

Tableau Online Integration

USER GUIDE

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# Introduction

Tableau Online is your analytics platform fully hosted in the cloud. It allows you to publish dashboards and share the discoveries with colleagues or customers to explore hidden opportunities with interactive visualizations and accurate data. All easily accessible from a browser.

# Solution Overview

This skill wraps a subset of the REST endpoints available on the Tableau Online. Using the Tableau Server REST API, you can manage and change Tableau Server resources programmatically, via HTTP. The API gives you simple access to the functionality behind the data sources, projects, workbooks, site users, and sites on a Tableau server. You can use this access to create your own custom applications or to script interactions with Tableau Server resources.

# Pre-Requisites and Environment Configuration

## Tableau Online Access

Use of this skill requires access to your organization Tableau Online site. Furthermore, you would require to create your personal token before you start using the Tableau Online APIs.

1. Follow the instructions at <https://help.tableau.com/current/pro/desktop/en-us/useracct.htm> to create the personal token.

# Using the Skill

Below are the available actions in the skill and the details of the inputs/outputs that are available.

## Sign In (Personal Token)

Signs you in as a user on the specified site on Tableau Server and returns a credentials token that you use in subsequent calls to the server.

### Inputs

|  |  |  |
| --- | --- | --- |
| Parameter | Type | Description |
| Token Name | Text | The name of the personal access token when signing in with a personal access token. The token name is available on a user’s account page on Tableau server or online. |
| Token Secret | Text | The secret value of the personal access token when signing in with a personal access token. |
| Content Url | Text | The URL of the site to sign in to. |

### Outputs

|  |  |  |
| --- | --- | --- |
| Parameter | Type | Description |
| Response\_Content | Text | A JSON value containing response information related to the request. |
| HTTP Status Code | Text | HTTP Status code returned in response. |
| Response Headers | Collection | Collection of headers data returned in response. |
| Json Response | Text | A custom code of converted output in JSON format from XML response. |
| Message | Text | Exception message that thrown out from custom code. |

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## Sign In (Impersonate)

Login with username and password to sign in and impersonate a specific user on the specified site on Tableau Server and returns a credentials token that you use in subsequent calls to the server.

### Inputs

|  |  |  |
| --- | --- | --- |
| Parameter | Type | Description |
| Username | Text | The name of the user when signing in with username and password. |
| Password | Text | The password when signing in with username and password. |
| Content Url | Text | The URL of the site to sign in to. |

### Outputs

|  |  |  |
| --- | --- | --- |
| Parameter | Type | Description |
| Response\_Content | Text | A JSON value containing response information related to the request. |
| HTTP Status Code | Text | HTTP Status code returned in response. |
| Response Headers | Collection | Collection of headers data returned in response. |
| Json Response | Text | A custom code of converted output in JSON format from XML response. |
| Message | Text | Exception message that thrown out from custom code. |

## Sign Out

Signs you out of the current session. This call invalidates the authentication token.

### Inputs

|  |  |  |
| --- | --- | --- |
| Parameter | Type | Description |
| Access Token | Text | The authenticate token to consume Tableau endpoint services. |

### Outputs

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Parameter | | Type | | Description | |
| Response\_Content | | Text | | A JSON value containing response information related to the request. |
| HTTP Status Code | | Text | | HTTP Status code returned in response. |
| Response Headers | | Collection | | Collection of headers data returned in response. |

## Query Content Url Site

Returns information about the specified site, with the option to return information about the storage space and user count for the site.

### Inputs

|  |  |  |
| --- | --- | --- |
| Parameter | Type | Description |
| Access Token | Text | The authenticate token to consume Tableau endpoint services. |
| Content Url | Text | The URL of the site to get information for. |

### Outputs

|  |  |  |
| --- | --- | --- |
| Parameter | Type | Description |
| Response\_Content | Text | A JSON value containing response information related to the request. |
| HTTP Status Code | Text | HTTP Status code returned in response. |
| Response Headers | Collection | Collection of headers data returned in response. |
| Json Response | Text | A custom code of converted output in JSON format from XML response. |
| Message | Text | Exception message that thrown out from custom code. |

## Query Site Name

Returns information about the specified site, with the option to return information about the storage space and user count for the site.

### Inputs

|  |  |  |
| --- | --- | --- |
| Parameter | Type | Description |
| Access Token | Text | The authenticate token to consume Tableau endpoint services. |
| Site Name | Text | The name of the site to get information for. |

### Outputs

|  |  |  |
| --- | --- | --- |
| Parameter | Type | Description |
| Response\_Content | Text | A JSON value containing response information related to the request. |
| HTTP Status Code | Text | HTTP Status code returned in response. |
| Response Headers | Collection | Collection of headers data returned in response. |
| Json Response | Text | A custom code of converted output in JSON format from XML response. |
| Message | Text | Exception message that thrown out from custom code. |

## Query Workbooks for Site

Return the workbooks on site.

### Inputs

|  |  |  |
| --- | --- | --- |
| Parameter | Type | Description |
| Access Token | Text | The authenticate token to consume Tableau endpoint services. |
| Site Id | Text | The ID of the site that contains the workbooks. |

### Outputs

|  |  |  |
| --- | --- | --- |
| Parameter | Type | Description |
| Response\_Content | Text | A JSON value containing response information related to the request. |
| HTTP Status Code | Text | HTTP Status code returned in response. |
| Response Headers | Collection | Collection of headers data returned in response. |
| Json Response | Text | A custom code of converted output in JSON format from XML response. |
| Message | Text | Exception message that thrown out from custom code. |

## Update Workbook

Modifies an existing workbook, allowing you to change the owner or project that the workbook belongs to and whether the workbook shows views in tabs.

### Inputs

|  |  |  |
| --- | --- | --- |
| Parameter | Type | Description |
| Access Token | Text | The authenticate token to consume Tableau endpoint services. |
| Site Id | Text | The ID of the site that contains the workbooks. |
| Workbook Id | Text | The ID of the workbook to update. |
| Show Tab Flag | Text | Specify true to have the updated workbook show views in tabs; otherwise, false. The default is false. |
| Recently Viewed Flag | Text | Set this value to true to have the updated workbook show in the site's recently viewed list. The default is false. |
| Encrypt Extracts Flag | Text | Set true to encrypt the extracts or false to not encrypt extracts |
| Project Id | Text | The ID of a project to assign the workbook to. |
| Owner Id | Text | The ID of a user to assign the workbook to as owner. |

### Outputs

|  |  |  |
| --- | --- | --- |
| Parameter | Type | Description |
| Response\_Content | Text | A JSON value containing response information related to the request. |
| HTTP Status Code | Text | HTTP Status code returned in response. |
| Response Headers | Collection | Collection of headers data returned in response. |
| Json Response | Text | A custom code of converted output in JSON format from XML response. |
| Message | Text | Exception message that thrown out from custom code. |

## Query Workbook

Returns information about the specified workbook, including information about views and tags.

### Inputs

|  |  |  |
| --- | --- | --- |
| Parameter | Type | Description |
| Access Token | Text | The authenticate token to consume Tableau endpoint services. |
| Site Id | Text | The ID of the site that contains the workbooks. |
| Workbook Id | Text | The ID of the workbook to update. |

### Outputs

|  |  |  |
| --- | --- | --- |
| Parameter | Type | Description |
| Response\_Content | Text | A JSON value containing response information related to the request. |
| HTTP Status Code | Text | HTTP Status code returned in response. |
| Response Headers | Collection | Collection of headers data returned in response. |
| Json Response | Text | A custom code of converted output in JSON format from XML response. |
| Message | Text | Exception message that thrown out from custom code. |

## Delete Workbook

Deletes a workbook. When a workbook is deleted, all its assets are also deleted, including associated views, data connections, and so on.

### Inputs

|  |  |  |
| --- | --- | --- |
| Parameter | Type | Description |
| Access Token | Text | The authenticate token to consume Tableau endpoint services. |
| Site Id | Text | The ID of the site that contains the workbooks. |
| Workbook Id | Text | The ID of the workbook to update. |

### Outputs

|  |  |  |
| --- | --- | --- |
| Parameter | Type | Description |
| Response\_Content | Text | A JSON value containing response information related to the request. |
| HTTP Status Code | Text | HTTP Status code returned in response. |
| Response Headers | Collection | Collection of headers data returned in response. |

# Support

Support for this skill is provided via the Blue Prism Digital Exchange Community Forum. Post your questions here:

[Digital Exchange Community Forum](https://community.blueprism.com/communities/community-home?communitykey=1e516cfe-4d1f-4de9-a9eb-58d15bf38c81&tab=groupdetails)