Setting Up Tableau

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This guide provides information about and best practices for setting up Tableau. It is intended for advanced users.

Before You Start

The aACE+ Tableau integration uses Tableau Desktop (https://www.tableau.com/products/desktop). For an example of how this feature can help your team, read our feature highlight (https://www.aacesoft.com/resources/dive-deep-into-your-data-with-aace-tableau).

You can contact Tableau directly for pricing or download a version of the software to evaluate. When you evaluate Tableau, be mindful of these options and best practices:

- Tableau Public — This is the free version of Tableau. This version can be useful if you'd like to get the initial configuration out of the way before downloading Tableau Desktop. Tableau Public is limited in functionality and may introduce security issues. We recommend that you disconnect this version from your FileMaker database when it's not in use.
- Tableau Desktop Free Trial — You can download a *temporary* trial version to assess the software. We recommend that you only sign up for the trial version when you're ready to focus on the evaluation. The Tableau support team is very energetic: they will contact you repeatedly to help you conduct an effective evaluation. This may include providing resources, guides, and videos to help you build out your dashboards and reporting. The Tableau team will recommend that you first use static data (e.g. an Excel export) rather than dynamic data. Be mindful of the evaluation period in which you will also need to test a connection to your live data.
- Goal-directed Evaluation — The best way to learn new software is by applying it to accomplish a real goal. Find a report that can actually benefit your team members, then figure out how to build it in Tableau. Keep in mind that real reporting can get quite complex; we recommend that you work on simpler reports as you first begin.

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1. Configure an SSL certificate (https://aace6.knowledgeowl.com/help/configuring-an-ssl-certificate-fms19) for your FileMaker Server.
2. Configure your FM server (https://aace6.knowledgeowl.com/help/installing-configuring-filemaker-server-

fms19#ConfiguringFMS19) to enable the FileMaker Data API.

3. Install the aACE integration file.
4. In Tableau, use a Web Data Connector to create a new connection with your FileMaker server address:

   ```
   https://yourURL/fmi/data/v1/tableau/fm_connector.html
   ```

5. Enter the following credential information to enable Tableau to connect with your aACE system:
   - Source Database Name: aACEv6v0_Integration_Tableau
   - Source Layout Name: "Orders" (or other layout)
   - Account Name: Management
   - Password: Your aACE system's management password
   - Enable incremental refresh: Leave this option disabled at first
6. Rename this new connection to "aACE".
7. Create a new data source, select New Data Source, and repeat Steps 4-5 above, using a different layout (e.g. Source Layout Name: "PurchaseOrders").

Best Practices for Tableau

Tableau draws data from aACE, but what you see will be the underlying field name, rather than the label on the aACE interface (e.g. a field named "Balance" may map to "OrderBalance"). If you are unsure about how the aACE and Tableau fields should be mapped, contact aACE support () or your implementation partner.

aACE contains many fields that are calculations. If you need to improve performance in your Tableau dashboards, it may be effective to create those calculations in Tableau.