Tableau Integration

Easily export Agiloft data to Tableau for analysis by setting up a Tableau connector in your KB.

> ⓘ **Prerequisites**
>
> To use Agiloft data in Tableau, you need a Tableau account and the Advanced or Premium edition of Agiloft. If you have a lower edition, you can use the Alternate Connector Method to send data to Tableau without REST.

Setting Up the Connector

The Agiloft connector is set up from the Tableau side of the integration.

> ✅ This method requires the Advanced or Premium edition because it leverages REST APIs in the background. If you have a lower edition, you can use the Alternate Connector Method to send data to Tableau without REST.

1. Log in to Tableau using the account you want to use to analyze Agiloft data.
2. If you haven't already, download and install Tableau's desktop application.
3. Download the Agiloft connector from the Tableau Extension Gallery.
4. Move the .taco file to the proper directory:
   - **Windows:** C:\Users[Windows User]\Documents\My Tableau Repository\Connectors
   - **macOS:** /Users/[user]/Documents/My Tableau Repository/Connectors
5. When the desktop application and the Agiloft connector have been installed, open the Tableau desktop application and go to Connect.
6. In the sidebar, click More. In the More menu, click Agiloft JDBC by Agiloft.
7. If you are prompted to install the JDBC driver, download it and move it to the following directory, and then close Tableau and repeat steps 5-6:
   - **Windows:** C:\Program Files\Tableau\Drivers
   - **macOS:** /Users/[user]/Library/Tableau/Drivers
8. In the window that opens, enter the information for your KB:
   a. Server: Enter the KB server, usually the first three segments of the URL. For example, example.agiloft.com might be the server address.
   b. Port: Enter the port number for your KB. In most cases, this is 443. However, if your KB's URL uses http:// instead of https://, the port number is likely 80.
   c. KnowledgeBase: Enter the name of your KB. This is what appears in the upper right corner of the KB, and what you enter in the Project field when logging in.

      d. Enter the username and password for the account you want to use for this integration. As with most integrations, it's best to create a dedicated account for this purpose to avoid conflicts with other integrations and scheduled synchronizations.

      e. Select the Require SSL checkbox.

9. Click Sign In.

Once the systems are connected, you can access your Agiloft data right in Tableau.

1. Click one of the tables in the list to open it.
2. Drag content into the Tableau pane as you normally do in Tableau.

For more information about using Tableau, refer to Tableau's training materials.

Alternate Connector Method

If you have a lower edition of Agiloft that doesn't include using APIs, you can use this simpler version of the connector to send data to Tableau using a saved search.

> ⓘ **Prerequisites**
>
> To use Agiloft data in Tableau, you need:
>
> - A Tableau account
> - A user account in Agiloft that Tableau will use to access the saved search data

Configuring the KB

Configuration in Agiloft is as simple as creating a saved search for the data you want to export.

1. In Agiloft, navigate to the appropriate table and go to Search > New or select an existing search and go to Search > Edit.
2. Configure the saved search as desired until you reach the Options tab. For details on the other options, see Creating Saved Searches.
3. On the Options tab, name and save the search.
4. Select Yes next to "Make this search available to Tableau." The WDC URL field automatically populates.

> ✅ To edit this field, you need to be in one of the WDC Editor Groups listed in Setup > System > Security > Web Services.

5. Copy the WDC URL into a note or document so you can insert it in Tableau.

6. Configure the remaining settings as desired, use the Apply tab to make the search available to users if necessary, and click Finish.

You can configure multiple saved searches for use with Tableau, but you must add each WDC URL individually.

Configuring Tableau

With the WDC URL from Agiloft, you can configure Tableau to receive the data.

1. In Tableau, under Connect, select Web Data Connector.
2. Paste the WDC URL into the field and press Enter.
3. When prompted, enter the login and password credentials for a user account. Make sure the account has read permissions for the table and the data in the saved search, because Tableau uses these credentials to pull data from Agiloft.
4. Follow the Tableau documentation to add the WDC URL to the safe list, and to control the refresh frequency if desired. If you add multiple Agiloft WDC URLs, you must add each one to the safe list.

Removing a Saved Search

If you need to remove a saved search from Tableau, edit the search, go to the Options tab, and select No next to "Make this search available to Tableau."