

HOW TO AUTOMATE DATA REFRESH USING WINDOWS TASK SCHEDULER 2018

OVERVIEW

Windows Task Scheduler will run applications that do not need human interaction.

- Nothing needs to be clicked,
- there is no text to be entered.

It's perfect for when you want the data to be downloaded before you arrive at work.

It can also be used to refresh data without using Excel on your computer.

Windows Task Scheduler lets you choose which programs to run, and when to run them.

You can use a program provided by NEXT Analytics named **NXACMD**.

NXACMD does two things for you:

- 1) Opens puts fresh data in Excel spreadsheets
- 2) Puts fresh data into Google Sheets

The computer does not need to have Excel installed and it requires no user interaction to perform the data refresh.

The computer does need to have a license to use NEXT Analytics – the free version won't work for this.

The business benefit is that any reporting system can be assured of having up to date information being reported.

- The advantage of using NXACMD is that it doesn't require human interaction.
- It connects directly to the data service, downloads the data, and then puts the data into the spreadsheet. Because it connects directly from your computer, there is no quota applied by NEXT Analytics. Download as many gigabytes as you want, and you can do that at no extra cost or quota penalty.
- It does all this in background, without tying up your computer or making you have to do anything with a spreadsheet.

PREPARATION

Download this zip file: <http://downloads.nextanalytics.com/nxacmd/nxacmd.zip>

Uncompress it into the folder: **documents\nextanalytics**

After the setup program completes, it will attempt to update all the spreadsheets that are in your documents\nextanalytics\dashboards folder, including any subfolder.

This is a good test of your configuration and is easier to diagnose than from within Windows Task Scheduler.

When you see that your spreadsheets are being updated, then it is safe to proceed.

The next step is to add the task to Windows Task Scheduler.

ADD A TASK TO WINDOWS TASK SCHEDULER

Before you start Windows Task Scheduler, please locate the nxacmd program was installed by the setup program. The foregoing instructions recommended you put it in **documents\nextanalytics**.

You can find the Windows Task Scheduler on the Windows start menu. Click on Start and start typing "Task Scheduler".

Create Basic Task Wizard

Create a Basic Task

Use this wizard to quickly schedule a common task. For more advanced options or settings such as multiple task actions or triggers, use the Create Task command in the Actions pane.

Trigger

Action

Finish

Name: NEXT Analytics Daily Refresh

Description:

< Back Next > Cancel

Choose the frequency you want e.g. Daily



Task Trigger

Create a Basic Task

Trigger

Action

Finish

When do you want the task to start?

- Daily
- Weekly
- Monthly
- One time
- When the computer starts
- When I log on
- When a specific event is logged

< Back

Next >

Cancel

Create Basic Task Wizard ×

 **Daily**

Create a Basic Task

Trigger

Daily

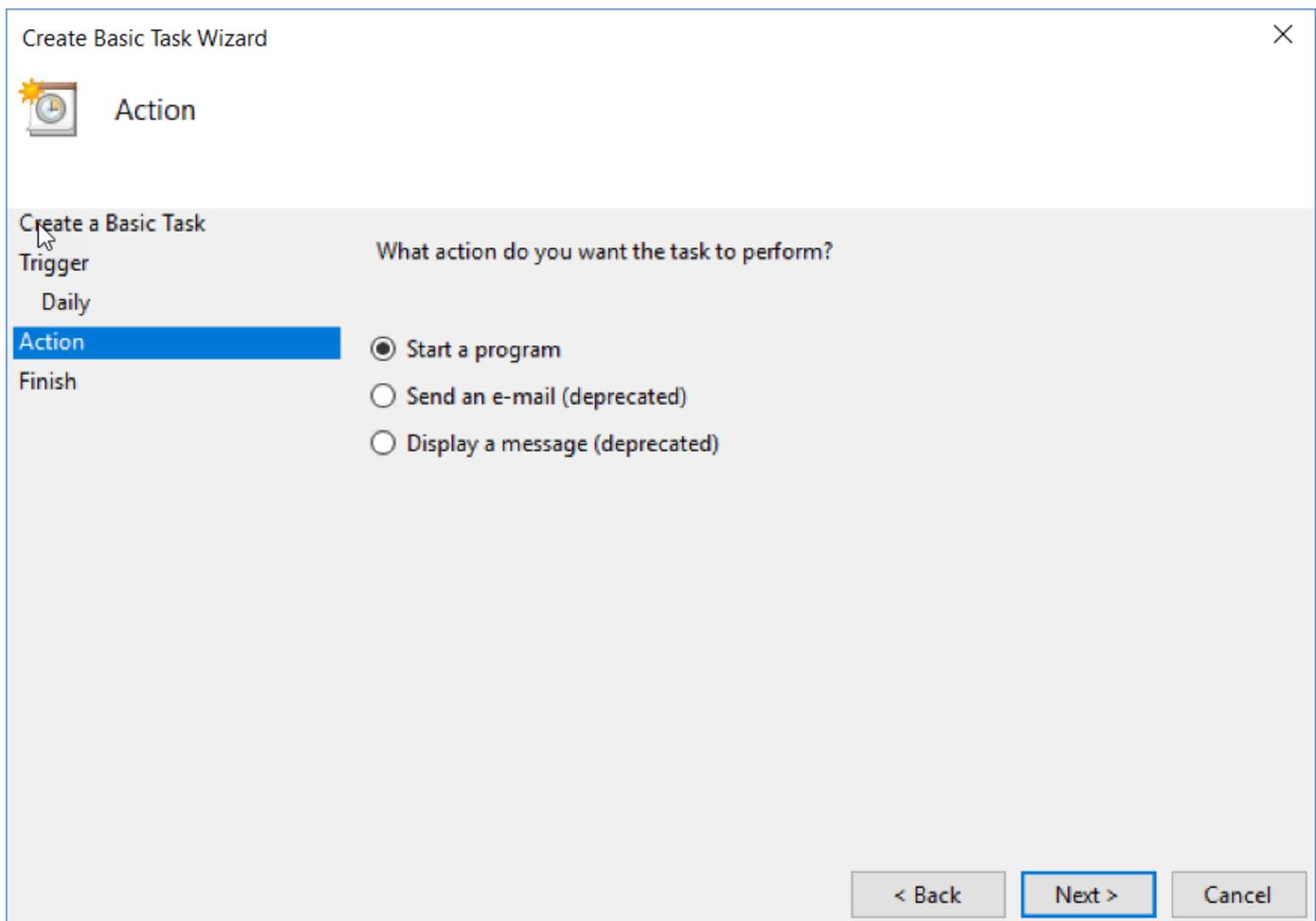
Action

Finish

Start: 2017-07-17 6:03:57 AM Synchronize across time zones

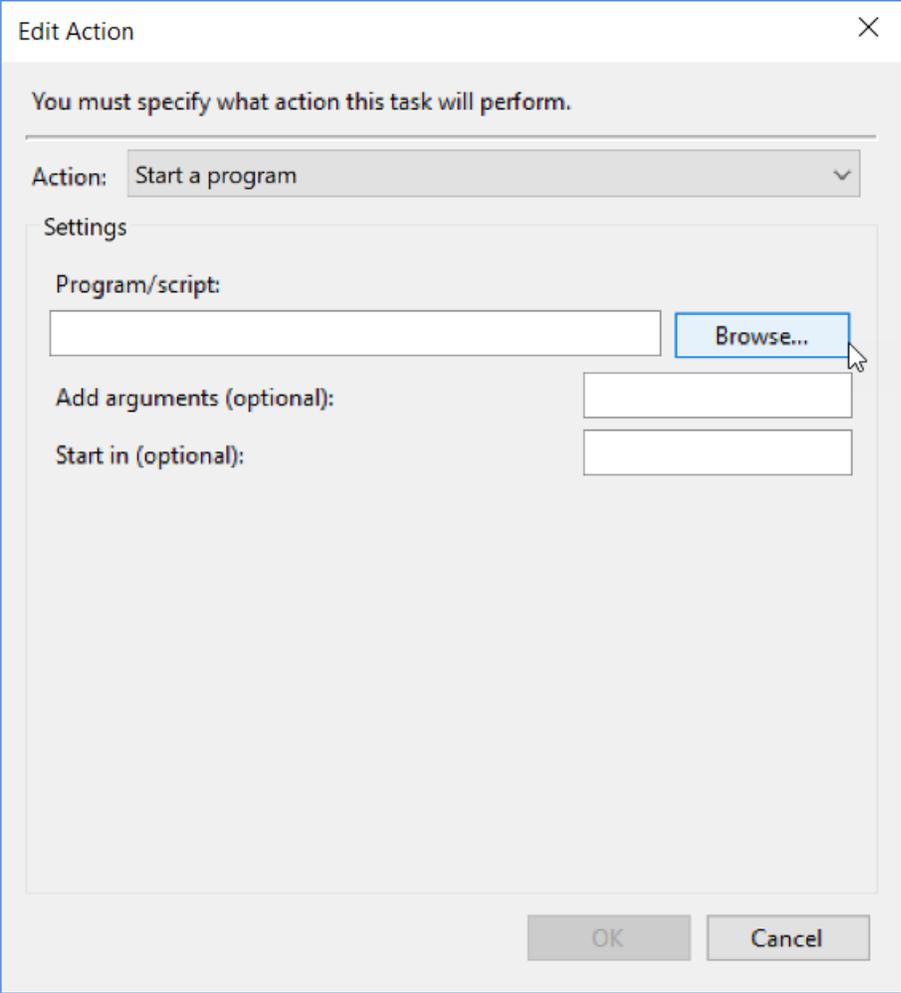
Recur every: days

CREATE THE ACTION

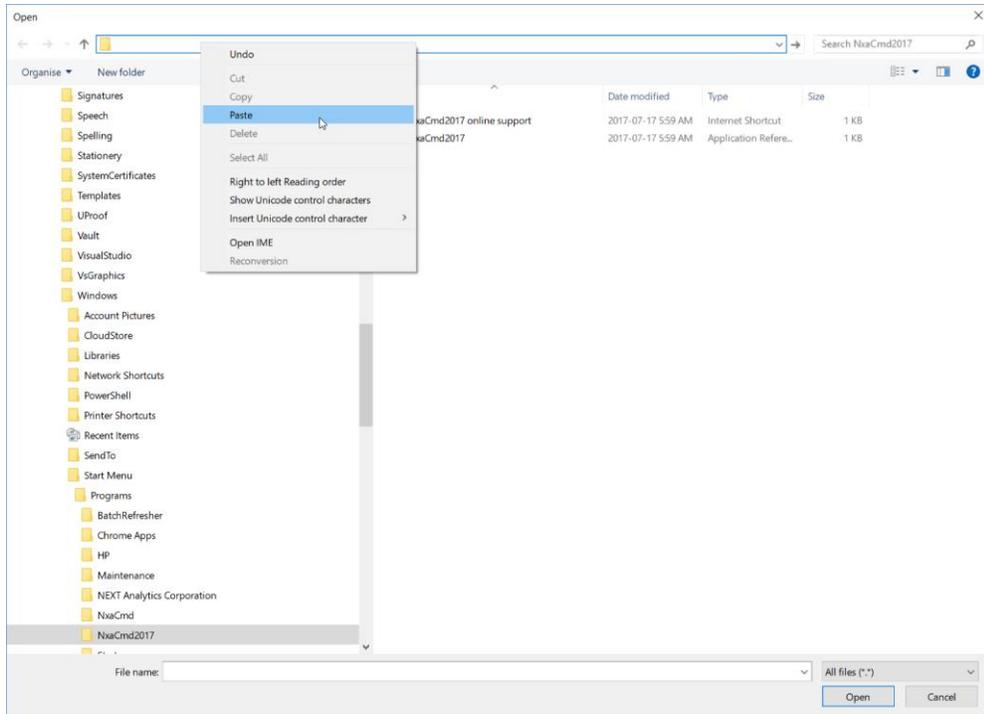


BROWSE FOR THE PROGRAM

Click the browse button.

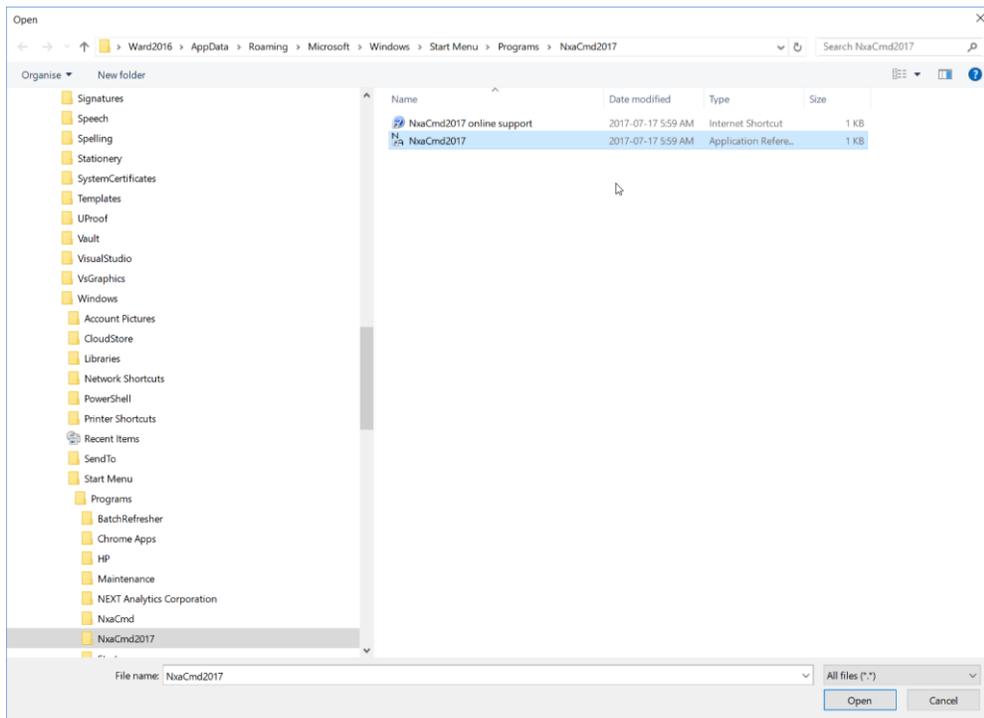


Browse for, or paste the file location of nxacmd.exe, located in **documents\nextanalytics**.



That will bring you to the location on your computer (it's different on every computer)..

Choose the second entry, as shown below, and click Open.



You will now have a Windows Task Scheduler Entry for nxacmd.

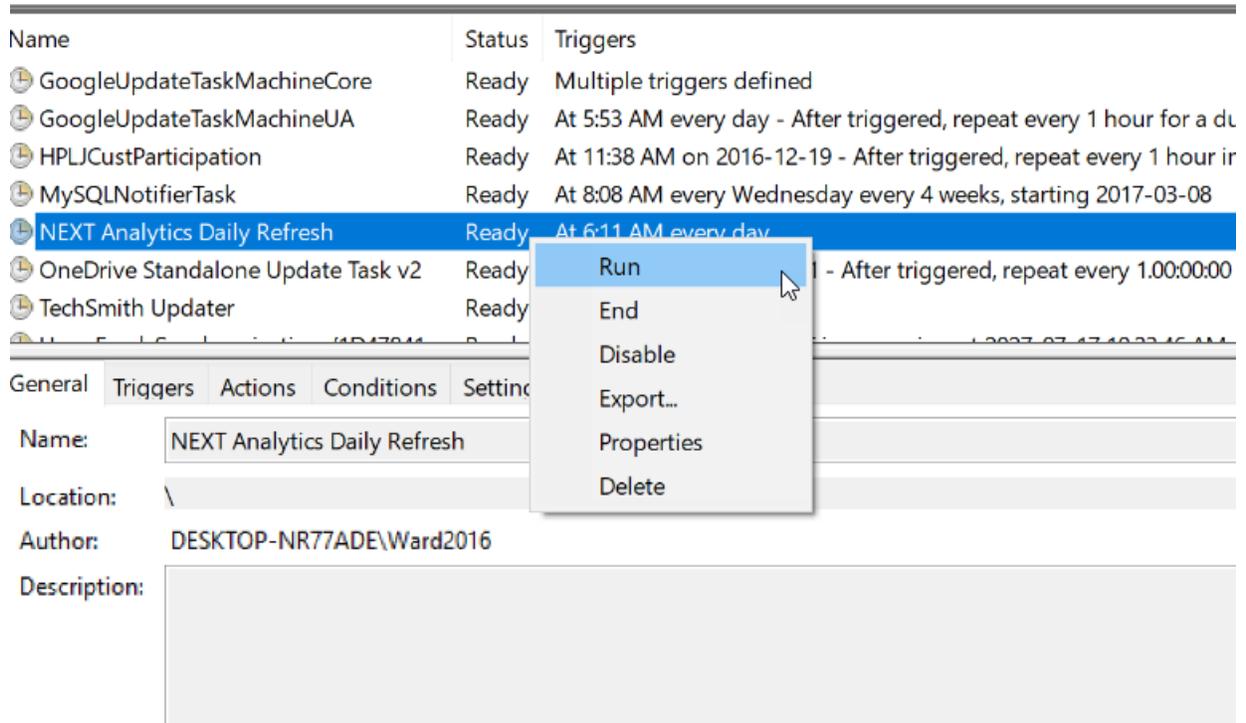
YOU JUST CREATED A TASK. TEST THAT IT CAN EXECUTE.

Do you want to try refreshing your Excel Spreadsheets? **If you are interested in refreshing a Google Sheet, then there's a chapter on that later in this document.**

You can test it by right mouse clicking on it and choosing "Run".

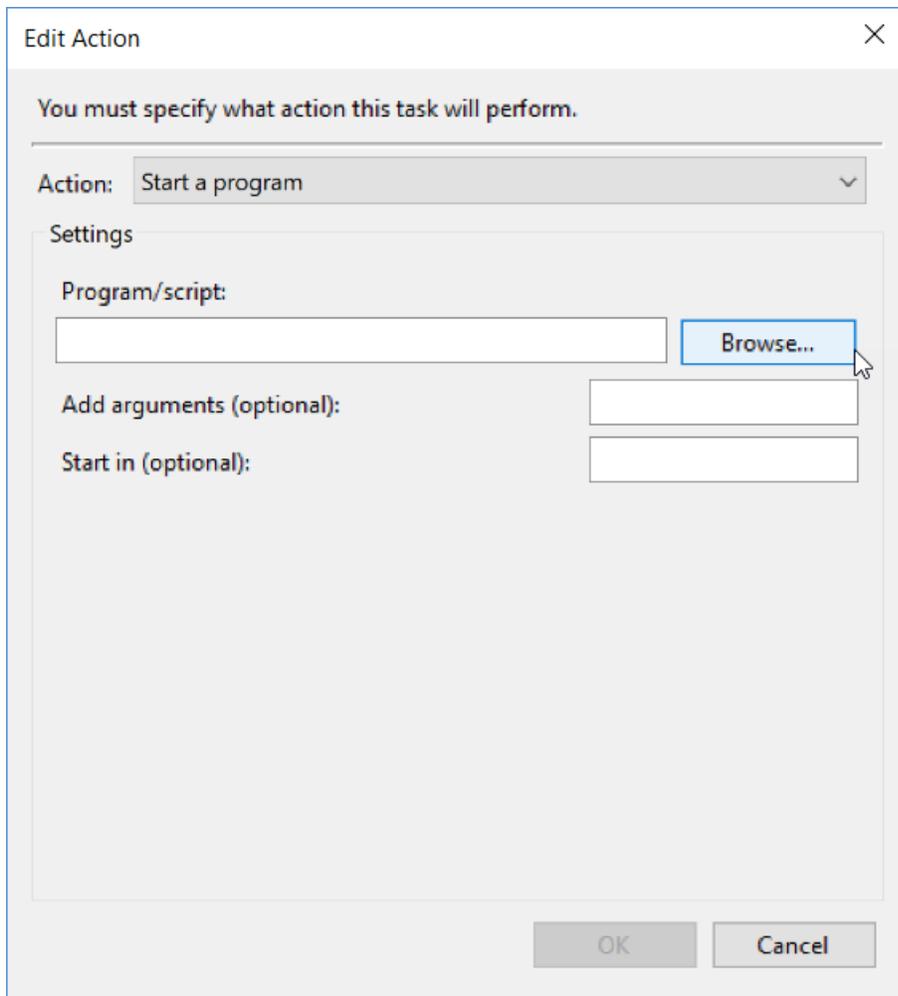
NXACMD is programmed to refresh any dashboards that are within the documents\nextanalytics\dashboards folder.

If you see that your dashboards are being refreshed, then Windows Task Scheduler is not expected to have any trouble doing it during a scheduled running of that Task.



AUTOMATED DATA REFRESH FOR GOOGLE SHEET

When you see the following screen, you need to put a value where it says "Add arguments".



gss_id= XYZ

Where XYZ is the ID of the Google Sheet. You can get this from the URL. In the follow example, it's the part marked in yellow.

<https://docs.google.com/spreadsheets/d/1NDw5-XXXjREZ30TCfNhEWIoRoFhZkeOabttAfShhiLg/edit#gid=1958903294>

In summary, the argument would look like this (without the yellow):

gss_id=1NDw5-XXXjREZ30TCfNhEWIoRoFhZkeOabttAfShhiLg

If you create this argument, then that one particular Sheet will be updated.