

Accessing the Data Warehouse with FileMaker - Configuration Instructions

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Access to MIT's Data Warehouse within FileMaker using FileMaker's External SQL Sources (ESS) feature requires FileMaker 9 or later. IS&T recommends using the most current version distributed at MIT.

Setting up an ESS connection to the Data Warehouse can be grouped into the following steps:

- A. [Request Access to the MIT Data Warehouse](#)
 - B. [On the Host Machine: Install the Oracle Driver and Set Up Data Source](#)
 - C. [In the FileMaker Database: Configure FileMaker ODBC Connectivity](#)
 - [Create an External Data Source for the Data Warehouse in FileMaker](#)
 - [Add Data Warehouse-Based Table Occurrences in FileMaker](#)
- [Related Links](#)

A. Request Access to the MIT Data Warehouse

If you do not already have access to the MIT Data Warehouse, request it online on the [MIT Data Warehouse web page](#). All users who will access Warehouse data via the ESS feature must also obtain access to the MIT Data Warehouse. Please allow at least one full working day beyond the day of your request for your access to be activated.

B. On the Host Machine: Install the Oracle Driver and Set Up Data Source

The first configuration step is to set up an ODBC data source for the Data Warehouse on the machine where the FileMaker database lives. If the database is hosted with FileMaker Server (strongly recommended), this is the server machine; if it's a local single-user file, this is the user's machine. You'll need to download and install the Oracle driver which matches the appropriate machine's platform, and then use an ODBC administrator application to create the data source name (DSN) on the system. For instructions specific to your platform, follow the appropriate link below:

- Windows: [Accessing the Data Warehouse with FileMaker - Configuring ODBC for Windows](#)
- Macintosh: [Accessing the Data Warehouse with FileMaker - Configuring ODBC for Macintosh](#)

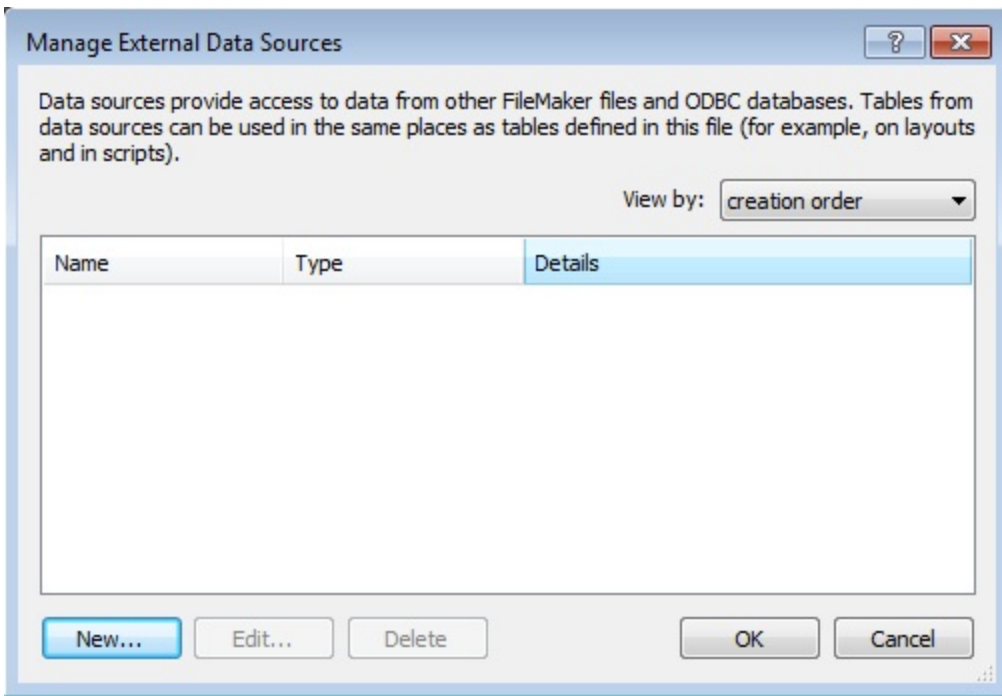
Note: IS&T recommends use of its [Managed Servers](#).

C. In the FileMaker Database: Configure FileMaker ODBC Connectivity

The next step is to define the connection between the FileMaker database and the Data Warehouse. This involves creating a link from the FileMaker database to the Warehouse DSN, and then adding the desired Warehouse tables to the FileMaker database as shadow table occurrences.

Create an External Data Source for the Data Warehouse in FileMaker

1. Open your database in FileMaker Pro or FileMaker Advanced.
2. Go to **File > Manage > External Data Sources**.
3. Click **New**.



4. In the **Name** field, type **warehouse**.
5. Select **Type: ODBC**.
6. Under **Filter by Type**, check the box for **Views**. You may also check the boxes for **Tables** and **System Tables**, if desired, but most users will not need to do so.
7. Under **Schema Name**, type **WAREUSER**. (Optional, but recommended.)



Important Security Note: Make sure that **Authentication** is set to **Prompt user for user name and password**. Do not specify a username or password.

Edit Data Source

Name:

Type: ☐ FileMaker ☒ ODBC

DSN:

Authentication

☒ Prompt user for user name and password

☐ Specify user name and password (applies to all users)

User name:

Password:

☐ Use Windows Authentication (Single Sign-on)

SPN:

Filter tables

Catalog name:

Schema name:

Table name:

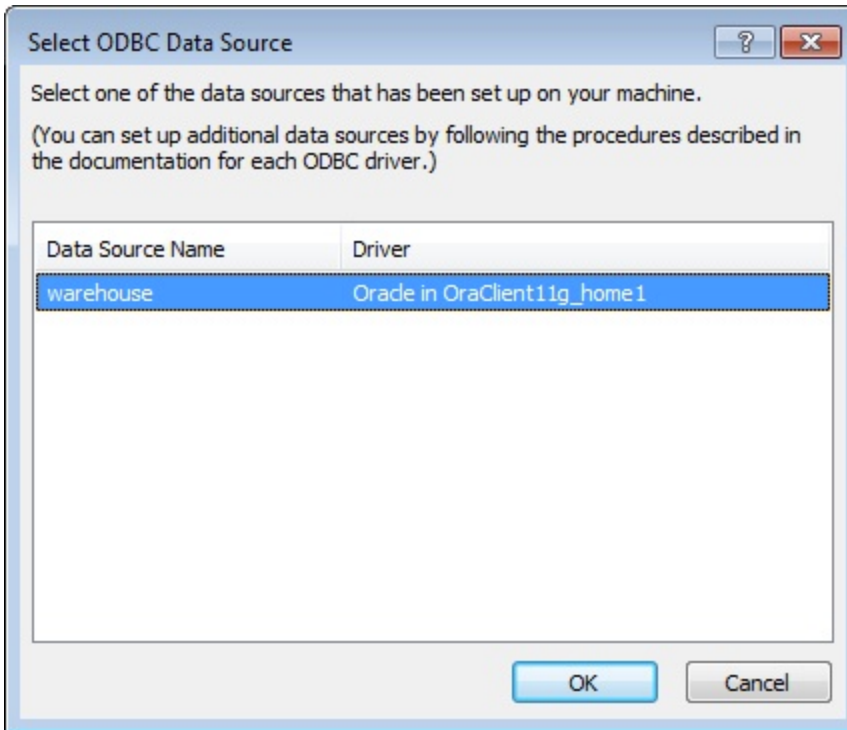
Filter by Type:

☐ Tables

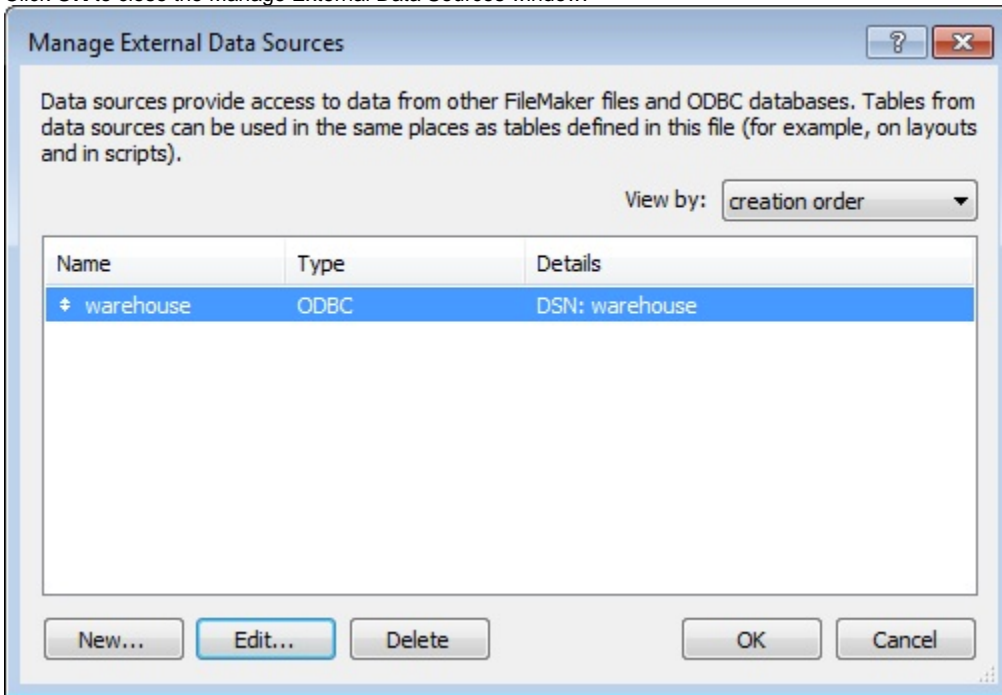
☒ Views

☐ System tables

8. Click the **Specify** button next to the **DSN** field.
9. Select **warehouse** from the list of data source names, and click **OK**.

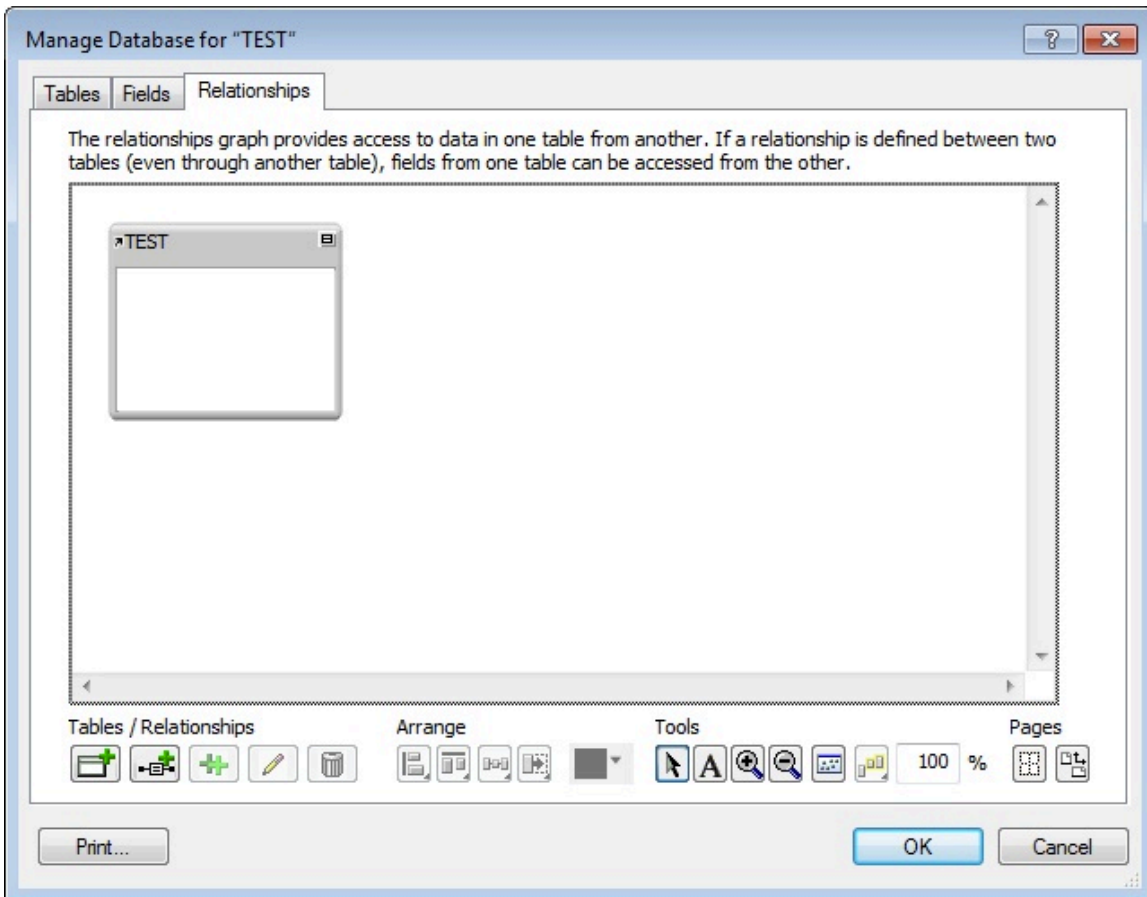


10. Click **OK** to close the Edit Data Source window.
11. Click **OK** to close the Manage External Data Sources window.

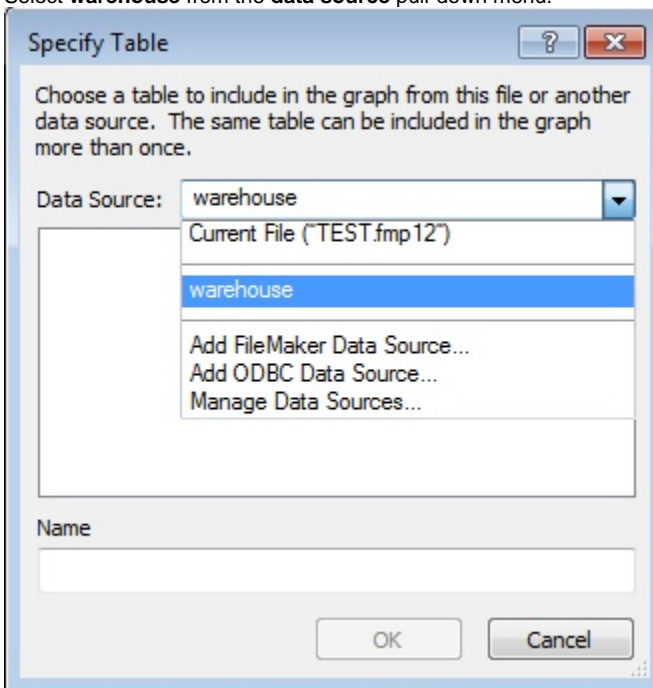


Add Data Warehouse-Based Table Occurrences in FileMaker

1. Open your database in FileMaker and go to **File > Manage > Database > Relationships**.
2. Click on the **Specify Table** button: 



3. Select **warehouse** from the **data source** pull-down menu.



4. Enter your Data Warehouse username and password and click **OK**.



Connect to "warehouse"

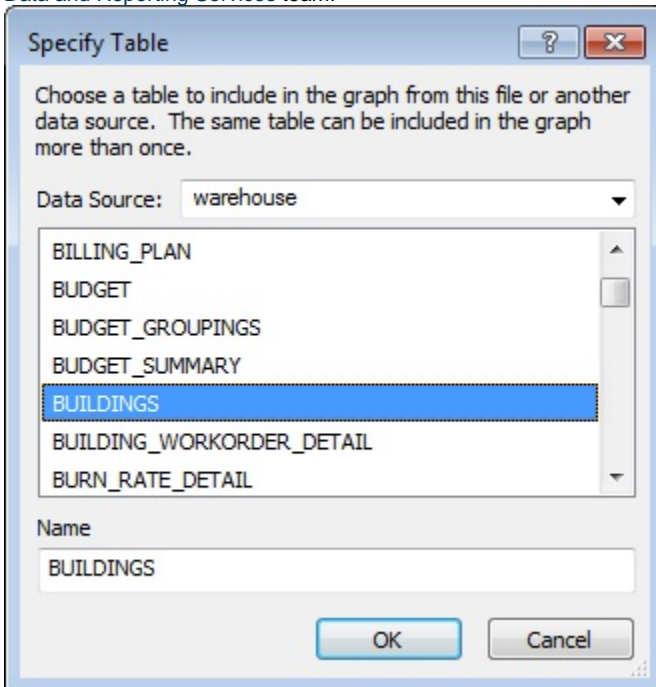
Please enter your user name and password for the ODBC data source, "warehouse".

User name:

Password:

OK Cancel

5. A list of Data Warehouse tables and views is displayed. Only tables and views you are authorized to access are included. Select the desired table or view and click **OK**. If you are not certain which table contains the desired data, consult the [list of all tables](#), or contact the [Data and Reporting Services](#) team.



Specify Table

Choose a table to include in the graph from this file or another data source. The same table can be included in the graph more than once.

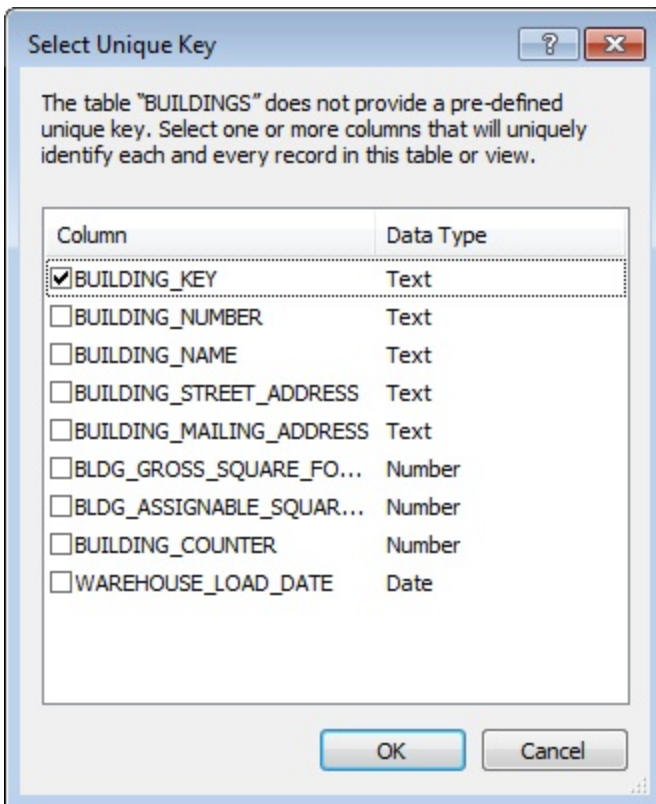
Data Source:

BILLING_PLAN
BUDGET
BUDGET_GROUPINGS
BUDGET_SUMMARY
BUILDINGS
BUILDING_WORKORDER_DETAIL
BURN_RATE_DETAIL

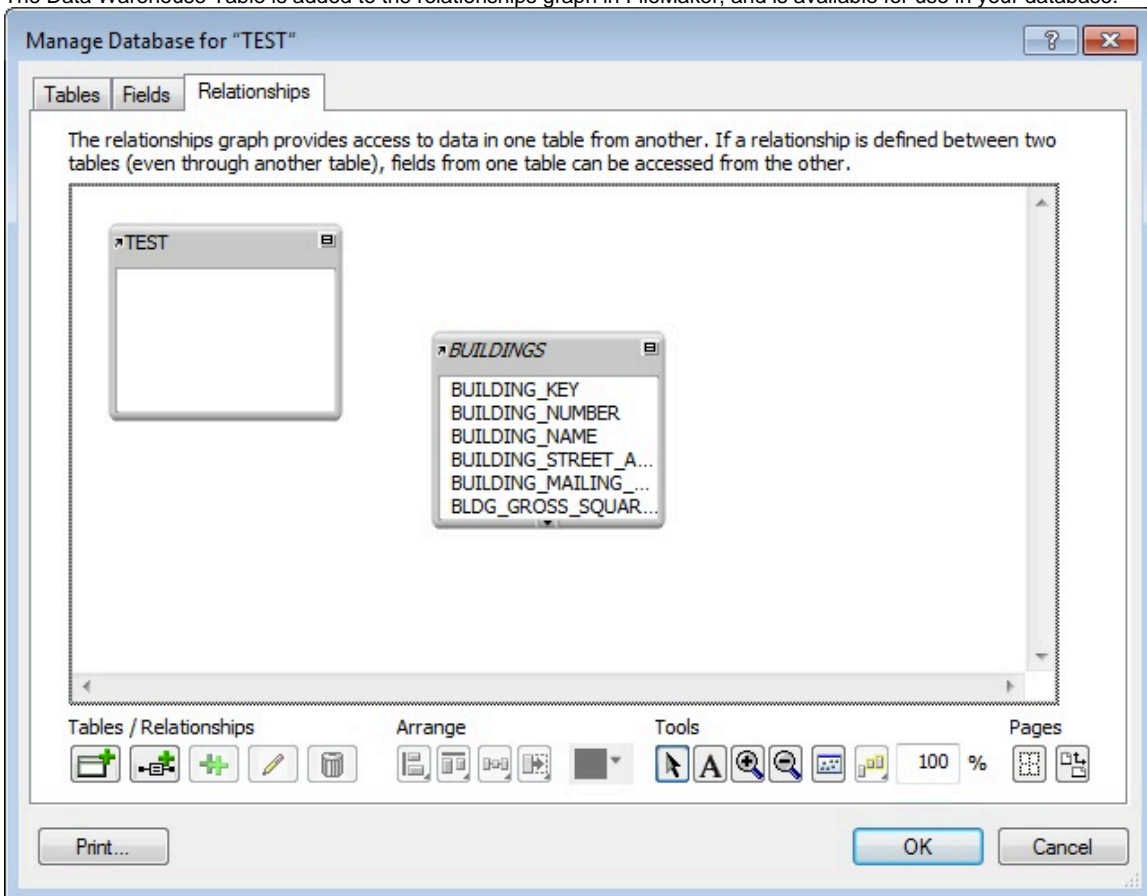
Name

OK Cancel

6. You may be prompted to select a unique key. Check the box for the field that contains the unique key for that table and click **OK**. If you are not sure which field to choose, contact the [Data and Reporting Services](#) team.



7. The Data Warehouse Table is added to the relationships graph in FileMaker, and is available for use in your database.



Related Links

Warehouse tables not displayed in FileMaker with ODBC connection to Data Warehouse

Data and Reporting Services at MIT