Informatica

Informatica® Cloud Data Integration

Xactly Connector

Informatica Cloud Data Integration Xactly Connector
December 2020

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Preface

Use *Xactly Connector* to learn how to read from or write to Xactly by using Cloud Data Integration. Learn to create an Xactly connection and run synchronization tasks in Cloud Data Integration..

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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 Xactly Connector

This chapter includes the following topics:

- Xactly Connector, 6
- Supported Features Objects and Task Operations, 6

Xactly Connector

You can use Xactly Connector to connect to Xactly from Data Integration.

Use Xactly Connector to read data such as commissions, bonus, orders, users, and roles from Xactly and integrate the data with other on-premise or cloud applications. You can read data from Xactly or from other applications and write the data to Xactly. Xactly Connector supports API Version 1.4.

Xactly is a cloud-based software, which helps you to manage sales performance, sales compensation, and sales effectiveness.

Supported Features Objects and Task Operations

When you create an Xactly connection, you must select the feature that you want to use. Features are different entities of Xactly Connector. Each feature contains a set of objects.

The following table provides a list of features and objects that Xactly Connector supports:

Features	Read	Insert	Update	Upsert	Delete	Lookup
BusinessGroup	Yes	NA	NA	Yes	Yes	Yes
CurrencyRate	Yes	NA	NA	Yes	Yes	Yes
EmployeeStatus	Yes	NA	NA	NA	Yes	Yes
Person	Yes	NA	NA	Yes	Yes	Yes
Position	Yes	NA	NA	Yes	NA	Yes
PositionHierarchy	Yes	NA	NA	Yes	NA	Yes

Features	Read	Insert	Update	Upsert	Delete	Lookup
PositionHierarchyType	Yes	NA	NA	NA	NA	Yes
PositionRelations	Yes	NA	NA	Yes	NA	Yes
PositionRelationType	Yes	NA	NA	Yes	NA	Yes
Role	Yes	NA	NA	NA	NA	Yes
Title	Yes	NA	NA	Yes	Yes	Yes
UnitType	Yes	NA	NA	Yes	Yes	Yes
User	Yes	NA	NA	Yes	Yes	Yes

CHAPTER 2

Xactly Connections

This chapter includes the following topics:

- Xactly Connection Overview, 8
- Creating an Xactly Connection, 8
- Xactly connection properties, 9
- Configuring the Proxy Settings on Windows, 10
- Configuring the Proxy Settings on Linux, 11

Xactly Connection Overview

Create an Xactly connection to connect to Xactly so that the agent can read data from and write data to Xactly. You can use Xactly connections to specify sources and targets in synchronization tasks.

You can create an Xactly connection on the **Connections** page.

Creating an Xactly Connection

To use Xactly Connector in a synchronization task, you must first create a connection.

You can configure a connection on the Connections page or in a wizard as you configure a task.

Perform the following steps to create an Xactly connection:

1. On the **Connections** page, click **New Connection** to create a connection.

   The **New Connection** page appears.
2. Specify the following details:

Connection Property	Description
Connection Name	Enter a unique name for the connection.
Description	Provide a relevant description for the connection.

Connection Property	Description
Type	Type of connection. Select **Xactly** from the list.
Secure Agent	Select the appropriate secure agent from the list.
UserID	Enter the UserID for accessing the Xactly portal.
PassKey	Enter the password for accessing the Xactly portal.
Xactly App Name	Specify the application name to sign in to Xactly.
WSDL URL	Provide a WSDL URL.
Endpoint URL	Enter the endpoint URL where you want to send the request.
Enable Logging	Select to log SOAP request and response in the session log file.

3. Click **Save** to save the connection.

   You should test the connection before saving the connection details. You can click **Test Connection** to verify if the connection is successful.

Xactly connection properties

When you set up an Xactly connection, you must configure the connection properties.

The following table describes the Xactly connection properties:

Connection property	Description
Connection Name	Enter a unique name for the connection.
Description	Provide a relevant description for the connection.
Type	Type of connection. Select **Xactly** from the list.
Secure Agent	Select the appropriate secure agent from the list.
UserID	Enter the UserID for accessing the Xactly portal.
PassKey	Enter the password for accessing the Xactly portal.
Xactly App Name	Specify the application name to sign in to Xactly.
WSDL URL	Provide a WSDL URL.
Endpoint URL	Enter the endpoint URL where you want to send the request.
Enable Logging	Select to log SOAP request and response in the session log file.

Configuring the Proxy Settings on Windows

If your organization uses an outgoing proxy server to connect to the internet, the Secure Agent connects to Informatica Intelligent Cloud Services through the proxy server.
To configure the proxy server settings for the Secure Agent on a Windows machine, you must configure the proxy server settings through the Secure Agent Manager and the JVM options of the Secure Agent.

Contact your network administrator for the correct proxy settings.

1. Click **Start** > **All Programs** > **Informatica Cloud Secure Agent** > **Informatica Cloud Secure Agent** to launch the Secure Agent Manager.

   The Secure Agent Manager displays the Secure Agent status.
2. Click **Proxy** in the Secure Agent Manager page.
3. Click **Use a Proxy Server** to enter proxy server settings.
4. Configure the following proxy server details:

Field	Description
Proxy Host	Required. Host name of the outgoing proxy server that the Secure Agent uses.
Proxy Port	Required. Port number of the outgoing proxy server.
User Name	User name to connect to the outgoing proxy server.
Password	Password to connect to the outgoing proxy server.

5. Click **OK**.
6. Log in to Informatica Intelligent Cloud Services.
7. Open Administrator and select **Runtime Environments**.
8. Select the Secure Agent for which you want to configure a proxy server.
9. On the upper-right corner of the page, click **Edit**.
10. In the **System Configuration Details** section, select the **Type** as **DTM** for the Data Integration Service.
    - To use an unauthenticated proxy server, add the following parameters in any **JVMOption** field and specify appropriate values for each parameter:

Parameter	Description
-Dhttp.proxyHost=	Host name of the outgoing HTTP proxy server.
-Dhttp.proxyPort=	Port number of the outgoing HTTP proxy server.
-Dhttps.proxyHost=	Host name of the outgoing HTTPS proxy server.
-Dhttps.proxyPort=	Port number of the outgoing HTTPS proxy server.

For example,

```
JVMOption1=-Dhttp.proxyHost=<proxy_server_hostname>
JVMOption2=-Dhttp.proxyPort=8081
```

```
JVMOption3=-Dhttps.proxyHost=<proxy_server_hostname>
JVMOption4=-Dhttps.proxyPort=8081
```

- To use an authenticated proxy server, add the following parameters in any **JVMOption** field and specify appropriate values for each parameter:

Parameter	Description
-Dhttp.proxyHost=	Host name of the outgoing HTTP proxy server.
-Dhttp.proxyPort=	Port number of the outgoing HTTP proxy server.
-Dhttp.proxyUser=	User name for the HTTP proxy server.
-Dhttp.proxyPassword=	Password for the user.
-Dhttps.proxyHost=	Host name of the outgoing HTTPS proxy server.
-Dhttps.proxyPort=	Port number of the outgoing HTTPS proxy server.
-Dhttps.proxyUser=	User name for the HTTPS proxy server.
-Dhttps.proxyPassword=	Password for the user.

For example,

```
JVMOption1=-Dhttp.proxyHost=<proxy_server_hostname>
JVMOption2=-Dhttp.proxyPort=8008
JVMOption3=-Dhttp.proxyUser=adminuser
JVMOption4=-Dhttp.proxyPassword=password
JVMOption5=-Dhttps.proxyHost=<proxy_server_hostname>
JVMOption6=-Dhttps.proxyPort=8008
JVMOption7=-Dhttps.proxyUser=adminuser
JVMOption8=-Dhttps.proxyPassword=password
```

Note: You can configure only five **JVMOption** fields in the **System Configuration Details** section. To configure the remaining parameters, you must add the **JVMOption** fields in the **Custom Configuration Details** section. In the **Custom Configuration Details** section, select the **Type** as **DTM** for the Data Integration Service, add the **JVMOption** fields, and specify the remaining parameters and appropriate values for each parameter.

11. Click **Save**.

    The Secure Agent restarts to apply the settings.

Configuring the Proxy Settings on Linux

If your organization uses an outgoing proxy server to connect to the internet, the Secure Agent connects to Informatica Intelligent Cloud Services through the proxy server.

You can update the proxy server settings defined for the Secure Agent from the command line. To configure the proxy server settings for the Secure Agent on a Linux machine, you must use a shell command that updates the `proxy.ini` file and configure the JVM options of the Secure Agent.

Contact your network administrator for the correct proxy settings.

1. Navigate to the following directory:

   `<Secure Agent installation directory>/apps/agentcore`
2. To update the `proxy.ini` file, enter the following command:

   `consoleAgentManager.sh configureProxy <proxy host> <proxy port> <proxy user name> <proxy password>`
3. Log in to Informatica Intelligent Cloud Services.
4. Open Administrator and select **Runtime Environments**.
5. Select the Secure Agent for which you want to configure a proxy server.
6. On the upper-right corner of the page, click **Edit**.
7. In the **System Configuration Details** section, select the **Type** as **DTM** for the Data Integration Service.
   - To use an unauthenticated proxy server, add the following parameters in any **JVMOption** field and specify appropriate values for each parameter:

Parameter	Description
-Dhttp.proxyHost=	Host name of the outgoing HTTP proxy server.
-Dhttp.proxyPort=	Port number of the outgoing HTTP proxy server.
-Dhttps.proxyHost=	Host name of the outgoing HTTPS proxy server.
-Dhttps.proxyPort=	Port number of the outgoing HTTPS proxy server.

     For example,

     ```
     JVMOption1=-Dhttp.proxyHost=<proxy_server_hostname>
     JVMOption2=-Dhttp.proxyPort=8081
     JVMOption3=-Dhttps.proxyHost=<proxy_server_hostname>
     JVMOption4=-Dhttps.proxyPort=8081
     ```
   - To use an authenticated proxy server, add the following parameters in any **JVMOption** field and specify appropriate values for each parameter:

Parameter	Description
-Dhttp.proxyHost=	Host name of the outgoing HTTP proxy server.
-Dhttp.proxyPort=	Port number of the outgoing HTTP proxy server.
-Dhttp.proxyUser=	User name for the HTTP proxy server.
-Dhttp.proxyPassword=	Password for the user.
-Dhttps.proxyHost=	Host name of the outgoing HTTPS proxy server.

Parameter	Description
-Dhttps.proxyPort=	Port number of the outgoing HTTPS proxy server.
-Dhttps.proxyUser=	User name for the HTTPS proxy server.
-Dhttps.proxyPassword=	Password for the user.

For example,

```
JVMOption1=-Dhttp.proxyHost=<proxy_server_hostname>
JVMOption2=-Dhttp.proxyPort=8008
JVMOption3=-Dhttp.proxyUser=adminuser
JVMOption4=-Dhttp.proxyPassword=password
JVMOption5=-Dhttps.proxyHost=<proxy_server_hostname>
JVMOption6=-Dhttps.proxyPort=8008
JVMOption7=-Dhttps.proxyUser=adminuser
JVMOption8=-Dhttps.proxyPassword=password
```

Note: You can configure only five **JVMOption** fields in the **System Configuration Details** section. To configure the remaining parameters, you must add the **JVMOption** fields in the **Custom Configuration Details** section. In the **Custom Configuration Details** section, select the **Type** as **DTM** for the Data Integration Service, add the **JVMOption** fields, and specify the remaining parameters and appropriate values for each parameter.

8. Click **Save**.

   The Secure Agent restarts to apply the settings.

CHAPTER 3

Synchronization Tasks with Xactly Connector

This chapter includes the following topics:

- Xactly Sources in Synchronization Tasks, 14
- Xactly Targets in Synchronization Tasks, 15
- Data Filters, 15
- Creating an Xactly Synchronization Task, 16
- Defining Xactly Write Operations, 16

Xactly Sources in Synchronization Tasks

You can use an Xactly object as a single source in a synchronization task.

You configure the Xactly source properties on the **Source** page of the Synchronization Task wizard.

The following table describes the Xactly source properties:

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

Xactly Targets in Synchronization Tasks

You can use a single object as a target in a synchronization task.

You can configure the Xactly target properties on the **Target** page of the Synchronization Task wizard.

The following table describes the Xactly target properties:

Property	Description
Connection	Name of the target connection.
Target Object	Name of the target object.
Child Object	Displays child objects related to the selected target object.
Display technical names instead of labels	Display technical names instead of business names.
Display target fields in alphabetical order	Displays target fields in alphabetical order instead of the order returned by the source system.

Data Filters

Data filters help you to fetch specific data of a particular object. You can assign a filter field to the object, and the synchronization task processes the data.

Perform the following steps to use data filters:

1. In a synchronization task, select the **Data Filters** tab.
2. Click **New**.

   The Data Filter dialog box appears.
3. Enter the data filter fields as described in the following table:

Field Type	Description
Object	Select object for which you want to assign filter fields.
Filter By	Select the filter field.
Operator	Select the corresponding operator.
Filter Value	Enter the filter value.

   Note: When you use Xactly Connector to read from Xactly, you can only use the **Equals** operator when you create a data filter.
4. Click **OK**.

Creating an Xactly Synchronization Task

Create a connection before you create a synchronization task.

Consider the task operation Insert to perform the synchronization task.

Perform the following steps to set up a synchronization task in Data Integration:

1. In Data Integration, click **New** > **Tasks**.
2. Select **Synchronization Task**, and click **Create**.

   The **Definition** tab appears.
3. Specify the task name, provide a description, and select the task operation **Insert**.
4. Click **Next**.

   The Source tab appears.
5. Select the source connection, source type, and source object for the task.
6. Click **Next**.

   The Target tab appears.
7. Select the target connection, target type, and target object for the task.
8. Click **Next**.

   The Data Filters tab appears.
9. To process all rows, select the **Data Filters** tab.

   To assign filters to a synchronization task, see "Data Filters" on page 15.
10. Click **Next**.

    The Field Mapping tab appears.
11. On the **Field Mapping** tab, map source fields to the appropriate target fields.
12. Click **Next**.

    The Schedule tab appears.
13. On the **Schedule** tab, schedule the task as required and save.
14. Click **Save** and then **Finish**.
15. From the **Explore** page, select the task, and click **Actions** > **Run**.

    In Monitor, you can monitor the status of the task.

Defining Xactly Write Operations

You can perform the following write operations with Xactly objects:

- To perform an Xactly save operation, select an upsert operation on the **Definition** tab of a synchronization task.
- To perform an Xactly delete operation, select a delete operation in the **Definition** tab of a synchronization task.

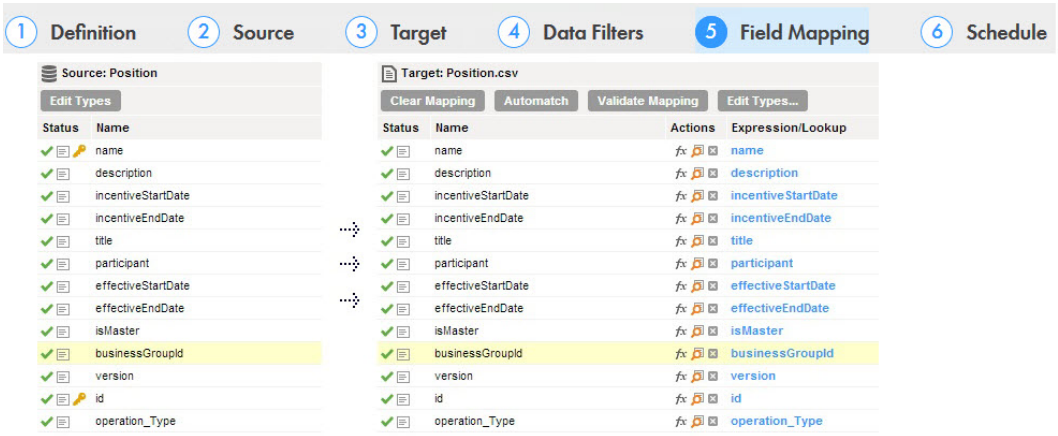
You can also perform the following operations with Xactly Connector:

- saveversion. Save a version of an effective dated object with the saveversion operation.

- addversion. Add a new version of an effective dated object with the addversion operation.
- deleteversion. Delete a version of an effective dated object with the deleteversion operation.

Note: On the **Field Mapping** tab, you must define the appropriate operations in the **Operation Type** field.

The following figure displays an example of how to define the saveversion operation:



CHAPTER 4

Troubleshooting Configuration Issues

This chapter includes the following topic:

- Configuration Issues and Tasks, 18

Configuration Issues and Tasks

- Select the **Enable Logging** check box to log the SOAP request and response. You can log the SOAP request and response in the session of the task.
- In Xactly, the **equals** operator behaves as **Contains** operator.
- The metadata ID is a required field for the Xactly.
- You must specify the ID for operations such as saveversion, deleteversion, and delete. You get **The object passed to the API operation is invalid** exception if you do not specify an ID in the .csv file.
- The Xactly objects support **delete** and **deleteVersions** operations. However, the delete and deleteversions opertions do not function for a few objects.
- The Xactly endpoint returns a success status for delete operation for some objects. If the Xactly endpoint does not return a success status data, you can consult the Xactly support.
- You can contact Data Integration Customer Support If you get an **Out of Memory** exception.

Note: Use the Xactly enable logging feature of the connector to collect the SOAP request before contacting the Xactly support. You can see the log and exception messages thrown during the configuration in the log files. You can save the log file in a specific location.

For example, `<Secure Agent installation directory>\apps\Data_Integration_Server\<latest version of connector>\ICS\main\tomcat\log`

APPENDIX A

Generating the client stub for Xactly WSDL

You can create an `Xactly_client-1.0.0.jar` stub for the Xactly WSDL. You must configure the JAVA_HOME environment before you generate a stub creation.

1. Download JDK 1.8 from the following website:

   http://www.oracle.com/technetwork/java/javase/downloads/jdk8-downloads-2133151.html
2. Set the JAVA_HOME environment variable to the location that contains the JDK 1.8 file. For example, set JAVA_HOME="c:\Program Files\Java\jdk1.8.0_181".
3. Download the Xactly WSDL to a temporary path, for example, `C:\temp\Xactly\wsdl`.
4. You can either run the commands one by one in the command prompt or copy paste the entire command to a Win batch file and run the command as a batch file.
5. Navigate to the `C:\temp\Xactly` folder.

   Use the following commands to create the Xactly stub:

   ```
   set classpath=%JAVA_HOME%
   mkdir C:\temp\Xactly\out
   mkdir C:\temp\Xactly\src
   wsimport.exe -keep -XadditionalHeaders -Xdebug -s C:\temp\Xactly\src -d C:\temp
   \Xactly\out -verbose C:\temp\Xactly\wsdl\DiscoveryService.wsdl -wsdllocation /wsdl/
   DiscoveryService.wsdl
   jar -cvf C:\temp\Xactly\Xactly_client-1.0.0.jar -C out . wsdl
   ```
6. Stop the Secure Agent.
7. Copy the Xactly_client-1.0.0 jar to the following directory:

   ```
   <Secure Agent installation directory>\downloads\<latest connector zip package>\package
   \connectors\ctk\<plugin ID>
   ```
8. Start the Secure Agent.

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