

# **Tableau MailScheduler**

Installation manual

Date	: 21-8-2023
Version	: 2.3.3



### **1** Requirements

To successfully install the Tableau MailScheduler, you have to pass these requirements:

Windows Server At least 8GB RAM 2 CPU or more (preferred) 50GB HDD space on the server

The installation of the Tableau MailScheduler includes the installation of a XAMPP server to host the application.

With this download, you can proceed the general installation process described in chapters 1-6 of this manual. Download the MailScheduler application and license in your portal. The installation is described in chapters 7-10 of this manual.



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### 3 Tableau Online and Server

The installation on Tableau Online and Server involves multiple steps. These are:

- Retrieve a Personal Access Token on Tableau Online
- Install XAMPP
- Configure Windows Task Scheduler
- Install Mail Scheduler Application on XAMPP
- Configure
  - o Database
  - o Environment
  - o Users

#### 3.1 Retrieve a Personal Access Token

The Personal Access Token enables the Mail Scheduler to connect to Tableau with the user's permissions with the Personal Access Token. A best practice is to use the Personal Access token of a service user with at least read permissions on the entire Tableau Site.

Steps to be taken:

Log in to your Tableau Online environment with the user you want to use for accessing the dashboards.

<		Q Search for views, metrics, workbooks, and more
<pre></pre>	Home	New -
Infotopics Beta 🔹	Favorites and Recents	
☆ Home	Click the star icon $\gamma_{i=1}^{A}$ to add a favorite.	
슈 Favorites		
③ Recents	Learn Tableau. Free training videos $\rightarrow$	
දීය Shared with Me		
Q Recommendations		
Personal Space		
Collections		
Explore		
20 Hears		
Croune		
Schedules		
labe		
🖻 Tasks		
Site Status		
Settinge		
(0) ootaa Bo		



<	Q, Search for views, metrics, workbooks,	and more
apps for tableau	Home	My Account Settings Set as Start Page
Infotopics Beta 🔹	Favorites and Recents	Sign Out
Home	Click the star icon $\frac{1}{2\sqrt{2}}$ to add a favorite.	
7 Favorites		
Recents	Learn Tableau. Free training videos $ ightarrow$	
Shared with Me		
Recommendations		
Porconal Space		
Collections		
Explore		
ှိ Users		
5 Groups		
Schedules		
b Jobs		
Tasks		
1 Site Status		
Settings		

Open the dropdown in the right top corner and select "My Account Settings."

Scroll down to the section "Personal Access Tokens."

apps for tableau	Siebe Grijpma	
	User external/siebe.grijpma@infotopics.nl Site role Site Administrator Explorer Last sign in Mar 28, 2022, 12:38 PM siebe.grijpma@infotopics.nl	
Infotopics Beta 👻	Content 0 Alerts 0 Subscriptions 0 Collections 0 Settings	
	Azure Synapse Analytics Add	
☆ Home	Dremio Add	
A Favorites	Esri Add	
	Salesforce CDP Add	
9 Recents	Snowflake Add	
Shared with Me		
© Recommendations	Connected Clients Use a connected client security token to stay signed into this site after you've signed in from another Tableau client. Delete unused clients to make room for more. Learn More	
	No connected clients.	
Personal Space		
Collections	Personal Access Tokens Personal access tokens are long-lived authentication tokens that allow users to run automation with Tableau REST APIs without requiring hard- coded credentials or interactive login.	
Explore	Token Name Create new token	
	No personal access tokens exist.	
25 Users		
ကို Groups	Notifications	
Schedules		
3. John	Preferences On Tableau Email	
0 1003	Collaboration	
Tasks	Comment mentions	
🗓 Site Status	Shire L L Data aleris Z	
§} Settings	Systems Status	
	Flow runs V	
	Extract jobs 🗹 🗹	
	Webhooks Z	



Create a new token by entering a name (for instance, "MailScheduler")

Personal Access Tokens	coded credentials or interactive login.
	MailScheduler Create new token
	No personal access tokens exist.

When you click the button "Create new token," a modal window with the token will pop up. Be aware that this is the only moment you have access to the "secret" of the token, so make sure you copy it to your clipboard and save it in a plain text file.

	No connected clients.	Personal access token created successfully The token secret will only be shown once, store it on a safe location.	
ersonal Access Tokens	Personal access tokens are lor	Token Name	hout requiring hard-
	coded credentials or interactiv	MailScheduler	
		Token Secret	
		1BYQA 4DFnDocypUEegNsLt89	
	No personal access tokens exi	Discard Copy to clipboard	

Press the "Copy to clipboard" button to copy the Token Secret to the clipboard. The image shown has a blank space for security reasons.

To store the Personal Access Token, click the close button in the top right corner of the pop-up. Do NOT use the "Discard." Button since this will erase the Personal Access Token. After closing the modal with the x button, your token is stored and visible.

Token Name	Create new token	
Name		
MailScheduler	D Revoke	

You will use the Personal Access Token's Name and Secret to access a Site in the MailScheduler.



### 4 Install XAMPP server

The Tableau MailScheduler is a solution that uses a Laravel primary platform to run on. We provide/install the primary platform Apache/PHP/MySQL to run the Mail Scheduler in this installation step.

We use the default XAMPP installation by apachefriends.org. Download the latest Windows version from: <u>https://www.apachefriends.org/download.html</u>.

From the XAMPP install, we only use Apache and MySQL; These are the only XAMPP components you have to install and start.

#### 4.1 Installation XAMPP

😫 Setup	-		×	🖂 Setup	-		$\times$
$\frown$	Setup - XAMPP		- 81	Select Components			83
	Welcome to the XAMPP Setup Wizard.		I	Select the components you want to install; clear the Next when you are ready to continue.	components you do not want t	o install. (	Click
bitnami	< Back Next >	Car	cel	Program Languages     phpMyAdmin     Webalzer     Fike Sendmal	<back next=""></back>	Car	ncel

In the next window, enter the path for installation, e.g., C:\xampp It is best to use paths without spaces and special characters.

After selecting the install path, a screen asks you to learn more about Bitnami for XAMPP. Deselect the checkbox and continue with the installation process. After successful installation, the control panel is shown. (In the screenshot below, you notice the Apache runs on port 8000).



ខ	XAI	MPP Cont	rol Panel v3	.2.2				🥔 Config
Modules Service	Module	PID(s)	Port(s)	Actions				Netstat
	Apache	90280 105136	443, 8000	Stop	Admin	Config	Logs	E Shell
	MySQL	106572	3306	Stop	Admin	Config	Logs	Explorer
	FileZilla			Start	Admin	Config	Logs	Services
	Mercury			Start	Admin	Config	Logs	😡 Help
	Tomcat			Start	Admin	Config	Logs	Quit
13:39:48 13:39:49 13:39:56 13:39:57 13:45:30	[Apache] [Apache] [mysql] [mysql] [mysql]	Attemptin Status ch Attemptin Status ch Attemptin Status ch	g to start Apach ange detected: r g to start MySQ ange detected: r g to stop MySQI ange detected: s	e app unning L app unning L app stopped				^

The XAMPP installation of Apache and MySQL might conflict with existing installations on the server/machine (port numbers already in use). You can change the default port numbers to free port numbers following the next steps.

#### 4.2 Change default port numbers Apache & MySQL

The default port used by Apache is 80.

Look at all your used ports with <u>Netstat</u> (integrated to <u>XAMPP</u> Control Panel).

		CUILIUI Fallel VC	).Z. [	8 Coning
Modules	tute DID(		A-4'	Netstat
Service Mo	aule PID(	s) Port(s)	Actions	

Then you can see all used ports, and here we see that the System already uses the 80 port.

	-			_
Active socket	New socket	Old	socket	Refresh
Address	Port	PID	Name	×
0.0.0.0	80	4	System	

Choose a free port number (8012, for this example).



#### 4.3 Edit the file "httpd.conf"

You should find this file in C:\xampp\apache\conf on Windows:

Listen 80 ServerName localhost:80

Replace them by:

Listen 8000 ServerName localhost:8000

Save the file.

Access: http://localhost:8000 to check if it works.

If not, you must edit the http-ssl.conf file as explained in step 3 below.  $\downarrow$ 

#### 4.4 Edit the file "http-ssl.conf"

You should find this file in C:\xampp\apache\conf\extra on Windows.

Locate the following lines:

```
Listen 443
<VirtualHost _default_:443>
ServerName localhost:443
```

Replace them with a other port number (8013 for this example) :

```
Listen 8013
<VirtualHost _default_:8013>
ServerName localhost:8013
```

Save the file. Restart the Apache Server.

Access: <u>http://localhost:8000</u> to check if it's working.

#### 4.5 Change MySQL root password

For security purposes, we change the root password of the MySQL server. Point your browser to <a href="http://localhost/phpmyadmin/">http://localhost/phpmyadmin/</a>

You will automatically be logged in as the root user. Select the tab "User accounts" as shown below.



275 All 🙉 🖳 🖄 🖄	Databas	es 📙 SQL	🐁 Stat	tus 🔲 User accounts	Export	🐱 Import 🥜 Settings
Favorites	User accou	nts overview	User gro	oups		
ew formation_schema iysql erformance_schema hpmyadmin	User a	ccounts	overv	view		
st	🛕 A user ad	count allowing	any user fro	m localhost to connect is pr	esent. This will p	revent other users from connec
	User nar	ne Host name	e Password	I Global privileges 😣 U	ser group Gran	t Action
	Any	%	No 😡	USAGE	No	🧶 Edit privileges 🔜 Export
	🗆 Any	localhost	No	USAGE	No	🐉 Edit privileges 🔜 Export
	🗆 pma	localhost	No	USAGE	No	💩 Edit privileges 🔜 Export
	🗆 root	127.0.0.1	Yes	ALL PRIVILEGES	Yes	💩 Edit privileges 🔜 Export
	🗆 root	::1	Yes	ALL PRIVILEGES	Yes	🐉 Edit privileges 🔜 Export
	🗆 root	localhost	Yes	ALL PRIVILEGES	Yes	🐉 Edit privileges 🔜 Export
	New &	er account				
	& Rem	ove selected u	iser accoun	ts		
	(Revoke a	II active privileg he databases t	es from the hat have the	users and delete them after same names as the users.	wards. )	

Click the "edit privileges" button for the root user on "localhost."

bal Database	Change password	Login Informati	on						
lit privileges	: User acc	count 'root'	@'locall	iost'				 	
Global privileges	Check all	I.	- 						
SELECT     INSERT     UPDATE     DELETE     FILE	CREATE ALTER LINDEX CREATE TEMPO CREATE TEMPO CREATE TEMPO CREATE ROUTIN CREATE ROUTIN CREATE ROUTIN CREATE VIEW	DRARY TABLES	GRANT     GRANT     GRANT     SUPER     PROCESS     RELOAD     SHOW DATA     LOCK TABL     CREFERENCE     REPLICATI     REPLICATI     CREATE US	BASES ES S ON CLIENT ON SLAVE ER	Resource Note: Setting Max QUERIES Max UPDATES Max CONNECT Max USER_CO	PER HOUR 0 PER HOUR 0 PER HOUR 0 UNIX 0 UNI	) removes the limit.		



Click the "Change password" button on top of the page and change the password into a safe difficult-to-guess password. We will not use the root user regularly. We will use it for installation and support purposes. Please write down or save the password in a safe place!

After changing and saving the password, your access to phpMyAdmin will expire. You will have to edit the phpMyAdmin config file, which you can find at:

C:\xampp\phpMyAdmin\config.inc.php

Change the section on authentication type and info as stated below:

```
/* Authentication type and info */
$cfg['Servers'][$i]['auth_type'] = 'cookie';
$cfg['Servers'][$i]['user'] = 'root';
$cfg['Servers'][$i]['password'] = '';
$cfg['Servers'][$i]['extension'] = 'mysqli';
$cfg['Servers'][$i]['AllowNoPassword'] = false;
$cfg['Lang'] = '';
```

The AllowNoPassword field forces the use of passwords on phpMyAdmin.



### 5 Database & database user

Use a browser window to navigate to <u>http://localhost/phpmyadmin/</u> again. Login as root and select the tab "user accounts" in phpMyAdmin.

🏡 🗾 🧿 📄 🌼 😋	Databas	es 📃 SQL	- 🚯 Stat	us 🔲 User accounts	🖶 Export	🖶 Import	🥜 Settings	
Recent Favorites	User accou	ints overview	User gro	ups				
New     information_schema     mysql     performance_schema     phpmyadmin	User a	locounts	s overv	iew				
La test	📐 A user a	ccount allowing	any user from	m localhost to connect is pre	esent. This will p	prevent other us	sers from connec	ting
	User na	me Host nam	e Password	Global privileges 😡 Us	ser group Grar	nt Action		
	🗆 Any	%	No 😡	USAGE	No	ಿ Edit privi	leges 🔜 Export	
	🗆 Any	localhost	No	USAGE	No	🔊 Edit privi	leges 🔜 Export	
	🔲 pma	localhost	No	USAGE	No	ಿ Edit privi	leges 🔜 Export	
	🗆 root	127.0.0.1	Yes	ALL PRIVILEGES	Yes	🔊 Edit privi	leges 🔜 Export	
	🗆 root	::1	Yes	ALL PRIVILEGES	Yes	🧶 Edit privi	leges 🔜 Export	
	🗆 root	localhost	Yes	ALL PRIVILEGES	Yes	💩 Edit privi	leges 🔜 Export	
	New &	ser account						
	- 🤱 Rem	ove selected (	user account	S				
	( Revoke a	II active privile <u>c</u> the databases t	ges from the u that have the	isers and delete them aften same names as the users.	wards. )			



#### Click "Add user account"

Login Information			
User name:	Use text field:	▼ scheduler	
Host name:	Use text field:	▼ localhost	0
Password:	Use text field:	•	Strength: Weak
Re-type:		•••••	
Authentication Plugin		Native MySQL authenti	cation 🔻
Generate password:	Generate		
Database for user ac	count		
Create database w	ith same name and gra	nt all privileges.	

Please remember the password we entered; We have to set it in the Mail Scheduler environment file (.env) later.



### 6 Install the Scheduler application

The Tableau MailScheduler is a Laravel app using PHP scripts and a MySQL database.

#### 6.1 Install script folders & files

This step covers the installation of the PHP scripts in the proper folders.

- 1. Use your windows explorer to navigate to the htdocs folder in your XAMPP installation and remove all files and folders.
- create a " scheduler " folder in the XAMPP htdocs folder. For example, C:\xampp\htdocs\scheduler\
- 3. Copy the files you downloaded from our portal to this new folder
- 4. Also copy your license.lic file
- 5. Rename the license.lic file to LICENSE by opening it in notepad++ and use the `save as`
- 6. Open Powershell by holding the shift key on your keyboard and right click in the folder and select PowerShell window from the context menu.
- 7. Type `./install.bat` in the powershell (This command will create the .env file)



#### 6.2 .env

The root of the c:\xampp\htdocs\scheduler folder now contains a file called ".env.". This file must be edited.

Edit your .env file like the example below using your personal values for the colored fields:

APP\_NAME=MailScheduler APP\_KEY= APP\_URL=http://localhost:8000 APP\_TIMEZONE=Europe/Amsterdam QUEUE CONNECTION=database RETRY AFTER=180 JOB TIMEOUT=120 BACKOFF=[10,25,50] TABLEAU API VERSION='3.15' DB\_CONNECTION=mysql DB HOST=localhost DB PORT=3306 DB\_DATABASE=scheduler DB USERNAME=scheduler DB\_PASSWORD=my\_password MAIL DRIVER=smtp MAIL HOST=smpt.office365.com MAIL PORT=587 MAIL ENCRYPTION=tls MAIL USERNAME=mailer@domein.nl #MAIL\_PASSWORD=my\_password MAIL\_FROM\_ADDRESS=mailer@domein.nl

The TABLEAU\_API\_VERSION should match the version of your tableau server instance. You can find the versions here: <u>https://help.tableau.com/current/api/rest\_api/en-</u>

us/REST/rest\_api\_concepts\_versions.htm

MAIL\_FROM\_NAME=Mailer

When done editing the file, we save it with the name: ".env," including the dot at the beginning of the filename.

Now run the install.bat script again to install the app.

If no error shows up in the PowerShell, the installation has succeeded.

#### 6.3 Create MailScheduler admin user

In Windows explorer, start a PowerShell window (Shift right-click and select PowerShell window) in the folder c:\xampp\htdocs\scheduler

Use the following command to create the admin user:

C:\xampp\php\php.exe mail-scheduler-2.phar make:user



Note: the path to your php.exe can be different, depending of your installation path of xampp

You will be prompted to enter the username, email address, and password for the administrative user of the Mail Scheduler. After setup you will be able to login with this account in mail scheduler.

#### 6.4 Add virtual host

We now need to address the virtual host. Point your windows explorer to

C:\xampp\apache\conf\extra\httpd-vhosts.conf

And change it to your convenience

<VirtualHost \*:8000>

ServerAdmin webmaster@infotopics.nl DocumentRoot "C:/xampp/htdocs/scheduler/public" ServerName localhost ServerAlias localhost ErrorLog "logs/scheduler-error.log" CustomLog "logs/scheduler-access.log" common </VirtualHost>

In the file C:\xampp\apache\conf\extra\httpd-ssl.conf, search for the section where example.com is configured as a virtual host in the SSL configuration. Enter your server and certificate properties for SSL configuration. For SSL configuration, there are many ways to accomplish your desired situation. The online XAMPP community has lots of articles. Please use google if you are not satisfied with the description below.

<virtualhost _default_:443=""></virtualhost>
# General setup for the virtual host
DocumentRoot "C:/xampp/htdocs"
ServerName localhost:443
ServerAdmin your-email-address@example.com
ErrorLog "C:/xampp/apache/logs/error.log"
TransferLog "C:/xampp/apache/logs/access.log"
# SSL Engine Switch:
# Enable/Disable SSL for this virtual host.
SSLEngine on
SSLCertificateFile "conf/ssl.crt/example.crt"



SSLCertificateKeyFile "conf/ssl.key/ example.key"

SSLCertificateChainFile "conf/ssl.crt/example\_Intermediates\_en\_Root.crt"



### 7 Scheduling

For the schedule to run automatically, we need to setup 2 tasks in the windows task scheduler. Open Windows Task Scheduler and create a new task

	☞ 🗅 ⊕	Filters $\checkmark$
ŵ	Best match	
0	Task Scheduler Desktop app	
۵	Settings	
	🖄 Schedule tasks	
	Search suggestions	
	𝒫 task sche − See web results	>

- 1. Click Create Task in the menu at the right
- 2. Enter Task name and description (For example, Mail Scheduler)
- 3. Select SYSTEM user to run the task:

🕒 Create Task	×
Select User or Group	×
Select this object type:	
User, Group, or Built-in security principal	Object Types
From this location:	
ITSLPT36	Locations
Enter the object name to select (examples):	
SYSTEM	Check Names
Advanced	OK Cancel
INFOTOPICS\merijn	Change <u>U</u> ser or Group
Rup only when user is logged on	



4. Run with the highest privileges and check hidden:

ing ing	gers Actions Cond	itions Settings			
Name:	PDF Scheduler				
Location:	Λ.				
Author:	INFOTOPICS\merlijn				
Description:	Desc.				
Security opt	ions	ollowing user account:			
NT AUTHO	RITY\SYSTEM	5		Change User o	or Group
Run only	when user is logged	on			
O Run whe	ether user is logged or	n or not			
Do r	ot store password. T	he task will only have access	to local computer re	sources.	
	n highest privileges				
🗹 Run witl	Configurator	Windows 10			~
☑ Run with ☑ Hidden	configure for.				

- 5. Select tab "Triggers."
- 6. Create a new trigger:

Edit Trigger	×
Begin the task: On a schedule	_
One time     Daily     Weekly     Monthly	
Advanced settings Delay task for up to (random delay): 1 hour	1
Repeat task every: 1 minute      for a duration of: Indefinitely      Stop all running tasks at end of repetition duration	1
Stop task if it runs longer than:	
☐ Enabled	
OK Cancel	



7. Select tab "Action" and create a new action

**Program script:** C:\xampp\php.exe (use the path to the php.exe in XAMPP):

Add arguments: mail-scheduler-2.phar schedule:run

Start in: C:\xampp\htdocs\scheduler

ction:	Start a program					
Setting	s					
Progra	am/script:					
C:\xam	npp\php\php.exe	Browse				
Add arguments (optional):		iuler-2.phar schedule:run				
Start i	n (optional):	C:\xampp\htdocs\sched				

8. Click tab "settings" and check the checkboxes as shown in the following screenshot:

🕒 Create Task	×
General Triggers Actions Conditions Settings	1
Specify additional settings that affect the behavior of the task.	·
Allow task to be run on demand	
Run task as soon as possible after a scheduled start is miss	sed
If the task fails, restart every:	1 minute v
Attempt to restart up to:	3 times
Stop the task if it runs longer than:	1 day 🗸
If the running task does not end when requested, force it t	to stop
If the task is not scheduled to run again, delete it after:	30 days 🗸
If the task is already running, then the following rule applies:	
Run a new instance in parallel $\checkmark$	
	OK Cancel

The server tasks schedule is now set and can be saved/ started.



### Enable the Queue Worker

Create another task.

The setup of the task is the same as the first one except for:

- 1. On the `Action` tab: The argument of the action should be `mail-scheduler-2.phar queue:work`
- 2. On the `Settings` tab: Select `do not start another one in this case. ` in the dropdown at the bottom to prevent multiple instances running at the same time.



#### 7.1 Tip: Run on startup Windows

Try to run Your XAMPP Control Panel as Run as administrator, then install Apache and MySQL.



When Xampp will open, then ensure that Apache and MySQL service stopped.

Modules	11- de la	DID(-)	De etter)					Netstat
ervice	Module	PID(S)	Port(S)	Actions				Shell
$\mathbf{X}$	Apache			Start	Admin	Config	Logs	Silei
×	MySQL			Start	Admin	Config	Logs	Explorer
×	FileZilla			Start	Admin	Config	Logs	Services
	Mercury			Start	Admin	Config	Logs	💽 Help
×	Tomcat			Start	Admin	Config	Logs	Quit
2:34:30 2:34:30 2:34:30 2:34:30 2:34:30 2:34:30 2:34:30 2:34:30 2:34:30	PM [main] PM [main] PM [main] PM [main] PM [main] PM [main] PM [main] PM [main]	Control Par Running wit XAMPP Ins Checking fo All prerequi Initializing I Starting Ch Control Par	el Version: 3.2 th Administrato tallation Directo or prerequisites sites found Modules eck-Timer nel Ready	2.2 [Comp r rights - go ory: "c:\xar	iled: Nov 12 bod! npp\"	2th 2015 ]		E



Now check/tick on Apache and MySQL service module (at the left).

Modules								
Service	Module	PID(s)	Port(s)	Actions				Netstat
	Apache	6484	80, 443	Stop	Admin	Config	Logs	Shell
	MySQL	8632	3306	Stop	Admin	Config	Logs	Explorer
×	FileZilla			Start	Admin	Config	Logs	Services
	Mercury			Start	Admin	Config	Logs	Help
×	Tomcat			Start	Admin	Config	Logs	Quit
2:38:15 2:38:15 2:38:15 2:38:15 2:38:15 2:38:15 2:38:15 2:38:15 2:38:15 2:38:15	PM [main] PM [main] PM [main] PM [Apache] PM [Apache] PM [mysql] PM [main] PM [main]	XAMPP Inst Checking fo All prerequis Initializing N XAMPP Apa XAMPP Apa XAMPP My Starting Che Control Pan	allation Direct r prerequisites sites found Modules ache Service is ache Service is SQL Service is eck-Timer el Ready	ory: "c:\xar s already ru s already ru s already ru s already ru	npp\" Inning on po Inning on po Inning on po	rt 80 rt 443 rt 3306		E

Now Apache and MySQL will be added in window services. You can set these services as start on window startup.



#### 7.2 Install OpenSSL certificate

In the PHP.INI file, you can edit the path to an OpenSSL certificate file. Use your XAMPP configuration (see image) to edit this file or open the php.ini file in the xampp\php folder with your favorite editor.

In the php.ini file, search for "openssl.cafile" and change the path and filename to the crt file you would like to use. For example:

openssl.cafile="D:\xampp\apache\bin\Infotopics.crt"

Make sure the line is not commented out with a semicolon (;)

Stop and start your Apache server to make sure these settings are applied.





### 8 Update procedure

Depending on what version you come from, the upgrading procedure is slightly different.

#### 8.1 V1 to V2

First, make a backup of your database.

For Tableau Mail Scheduler V2, php8.0 is required. Make sure to select php8.0 in Xampp.

Copy the new files to the installation directory.

Open the .env file and check if credentials are up-to-date with section 2.8.1.

Run in the Powershell:

C:\xampp\php\php.exe mail-scheduler-2.phar migrate

Now the database structure is up-to-date. Next, we should add the PAT tokens. Login to the MailScheduler and add the PAT tokens to the sites you use. (https://help.tableau.com/current/server/en-us/security\_personal\_access\_tokens.htm)

The command below will convert the old data to the new structure. All views will be indexed, and their IDs will be stored in the database, optimizing the process.

C:\xampp\php\php.exe mail-scheduler-2.phar migrate-from-v1-to-v2

Verify that the data is converted successfully.



#### 8.2 V1.\* to V1.\* (older versions)

Updates to the Tableau MailScheduler generally consist of 2 steps.

- Extract ZIP file in the C:\xampp\htdocs\scheduler folder
- In Windows explorer, start a PowerShell window (Shift right-click and select PowerShell window) in the folder c:\xampp\htdocs\scheduler. Run this command:

C:\xampp\php\php.exe mail-scheduler-2.phar migrate

• Also run the update command:

C:\xampp\php\php.exe mail-scheduler-2.phar app:update



## Installing on linux

#### Setup cronjobs

\*When installing on linux, make sure to run it from the root directory. cd /your/directory; /location-of-your-phar/php mail-scheduler-2.phar schedule:run >> /your/directory/logs/cronjob.log

cd /your/directory; /location-of-your-phar/php mail-scheduler-2.phar queue:work >> /your/directory/logs/cronjob.log