



Informatica® Cloud Data Integration

Adaptive Insights Connector Guide

© Copyright Informatica LLC 2019

This software and documentation are provided only under a separate license agreement containing restrictions on use and disclosure. No part of this document may be reproduced or transmitted in any form, by any means (electronic, photocopying, recording or otherwise) without prior consent of Informatica LLC.

U.S. GOVERNMENT RIGHTS Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation is subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License.

Informatica, the Informatica logo, Informatica Cloud, and PowerCenter are trademarks or registered trademarks of Informatica LLC in the United States and many jurisdictions throughout the world. A current list of Informatica trademarks is available on the web at <https://www.informatica.com/trademarks.html>. Other company and product names may be trade names or trademarks of their respective owners.

Portions of this software and/or documentation are subject to copyright held by third parties. Required third party notices are included with the product.

See patents at <https://www.informatica.com/legal/patents.html>.

DISCLAIMER: Informatica LLC provides this documentation "as is" without warranty of any kind, either express or implied, including, but not limited to, the implied warranties of noninfringement, merchantability, or use for a particular purpose. Informatica LLC does not warrant that this software or documentation is error free. The information provided in this software or documentation may include technical inaccuracies or typographical errors. The information in this software and documentation is subject to change at any time without notice.

NOTICES

This Informatica product (the "Software") includes certain drivers (the "DataDirect Drivers") from DataDirect Technologies, an operating company of Progress Software Corporation ("DataDirect") which are subject to the following terms and conditions:

1. THE DATADIRECT DRIVERS ARE PROVIDED "AS IS" WITHOUT WARRANTY OF ANY KIND, EITHER EXPRESSED OR IMPLIED, INCLUDING BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NON-INFRINGEMENT.
2. IN NO EVENT WILL DATADIRECT OR ITS THIRD PARTY SUPPLIERS BE LIABLE TO THE END-USER CUSTOMER FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, CONSEQUENTIAL OR OTHER DAMAGES ARISING OUT OF THE USE OF THE ODBC DRIVERS, WHETHER OR NOT INFORMED OF THE POSSIBILITIES OF DAMAGES IN ADVANCE. THESE LIMITATIONS APPLY TO ALL CAUSES OF ACTION, INCLUDING, WITHOUT LIMITATION, BREACH OF CONTRACT, BREACH OF WARRANTY, NEGLIGENCE, STRICT LIABILITY, MISREPRESENTATION AND OTHER TORTS.

The information in this documentation is subject to change without notice. If you find any problems in this documentation, report them to us at infa_documentation@informatica.com.

Informatica products are warranted according to the terms and conditions of the agreements under which they are provided. INFORMATICA PROVIDES THE INFORMATION IN THIS DOCUMENT "AS IS" WITHOUT WARRANTY OF ANY KIND, EXPRESS OR IMPLIED, INCLUDING WITHOUT ANY WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND ANY WARRANTY OR CONDITION OF NON-INFRINGEMENT.

Publication Date: 2019-05-10

Table of Contents

Preface	4
Informatica Resources.	4
Informatica Documentation.	4
Informatica Intelligent Cloud Services web site.	4
Informatica Intelligent Cloud Services Communities.	4
Informatica Intelligent Cloud Services Marketplace.	5
Data Integration connector documentation.	5
Informatica Knowledge Base.	5
Informatica Intelligent Cloud Services Trust Center.	5
Informatica Global Customer Support.	5
Chapter 1: Introduction to Adaptive Insights Connector	6
Adaptive Insights Connector Overview.	6
Adaptive Insights Connector Task and Object Types.	7
Introduction to Adaptive Insights.	8
Administration of Adaptive Insights Connector.	8
Chapter 2: Adaptive Insights Connections	9
Adaptive Insights Connections Overview.	9
Adaptive Insights Connection Properties.	9
Chapter 3: Synchronization Tasks with Adaptive Insights	10
Adaptive Insights Sources in Synchronization Tasks.	10
Adaptive Insights Targets in Synchronization Tasks.	11
Synchronization Task Example.	12
Chapter 4: Mapping and Mapping Tasks With Adaptive Insights	14
Adaptive Insights Sources in Mappings and Mapping Tasks.	14
Adaptive Insights Targets in Mappings and Mapping Tasks.	15
Mapping Task Example.	15
Appendix A: Data Type Reference	17
Data Type Reference Overview.	17
Adaptive Insights and Transformation Data Types.	17
Index	18

Preface

The *Data Integration Adaptive Insights Connector Guide* contains information about how to set up and use Adaptive Insights Connector. The guide explains how business users can use Adaptive Insights Connector to read data from and write data to Adaptive Insights.

Informatica Resources

Informatica provides you with a range of product resources through the Informatica Network and other online portals. Use the resources to get the most from your Informatica products and solutions and to learn from other Informatica users and subject matter experts.

Informatica Documentation

Use the Informatica Documentation Portal to explore an extensive library of documentation for current and recent product releases. To explore the Documentation Portal, visit <https://docs.informatica.com>.

Informatica maintains documentation for many products on the Informatica Knowledge Base in addition to the Documentation Portal. If you cannot find documentation for your product or product version on the Documentation Portal, search the Knowledge Base at <https://search.informatica.com>.

If you have questions, comments, or ideas about the product documentation, contact the Informatica Documentation team at infa_documentation@informatica.com.

Informatica Intelligent Cloud Services web site

You can access the Informatica Intelligent Cloud Services web site at <http://www.informatica.com/cloud>.

This site contains information about Data Integration editions and applications as well as information about other Informatica Cloud integration services.

Informatica Intelligent Cloud Services Communities

Use the Informatica Intelligent Cloud Services Community to discuss and resolve technical issues. You can also find technical tips, documentation updates, and answers to frequently asked questions.

Access the Informatica Intelligent Cloud Services Community at:

<https://network.informatica.com/community/informatica-network/products/cloud-integration>

To find resources on using Application Integration (the Informatica Cloud Real Time service), access the community at:

<https://network.informatica.com/community/informatica-network/products/cloud-integration/cloud-application-integration/content>

Developers can learn more and share tips at the Cloud Developer community:

<https://network.informatica.com/community/informatica-network/products/cloud-integration/cloud-developers>

Informatica Intelligent Cloud Services Marketplace

Visit the Informatica Marketplace to try and buy Data Integration Connectors, templates, and mapplets:

https://marketplace.informatica.com/community/collections/cloud_integration

Data Integration connector documentation

You can access documentation for Data Integration Connectors at the Documentation Portal. To explore the Documentation Portal, visit <https://docs.informatica.com>.

Informatica Knowledge Base

Use the Informatica Knowledge Base to find product resources such as how-to articles, best practices, video tutorials, and answers to frequently asked questions.

To search the Knowledge Base, visit <https://search.informatica.com>. If you have questions, comments, or ideas about the Knowledge Base, contact the Informatica Knowledge Base team at KB_Feedback@informatica.com.

Informatica Intelligent Cloud Services Trust Center

The Informatica Intelligent Cloud Services Trust Center provides information about Informatica security policies and real-time system availability.

You can access the trust center at <https://www.informatica.com/trust-center.html>.

Subscribe to the Informatica Intelligent Cloud Services Trust Center to receive upgrade, maintenance, and incident notifications. The [Informatica Intelligent Cloud Services Status](#) page displays the production status of all the Informatica cloud products. All maintenance updates are posted to this page, and during an outage, it will have the most current information. To ensure you are notified of updates and outages, you can subscribe to receive updates for a single component or all Informatica Intelligent Cloud Services components. Subscribing to all components is the best way to be certain you never miss an update.

To subscribe, go to the [Informatica Intelligent Cloud Services Status](#) page and click **SUBSCRIBE TO UPDATES**. You can then choose to receive notifications sent as emails, SMS text messages, webhooks, RSS feeds, or any combination of the four.

Informatica Global Customer Support

You can contact a Customer Support Center by telephone or online.

For online support, click **Submit Support Request** in Informatica Intelligent Cloud Services. You can also use Online Support to log a case. Online Support requires a login. You can request a login at <https://network.informatica.com/welcome>.

The telephone numbers for Informatica Global Customer Support are available from the Informatica web site at <https://www.informatica.com/services-and-training/support-services/contact-us.html>.

CHAPTER 1

Introduction to Adaptive Insights Connector

This chapter includes the following topics:

- [Adaptive Insights Connector Overview, 6](#)
- [Adaptive Insights Connector Task and Object Types, 7](#)
- [Introduction to Adaptive Insights, 8](#)
- [Administration of Adaptive Insights Connector, 8](#)

Adaptive Insights Connector Overview

Adaptive Insights enables you to securely read data from and write data to Adaptive Insights. You can use Adaptive Insights objects as sources and targets in synchronization tasks, mappings, and mapping tasks.

Use Adaptive Insights Connector to read data from flat files, applications, or databases. Data sources can include third-party systems like Salesforce and NetSuite. The Adaptive Insights connector enables organizations to streamline data and processes across information systems for operational efficiency, including automation of training assignments and moderation of administrative tasks.

Example

You are a sales analyst and you need to migrate real-time sales opportunity information from a Salesforce system to Adaptive Insights to reconcile and analyze the data and generate a report. You can use Adaptive Insights Connector to integrate with Salesforce to automatically import key data such as leads, opportunities, customer wins, sales rep compensation details, and custom fields.

Adaptive Insights Connector Task and Object Types

The following table lists the task types that Adaptive Insights Connector supports:

Task Type	Source	Target	Lookup	Data Preview
Synchronization	Yes	Yes	No	Yes
Mapping	Yes	Yes	No	Yes

The following table lists the object types that Adaptive Insights Connector supports:

Object Name	Read	Insert	Update	Delete	Upsert
createAccount	No	Yes	No	No	No
createDimension	No	Yes	No	No	No
createDimensionValue	No	Yes	No	No	No
createLevel	No	Yes	No	No	No
createUser	No	Yes	No	No	No
eraseActuals	No	No	No	Yes	No
exportAccounts	Yes	No	No	No	No
exportLevels	Yes	No	No	No	No
exportInstances	Yes	No	No	No	No
exportLocales	Yes	No	No	No	No
exportRoles	Yes	No	No	No	No
exportDimensionFamilies	Yes	No	No	No	No
exportVersions	Yes	No	No	No	No
exportCustomerLogo	Yes	No	No	No	No
exportActiveCurrencies	Yes	No	No	No	No
importCubeData	No	Yes	No	No	No
importStandardData	No	Yes	No	No	No
importTransactions	No	Yes	No	No	No
publishChanges	No	No	No	No	No
updateAccount	No	No	Yes	No	No

Object Name	Read	Insert	Update	Delete	Upsert
updateDimension	No	No	Yes	No	No
updateDimensions	No	No	Yes	No	No
updateDimensionValue	No	No	Yes	No	No
updateLevel	No	No	Yes	No	No

Introduction to Adaptive Insights

Adaptive Insights covers the planning, consolidation, analytics and reporting functions with its Business Planning Cloud. The Adaptive Insights Business Planning Cloud enables a comprehensive set of cloud-based software solutions supported by a powerful, in-memory technology platform that enables functional and company-wide business planning and built-in analytics at a very large scale.

Administration of Adaptive Insights Connector

As a user, you can use Adaptive Insights Connector after the organization administrator performs the following tasks:

1. Create an Adaptive Insights account to access Adaptive Insights objects.
2. Get the API Key.

If you have subscribed for the Adaptive Insights silver plan or later, you need the API Key. You can get the API Key from your profile in **My Profile & Settings**.

CHAPTER 2

Adaptive Insights Connections

This chapter includes the following topics:

- [Adaptive Insights Connections Overview, 9](#)
- [Adaptive Insights Connection Properties, 9](#)

Adaptive Insights Connections Overview

Create an Adaptive Insights connection to access Adaptive Insights data from Cloud Data Integration. Use an Adaptive Insights connection to read data from an Adaptive Insights source and write data to an Adaptive Insights target.

You can use Adaptive Insights connections in synchronization tasks, mapping tasks, and Mappings.

Adaptive Insights Connection Properties

You can create a connection on the **Connections** page or when you create a task. When you create an Adaptive Insights connection, you must configure the connection properties. After you create a connection, it becomes available to all users who have access to the organization.

The following table describes the Adaptive Insights connection properties:

Connection Property	Description
Login	Mandatory. The API key from the account owner's profile.
Password	The source from the account owners profile.
Locale	The page size for the read operation. Default value is 100.
instanceCode	Mandatory. Default value is <code>https://api.AdaptiveInsights.com/v1.svc</code>

CHAPTER 3

Synchronization Tasks with Adaptive Insights

This chapter includes the following topics:

- [Adaptive Insights Sources in Synchronization Tasks, 10](#)
- [Adaptive Insights Targets in Synchronization Tasks, 11](#)
- [Synchronization Task Example, 12](#)

Adaptive Insights Sources in Synchronization Tasks

You can use the following Adaptive Insights objects as a source object in a synchronization task:

- **eraseActuals**
- exportAccounts
- exportActiveCurrencies
- exportCustomerLogo
- exportDimensionFamilies
- exportInstances
- exportLevels
- exportLocales
- exportRoles
- exportVersions

You can configure the Adaptive Insights source properties on the Source page of the Synchronization Task wizard.

The following table describes the Adaptive Insights source properties:

Property	Description
Connection	Name of the source connection.
Source Type	Type of the source object. Select Single .
Source Object	Source object for the synchronization task.

Property	Description
Display technical names instead of labels	Displays technical names instead of business names.
Display source fields in alphabetical order	Displays source fields in alphabetical order instead of the order returned by the source system.

Adaptive Insights Targets in Synchronization Tasks

You can use the following Adaptive Insights objects as a target object in a synchronization task:

- createAccount
- createDimension
- createDimensionValue
- createLevel
- createUser
- eraseActuals
- importCubeData
- importStandardData
- importTransactions
- publishChanges
- updateAccount
- updateDimension
- updateDimensions
- updateDimensionValue
- updateLevel

You can configure the Adaptive Insights target properties on the Target page of the Synchronization Task wizard.

The following table describes the Adaptive Insights target properties:

Property	Description
Connection	Name of the target connection.
Target Type	Type of the target object. Select Single.
Target Object	Target object for the synchronization task.
Operation	Target operation. Select Insert or Update .

Synchronization Task Example

You can create a synchronization task to read data from a single Adaptive Insights object and write data to a flat file object.

Perform the following steps to create a synchronization task:

1. Log in to Informatica Intelligent Cloud Services.
2. Select **Data Integration** from the menu.
3. Click **New > Tasks > Synchronization Task** to create a synchronization task.
4. On the **Definition** tab, configure the following fields:

Field	Description
Task Name	Name of the synchronization task. For example, exportAccounts.
Description	Description of the synchronization task. Maximum length is 255 characters.
Task Operation	Select Insert .

5. Click **Next**.
6. On the **Source** tab, configure the following fields:

Field	Description
Connection	Select the Adaptive Insights connection. For example, AdaptiveInsights_Read.
Source Type	Select Single.
Source Object	Select the source object. For example, exportAccounts.

7. Click **Next**.
8. On the **Target** tab, configure the following fields:

Field	Description
Connection	Select a flat file connection. For example, Info_PC_12_Flatfile.
Target Object	Select the target object or create a new target object. For example, exportAccounts.csv.

9. Click **Next**.
10. On the **Data Filters** tab, set the filter conditions. If you do not set a filter condition, all rows are processed for the task.
11. Click **Next**.
12. On the **Field Mapping** tab, drag and drop the required fields from the source to the target.
13. Click **Next**.

14. On the **Schedule** tab, you can schedule the task for each requirement and save. You can run a synchronization task manually, or you can schedule the task to run at a specific time or at specified time intervals.
15. Click **Finish**. To run the task, click **Run**.
16. On the **Monitor** tab, you can monitor the status of the task.

CHAPTER 4

Mapping and Mapping Tasks With Adaptive Insights

This chapter includes the following topics:

- [Adaptive Insights Sources in Mappings and Mapping Tasks, 14](#)
- [Adaptive Insights Targets in Mappings and Mapping Tasks, 15](#)
- [Mapping Task Example , 15](#)

Adaptive Insights Sources in Mappings and Mapping Tasks

You can use the following Adaptive Insights objects as a source in mappings and mapping tasks:

- **eraseActuals**
- ListAchievements
- UserList

The following table describes the Adaptive Insights source properties:

Property	Description
Connection	Name of the source connection.
Source Type	Type of the source object. Select Single .
Object	Source object for the mapping task.
Filter	Filter condition to filter source data in Adaptive Insights.

Adaptive Insights Targets in Mappings and Mapping Tasks

You can use the following Adaptive Insights objects as target in mappings and mapping tasks:

- CreateUser
- DeleteUser
- eraseActuals
- importCubeData
- importStandardData
- importTransactions
- UpdateUser

The following table describes the Adaptive Insights target properties:

Property	Description
Connection	Select an active source connection or click New Connection to create one.
Target Type	Type of the target object. Select Single Object .
Object	Target object for the mapping task.
Operation	Target operation. Select Insert or Update .

Mapping Task Example

You can create a mapping to read data from a single Adaptive Insights object and write data to a target object. You can use the mapping to create a mapping task.

Perform the following steps to create a mapping and a mapping task:

1. Select **Data Integration** from the menu. The **Data Integration** Home page appears.
2. In the **Data Integration** Home page, click **New > Mappings > Mapping**.
3. Click **Create**.
4. In the **Mapping Properties**, enter the name and description of the mapping.
5. In the **Design** section, drag a source from the palette into the editor. Select the source to view the properties.
6. In the **Source Properties**, click the **Source** tab.

- In the **Source** tab, configure the following fields:

Field	Description
Connection	Select an Adaptive Insights connection. For example, AdaptiveInsights_Read.
Source Type	Select Single .
Object	Select the exportLevels source object.

- In the **Design** section, drag a target from the palette into the editor. Select the target to view the properties.
- In the **Target Properties**, click the **Target** tab.
- In the **Target** tab, configure the following fields:

Field	Description
Connection	Select a flat file connection. For example, Info_PC_12_Flatfile.
Target Type	Select Single.
Object	Select the exportLevels.csv target object.
Operation	Select Insert.

- In the **Design** section, connect the source to the target to map the fields.
- In the **Target Properties**, click the **Field Mapping** tab to view the mapped fields of the source to the target.
- Click **Save** and then click **Run**.
- In **Monitor**, you can monitor the status of the mapping. You can use the mapping to create a mapping task.
- In the Data Integration Home, click **New > Task > Mapping Task**.
- Click **Create**.
- In the **Definition** tab, configure the following fields:

Field	Description
Task Name	Enter a name for the mapping task. For example, exportLevel_MCT.
Description	Enter a description for the mapping task.
Runtime Environment	Select the Runtime Environment that contains the Secure Agent to run the task.
Mapping	Select the Mapping.

- On the **Schedule** tab, you can schedule the mapping task to run at a specific time or at specified time intervals.

APPENDIX A

Data Type Reference

This appendix includes the following topics:

- [Data Type Reference Overview, 17](#)
- [Adaptive Insights and Transformation Data Types, 17](#)

Data Type Reference Overview

Data Integration uses the following data types in synchronization tasks and mapping tasks with Adaptive Insights:

Adaptive Insights data types

Adaptive Insights data types appear in the source and target transformations when you choose to edit metadata for the fields.

Transformation data types

Set of data types that appear in the transformations. They are internal data types based on ANSI SQL-92 generic data types, which the Secure Agent uses to move data across platforms. Transformation data types appear in all transformations in a mapping.

When Data Integration reads source data, it converts the native data types to the comparable transformation data types before transforming the data. When Data Integration writes to a target, it converts the transformation data types to the comparable native data types.

Adaptive Insights and Transformation Data Types

The following table lists the supporting Adaptive Insights data types that Data Integration supports and the corresponding transformation data types:

Adaptive Insights Data Type	Transformation Data Type	Description
String	String	1 to 10485760 characters

INDEX

C

Cloud Application Integration community
URL [4](#)
Cloud Developer community
URL [4](#)

D

Data Integration community
URL [4](#)

I

Informatica Global Customer Support
contact information [5](#)
Informatica Intelligent Cloud Services
web site [4](#)

M

maintenance outages [5](#)

S

status
Informatica Intelligent Cloud Services [5](#)
system status [5](#)

T

trust site
description [5](#)

U

upgrade notifications [5](#)

W

web site [4](#)