

Birst Pronto: Refresh Data in Pronto

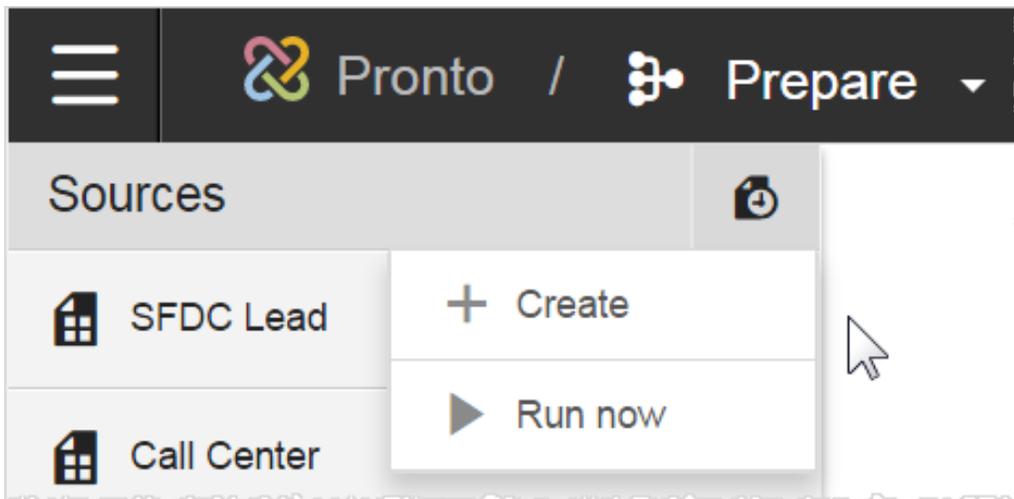
Posted by [Dee Elling](#) Jan 30, 2017

Dashboards and reports are great tools for visualizing and analyzing the state of your organization or project, but they are not so useful if the data gets stale or a metric loses its meaning. That's why it is so important that the data gets refreshed on an ongoing basis.

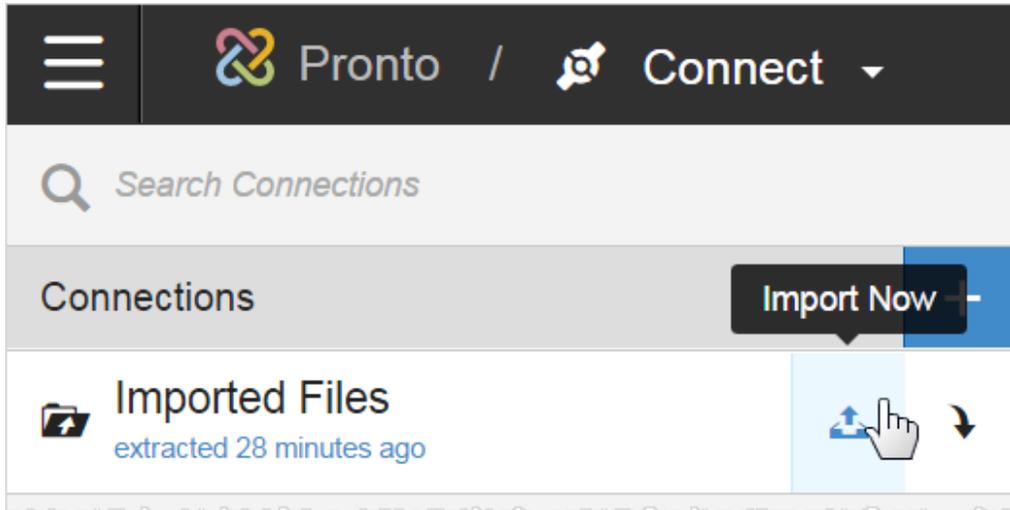
Pronto will go to the data source and re-import it, and republish any prepared sources, on a schedule that you set up.

Pronto refreshes and updates all of the raw sources in the entire project. If there are prepared sources, Pronto will also publish them after their raw source is extracted. Recall that the publish functionality takes the raw data and applies any transformations that you defined in the Prepare page, and updates the prepared source, so you definitely need both of those processes to run.

The refresh feature is on the Pronto Prepare page, above the list of sources.



The Run now option immediately imports and publishes, which is very useful when you are building and refining your project, or when you know about a change and want to update right away. By the way, the Connect page also has an option to refresh.



When you have gotten to the point in your project development where you want to refresh the data on a regular basis, here are some things to think about:

- What is the optimum time relative to the data refreshes in the actual connection? You'd want to update Birst after any regular updates in Salesforce, for example, or after a day's work in Jira.
- When are people most likely to view the reports and dashboards? You may want to do a refresh prior to the start of the business day.
- Do you want to be notified about the extraction?

To create a schedule from Prepare - Sources - Schedule - Create, first toggle it on. (This is so you can disable it later, if you want to temporarily pause the scheduled extractions.)

The image shows a 'Refresh data' dialog box. At the top left, there is a blue toggle switch that is currently turned on, with a hand cursor pointing at it. To the right of the toggle is the text 'Refresh data'. In the top right corner of the dialog, there is a black 'X' icon for closing. Below the title bar, the dialog is organized into sections. The first section is titled 'Repeats' and contains a dropdown menu with 'Daily' selected. The second section is titled 'At' and contains three dropdown menus: the first shows '12', the second shows '0', and the third shows 'AM'. Below these is a larger dropdown menu showing 'CST'. At the bottom of the dialog, there is another blue toggle switch, currently turned on, followed by the text 'Email refresh status'.

Then schedule the frequency and time of the update, such as every Monday at 8AM PST. By default Pronto will send an email to the owner of the project, so if you don't want to be notified you can toggle it off.

Don't forget to click Save!