Informatica

Informatica® Cloud Data Integration

# Salesforce Analytics Connector

Informatica Cloud Data Integration Salesforce Analytics Connector
October 2022

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# Preface

Use *Salesforce Analytics Connector* to learn how to write to Salesforce Analytics by using Cloud Data Integration. Learn to create a Salesforce Analytics connection, develop and run synchronization tasks, mappings, and mapping tasks in Cloud Data Integration.

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CHAPTER 1

# Introduction to Salesforce Analytics Connector

Salesforce Analytics Connector provides connectivity between Data Integration and Salesforce Analytics. You can integrate and transform data from sources, such as flat files, databases, and applications, to write to a Salesforce Analytics target. You can then view reports on Salesforce Analytics.

Salesforce Analytics targets represent objects in the Salesforce Analytics object model. Salesforce Analytics objects are tables that correspond to tabs and other user interface elements on the Salesforce Analytics website.

Use a Salesforce Analytics connection in synchronization tasks, mappings, and mapping tasks.

You can switch mappings to advanced mode to include transformations and functions that enable advanced functionality.

**Note:** You cannot read data from a partitioning-enabled source.

## Introduction to Salesforce Analytics

Salesforce Analytics is a cloud-based platform that connects data from multiple sources, creates interactive views of that data, and displays those views in dashboards.

You can use Salesforce Analytics to get instant access to analytics data and explore data of any data source. You can integrate data from multiple business applications and solutions, such as Customer Relationship Management (CRM) and Enterprise resource planning (ERP) into a single view. You can securely transmit data of any data source with the native Salesforce cloud service. Sales, service, and marketing users can use Salesforce Analytics reports to understand and act on real-time information.

## Salesforce Analytics Connector assets

When you create a Salesforce Analytics connection to perform a task, you can select objects supported by Salesforce Connector for the task.

When you use Salesforce Analytics Connector, you can include the following Data Integration assets:

- Mapping

- Mapping task
- Synchronization task

For more information about configuring assets and transformations, see *Mappings*, *Transformations*, and *Tasks* in the Data Integration documentation.

# Salesforce Analytics objects

Salesforce Analytics does not contain predefined metadata. Salesforce Analytics uses the JSON file format to describe the metadata. You must create a JSON file that contains metadata in the Salesforce Analytics schema format.

To create a JSON file, create a .csv file that contains the data that you want to load into Salesforce Analytics. Use the Salesforce `datasetloader.jar` file to convert the .csv file into a JSON file.

You can also create a JSON file at the time of target creation. On the Target page, click **Create Target**. The Secure Agent generates a JSON file and saves the file to the temporary directory that you specify when creating a connection.

## Generating a JSON file

You must create a JSON file before you can import the file into the Salesforce Analytics Connector.

Before you create a JSON file, you must download the `datasetloader.jar`. Contact Salesforce for the `datasetloader.jar` file.

1. Create a .csv file with the supported data types and data.
2. From the command prompt, run the command: `java -jar datasetloader.jar <filename>.csv`.

   A JSON file is created in the Salesforce Analytics schema format.

## Manually creating a JSON file

1. Open a text editor and enter data in the following Salesforce Analytics schema format:

```
{
  "fileFormat" : {

  },
  "objects" : [ {
    <object_detail>,
                "fields" : [ {
                                <Field1 details>
                }
                {               <Field2 details>
                }……
    ]
}]
}
```

2. Save and close the file in the .json format.

## Sample JSON file

The following example shows a sample JSON file in the Salesforce Analytics schema format:

```
{
  "fileFormat" : {
    "charsetName" : "UTF-8",
    "fieldsDelimitedBy" : ",",
    "fieldsEnclosedBy" : "\"",
    "linesTerminatedBy" : "\n",
    "numberOfLinesToIgnore" : 1
  },
  "objects" : [ {
    "name" : "emp_hf2",
    "fullyQualifiedName" : "emp_hf2",
    "connector" : "SalesforceAnalyticsCloudDatasetLoader",
    "label" : "emp_hf2",
    "description" : "emp_hf2",
    "acl" : null,
    "rowLevelSecurityFilter" : null,
    "fields" : [ {
      "name" : "id",
      "fullyQualifiedName" : "id",
      "label" : "id",
      "description" : "id",
      "type" : "Int",
      "precision" : 10,
      "scale" : 0,
      "defaultValue" : "0",
      "format" : null,
      "isSystemField" : false,
      "isUniqueId" : false,
      "isMultiValue" : false,
      "multiValueSeperator" : null,
      "acl" : null,
      "fiscalMonthOffset" : 0
    }
} ]
```

# Salesforce Analytics Connector example

You are a sales analyst in an enterprise. You want to track the overall growth trend in sales, geographic distribution of sales, and top customers, and present a snapshot of the sales distribution to senior executives.

You can integrate data from multiple sources, filter the data, and make the data available on Salesforce Analytics through Salesforce Analytics Connector. You can then use the data for analysis. The visual representation of data helps you understand the profitability, with views presented by geography, product category, and customer segment.

**Note:** Ensure that the field name does not contain two consecutive underscores. However, you can use `__c` as suffix in the field name when you read data.

# Salesforce Analytics target operations

The following table describes Salesforce Analytics Target operations in synchronization and mapping tasks:

| Property | Description |
|---|---|
| Target Load Type | You can choose Normal mode or Bulk mode. Default is Normal mode. |
| Insert | Inserts a row to the Salesforce Analytics database. |
| Delete | Deletes a row from the Salesforce Analytics database. When you enable DELETE, the Secure Agent deletes all rows flagged for delete and rejects all rows flagged when you disable DELETE . |
| Upsert | When you enable UPSERT, the Secure Agent upserts records, links the external ID to the external ID field from the source through the transformations in the target definition. Salesforce uses UPSERT to identify the records that must be upserted. |

# Administration of Salesforce Analytics Connector

As a user, you can use Salesforce Analytics Connector after the organization administrator ensures that users have access to the Secure Agent directory that contains the success and error files. This directory path must be the same on each Secure Agent machine in the runtime environment.

To avoid a Java heap space error when you create or run a task, set the JVM options for type DTM to increase the -Xmx value in the system configuration details of the Secure Agent. For example, -Xmx1024m. Restart the Secure Agent for the property to take effect.

CHAPTER 2

# Salesforce Analytics connections

Create a Salesforce Analytics connection to write data to Salesforce Analytics.

You can use Salesforce Analytics connections to specify targets in synchronization and mapping tasks. When you create a Salesforce Analytics connection, you enter properties specific to Salesforce Analytics.

You can create a Salesforce Analytics connection in the Administrator > Connections page in the Synchronization Task wizard, or in the Mapping Task wizard when you create a task. The connection becomes available to the entire organization to use.

**Note:** When a connection to Salesforce Analytics fails, the Secure Agent retries a maximum of three attempts at a 300-second interval to establish the connection.

## Salesforce Analytics connection properties

When you set up a Salesforce Analytics connection, you must configure the connection properties.

The following table describes the Salesforce Analytics connection properties:

| Connection property | Description |
|---|---|
| Runtime Environment | The name of the runtime environment where you want to run the tasks. |
| Username | User name of the Salesforce Analytics account. |
| Password | Password for the Salesforce Analytics account. |
| Security Token | The token used to login to Salesforce Analytics from an untrusted network. |
| Service URL | URL of the Salesforce Analytics service that you want to access. For example: `https://login.salesforce.com/services/Soap/u/48.0`<br>In a test or development environment, you might want to access the Salesforce Analytics Sandbox testing environment. |
| Temp Folder Name | The directory where the Secure Agent stores the JSON files and data archive files. After the successful execution of a task, the temporary .gz files are deleted. |
| Default Date Format | The date format to read date columns in the JSON file. |

CHAPTER 3

# Synchronization tasks with Salesforce Analytics Connector

Use the Synchronization task to synchronize data between a source and target.

You can configure a synchronization task using the Synchronization Task wizard.

When you create a task, you can associate it with a schedule to run it at specified times or on regular intervals. Or, you can run it manually. You can monitor tasks that are currently running in the activity monitor and view logs about completed tasks in the activity log.

## Salesforce Analytics targets in synchronization tasks

You can use a Salesforce Analytics object as a target in a synchronization task.

When you use Salesforce Analytics target objects, you can select a standard object as the primary source.

You can configure Salesforce Analytics target properties on the **Schedule** page of the Synchronization Task wizard.

The following table describes the Salesforce Analytics advanced target properties:

| Advanced Target Property | Description |
|---|---|
| Target Load Type | Sets the default load type for sessions. You can choose standard or bulk loading. |
| Target Folder | Sets the location of the target on Salesforce Analytics. |
| Override Target Dataset | Overwrites the target data before loading data into Salesforce Analytics. |
| Monitor Job Status | Monitors the status of all the four phases in the Salesforce job.<br>Default is false.<br>For more information on monitor job status, see https://knowledge.informatica.com/s/article/The-status-of-the-Salesforce-Analytics-job-in-Cloud-Data-Integration-does-not-match-the-status-in-Salesforce-Analytics?language=en_US. |

| Advanced Target Property | Description |
|---|---|
| Success File Directory | Directory for the success rows file. You must specify a directory path that is available on each Secure Agent machine in the runtime environment to save the success rows file. Ensure that your administrator has granted you access to this directory.<br>If you do not specify a directory, the success rows file is not created. |
| Error File Directory | Directory for the error rows file. By default, the error rows file is written to the following Secure Agent directory: `<Secure Agent installation directory>\apps\Data_Integration_Server\data\error`<br>Specify a directory path that is available on each Secure Agent machine in the runtime environment. Ensure that your administrator has granted you access to this directory. |

# Synchronization task example

You work in the retail industry, and business analysts in your enterprise need to analyze product sales trends based on a particular region.

Sales record files can contain information about products that are sold in multiple outlets and regions. You can consolidate the data from the sales record in Salesforce.

Configure a synchronization task to write to Salesforce Analytics.

You perform the following synchronization tasks:

**Define the synchronization task.**

Configure a synchronization task to use the insert operation.

**Use a Salesforce source object.**

The source for the synchronization task is a Salesforce connection that contains the product sales data. The Salesforce object is a single source in the synchronization task. Include the Row ID, Order ID, Order Quantity, Order Date, Unit Price, Region, and Product Category source columns in Salesforce. Specify *SALES_RECORDS* as the resource for the source object.

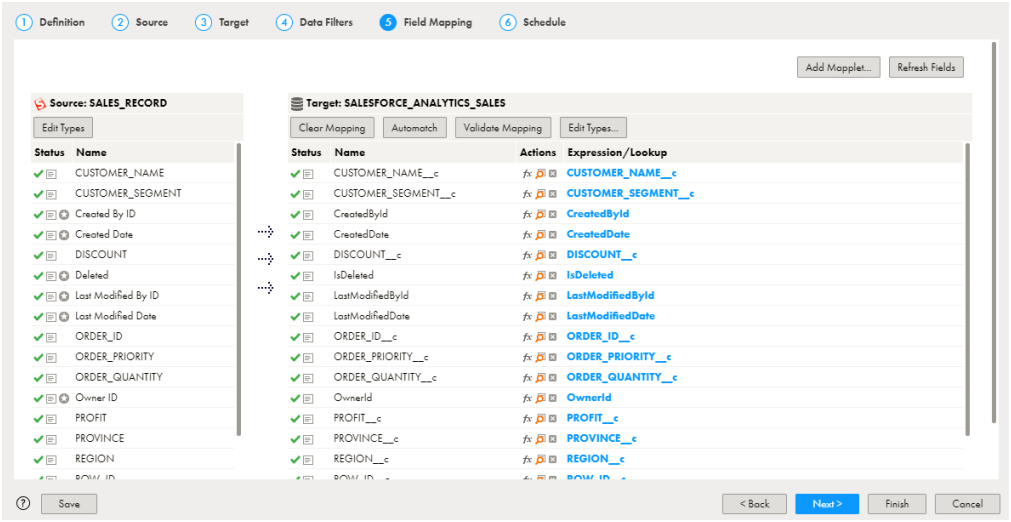
**Create a Salesforce Analytics target object.**

Select the fields *Row_Id*, *Order_Id*, *Order_Quantity*, *Order_Date*, *Unit_Price*, *Region*, and *Product_Catagory* from the source object that you want to insert into the target object. Provide a name *SALESFORCE_ANALYTICS_SALES* for the target object and specify the connection type as Salesforce Analytics. The synchronization task populates the fields in the location you specify in the connection.

**Configure a field mapping.**

Map all the fields under *SALES_RECORDS* source data to all the fields in the target *SALESFORCE_ANALYTICS_SALES*. The synchronization task writes the mapped source data to Salesforce Analytics.

The following image shows the mapping of the *SALES_RECORDS* source with the *SALESFORCE_ANALYTICS_SALES* target:

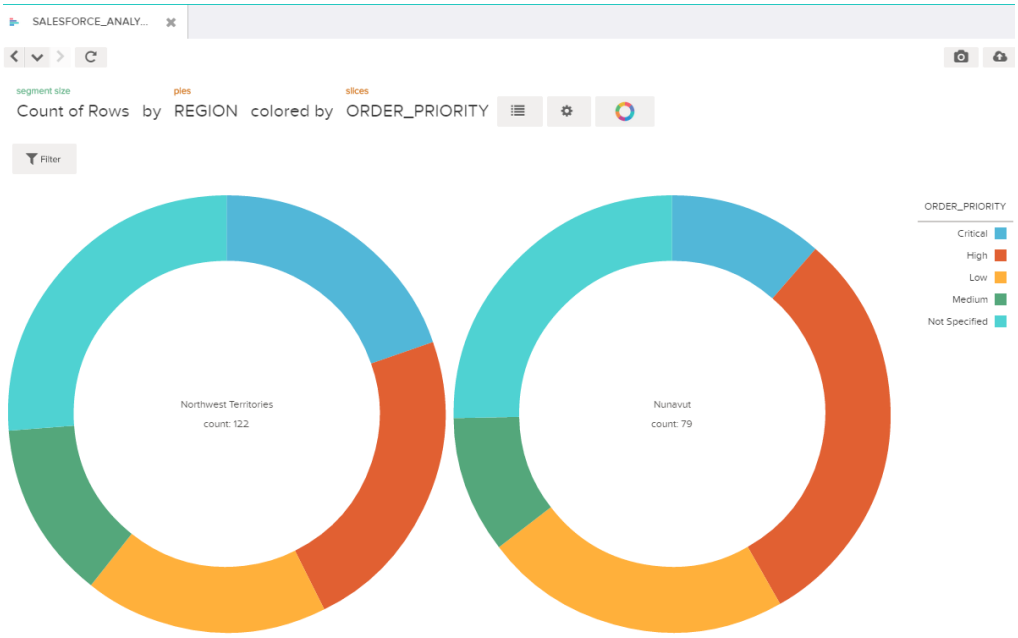



**Configure the advanced target properties.**

In the advanced target properties, you choose to publish to Salesforce Analytics. Provide the project name *Salesforce_Analytics_Sales* and site name, *Sales*. Specify a directory path that is available on each Secure Agent machine in the runtime environment. Save and run the task.

Open the site in Salesforce Analytics to visualize the exported data.

The following image shows the data categorized by region in Salesforce Analytics.



CHAPTER 4

# Mappings and mapping tasks with Salesforce Analytics

Use the Data Integration Mapping Designer to create a mapping. In advanced mode, the Mapping Designer updates the mapping canvas to include transformations and functions that enable advanced functionality.

## Salesforce Analytics targets in mappings

When you create a mapping, you can configure a Target transformation to represent a single Salesforce Analytics object.

The following table describes the Salesforce Analytics target properties:

| Property | Description |
|---|---|
| Connection | Name of the target connection. |
| Target Object | Target object for a single target or primary target object for multiple targets. |

**Note:** You cannot use any of the following as Target Object Name:

- Unicode characters
- Keywords in Java language, such as constants, operators, and built-in variables. These keywords are reserved for specific functions. For example, NULL, NEW, SYSDATE, AND, OR, TRUE, FALSE, SET.

The following table describes the Salesforce Analytics target advanced properties:

| Advanced Property | Description |
|---|---|
| Target Load Type | Sets the default load type for mappings. You can choose standard or bulk loading. |
| Target Folder | Sets the location of the target on Salesforce Analytics. |
| Override Target Dataset | Overwrites the target data before loading data into Salesforce Analytics. |

| Advanced Property | Description |
|---|---|
| Monitor Job Status | Monitors the status of all the four phases in the Salesforce job.<br>Default is false.<br>For more information on monitor job status, see https://knowledge.informatica.com/s/article/The-status-of-the-Salesforce-Analytics-job-in-Cloud-Data-Integration-does-not-match-the-status-in-Salesforce-Analytics?language=en_US. |
| Success File Directory | Directory for the success rows file. You must specify a directory path that is available on each Secure Agent machine in the runtime environment to save the success rows file. Ensure that your administrator has granted you access to this directory.<br>If you do not specify a directory, the success rows file is not created. |
| Error File Directory | Directory for the error rows file. By default, the error rows file is written to the following Secure Agent directory: `<Secure Agent installation directory>/apps/Data_Integration_Server/data/error`<br>Specify a directory path that is available on each Secure Agent machine in the runtime environment. Ensure that your administrator has granted you access to this directory. |

# Salesforce Analytics targets in synchronization tasks

When you configure a mapping task based on an integration template, you can configure advanced properties for Salesforce Analytics targets.

For Salesforce Analytics target connections used in template-based mapping tasks, you can configure advanced properties in the **Targets** page of the Mapping Task wizard.

The following table describes the Salesforce Analytics target advanced properties:

| Advanced Property | Description |
|---|---|
| Target Load Type | Sets the default load type for mappings. You can choose standard or bulk loading. |
| Target Folder | Sets the location of the target on Salesforce Analytics. |
| Override Target Dataset | Overwrites the target data before loading data into Salesforce Analytics. |
| Success File Directory | Directory for the success rows file. You must specify a directory path that is available on each Secure Agent machine in the runtime environment to save the success rows file. Ensure that your administrator has granted you access to this directory.<br>If you do not specify a directory, the success rows file is not created. |
| Error File Directory | Directory for the error rows file. By default, the error rows file is written to the following Secure Agent directory: `<Secure Agent installation directory>\apps\Data_Integration_Server\data\error`<br>Specify a directory path that is available on each Secure Agent machine in the runtime environment. Ensure that your administrator has granted you access to this directory. |

CHAPTER 5

# Data type reference

Data Integration uses the following data types in mappings, synchronization tasks, and mapping tasks with Salesforce Analytics:

**Salesforce Analytics Native Data Types**

Salesforce Analytics data types appear in the Target transformations when you 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 mappings, synchronization tasks, and mappingtasks.

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.

## Salesforce Analytics and transformation data types

The following table lists the Salesforce Analytics data types that the Secure Agent supports and the corresponding transformation data types:

| Salesforce Analytics Data Type | Transformation Data Type | Description |
|---|---|---|
| DateTime | Date/Time | Jan 1, 0001 A.D. to Dec 31, 9999 A.D.<br>(precision to nanosecond) |
| Int | Integer | -2,147,483,648 to 2,147,483,647<br>Precision of 10, scale of 0<br>Integer value. |
| String | String | 1 to 104,857,600 characters |

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