How do I resync or refresh a source?

1. Overview

Source data in Vantage does not stay in sync with upstream changes automatically. When new form submissions come in, a DDE table is updated, an API endpoint has fresh data, or you have a new version of an Excel file — you need to resync the source so that dashboards and widgets reflect the latest data.

Resyncing is a manual action available on every source type.

2. When to Use

- When new form submissions have come in and you want them visible in dashboards.
- When you have an updated Excel or CSV file to replace the previous version.
- When a DDE table has been modified and you want Vantage to pick up the changes.
- When an API endpoint has fresh data and you want to pull it in.
- When row counts in the Sources listing look stale and you want to confirm current volumes.

3. Concepts

- **Resync** – Re-runs the ingest pipeline for a source. For Excel/CSV, this means uploading a new file. For API, internal form, and DDE sources, it re-fetches data from the upstream system and reloads ClickHouse.
- **Live Row Counts** – The Sources listing shows the current row count for each source. Counts on the general listing refresh approximately every 60 seconds. The individual source detail page always shows the live count.
- **Widget Cache** – Widget query results are cached for 5 minutes. After a resync, you may need to wait a few minutes or refresh the dashboard page to see updated numbers.

4. Set Up Guide

Step 1: Open Sources

1. In Vantage, click **Sources** from the navigation.
2. Locate the source you want to refresh in the list.

Step 2: Trigger Resync

For Excel / CSV sources:

1. Open the source.
2. Upload a replacement file with the updated data.
3. Vantage re-ingests the new file and replaces the previous dataset.

For API / Internal Form / DDE sources:

1. Open the source.
2. Click **Resync**.
3. Vantage re-fetches data from the upstream system and reloads ClickHouse.

Step 3: Wait for Completion

1. The source status updates once the background ingest job finishes.
2. The row count updates accordingly.

Step 4: Verify Downstream

1. Check that the row count matches what you expect.
2. Open dashboards and widgets that use this source to confirm the data looks correct.
3. If numbers still look stale, wait a few minutes for the widget cache to clear, then refresh the page.

5. Best Practices

- Resync before important reviews or demos to ensure data is current.
- When resyncing an Excel/CSV source, always upload the complete updated file — Vantage replaces the entire dataset, not just the changes.
- If you have added new columns to a form or DDE table, resync so the new columns appear in ClickHouse and become available for widgets.
- Watch the row count after a resync. A sudden drop might indicate a data issue in the upstream file or table.

6. Related Links / FAQs

Will resyncing disrupt live dashboards?
No. Widgets continue to work during a resync. Once the ingest completes, widgets serve the updated data on the next load.

Can I schedule automatic resyncs?
Not currently. All resyncs are admin-initiated. Automatic scheduled syncs are planned for a future release.

How do I know if a resync succeeded?
The source status in the Sources listing updates and the row count reflects the new data volume. If ingest fails, the source shows an error state.

My dashboard still shows old numbers after a resync. Why?
Widget results are cached for up to 5 minutes. Wait a few minutes and refresh the dashboard page. The updated data will appear once the cache clears.

7. Version Notes

Last Updated: 07 Sep 2026

Revision #1
Created 7 September 2026 10:08:19 by Manjula Jagadish
Updated 7 September 2026 10:10:19 by Manjula Jagadish