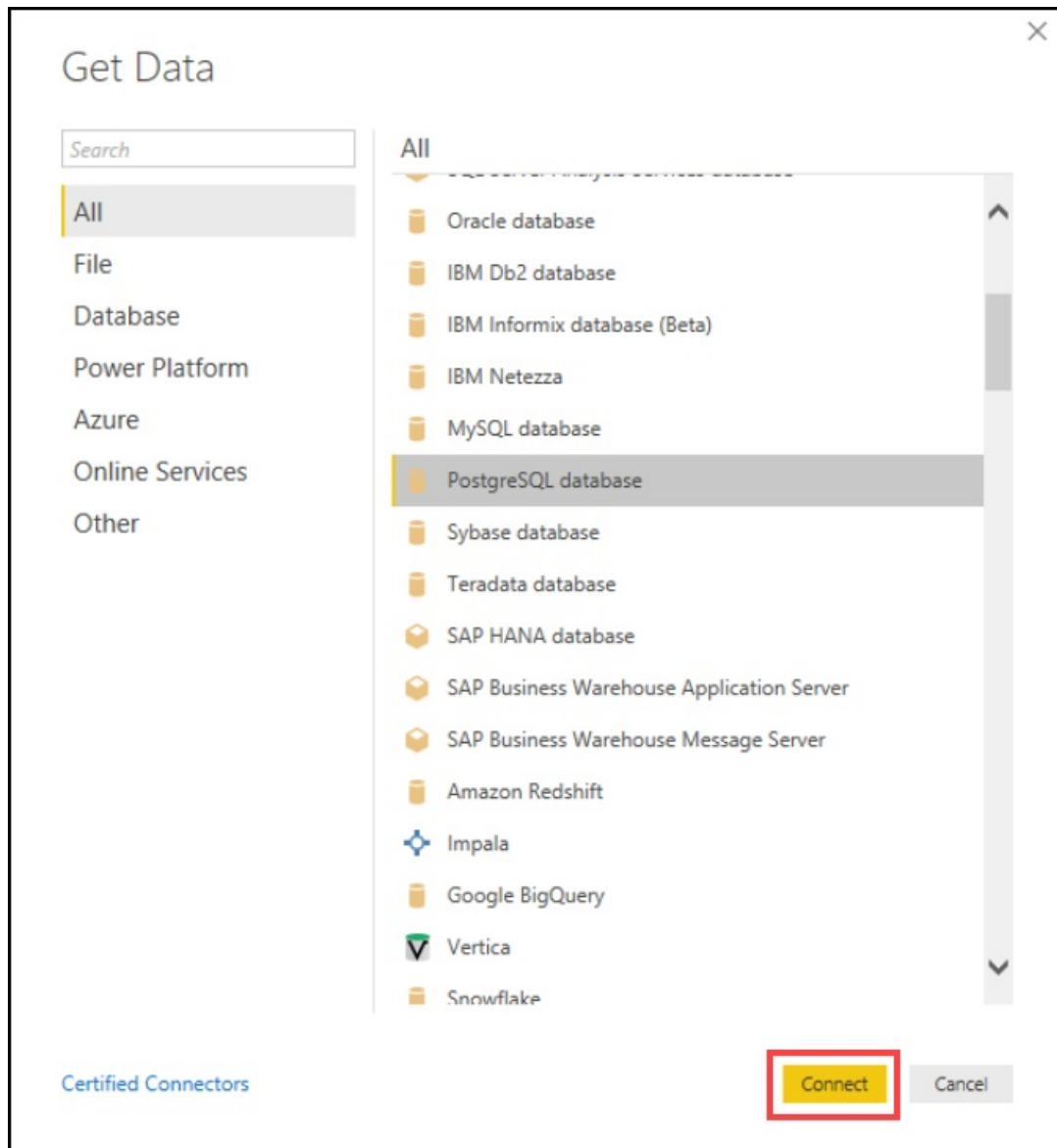
Get Data Icon

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



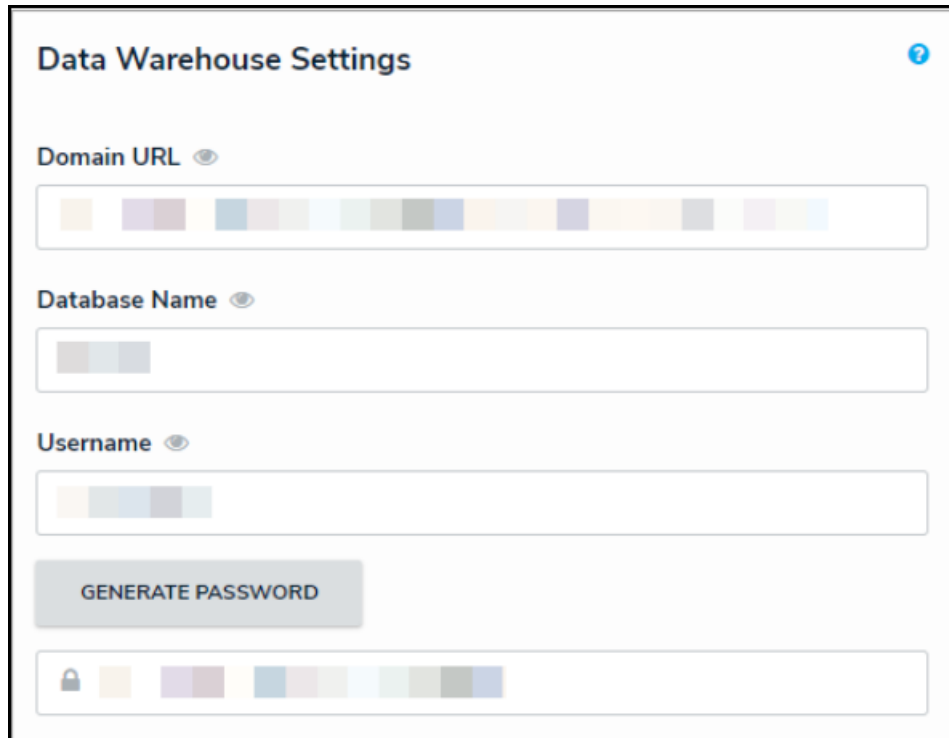
Get Data Screen

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.

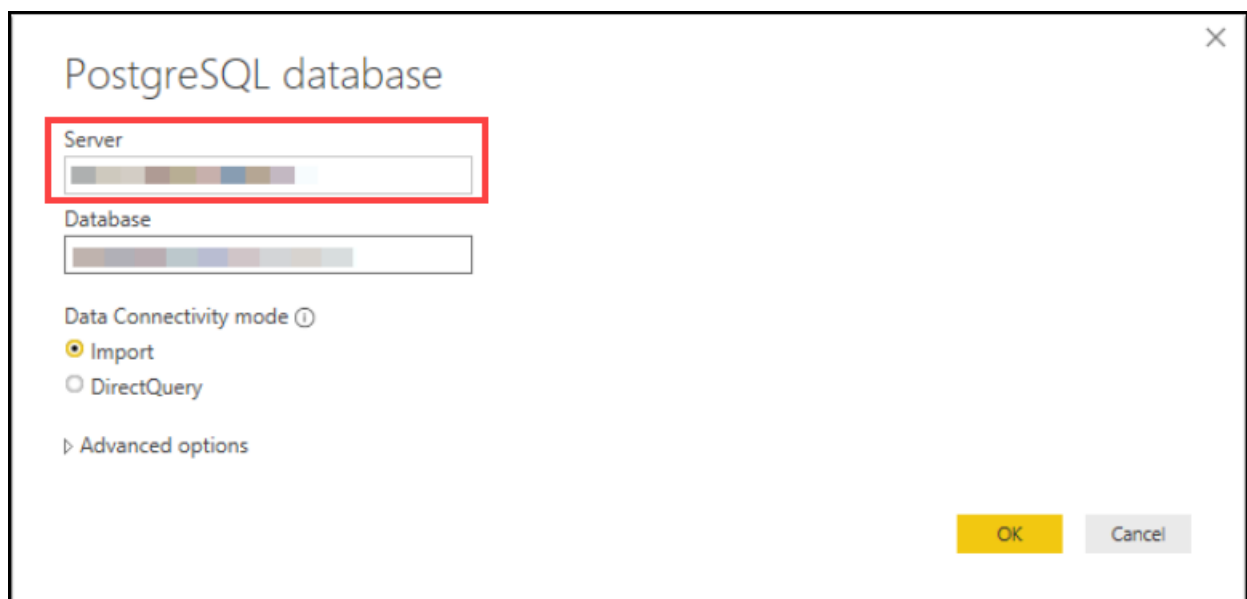


The 'Data Warehouse Settings' dialog box contains the following fields and controls:

- Domain URL**: A text input field with a blue eye icon for visibility.
- Database Name**: A text input field with a blue eye icon for visibility.
- Username**: A text input field with a blue eye icon for visibility.
- GENERATE PASSWORD**: A button to generate a password.
- Password**: A text input field with a lock icon and a blue eye icon for visibility.

Data Warehouse Settings

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

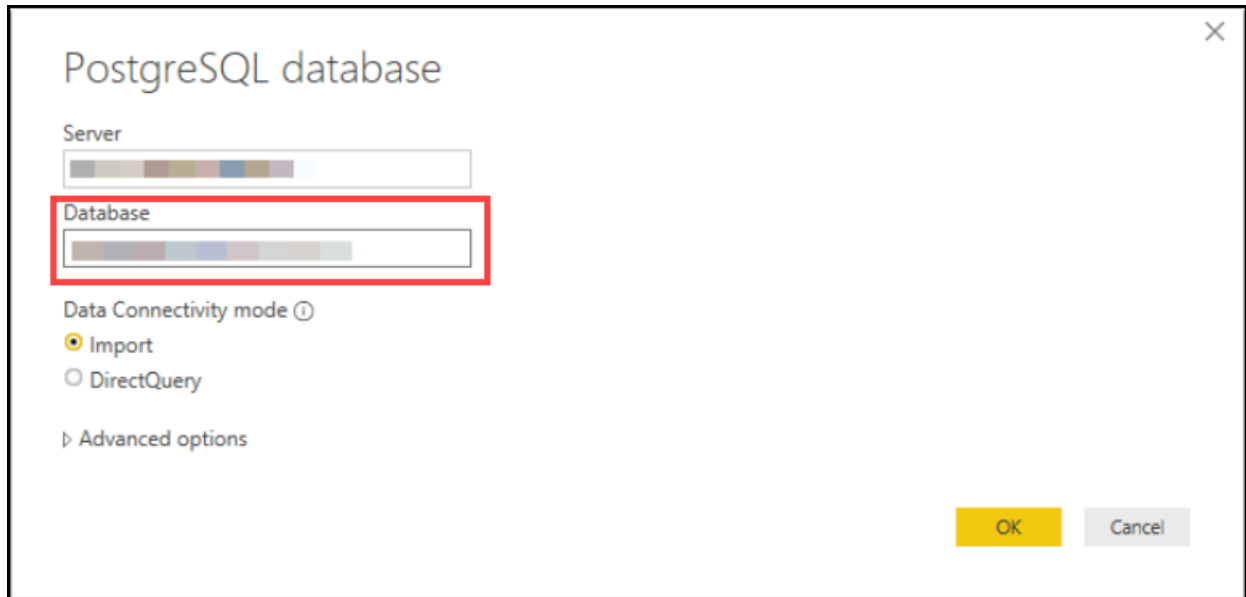


The 'PostgreSQL database' dialog box contains the following fields and controls:

- Server**: A text input field, highlighted with a red rectangle.
- Database**: A text input field.
- Data Connectivity mode**: Radio buttons for **Import** (selected) and **DirectQuery**.
- Advanced options**: A link to expand advanced settings.
- OK** and **Cancel**: Buttons at the bottom right.

Server Field

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



PostgreSQL database

Server

Database

Data Connectivity mode ⓘ

☒ Import

☐ DirectQuery

▶ Advanced options

OK Cancel

Database Field

- Click the **OK** button.



PostgreSQL database

Server

Database

Data Connectivity mode ⓘ

☒ Import

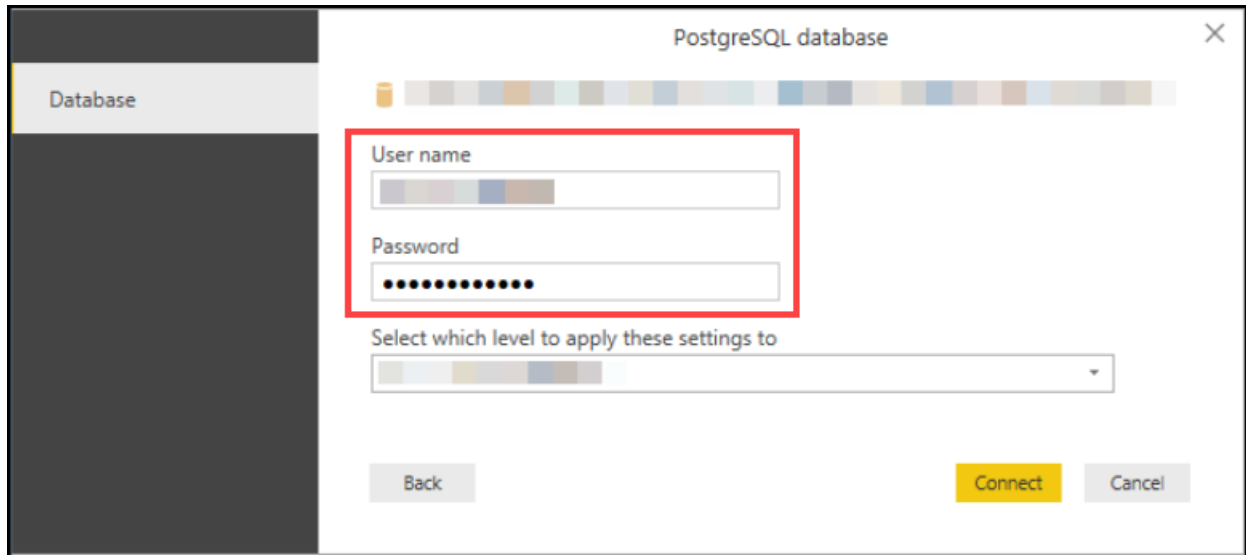
☐ DirectQuery

▶ Advanced options

OK Cancel

OK Button

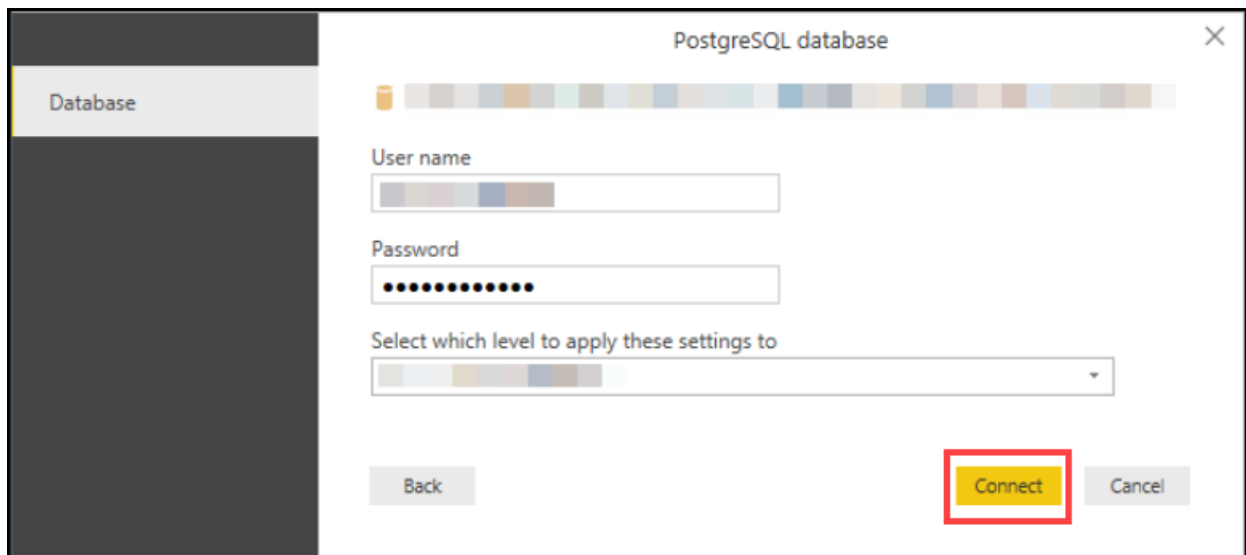
- From the **Database** screen, enter the **Username** and **Password** from the Resolver **User** screen in the **User name** and **Password** fields in Power BI.



The screenshot shows a 'PostgreSQL database' connection dialog. On the left is a dark sidebar with a 'Database' tab. The main area has a title bar, a progress bar, and three input fields: 'User name', 'Password', and a dropdown menu labeled 'Select which level to apply these settings to'. The 'User name' and 'Password' fields are enclosed in a red rectangular box. At the bottom are 'Back', 'Connect', and 'Cancel' buttons.

Username and Password Fields

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

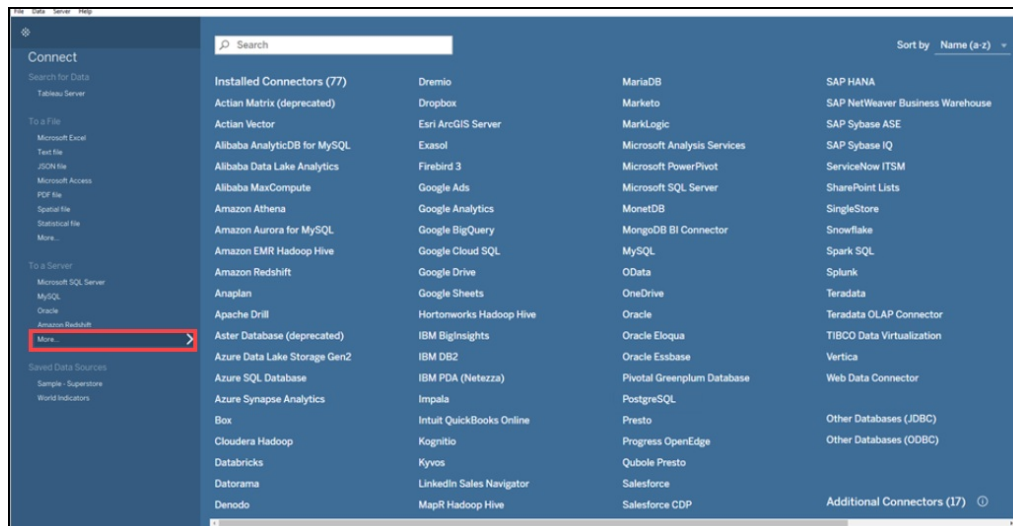


This screenshot is identical to the previous one, but the 'Connect' button at the bottom right is highlighted with a red rectangular box.

Connect Button

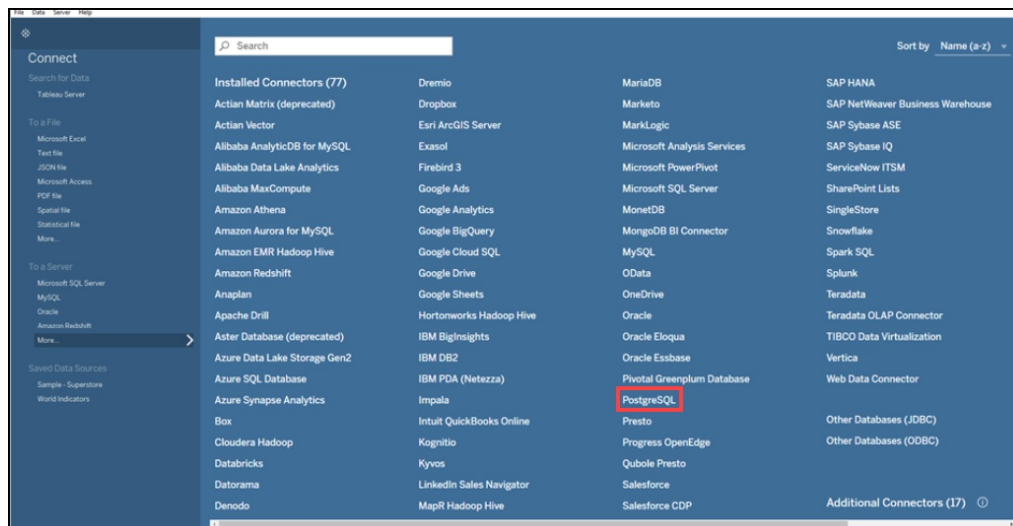
Connect to the Data Warehouse with Tableau

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



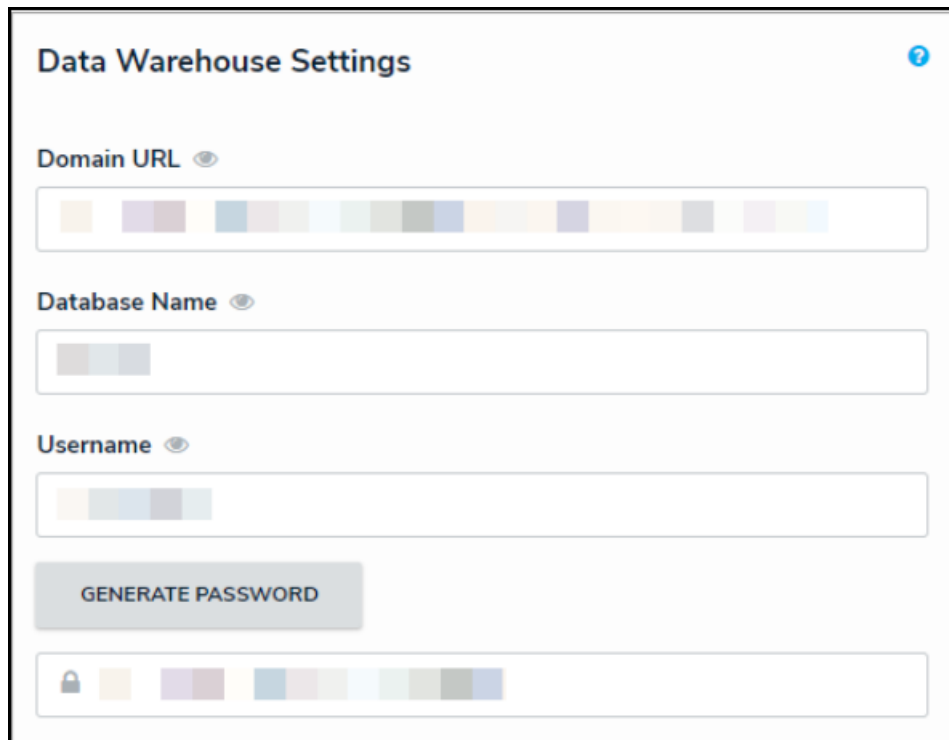
More Link

3. Click the **PostgreSQL** link.



PostgreSQL Link

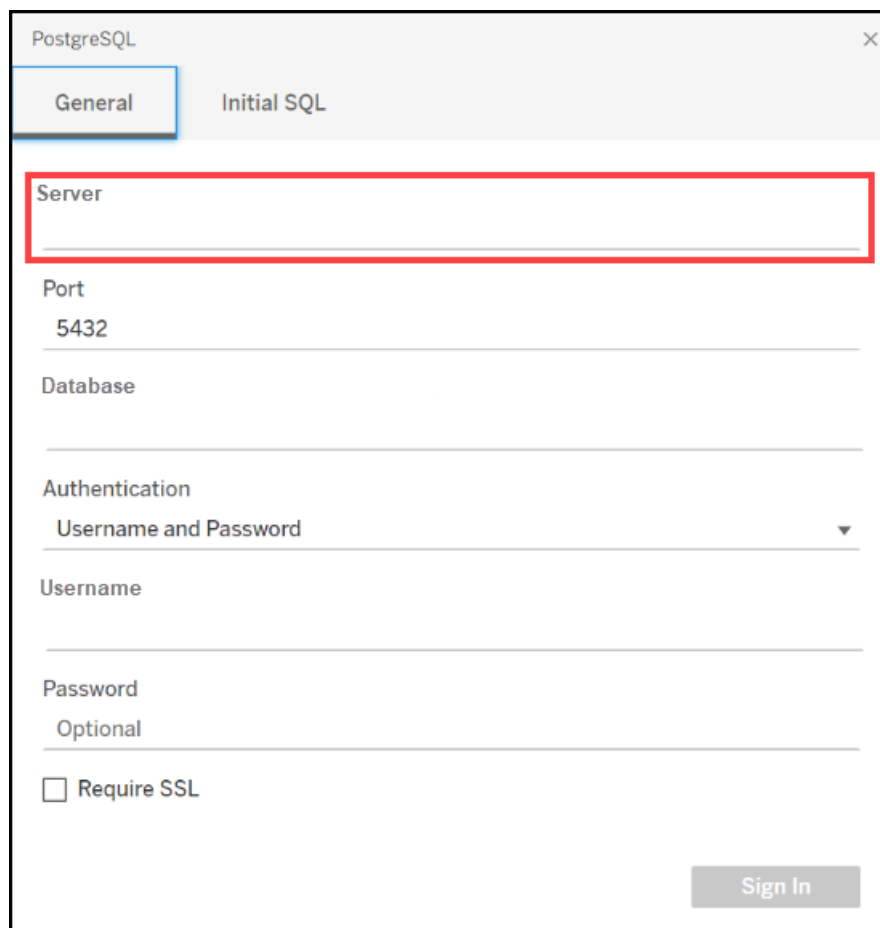
4. Follow the instructions in the [Access Your Data Warehouse Settings](#) article to access the data warehouse details from your Core user account page.



The screenshot shows the 'Data Warehouse Settings' form. It includes fields for 'Domain URL', 'Database Name', and 'Username', each with a color-coded selection bar. Below these is a 'GENERATE PASSWORD' button and a password field with a lock icon and a color-coded selection bar. A help icon is in the top right corner.

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' connection dialog in Tableau. The 'General' tab is selected. The 'Server' field is highlighted with a red rectangle. Other fields include 'Port' (5432), 'Database', 'Authentication' (Username and Password), 'Username', 'Password' (Optional), and a 'Require SSL' checkbox. A 'Sign In' button is 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' connection dialog box with a close button (X) in the top right corner. It has two tabs: 'General' (selected) and 'Initial SQL'. The 'General' tab contains the following fields and options:

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

Database Field

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

PostgreSQL

General Initial SQL

Server

Port
5432

Database

Authentication
Username and Password

Username

Password
Optional

☐ Require SSL

Sign In

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