Informatica

Informatica® Cloud Data Integration

Microsoft Dynamics 365 for Operations Connector

Informatica Cloud Data Integration Microsoft Dynamics 365 for Operations Connector

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Preface

Use *Microsoft Dynamics 365 for Operations Connector* to learn how to read from or write to Microsoft Dynamics 365 for Operations by using Cloud Data Integration. Learn to create a connection, develop mappings, and run synchronization and mapping tasks in Cloud Data Integration.

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.

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- View product availability information.
- Create and review your support cases.
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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 Microsoft Dynamics 365 for Operations Connector

You can use Microsoft Dynamics 365 for Operations Connector to connect to Microsoft Dynamics 365 for Operations from Data Integration.

Use Microsoft Dynamics 365 for Operations Connector to securely read data from and write data to Microsoft Dynamics 365 for Operations. After you read data from Microsoft Dynamics 365 for Operations, write the data to other applications, databases, or flat files for analyzing the data. You can use Microsoft Dynamics 365 for Operations objects as sources, lookups, and targets in synchronization tasks, mappings, and mapping tasks.

When you run a synchronization task or a mapping task, the agent uses the OData API to perform the specified operation and read data from Microsoft Dynamics 365 for Operations.

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

Microsoft Dynamics 365 for Operations Connector assets

Create assets in Data Integration to integrate data using Microsoft Dynamics 365 for Operations Connector.

When you use Microsoft Dynamics 365 for Operations Connector, you can include the following Data Integration assets:

- Synchronization task
- Mapping
- Mapping task

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

CHAPTER 2

Connections for Microsoft Dynamics 365 for Operations

Create a Microsoft Dynamics 365 for Operations connection to securely read data from or write data to Microsoft Dynamics 365 for Operations. You can use Microsoft Dynamics 365 for Operations connections to specify sources, lookups, and targets in synchronization tasks and mapping tasks.

Prepare for authentication

You can configure OAuth 2.0 and OAuth 2.0 client secret grant authentication types to connect to Microsoft Dynamics 365 for Operations.

Before you configure the connection properties, you need to keep the authentication details handy based on the authentication type that you want to use.

You also need to add the required domains to the list of approved IP addresses to connect to Microsoft Dynamics 365 for Operations.

For more information about the domains that you need to add to the list of approved IP addresses, see the List of domains knowledge article.

Note: You cannot use OAuth 2.0 client certificate grant authentication to access Microsoft Dynamics 365 for Operations.

OAuth 2.0 authentication

You need the Microsoft Dynamics 365 for Operations user name and password to configure OAuth 2.0 authentication to access Microsoft Dynamics 365 for Operations.

Additionally, you need the service URL and application ID for OAuth 2.0 authentication.

To get these details, the organization administrator needs to register your Microsoft Dynamics 365 for Operations application with Azure Active Directory.

For more information about the registration steps with Azure Active Directory, see Register your application.

OAuth 2.0 client secret grant authentication

You need the tenant ID and client secret and to use OAuth 2.0 client secret grant authentication to access Microsoft Dynamics 365 for Operations.

To get the tenant ID and client secret, you need to register your Microsoft Dynamics 365 for Operations application with the Azure Active Directory.

Additionally, you need the service URL and application ID for OAuth 2.0 client secret grant authentication.

Connect to Microsoft 365 for Operations

Let's configure the Microsoft Dynamics 365 for Operations connection properties to connect to Microsoft Dynamics 365 for Operations.

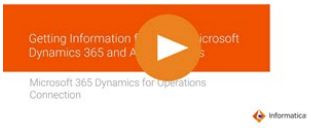
Before you begin

Before you get started, you'll need to get information from your Microsoft Dynamics 365 for Operations and AAD account based on the authentication type that you want to configure.

To configure OAuth 2.0 authentication, get the Microsoft Dynamics 365 for Operations user name and password.

To configure OAuth 2.0 client secret grant authentication, get the tenant ID and client secret from your Azure Active Directory (AAD) account.

The following video shows you how to get information from your Microsoft Dynamics 365 and AAD account:



Check out "Prepare for authentication" on page 8 to learn more about the authentication prerequisites.

Connection details

The following table describes the basic connection properties:

Property	Description
Connection Name	Name of the connection. Each connection name must be unique within the organization. Connection names can contain alphanumeric characters, spaces, and the following special characters: _ . + -, Maximum length is 255 characters.
Description	Description of the connection. Maximum length is 4000 characters.
Type	Microsoft Dynamics 365 for Operations

Property	Description
Use Secret Vault	Stores sensitive credentials for this connection in the secrets manager that is configured for your organization. This property appears only if secrets manager is set up for your organization. When you enable the secret vault in the connection, you can select which credentials that the Secure Agent retrieves from the secrets manager. If you don't enable this option, the credentials are stored in the repository or on a local Secure Agent, depending on how your organization is configured. For information about how to configure and use a secrets manager, see "Secrets manager configuration" in the Administrator help.
Runtime Environment	The name of the runtime environment where you want to run tasks. Select a Secure Agent, Hosted Agent, or serverless runtime environment.

Authentication types

You can configure OAuth 2.0 and OAuth 2.0 Client Secret Grant authentication types to access Microsoft Dynamics 365 for Operations.

Select the required authentication method and then configure the authentication-specific parameters.

Note: You cannot use OAuth 2.0 client certificate grant authentication to access Microsoft Dynamics 365 for Operations. The keystore file, keystore password, key alias, and key password properties that display for the client certificate grant authentication are not applicable to a Microsoft Dynamics 365 for Operations connection.

OAuth 2.0 authentication

OAuth 2.0 authentication requires the user name, password, service URL, and AAD application ID of your Microsoft Dynamics 365 for Operations account.

The following table describes the basic connection properties for OAuth 2.0 authentication:

Property	Description
Service URL	The URL of the Microsoft Dynamics 365 for Operations service. Enter the URL in the following format: `https:<server name>:<port number>` If you don't specify the port number in the URL, the agent uses port number 443 in the query.
Username	The user name to connect to Microsoft Dynamics 365 for Operations account.
Password	The password to connect to Microsoft Dynamics 365 for Operations account.
Application ID	The AAD application ID for Microsoft Dynamics 365 for Operations.

OAuth 2.0 client secret grant authentication

OAuth 2.0 client secret grant authentication requires the tenant ID, client secret, service URL, and AAD application ID of your Microsoft Dynamics 365 for Operations account.

The following table describes the basic connection properties for OAuth 2.0 client secret grant authentication:

Property	Description
Service URL	The URL of the Microsoft Dynamics 365 for Operations service. Enter the URL in the following format: `https:<server name>:<port number>` If you don't specify the port number in the URL, the agent uses port number 443 in the query.
Application ID	The AAD application ID for Microsoft Dynamics 365 for Operations.
Tenant ID	The directory ID for Azure Active Directory.
Client Secret	The client secret for the Microsoft Dynamics 365 for Operations account.

Advanced settings

The following table describes the advanced connection properties:

Property	Description
Retry Error Codes	HTTP error codes for temporary issues or failures in network requests or operations for which the Microsoft Dynamics 365 for Sales connection attempts retries. You can enter HTTP error codes, each separated by a comma.
Retry Count	The total number of retries to get the response from the Microsoft Dynamics 365 for Operations endpoint, determined by the retry interval you specify. Default is 0. If you enable the retry count and run a task, the task stops responding when the Microsoft Dynamics 365 for Operations server is down or not reachable from the Secure Agent.
Retry Interval	The time in seconds to wait before the Microsoft Dynamics 365 for Operations connection makes another attempt to receive a response. Default is 60 seconds.

Proxy server settings

If your organization uses an outgoing proxy server to connect to the Internet, you can use the serverless runtime environment to connect to Informatica Intelligent Cloud Services through the proxy server.

You can use the unauthenticated or authenticated proxy server. You can configure proxy both in mappings and in mappings in advanced mode.

To configure the proxy settings for the serverless runtime environment, see *Runtime Environments* in the Administrator help.

CHAPTER 3

Synchronization tasks with Microsoft Dynamics 365 for Operations 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.

Microsoft Dynamics 365 for Operations sources in synchronization tasks

You can use a Microsoft Dynamics 365 for Operations object as a single source in a synchronization task. You can configure the Microsoft Dynamics 365 for Operations source properties on the **Source** page of the Synchronization Task wizard.

The following table describes the Microsoft Dynamics 365 for Operations source properties:

Property	Description
Connection	The source connection for the task.
Source Type	Type of the source object. Select Single to read data from a single source.
Source Object	The source object for the task. 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.

You can configure the advanced source properties on the **Schedule** page of the Synchronization Task wizard.

The following table describes the Microsoft Dynamics 365 for Operations advanced source properties:

Advanced Property	Description
Number of rows to read	Sets the number of rows that the agent must read from the Microsoft Dynamics 365 for Operations source.
Number of rows ro skip	Sets the number of rows you can skip. For example, you can set this property to n to skip the first n rows in a source and read from the (n+1) row.
Page Size	Size of the page set to retrieve the maximum number of entries for each page. Default value is 100.

Microsoft Dynamics 365 for Operations targets in synchronization tasks

You can use a single object as a target in a synchronization task. You can configure Microsoft Dynamics 365 for Operations target properties on the **Target** page of the Synchronization Task Wizard.

The following table describes the Microsoft Dynamics 365 for Operations target properties:

Property	Description
Connection	Name of the target connection.
Target Object	Name of the target object.
Display technical names instead of labels	Displays 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.

When you configure a synchronization task to use a Microsoft Dynamics 365 for Operations target, you can configure advanced target properties. Advanced target properties appear on the **Schedule** page of the Synchronization Task Wizard.

The following table describes the Microsoft Dynamics 365 for Operations advanced target properties:

Advanced Property	Description
Success File Directory	Not applicable.
Error File Directory	Not applicable.

Microsoft Dynamics 365 for Operations lookups in synchronization tasks

You can create lookups for objects in Microsoft Dynamics 365 for Operations connection. You can retrieve data from a Microsoft Dynamics 365 for Operations lookup object based on the specified lookup condition.

When you configure a lookup in Microsoft Dynamics 365 for Operations, you select the lookup connection and lookup object. You also define the behavior when a lookup condition returns more than one match.

The following table describes the Microsoft Dynamics 365 for Operations lookup object properties that you can configure in a Lookup transformation in synchronization tasks:

Property	Description
Lookup Connection	Name of the lookup connection.
Lookup Object	Name of the lookup object for the synchronization task.
Number of rows to read	Fetches the number of rows specified.
Number of rows to skip	Sets the number of rows you can skip.
Page Size	Size of the page set to retrieve the maximum number of entries for each page.
Display technical names instead of labels	Displays technical names instead of business names.
Display fields in alphabetical order	Displays lookup fields in alphabetical order instead of the order returned by the source system.
Lookup Fields	The fields used to define the lookup condition. Select Source Fields and Lookup Fields. The synchronization task compares the value of the source field against the lookup field, and then returns a value based on the match. You can define multiple conditions in a lookup. If you define more than one lookup condition, all lookup conditions must be true to find the match.

The following table describes the lookup return value properties that you can configure:

Lookup Return Value Property	Description
Output Field	The field from the lookup table that you want to use.
Multiplicity	How the synchronization task handles multiple return values. Select one of the following values: - Error, if more than one output value. Select if the synchronization task should display an error when the lookup condition returns multiple values. The synchronization task rejects rows when multiple matches are found, writing them to the error rows file. This is the default. - Randomly pick one output value. Select if the synchronization task should choose the first returned value when a lookup condition returns multiple values. Different systems might use different orders to return lookup values.
Expression	A simple expression that uses $OutputField to represent the selected output field. By default, synchronization tasks pass the lookup return value without alteration with the following expression: `$OutputField`

CHAPTER 4

Mappings and mapping tasks with Microsoft Dynamics 365 for Operations Connector

Use the Data Integration Mapping Designer to create a mapping. When you create a mapping, you configure a source or target to represent a Microsoft Dynamics 365 for Operations object.

In advanced mode, the Mapping Designer updates the mapping canvas to include transformations and functions that enable advanced functionality.

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.

Microsoft Dynamics 365 for Operations sources in mappings

In a mapping, you can configure a Source transformation to represent a Microsoft Dynamics 365 for Operations source.

The following table describes the Microsoft Dynamics 365 for Operations source properties that you can configure in a Source transformation:

Property	Description
Connection	Name of the source connection.
Source Type	Select Single Object or Parameter.
Object	Name of the source object for mapping.
Filter	Filter value in a read operation. You can add conditions to filter records and reduce the number of rows that the Secure Agent reads from the source.
Sort	Sorts records based on the conditions you specify. Click **Configure** to add conditions to sort records and reduce the number of rows that the Secure Agent reads from the source.

The following table describes the Microsoft Dynamics 365 for Operations advanced properties that you can configure in a Source transformation:

Property	Description
Number of rows to read	The total number of rows you want to retrieve from the dataset. Data Integration reads the specified number of rows from the beginning of each page.
Number of rows to skip	Sets the number of rows you can skip. For example, you can set this property to 10 to begin reading from row 11.
Page Size	The number of rows to retrieve in each page or request. The number you specify determines how Data Integration retrieves data in manageable chunks. Default is 100.
Tracing Level	Sets the amount of detail that appears in the log file. You can choose terse, normal, verbose initialization, or verbose data. Default is normal.

Microsoft Dynamics 365 for Operations targets in mappings

In a mapping, you can configure a Target transformation to represent a single Microsoft Dynamics 365 for Operations target or Microsoft Dynamics 365 for Operations parameter.

The following table describes the Microsoft Dynamics 365 for Operations target properties:

Property	Description
Connection	Name of the target connection.
Target Type	Type of the target object. Select **Single Object** or **Parameter**.
Object	Name of the target object for the mapping.
Operation	Target operation. Select **Insert**, **Update**, or **Delete**. **Note: Upsert** operation is not applicable.

The following table describes the Microsoft Dynamics 365 for Operations advanced target properties that you can configure in a Target transformation:

Advanced Property	Description
Success File Directory	Not applicable.
Error File Directory	Not applicable.
Forward Rejected Rows	Not applicable.

Microsoft Dynamics 365 for Operations lookups in mappings

You can create lookups for objects in Microsoft Dynamics 365 for Operations connection. You can retrieve data from a Microsoft Dynamics 365 for Operations lookup object based on the specified lookup condition.

When you configure a lookup in Microsoft Dynamics 365 for Operations, you select the lookup connection and lookup object. You also define the behavior when a lookup condition returns more than one match.

The following table describes the Microsoft Dynamics 365 for Operations lookup object properties that you can configure in a Lookup transformation:

Property	Description
Connection	Name of the lookup connection.
Source Type	Type of the source object. Select Single Object.
Lookup Object	Name of the lookup object for the mapping.
Multiple Matches	Behavior when the lookup condition returns multiple matches. Select Return any row, Return all rows, or Report error.
Filter	Not applicable.
Sort	Not applicable.

The following table describes the Microsoft Dynamics 365 for Operations lookup object advanced properties that you can configure in a Lookup transformation in mappings:

Advanced Property	Description
Number of rows to read	Fetches the number of rows specified. Default value is 0.
Number of rows to skip	Sets the number of rows you can skip. Default value is 0.
Page Size	Size of the page set to retrieve the maximum number of entries for each page. Default value is 100.
Tracing Level	Sets the amount of detail that appears in the log file. You can choose terse, normal, verbose initialization or verbose data. Default is normal.

Microsoft Dynamics 365 for Operations mapping example

You are a sales manager in a manufacturing organization and your sales team needs details of potential customers. You want to review the customer activities in an analytics tool. Create a mapping task to use the insert operation. You use the following objects in the Microsoft Dynamics 365 for Operations mapping:

Source Object

The source object for a mapping task is Customer. Use the Microsoft Dynamics 365 for Operations connection to read customer data from Microsoft Dynamics 365 for Operations. The Customer object is a single source in the mapping task.

Target Object

Use a `.csv` file as the target object in the mapping task. The target in a mapping task is a flat file. The target includes the AddressCity, AddressCounty, BirthPlace, CreditLimit, CustomerAccount, InvoiceAccount, InvoiceAddress, and Name fields.

Mapping

Map the fields of the Microsoft Dynamics 365 for Operations Customer source to the flat file target.

The following image shows the Microsoft Dynamics 365 for Operations mapping:



The following image shows the mapped fields of Microsoft Dynamics 365 for Operations source with the flat file target object:



When you run the mapping, the agent writes the Customer details to the flat file.

The following image shows the Customer details that the agent writes based on the fields you mapped in the mapping task:

	AddressCity	AddressCounty	BirthPlace	CreditLimit	CustomerAccount	InvoiceAccount	InvoiceAddress	Name
2	Phoenix			1000000	US-009		InvoiceAccount	Owl Wholesales
3	Seattle	KING		500000	US-040		InvoiceAccount	Contoso Retail USA
4	Pasadena	LOS ANGELE		500000	US-002		InvoiceAccount	Contoso Retail Los Ang
5	New York	NEW YORK		500000	US-013		InvoiceAccount	Pelican Wholesales
6	San Diego	SAN DIEGO		500000	US-001		InvoiceAccount	Contoso Retail San Die
7	Alor jalal			500000	MY-001		InvoiceAccount	Royal Orchid
8	Boulder City	CLARK		400000	US-007		InvoiceAccount	Desert Wholesales
9	Irving	DALLAS		400000	US-011		InvoiceAccount	Contoso Retail Dallas
10	Artesia Wells	LA SALLE		400000	US-010		InvoiceAccount	Sunset Wholesales
11	Alamo	LINCOLN		400000	US-008		InvoiceAccount	Sparrow Retail
12	Los Angeles	LOS ANGELE		400000	US-003		InvoiceAccount	Forest Wholesales
13	New York	NEW YORK		400000	US-012		InvoiceAccount	Contoso Retail New Yc
14	Madison Heights	OAKLAND		350000	US-018		InvoiceAccount	Contoso Retail Detroit
15	Cable	CHAMPAIGN		250000	US-024		InvoiceAccount	Yellow Square
16	Arlington Heights	COOK		250000	US-015		InvoiceAccount	Contoso Retail Chicagc
17	Clarkston	DEKALB		250000	US-020		InvoiceAccount	Orchid Shopping
18	Dulles	ESSEX		250000	US-022		InvoiceAccount	Contoso Retail Virginia
19	Alpharetta	FULTON		250000	US-019		InvoiceAccount	Sunflower Wholesales
20	Seattle	KING		250000	US-005		InvoiceAccount	Contoso Retail Seattle

CHAPTER 5

Data type reference

Data Integration uses the following data types in Microsoft Dynamics 365 for Operations mappings ,synchronization task and mapping tasks:

- Microsoft Dynamics 365 for Operations native data types appear in the source transformations when you choose to edit metadata for the fields.
- Transformation data types. Set of data types that appear in the transformations. These are internal data types based on ANSI SQL-92 generic data types, which the Secure Agent uses to move data across platforms. They appear in all transformations in a mapping.

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

Microsoft Dynamics 365 for Operations and transformation data types

The following table lists the Microsoft Dynamics 365 for Operations data types that Data Integration supports and the corresponding transformation data types:

Microsoft Dynamics 365 for Operations Data Type	Transformation Data Type
date	date/time
enum	string
guid	string
int32	integer
int64	bigInt
real	decimal
string	string
UtcDateTime	date/time

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