Informatica®

Informatica® Cloud Data Integration

Adaptive Insights Connector

Informatica Cloud Data Integration Adaptive Insights Connector
April 2024

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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.

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CHAPTER 1

Introduction to Adaptive Insights Connector

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 such as Salesforce and NetSuite. 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.

Note: This connector is developed by Informatica partners, third-party system integrators, or customers. You can look up the Product Availability Matrix or Informatica Marketplace for more information.

Adaptive Insights Connector Task and Object Types

When you use Adaptive Insights Connector, you can include the following Data Integration assets:

- Mapping
- Mapping task

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

Object Name	Read	Insert	Update	Delete	Upsert
createUser	No	Yes	No	No	No
eraseActuals	No	No	No	Yes	No
eraseData	No	No	No	Yes	No
exportAccounts	Yes	No	No	No	No
exportAttributes	Yes	No	No	No	No
exportData	Yes	No	No	No	No
exportDimensions	Yes	No	No	No	No
exportLevels	Yes	No	No	No	No
exportInstances	Yes	No	No	No	No
exportLocales	Yes	No	No	No	No
exportModeledSheets	Yes	No	No	No	No
exportRoles	Yes	No	No	No	No
exportSheets	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
exportSheetData	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
updateAccounts	No	No	Yes	No	No
updateAttributes	No	No	Yes	No	No
updateDimension	No	No	Yes	No	No
updateDimensions	No	No	Yes	No	No

Object Name	Read	Insert	Update	Delete	Upsert
updateDimensionValue	No	No	Yes	No	No
updateLevel	No	No	Yes	No	No
updateLevels	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

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 Attributes	Description
Username	Required. The username of the registered user.
Password	Required. The password set by the user.
Locale	Optional. The language in which the system response messages appear. It is also used to interpret and format incoming and outgoing numbers and dates.
Instance Code	Required. The code indicates whether a particular user is logged in via default instance or another instance. Default value is `https://api.AdaptiveInsights.com/v1.svc`
Start Date	Optional. Indicates the range attribute from which the Secure Agent must read the data.
End Date	Optional. Indicates the range attribute till which the Secure Agent must read the data.
Dimensions	Optional. Indicates the dimension in which each row of data is grouped and exported for a particular dimension tag.

CHAPTER 3

Synchronization Tasks with Adaptive Insights

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.

Adaptive Insights Sources in Synchronization Tasks

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

- exportAccounts
- exportActiveCurrencies
- exportAttributes
- exportCustomerLogo
- exportDimension
- exportDimensionFamilies
- exportData
- exportInstances
- exportLevels
- exportLocales
- exportModeledSheet
- exportRoles
- exportSheets
- exportSheetData
- 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.
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.

Available Filters for Adaptive Insights Source Objects

The following section describes the list of filters that are available for the Adaptive Insights source objects for Data Synchronization tasks.

- **exportInstances:**

Field Name	DataType	Example
accesibleInstances	String	accessibleInstances = true

- **exportAccounts:**

Field Name	DataType	Example
sheet_id	String	Sheet Id = 844
include_versionName	String	Name = "GL Balances"

- **exportSheetData:**

Field Name	DataType	Example
Sheet_Id	String	Sheet_Id = 41
Version_Name	String	Version_Name = GL Balances
Version_isDefault	String	Version_isDefault = true
Level_Name	String	Level_Name = Total Entity
account_includeDescendants	String	account_includeDescendants = true
Format_useInternalCodes	String	useInternalCodes = true
Format_includeUnmappedItems	String	includeUnmappedItems = true

Field Name	DataType	Example
Level_isRollup	String	Level_isRollup = true
Level_includeDescendants	String	Level_includeDescendants = true
rules_includeZeroRows	String	Roles_includeZeroRows = true

- **exportData:**

Field Name	DataType	Example
Version_Name	String	Version_Name = GL Balances
Version_isDefault	String	Version_isDefault = true
Level_Name	String	Level_Name = Total Entity
account_includeDescendants	String	account_includeDescendants = true
Format_useInternalCodes	String	useInternalCodes = true
Format_includeUnmappedItems	String	includeUnmappedItems = true
Level_isRollup	String	Level_isRollup = true

Field Name	DataType	Example
Level_includeDescendants	String	Level_includeDescendants = true
rules_includeZeroRows	String	Roles_includeZeroRows = true

- **exportLevels:**

Field Name	DataType	Example
Sheet_Id	String	Sheet_Id = 41
VersionId	String	VersionId = 234
inaccessibleValues	String	inaccessibleValues = false

- **exportModeledSheet:**

Field Name	DataType	Example
exportModel_sheetToExport	String	exportModel_sheetToExport = sheetName

- **exportDimensions:**

Field Name	DataType	Example
include_versionName	String	include_versionName = Cash Flow
nclude_dimensionIDs	String	versionId = 234, 23, 41

The following objects do not have any filters associated with them:

- exportAttributes
- exportSheets
- exportActiveCurrencies
- exportVersions
- exportCustomerLogo
- exportDimensionFamilies
- exportRoles
- exportLocale

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
- eraseData
- importCubeData
- importStandardData
- importTransactions
- publishChanges
- updateAccount
- updateAccounts
- updateAttributes
- updateDimension
- updateDimensions
- updateDimensionValue
- updateLevel
- updateLevels

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**.

Least Required Fields for Adaptive Insights Targets in Data Synchronization Tasks

The following list shows the least required fields for objects used in Data Synchronization tasks.

- **createAccount:**

Fieldname	DataType	Example
parentId	String	parentId = 4
isGroup	String	isGroup = 0

Fieldname	DataType	Example
Name	String	name = Mikko
Code	String	code = 12
Description	String	description = abc
shortName	String	shortName = Mik
exchangeRateType	String	exchangeRateType = A
hasSalaryDetail	String	hasSalaryDetail = 1
dataPrivacy	String	dataPrivacy = PRIVATE
attributeID	String	attributeID = 23
valueID	String	valueID = 44

- **createDimension:**

Fieldname	DataType	Example
dimension_name	String	dimension_name = nov22

- **CreateDimensionValue:**

Fieldname	DataType	Example
dimensionId	String	dimensionId = 1323
name	String	name = truck

Fieldname	DataType	Example
attributeID	String	attributeID = 20
valueID	String	valueID = 170

- **createLevel:**

Fieldname	DataType	Example
name	String	name = .net
shortName	String	shortName = .net
parentId	String	parentId = 1

- **createUser:**

Fieldname	DataType	Example
email	String	email = abc@gmail.com
alternateName	String	alternateName = abc@greenco.com
name	String	name = Mark
password	String	password = mark@123
roleId	String	roleId = 1
ownedLevels	String	ownedLevels =
imeZone	String	imeZone = America/Mexico_City

- **updateAccount:**

Fieldname	DataType	Example
Id	String	id = 3381
name	String	name = Jack
code	String	code = mark@123
description	String	description = 1
shortName	String	shortName = J
exchangeRateType	String	exchangeRateType = A

Fieldname	DataType	Example
hasSalaryDetail	String	hasSalaryDetail = 1
dataPrivacy	String	dataPrivacy = private

- **updateDimension:**

Fieldname	DataType	Example
dimension_name	String	dimension_name = nov22

- **updateDimensionValue:**

Fieldname	DataType	Example
id	String	id = 1323
name	String	name = Squre

- **updateLevel:**

Fieldname	DataType	Example
id	String	id = 3525
name	String	name = Few_Level
shortName	String	shortName = NewLvlName

- **updateAccounts:**

Fieldname	DataType	Example
Id	String	id = 3381
name	String	name = Jack
code	String	code = mark@123
description	String	description = 1
shortName	String	shortName = J
exchangeRateType	String	exchangeRateType = A

Fieldname	DataType	Example
hasSalaryDetail	String	hasSalaryDetail = 1
dataPrivacy	String	dataPrivacy = private

- **updateLevels:**

Fieldname	DataType	Example
id	String	id = 3525
name	String	name = Few_Level
shortName	String	shortName = NewLvlName
currency	String	currency = USD

- **updateDimensions:**

Fieldname	DataType	Example
Name	String	dimension_name = nov22
id	String	Id = 122

- **updateAttributes:**

Fieldname	DataType	Example
name	String	name = nov22
id	String	Id = 122
type	String	type = account

- **importStandardData:**

Fieldname	DataType	Example
importDataOptions planOrActuals	String	planOrActuals = Actuals
importDataOptions moveBPtr	String	moveBPtr = false
importDataOptions allowParallel	String	allowParallel = false
importDataOptions useMappings	String	useMappings = false
version name	String	name = From General Ledger

Fieldname	DataType	Example
version isDefault	String	isDefault = false
Account	String	Account = 1140_CA_AllowanceDoubtfulAccts
Level	String	Level = Sales - North
Apr_2019	String	Apr_2019 = 19926101.32

- **importTransactions:**

Fieldname	DataType	Example
importDataOptions allowParallel	String	allowParallel = false
importDataOptions useMappings	String	useMappings = false
Organization	String	Organization = Sales - North
Account	String	Account = 1140_CA_AllowanceDoubtfulAccts
Transaction Type	String	Transaction Type = Invoice
Post Date	String	Post Date = 04/02/2019
Amount	String	Amount = 1236

- **eraseActuals:**

Fieldname	DataType	Example
eraseOptions actualsVersionName	String	actualsVersionName = From General Ledger
eraseOptions accountType	String	accountType = GL
eraseOptions start	String	Start = 4/1/2019
eraseOptions end	String	end = 4/1/2019
eraseOptions includeCellNotes	String	includeCellNotes = true

- **eraseData:**

Fieldname	DataType	Example
actualsVersionName	String	actualsVersionName=ActualsSubVersion2013
planVersionName	String	planVersionName=clone2013budget
accountType	String	accountType=CUSTOM

Fieldname	DataType	Example
cubeSheetName	String	cubeSheetName="Expense Cube"
start	String	start=01/2013
end	String	end=12/2013
includeCellNotes	String	includeCellNotes=true
code	String	WAT_Input_Custom| WAT_Input_Custom
name	String	Development| Hosting

- **importCubeData:**

Fieldname	DataType	Example
importDataOptions planOrActuals	String	planOrActuals = Actuals
importDataOptions allowParallel	String	allowParallel = false
importDataOptions moveBPtr	String	moveBPtr = false
version name	String	name = From General Ledger
version isDefault	String	isDefault = false
sheet name	String	name = Product Revenue
sheet isUserAssigned	String	isUserAssigned = true
ProductFurniture	String	ProductFurniture = Coffee table
CountryRegion	String	CountryRegion = Argentina
FabricationMachine	String	FabricationMachine = Do-All 15 Vertical
Customer	String	Customer = Price
Account	String	Account = Aeropostale
Level	String	Level = Corporate Plan

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

Use the Data Integration Mapping Designer to create a mapping. When you create a mapping, you configure a source or target to represent a Adaptive Insights object.

Describe the flow of data from the source to the target along with the required transformations. When you create a mapping task, select the mapping that you want to use. Use the Task wizard to create a mapping task. The mapping task processes data based on the data flow logic you define in the mapping.

Adaptive Insights Sources in Mappings and Mapping Tasks

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

- exportAccounts
- exportAttributes
- exportData
- exportLevels
- exportInstances
- exportLocales
- exportRoles
- exportDimension
- exportDimensionFamilies
- exportVersions
- exportCustomerLogo
- exportActiveCurrencies
- exportSheets
- exportSheetData
- exportModeledSheet

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:

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

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.
7. 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.

8. In the **Design** section, drag a target from the palette into the editor. Select the target to view the properties.
9. In the **Target Properties**, click the **Target** tab.

10. 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.

11. In the **Design** section, connect the source to the target to map the fields.
12. In the **Target Properties**, click the **Field Mapping** tab to view the mapped fields of the source to the target.
13. Click **Save** and then click **Run**.
14. In **Monitor**, you can monitor the status of the mapping.
You can use the mapping to create a mapping task.
15. In the Data Integration Home, click **New** > **Task** > **Mapping Task**.
16. Click **Create**.
17. 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.

18. 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

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

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