tableau®
SOFTWARE

On-Demand Training: Understanding Subscriptions & Schedules

Welcome to this video on Subscriptions and Schedules.

Schedules Overview

There are two types of tasks that can be scheduled in Tableau Server:

1. Extract refreshes

2. Subscriptions

Assigning an Extract to an Extract Schedule

Data Extract refreshes occur during their assigned Extract Schedule. You can assign the extract to an Extract Schedule when publishing from Tableau Desktop or after publishing from within the Tableau Server interface.

To assign an extract schedule during publishing:

- Open Tableau Desktop

- Extract your data, if you'd like incremental refreshes, specify an increment key now

- Publish your workbook or data source

- Select an extract schedule

- Publish

To assign an extract schedule after publishing:

- Log in to Tableau Server

- In the contents section, select a workbook or data source by checking the box

- Click Scheduled Tasks

- Click Add a Refresh

Subscription Schedules

Schedules are also used in subscriptions. Upon subscribing to a dashboard, a user is able to select a Subscription Schedule from the dropdown menu. After subscribing, the user will receive the subscribed content in their email inbox as a hyperlinked .png image. Clicking the image will open the dashboard in Tableau Server. The user will be required to authenticate with Tableau Server before accessing the secure dashboard.

Administrators are able to see subscription details, such as the user, name of the workbook, and the selected schedule.

A System Administrator will have the added ability to edit or delete subscriptions.

Creating New Schedules

Only users with System Administrator privileges may edit and create an extract or subscription schedule. When using multiple Sites, keep in mind that schedules are not site specific. Any schedule created will be made available on all sites and, unlike content, permissions cannot be assigned to schedules.

To create a schedule:

- Log in to Tableau Server as a System Administrator

- Go to the Admin section

- Go to the Schedules section

- Select New

- Name the schedule

- Select the type of schedule you would like to create – Extract or Subscription

- The priority of the schedule determines the order in which the schedule will execute relative to other schedules that are set to execute at the same scheduled time.

    - For example, if two schedules are set to run at 8am, the schedule with the higher priority will execute first.

- We can opt to run tasks in a schedule concurrently, with the maximum number being the number of Background Task processes in your Tableau Server.

- Finally, specify time preferences for the schedule.

- Click Create Schedule to finish.

We will now be able to select the schedule when creating an extract refresh or subscribing.

Best Practices

All schedules in Tableau Server are executed by the Backgrounder process. The number of Backgrounder processes in Tableau Server determines the maximum number of tasks that can run concurrently. The Backgrounder is also CPU intensive, so it is a best practice to schedule your Extract Refreshes to occur at off-peak hours, so as not to degrade performance for users. Subscription schedules typically complete in less time than Extract schedules, so consider scheduling Subscriptions to occur before Extracts to ensure they are received on time.

In scenarios where Extracts must be run continuously throughout the day, it is often recommended to separate the Backgrounder process on to a dedicated worker machine. Please refer to your administrator guide for more information on distributed environments.

Conclusion

Thank you for watching the Subscriptions and Schedules training video. We invite you to continue with the On-Demand Training videos to learn more about using Tableau.