Microsoft Power BI and Tableau Integration

Integrating your CommCare data with Power BI or Tableau has never been this easy!

- Step 1: Configure your Odata feed (just like you configure a Form or Case Export)
- Step 2: Copy the Odata feed/s
- Step 3: On Power BI / Tableau Desktop, select Odata Feed/Odata as your connection type.
- Step 4: Enter your Odata feed/s, and login using your CommCare credentials (Note: If you are using 2FA, specify your API key as the password. Your API Key can be found under you My Account Settings.)
  - Power BI Desktop: Use Basic Authentication
  - Tableau Desktop: Use authentication type 'Username and Password'

You can also follow along in the video below to see how the integration is set up with Tableau:
Useful docs from Microsoft and Tableau:

- https://docs.microsoft.com/en-us/power-bi/desktop-connect-odata

Important:

- The feature requires your web user role to have Full Organization Access.
- If you are using 2 factor authentication, please enter your regular email address and your API Key (as password) when Power BI / Tableau Desktop asks for credentials.

Performance Considerations:

- Odata feeds do not support incremental refresh, i.e. each time you refresh, the entire dataset is refreshed. You can mitigate performance issues by publishing the data viz/report from Tableau/PowerBI Desktop to Tableau Online or PowerBI Service, where you can configure the data viz/report to refresh automatically on a schedule defined by you. If you are still unhappy with the performance, please consider using our Data Export Tool to build a CommCare SQL DB PowerBI/Tableau data pipeline. Our Data Export tool supports incremental refresh and designed for enabling performant data pipelines.
Useful Tips

Set-up a web user read-only role limited to read ODATA feeds:

- Navigate to Users / Roles & Permissions
- Click +Add Role at the bottom of the page
- Provide a name to this role: e.g. Read-Only OData
- Unselect all permissions except the ones below:
  - Export Form Data (if necessary)
  - Export Case Data (if necessary)
  - PowerBI/Tableau Integration
  - Allow role to access data from all locations
- Save and assign this role to a user