



Informatica Cloud (Fall 2015)

## Anaplan Connector Guide

Document Version: 1.1

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# 1 Introduction

This guide explains how administrators and business users can set up and use the Anaplan Connector for Informatica Cloud® to export data from Anaplan, import data into Anaplan, delete data from Anaplan, or run a process that contains any combination of model-to-model imports and delete actions.

## 1.1 ABOUT THE ANAPLAN CONNECTOR

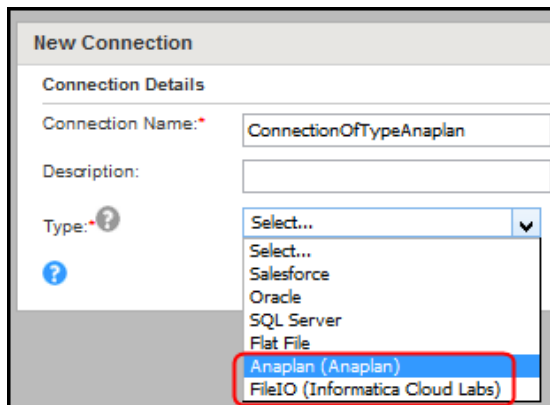
The Anaplan Connector for Informatica Cloud allows you to build an Informatica Cloud mapping that automates the running of an Anaplan action.

The advantages of using the Anaplan Connector for Informatica Cloud include:

- **Automation:** no need to run actions manually from the Anaplan graphical user interface
- **Ease of configuration:** no need to write a batch file (Windows) or shell script (UNIX/Linux/MacOs) for [Anaplan Connect](#)
- **Flexibility:** the mapping you create can take advantage of all the functionality that Informatica provide

## 2 Anaplan Connections

Each mapping requires two connections, one for the source, and one for the target.



### 2.1 CONNECTION TYPES

The following table summarizes the Connection types you need to configure a mapping for export, import, delete, or process, and explains what the Informatica user interface displays as the count.

Action	Source Connection Type	Target Connection Type	Operation	Count
Export	Anaplan	FileIO		1 if the flat file export succeeded, otherwise 0
Import	FileIO	Anaplan	Insert	The number of rows imported, and the number of error rows
Delete	FileIO	Anaplan	Delete	0 because no rows are imported or exported
Process	FileIO	Anaplan	Update	0 because a Process can contain multiple operations, and therefore cannot be represented as a simple number of rows. "Failure" appears both for a failure and for a warning, such as one or more rows not being imported.

### 2.2 INFORMATICA PREREQUISITES

1. For these demo mappings, we assume that you have set up a test server.
  - For instructions, see the Anapedia page on Informatica.
  - For production, you might need to request that the IT administrator of that server set up the required directories and files.
2. An Informatica Cloud Secure Agent that is installed, registered, and running.  
See <https://community.informatica.com/docs/DOC-1590>.

3. Knowledge of how to use Informatica Cloud, including how to create a Connection using the Filelo Connector.
4. On the same server where the Informatica Secure Agent is installed:
  - Knowledge of your Informatica Connection properties, such as Runtime Environment and the absolute path to a directory you can use as your output directory.
  - The existence of the following directories, which are required by Informatica's Filelo connector:

Directory Name on Linux or Mac OS	Directory Name on Windows	Subdirectory Name	Description
/tmp	C:\tmp\		This directory can have any name but it must contain the empty file named .infaccess
/tmp/fileiotest/	C:\tmp\fileiotest\		This directory can have any name but it must contain the subdirectories listed below.
		inprocess/	Name that matches the value given when configuring the FileO Informatica connector's "In Process Directory"
		success/	Name that matches the value given when configuring the FileO Informatica connector's "Success Directory". To check for information about a successful job, as soon as your job finishes, see Monitor > Activity Log, click a job in the list, and click View Session Log.
		error/	Name that matches the value given when configuring the FileO Informatica connector's "Error Directory". To check for any errors, as soon as your job finishes, see Monitor > Activity Log, click a job in the list, and click View Session Log.
		export/	To contain Anaplan export CSV files.
		import/	Contains one (1) CSV file to be imported to Anaplan. Cannot contain more than one file.
		delete/	Contains an empty text file to help trigger the Informatica mapping configuration for Anaplan Delete.
		process/	Contains an empty text file to help trigger the Informatica mapping configuration for Anaplan Process.

## 2.3 ANAPLAN PREREQUISITES

You need:

1. An Anaplan account with access to a model and workspace.
2. Knowledge of how to use and configure Anaplan actions. Each demo assumes that your model already has a corresponding action that you can run manually from the Anaplan graphical user interface:
  - For the **Export** demo, an Export action that exports data from a model.
  - For the **Import** demo, an Import action that imports data into a model.
  - For the **Delete** demo, an Other action that deletes data from a model.
  - For the **Process** demo, a Process action that contains multiple actions.
3. If you're using Certificate-based Authentication, you need to:
  - Have an Anaplan Certificate file installed on the same machine as your Informatica Cloud Secure Agent
  - Know the path to that certificate.

## 2.4 LIMITATIONS

- The maximum amount of data supported for an Import or Export is **75 MB**.

Anaplan tested this with the following settings:

- Data buffer for FileContentAsBase64String: 104MB
- Informatica Secure Agent: 6 GB of RAM
- DTM JVM: -Xmx4096m
- Tomcat JRE INFA\_MEMORY: -Xms512m to -Xmx4096m

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**Note:** See the Informatica documentation on increasing the field buffer size and increasing Secure Agent memory.

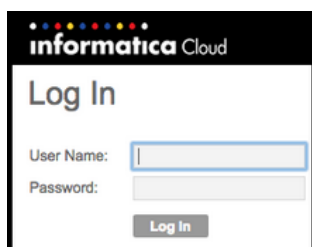
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- Model-to-Model import is supported in a Process, not in an Import.
- A Process is limited to any combination of Model-to-Model import actions and/or Delete actions.
- Characters in the Anaplan Column and Field names must be alphanumeric because Informatica does not support names that contain spaces or special characters (`, ~, !, @, #, \$, %, ^, & \*, (, ), +, =, <, >, [, ], {, })
- Characters in the data being transferred must be ASCII. See the list at [https://en.wikipedia.org/wiki/ASCII#ASCII\\_printable\\_code\\_chart](https://en.wikipedia.org/wiki/ASCII#ASCII_printable_code_chart)

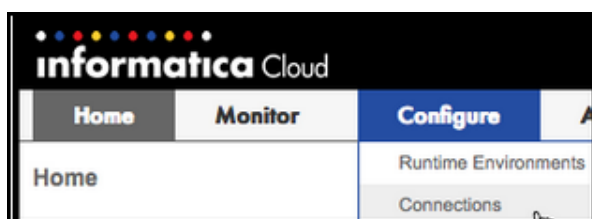
## 2.5 CONFIGURATION OF AN ANAPLAN CONNECTION WITH BASIC AUTHENTICATION

We recommend using Basic Authentication because it's quick and easy.

1. Log onto your Informatica Cloud.



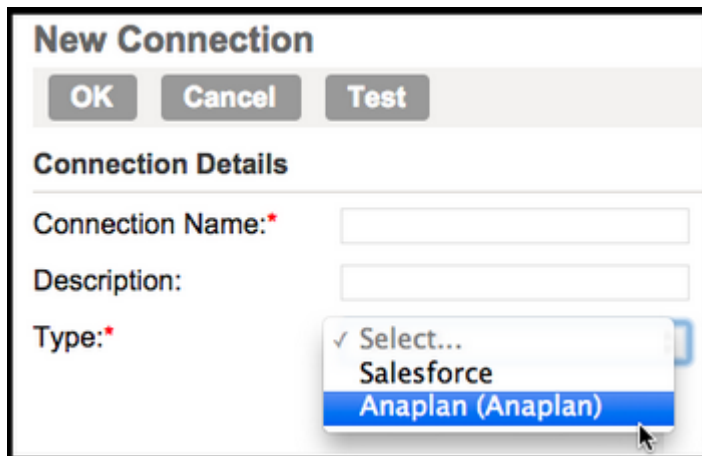
2. On the **Configure** menu, click **Connections**.



3. Under **Connections**, click **New**.



4. Type a **Connection Name** and on the **Type** list, click **Anaplan**.

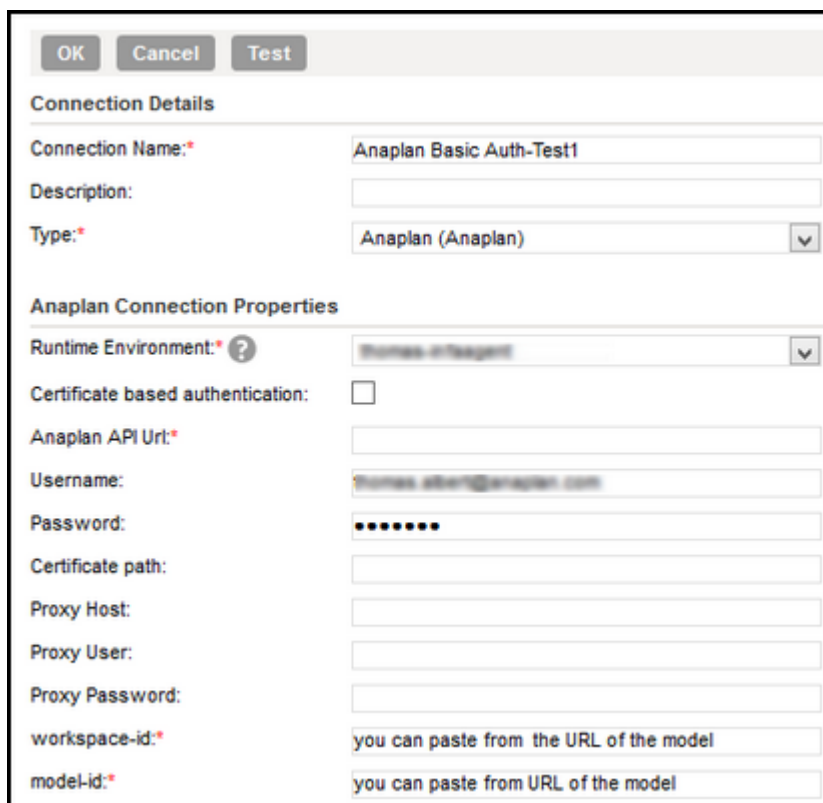


The screenshot shows the 'New Connection' dialog box with the following fields and options:

- Connection Name:** (empty text field)
- Description:** (empty text field)
- Type:** (dropdown menu with 'Salesforce' and 'Anaplan (Anaplan)' visible; 'Anaplan (Anaplan)' is highlighted by the mouse cursor)

5. To configure authentication:

- Under **Anaplan Connection Properties**, choose a **Runtime Environment**.
- Set the Anaplan **API URL** to <https://api.anaplan.com>.
- Type a **Username** and **Password**, and paste from the URL of an Anaplan model the **workspace-id** and **model-id**.

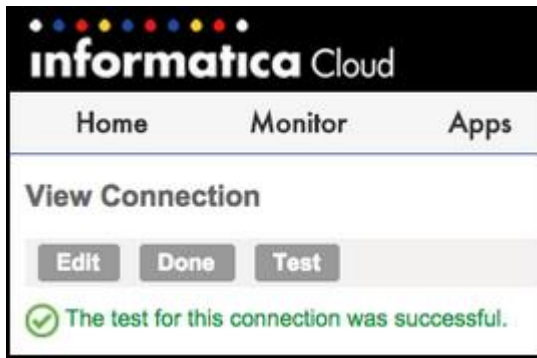


The screenshot shows the 'New Connection' dialog box with the 'Anaplan Connection Properties' section expanded. The fields and their values are:

- Connection Name:** Anaplan Basic Auth-Test1
- Description:** (empty text field)
- Type:** Anaplan (Anaplan)
- Runtime Environment:** (dropdown menu with 'Thomas-Integert' selected)
- Certificate based authentication:** ☐
- Anaplan API Url:** (empty text field)
- Username:** thomas.stor@anaplan.com
- Password:** (masked with dots)
- Certificate path:** (empty text field)
- Proxy Host:** (empty text field)
- Proxy User:** (empty text field)
- Proxy Password:** (empty text field)
- workspace-id:** you can paste from the URL of the model
- model-id:** you can paste from URL of the model

6. Click **Test** and verify that the connection is successful.





## 2.6 CONFIGURATION OF AN ANAPLAN CONNECTION WITH A CERTIFICATE-BASED AUTHENTICATION

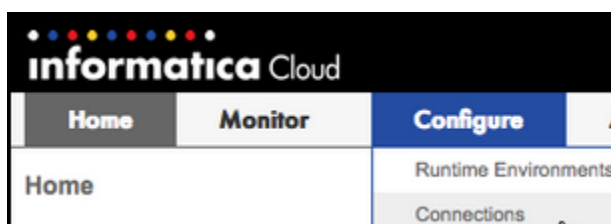
If you choose to use Certificate-based authentication, note that:

- You can download an Anaplan certificate by following the instructions at <https://community.anaplan.com/anapedia/getting-started/end-user/certificates>.
- Once you have downloaded the Anaplan certificate, the certificate is under your control and Anaplan Inc. is not responsible for keeping it secure.
- Informatica Cloud assumes that the location of any files (including certificates) that are referenced to be on a directory that the Cloud Secure Agent can access.
- In our example, an alias has been used as the entry in the Certificate Path field show in Step 5.e. below.

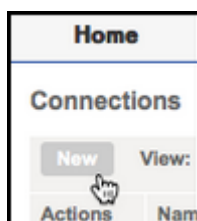
1. Log onto your Informatica Cloud.



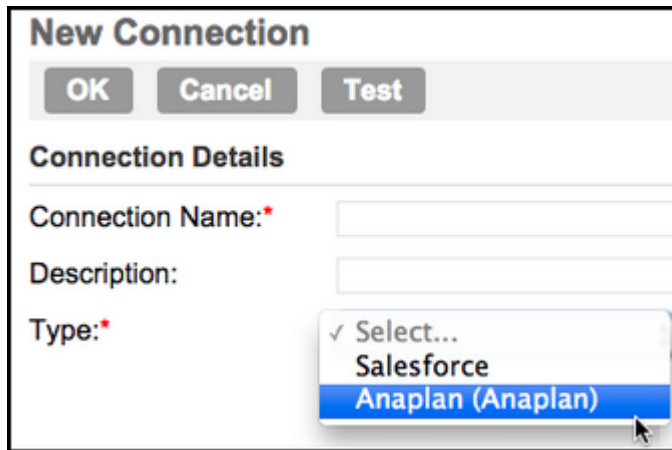
2. On the **Configure** menu, click **Connections**.



3. Under **Connections**, click **New**.



4. Type a **Connection Name** and on the **Type** list, click **Anaplan**.



The screenshot shows the 'New Connection' dialog box with the following fields and options:

- Connection Name:** (empty text box)
- Description:** (empty text box)
- Type:** (dropdown menu with 'Salesforce' and 'Anaplan (Anaplan)' options; 'Anaplan (Anaplan)' is selected)

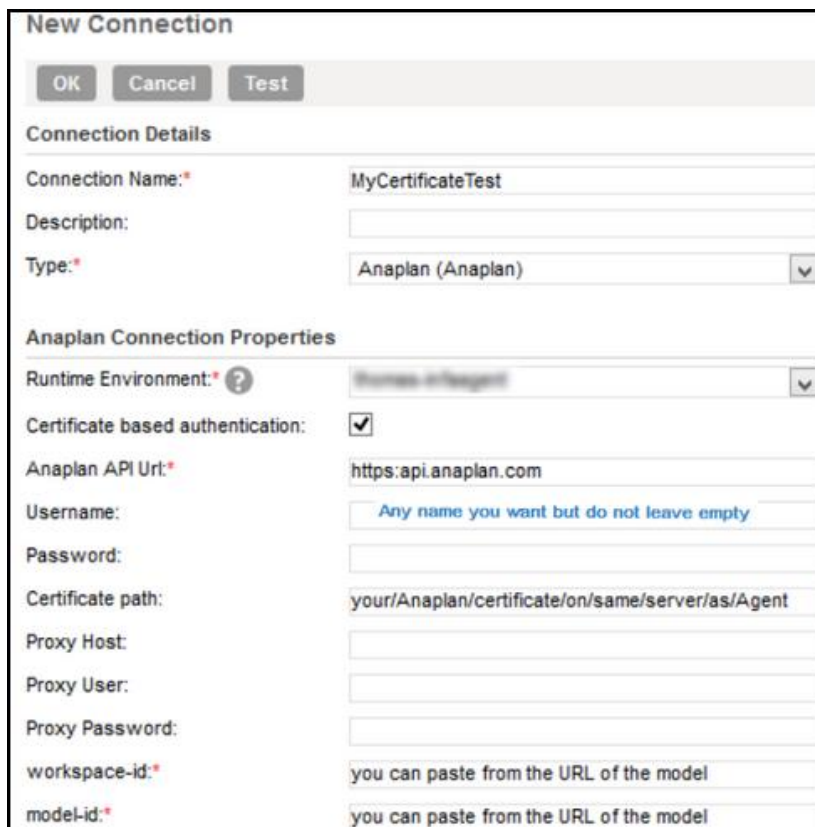
5. To configure authentication:
- Under **Anaplan Connection Properties**, choose a Runtime Environment.
  - Set the Anaplan API URL to <https://api.anaplan.com>.
  - Select the **Certificate-based authentication** check box.
  - Type the path to the certificate.

---

**Note:** For certificate-based authentication, you must enter a username but you don't need to enter a password.

---

6. Paste the workspace ID and model ID from the URL of the Anaplan model into the **workspace-id** and **model-id** boxes.



The screenshot shows the 'New Connection' dialog box with the following fields and options:

- Connection Name:** MyCertificateTest
- Description:** (empty text box)
- Type:** Anaplan (Anaplan)
- Anaplan Connection Properties:**
  - Runtime Environment:** (dropdown menu with 'Production - us/agent' selected)
  - Certificate based authentication:** ☒
  - Anaplan API Uri:** https://api.anaplan.com
  - Username:** Any name you want but do not leave empty
  - Password:** (empty text box)
  - Certificate path:** your/Anaplan/certificate/on/same/server/as/Agent
  - Proxy Host:** (empty text box)
  - Proxy User:** (empty text box)
  - Proxy Password:** (empty text box)
  - workspace-id:** you can paste from the URL of the model
  - model-id:** you can paste from the URL of the model

7. Click **Test** to test the connection.
8. Open an existing data synchronization task and then edit the connection to select the new certificate authorization connection you created.
9. Verify that the data review works when using this connection to define a source.

## 2.7 ANAPLAN CONNECTION PROPERTIES

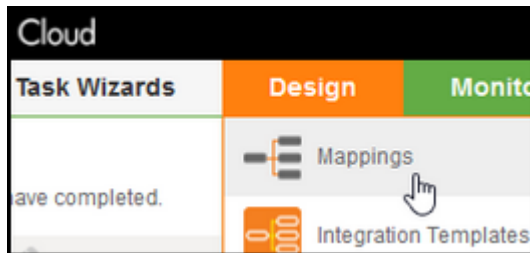
Connection Property	Description
Connection Name*	A name that distinguishes this connection from other connections.
Description	Indicate the purpose or explain who will use this connection. <i>(Optional)</i>
Type*	Select <b>Anaplan</b> from the list.
Runtime Environment*	The name of your Informatica Secure Agent.
Anaplan API URL*	<i>https://api.anaplan.com</i>
Username	An Anaplan user name, such as firstname.lastname@anaplan.com
Password	
Certificate path	
Proxy Host	
Proxy Password	
workspace-id	With the Anaplan model open, from the URL, paste the value after <i>selectedWorkspaceId=</i>
model-id	With the Anaplan model open, from the URL, paste the value after <i>selectedModelId=</i>

### 3 Export Mappings and Mapping Configuration Tasks with Anaplan

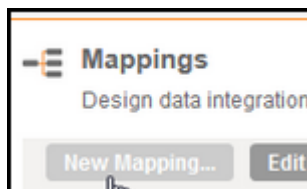
You can export from Anaplan into a CSV (comma separated values) file. A prerequisite for this example is the existence of a .infaaccess file in the /tmp/fileiotest/export/ directory of the same server as the Informatica Secure Agent. This file can be empty. See the complete list of [Informatica Prerequisites](#) and [Anaplan Prerequisites](#).

#### 3.1 DEFINING THE SOURCE

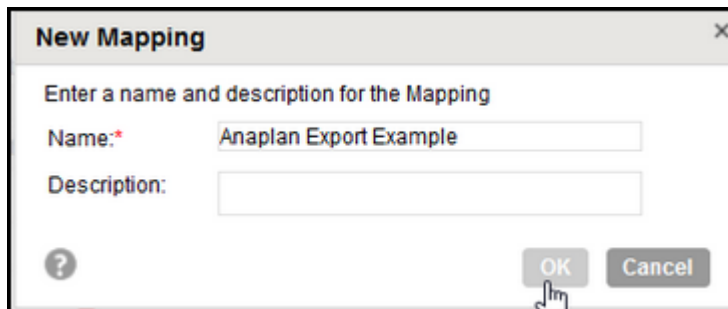
1. Open your browser to Informatica Cloud, log in, and select **Design > Mappings**.



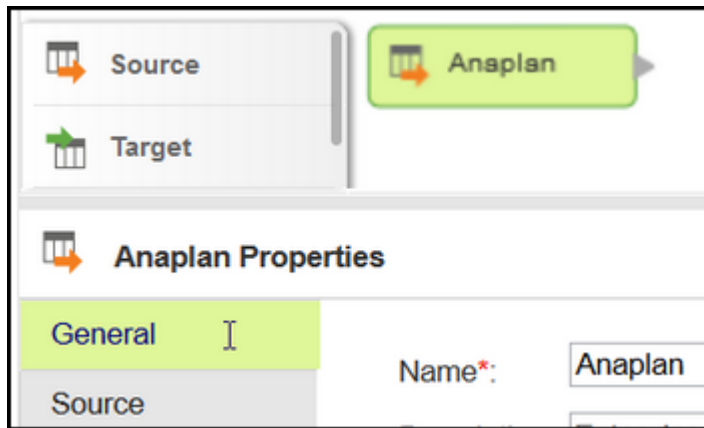
2. Click **New Mapping**.



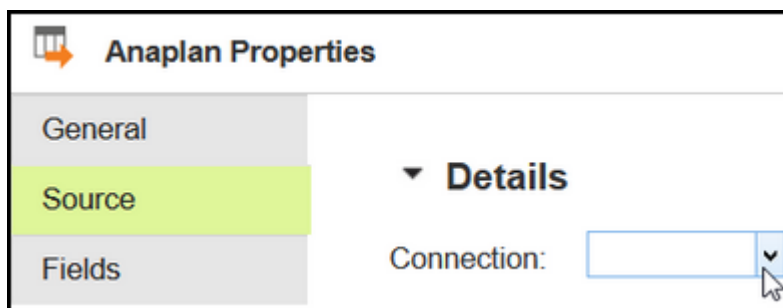
3. In the **New Mapping** dialog, type a name and click **OK**.



4. Drag a source onto the canvas.
5. In the **Properties** area, click the **General** tab and set the source **Name** to Anaplan.

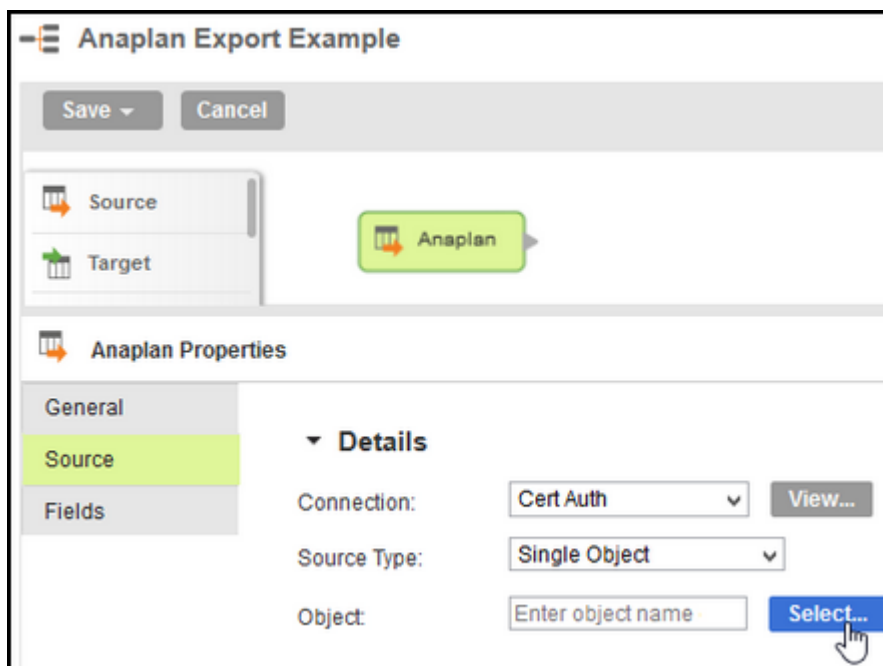


6. In the Properties area, click the **Source** tab and the **Connection** list, check if an Anaplan connection exists for your Informatica Cloud Secure Agent.  
(For information about creating Anaplan connections, see [Configuration of an Anaplan Connection with Basic Authentication](#) or [Configuration of an Anaplan Connection with a Certificate-based Authentication](#).)



Note that **Source Type** box now lists *Single Object*.

7. For **Object**, click **Select**.

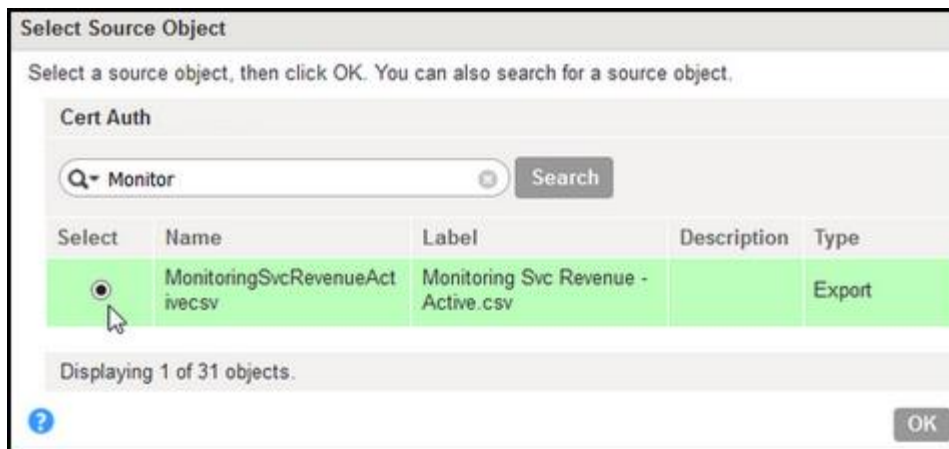


8. In the **Select Source Object** dialog, type the first letters of your Anaplan Export action (which typically corresponds to the name of the export file).

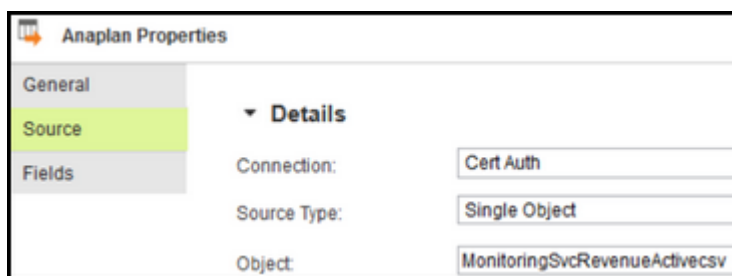
The Anaplan actions that match your search string appear in the **Labels** column.

9. Select the source object **Name** you want and click **OK**.

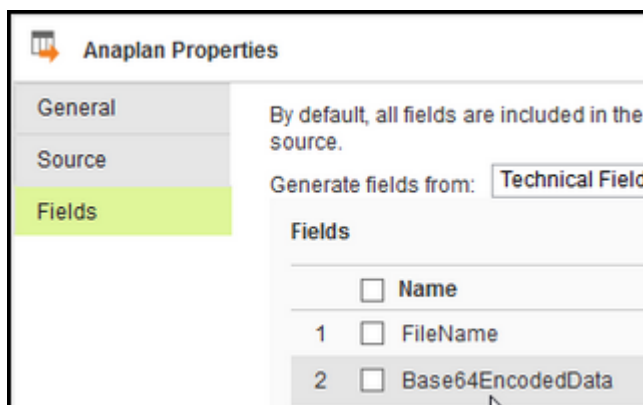
Note that the **Name** corresponds to the **Label** but without any spaces or special characters.



Note that the **Object** field shows the name.

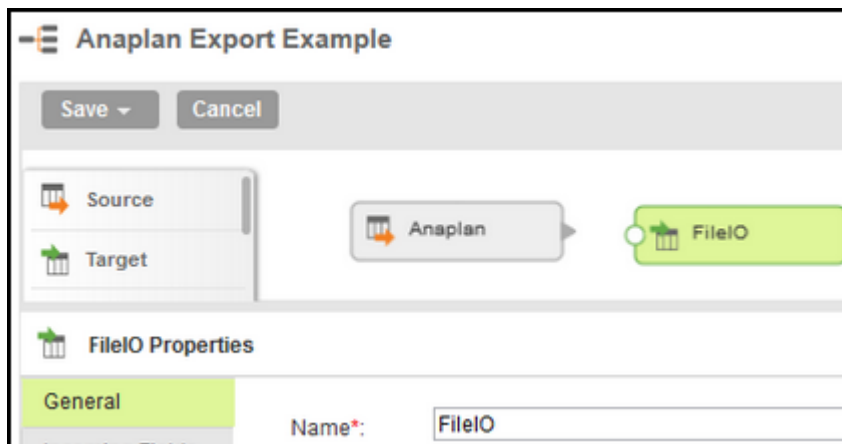


10. In the **Fields** area, note that the source data to be exported is encoded.

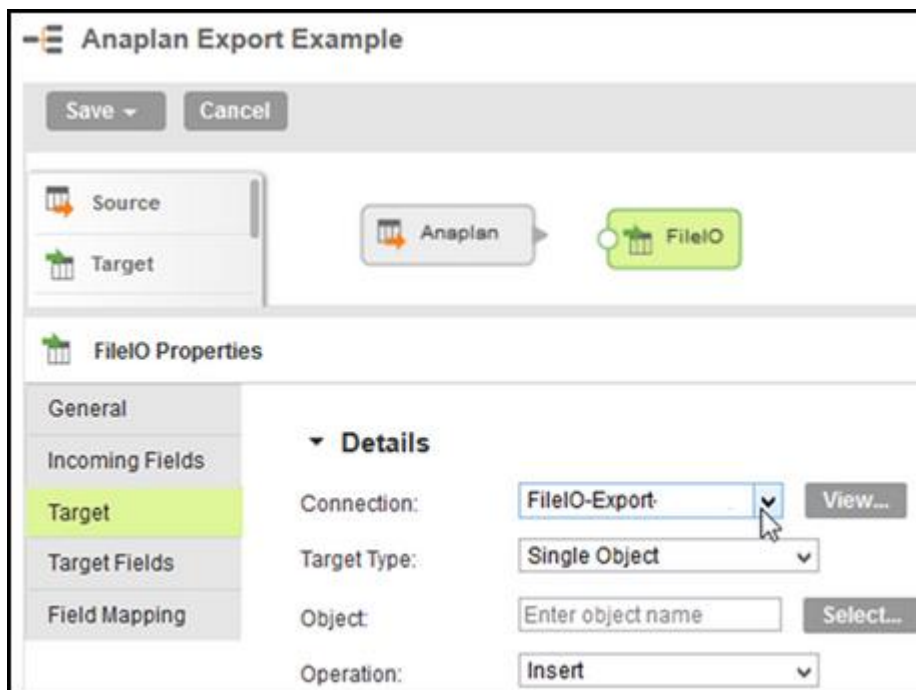


## 3.2 DEFINING THE TARGET

1. Click **Target** and type a **Name** that has no spaces or special characters.



2. In the **Properties** area, select the **Target** tab and use the **Connection** list to check whether a FileIO connection exists for your Informatica Cloud Secure Agent. If not, create one.



3. For **Connection**, click **View**, and note that the data will be exported to the *export* subdirectory of the Parent Directory of the computer with the Informatica Secure Agent.

View Connection

You can view the details of a connection here. Use a connect page displays the user information and other connection details close the window.

Connection Details

Connection Name:	FileIO
Description:	
Type:	FileIO
Created On:	Wed Aug 26 11:55:04 PDT 2015
Updated On:	Wed Aug 26 11:55:04 PDT 2015
Created By:	spencer.schlag@mapbox.com
Updated By:	spencer.schlag@mapbox.com

FileIO Connection Properties

conn.agent	spencer.schlag@mapbox.com
Parent Directory	/tmp/fileiotest
Process File Content As	base64encodedstring

- Click **Test** and verify that the connection works. Click **Close**.

View Connection

✓ The test for this connection was successful.

You can view the details of a connection here. Use a connect page displays the user information and other connection details close the window.

Connection Details

Type:	FileIO
Created On:	Wed Aug 26 11:55:04 PDT 2015
Created By:	spencer.schlag@mapbox.com

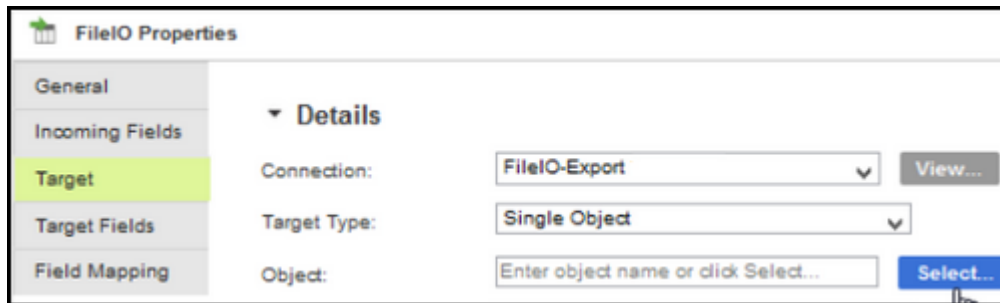
FileIO Connection Properties

conn.agent	spencer.schlag@mapbox.com
Parent Directory	/tmp/fileiotest
Process File Content As	base64encodedstring

Test Edit... Close

- To select the directory in which you will find the exported file, for Object, click **Select**.





**FileIO Properties**

General

Incoming Fields

**Target**

Target Fields

Field Mapping

**Details**

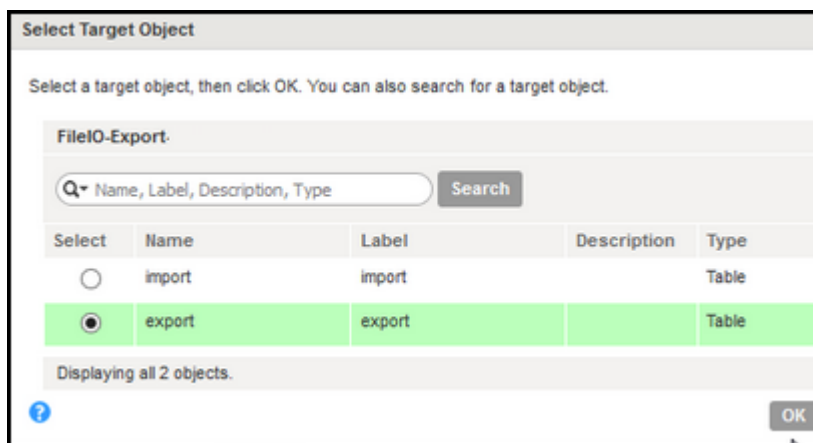
Connection: FileIO-Export View...

Target Type: Single Object

Object: Enter object name or click Select... Select...

6. In the **Select Target Object** dialog, select the **Name** and click **OK**.

Note that in this example, *export* is the name of the subdirectory that will contain the file created by the export.



**Select Target Object**

Select a target object, then click OK. You can also search for a target object.

FileIO-Export

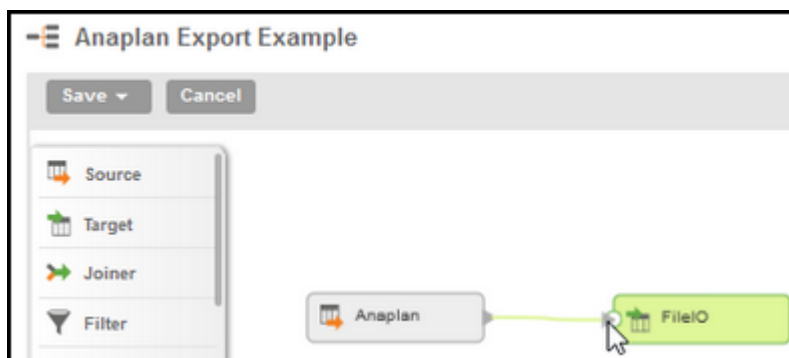
Q Name, Label, Description, Type Search

Select	Name	Label	Description	Type
<input type="radio"/>	import	import		Table
<input checked="" type="radio"/>	export	export		Table

Displaying all 2 objects.

OK

7. Drag a connection from the source to the target.



8. Under **FileIO Properties**, click **Target Fields** and verify the presence of the fields.



**FileIO Properties**

General

Incoming Fields

Target

**Target Fields**

Field Mapping

The following target fields are included in the data flow. You can delete un

Generate Target fields from: Technical Field Names

Fields

	Name	Type
1	FileName	string
2	FileDirectory	string
3	FileContentAsBase64String	string

9. Click **Field Mapping**.

The screenshot shows the 'FileIO Properties' dialog with the 'Field Mapping' tab selected. The 'Field map options' are set to 'Manual'. The 'Incoming Fields' list contains 'FileName' and 'Base64EncodedData'. The 'Target Fields' list contains 'FileName', 'FileDirectory', and 'FileContentAsBase64String'. The 'Field Name' dropdown is set to 'Manual'.

10. Drag-and-drop to manually map **File Name** to **File Name**.

The screenshot shows the 'FileIO Properties' dialog with the 'Field Mapping' tab. The 'Incoming Fields' list contains 'FileName' and 'Base64EncodedData'. The 'Target Fields' list contains 'FileName', 'FileDirectory', and 'FileContentAsBase64String'. The 'Field Name' dropdown is set to 'Manual'. A mouse cursor is dragging 'FileName' from the 'Incoming Fields' list to the 'Target Fields' list.

11. Drag-and-drop to manually map **Base64EncodedData** to **FileContentAsBase64String**.

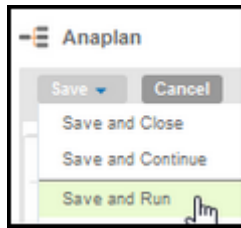
The screenshot shows the 'FileIO Properties' dialog with the 'Field Mapping' tab. The 'Incoming Fields' list contains 'FileName' and 'Base64EncodedData'. The 'Target Fields' list contains 'FileName', 'FileDirectory', and 'FileContentAsBase64String'. The 'Field Name' dropdown is set to 'Manual'. A mouse cursor is dragging 'Base64EncodedData' from the 'Incoming Fields' list to the 'Target Fields' list.

12. Make sure that no other fields are mapped.

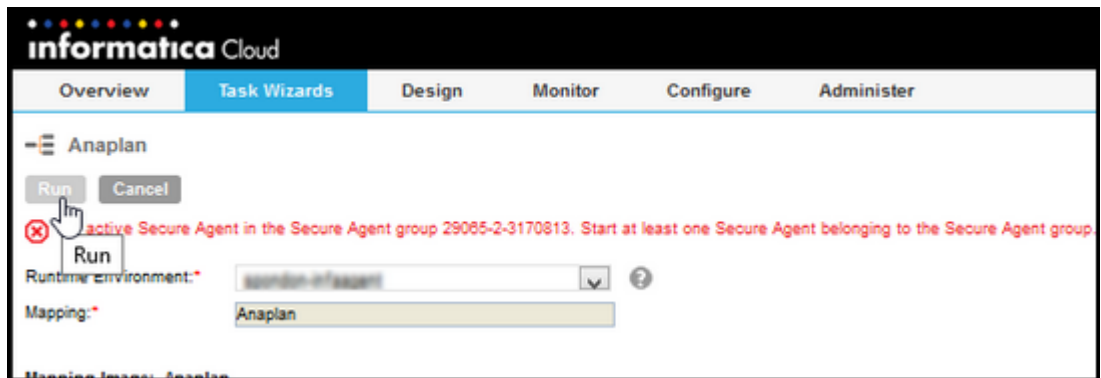
The screenshot shows the Anaplan interface with the 'FileIO' component selected. The 'Field Mapping' dialog is open, showing the 'Field map options' set to 'Manual'. The 'Incoming Fields' list contains 'FileName' and 'Base64EncodedData'. The 'Target Fields' list contains 'FileName', 'FileDirectory', and 'FileContentAsBase64String'. The 'Field Name' dropdown is set to 'Manual'. The 'Mapped Field' column shows 'FileName' mapped to 'FileName' and 'Base64EncodedData' mapped to 'Base64EncodedData'.

### 3.3 VALIDATING THE MAPPING

1. Click **Save** then click **Save and Run**.

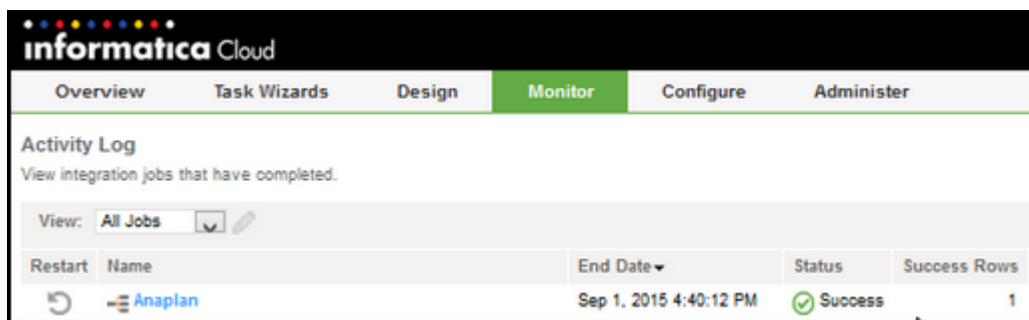


2. If you see the *No active Secure Agent message*, it's because the default agent is not configured for your mapping. To fix, on the **Runtime Environment** list, select your agent.



3. Run the mapping again and wait for it to complete. You can monitor the contents being written to the logs as the mapping is running.

When the mapping completes, a Success message should appear.



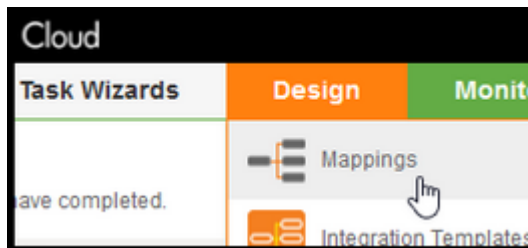
4. Go to the **export** subdirectory and verify the contents of the newly created file.  
You can now schedule the job to run automatically at the interval you specify.

## 4 Import Mappings and Mapping Configuration Tasks with Anaplan

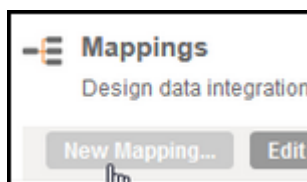
You can automate the import of a CSV (comma separated values) file into Anaplan. A prerequisite for this example is the existence of a .csv file in the */tmp/fileiotest/import/* directory of the same server as the Informatica Secure Agent. This is the .csv file that we will import into Anaplan. See the complete list of [Informatica Prerequisites](#) and [Anaplan Prerequisites](#).

### 4.1 DEFINING THE SOURCE

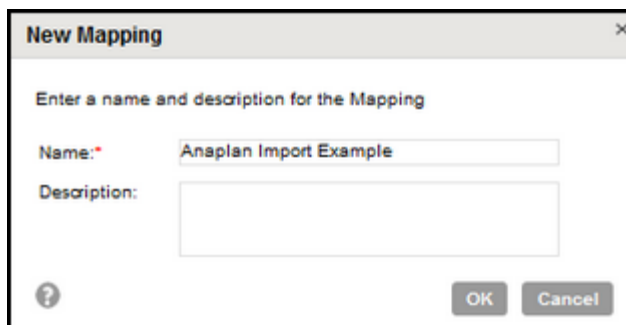
1. Log in to the Informatica Cloud. Select **Design > Mappings**.



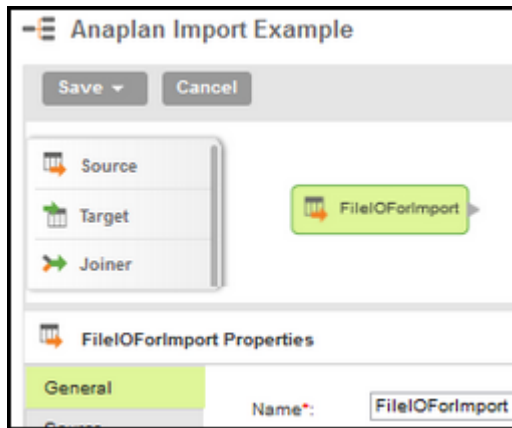
2. Click **New Mapping**.



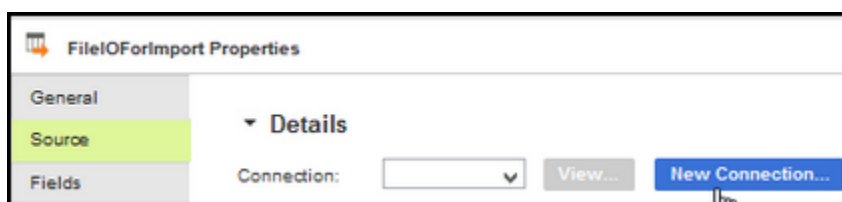
3. In the **New Mapping** dialog, type a name and click **OK**.



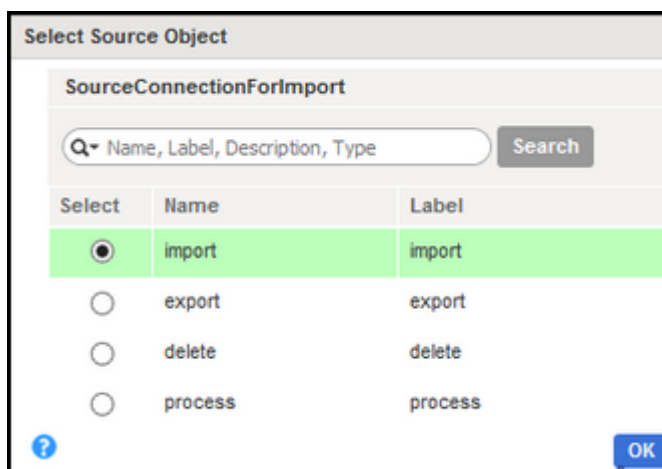
4. **Drag a Source** shape onto the canvas and give it a name.



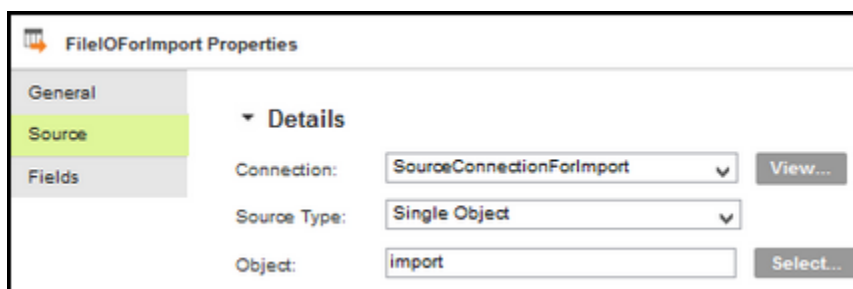
5. In the **Properties** pane, click **Source** and either choose an existing **Connection** of type *FileIO*, or create a **New Connection** of type *FileIO*.



6. If you configure a new connection, test it and then click **OK**.
7. For **Object**, click **Select** and in the **Select Source Object** dialog, select **import**, then click **OK**.

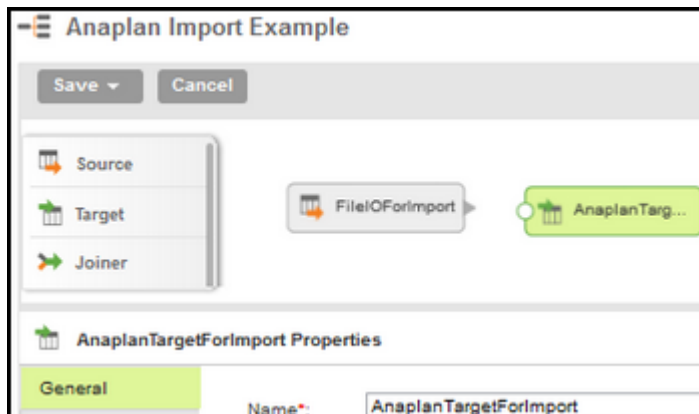


8. Verify that your **Source** properties are similar to the following:

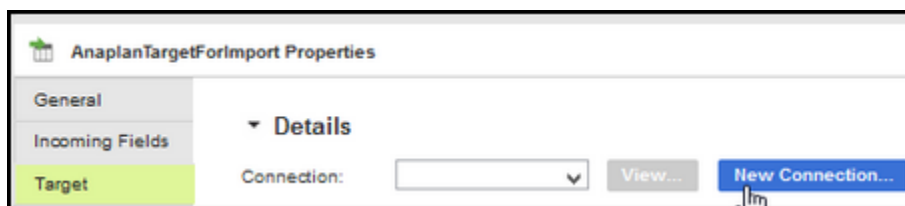


## 4.2 DEFINING THE TARGET

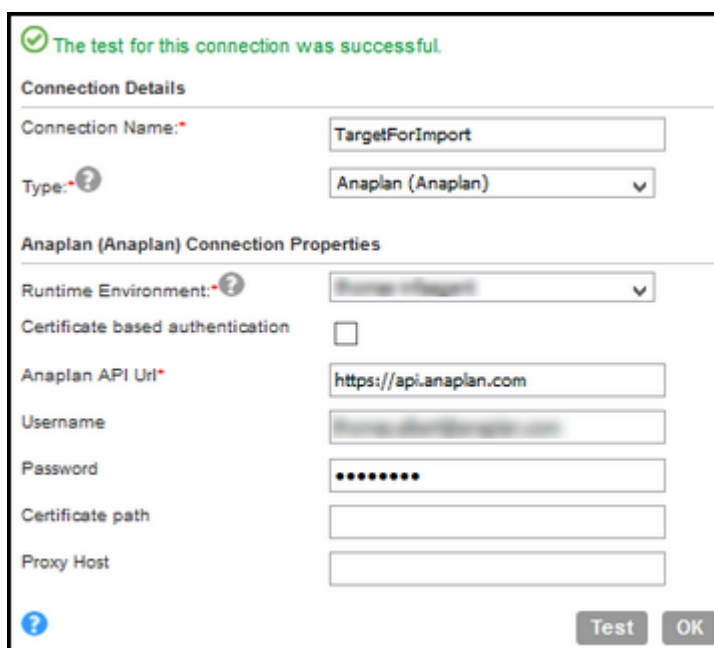
1. Click **Target**, drag a target shape onto the canvas, and type a **Name** that has no spaces or special characters.



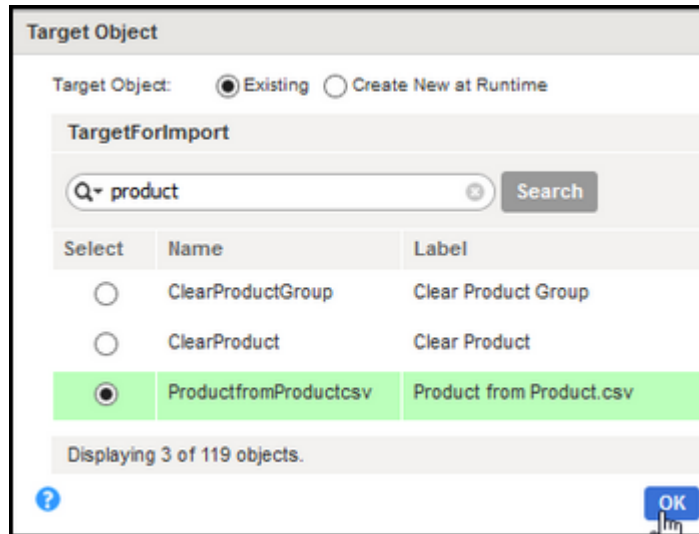
2. Click **Target**, and select an existing connection (of type **Anaplan**) from the list, or click New Connection. (For information about connections, see [Configuration of an Anaplan Connection with Basic Authentication](#) or [Configuration of an Anaplan Connection with a Certificate-based Authentication](#).)



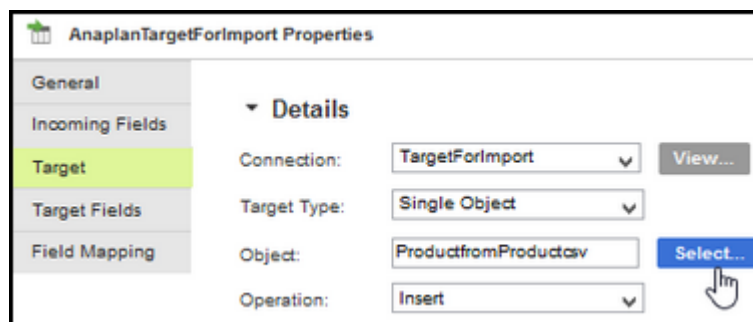
3. If you're configuring a new connection, make sure that it is of type Anaplan and then click **Test**. If the test is successful, click **OK**.



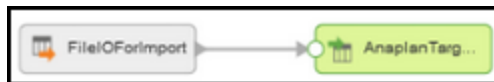
4. In the **Properties** area for the target object, click **Select** and search for the name of the Anaplan Import action. Select it and click **OK**.



5. Verify that the properties look similar to the following, with the **Operation** set to **Insert**:



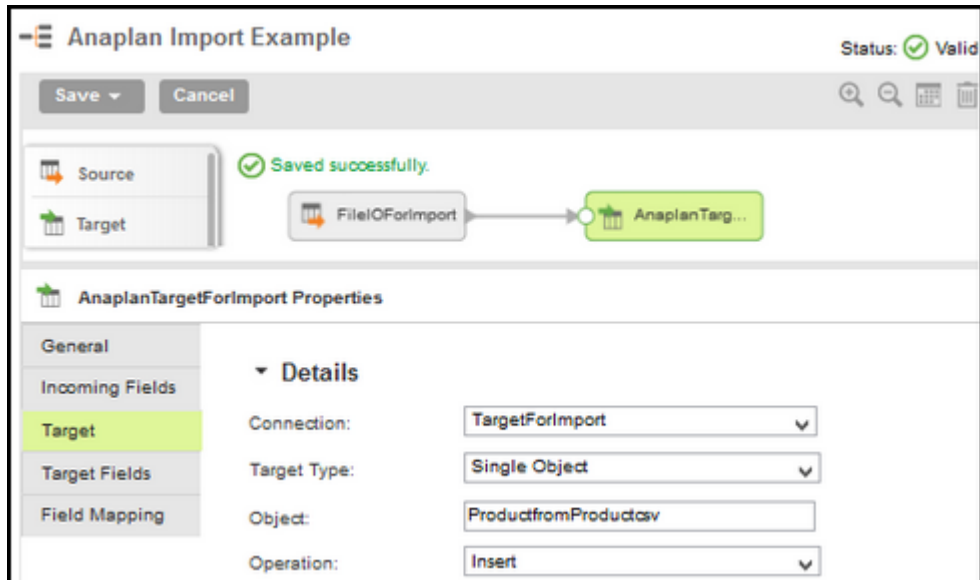
6. On the canvas, drag a connection between the Source and Target.



7. Drag-and-drop to manually map **FileName** to **FileName**, and **Base64EncodedData** to **FileContentAsBase64String**.

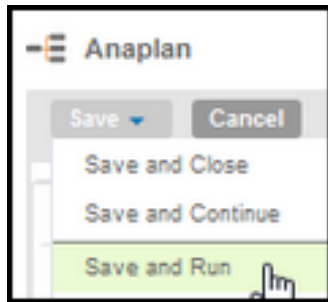


8. Click **Save** then click **Save and Continue**, and verify that the status is valid.

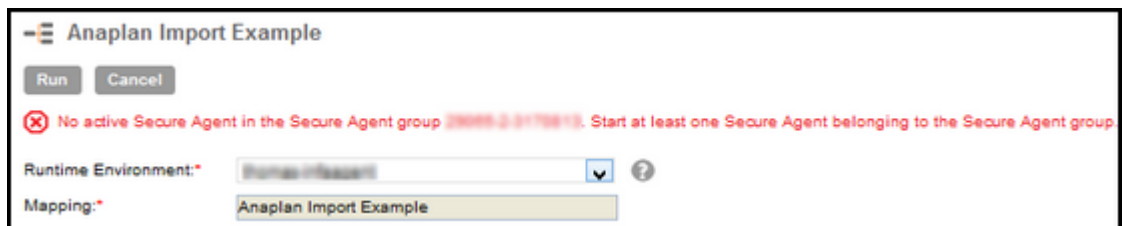


### 4.3 VALIDATING THE MAPPING

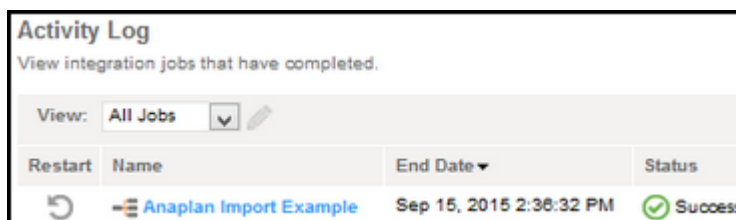
1. Click **Save** then click **Save and Run**.



2. If you see the *No active Secure Agent message*, it's because the default agent is not configured for your mapping. To fix this, from the **Runtime Environment** list, select your agent.



3. Run the mapping, and wait for it to complete. You can monitor the contents being written to the logs as the mapping is running.
4. When the mapping completes, a Success message should appear.



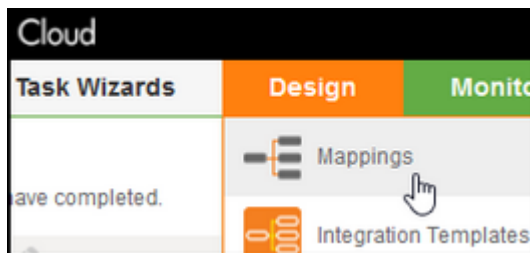


## 5 Delete Mappings and Mapping Configuration Tasks with Anaplan

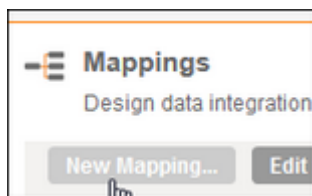
A prerequisite for this example is the existence of a file in the `/tmp/fileiotest/delete/` directory of the same server as the Informatica Secure Agent. This file can be empty. See the complete list of [Informatica Prerequisites](#) and [Anaplan Prerequisites](#).

### 5.1 DEFINING THE SOURCE

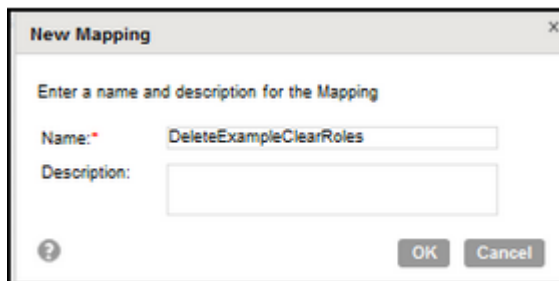
1. Open your browser to Informatica Cloud, log in, and select **Design > Mappings**.



2. Click **New Mapping**.



3. In the **New Mapping** dialog, type a name and click **OK**.

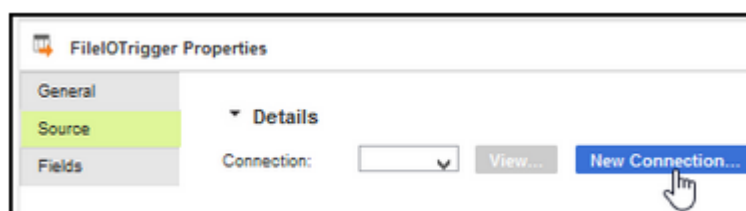


4. Drag a source shape onto the canvas and name it.
5. In the canvas, click the source shape, then in the **Properties** pane, click **Source > New Connection**.

---

**Note:** This source is a placeholder that is required to create this flow in Informatica Cloud and does not send a file to the delete action.

---



- On the **Connection** list, choose **FileIO (Informatica Cloud Labs)** for the **Type**, fill out the rest of the form, and click **Test**.

**New Connection**

✓ The test for this connection was successful.

You can create a new connection here. Use a connection to access a database, file or Salesforce. Enter your user information and other connection details, and then click OK to create a new connection.

**Connection Details**

Connection Name: DeleteExampleClearRoles

Description:

Type: FileIO (Informatica Cloud Labs)

**FileIO (Informatica Cloud Labs) Connection Properties**

conn.agent: /tmp/fileiotest/

Parent Directory: /tmp/fileiotest/

Process File Content As: base64encodedstring

Overwrite Target Files: ☐

Auto Archive Source Files: ☐

In Process Directory: inprocess

Success Directory: success

**Test** **OK** **Cancel**

- Click **OK**.
- In the **Properties** pane for Object, click **Select**, select **delete**, and click **OK**.
- In the **Properties** pane, verify that the Source properties look like this:

**FileIOTrigger Properties**

**General**

**Source**

**Fields**

**Details**

Connection: DeleteExampleClearRoles

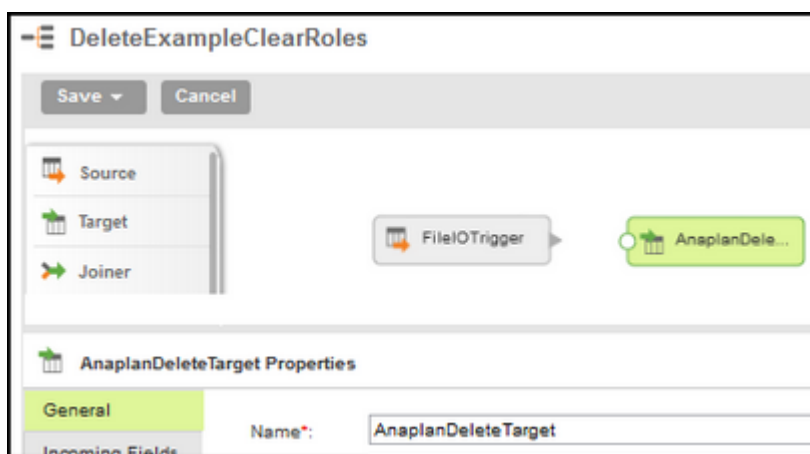
Source Type: Single Object

Object: delete

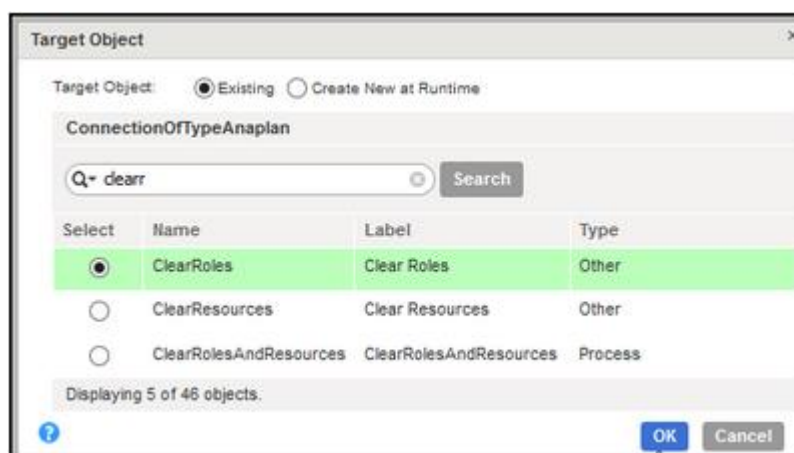
## 5.2 DEFINING THE TARGET

The Target Object corresponds to a Delete action within the Anaplan model.

1. Click **Target**, drag the shape onto the canvas, and type a **Name**.



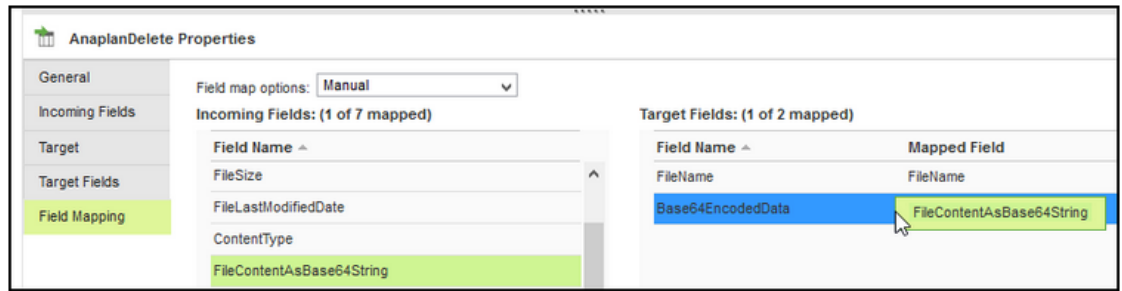
2. In the Properties pane, click **Target**, and for Connection, select the name of an existing Connection of type Anaplan, or create a new Connection of type Anaplan. For information about connections, see [Configuration of an Anaplan Connection with Basic Authentication](#) or [Configuration of an Anaplan Connection with a Certificate-based Authentication](#).
3. In the **Properties** pane for Target Object, click **Select**, and search for a delete action. Note that the **Label** corresponds to the name of the action in the Anaplan model and the Informatica **Name** is similar but has no spaces. Click **OK**.



4. Verify that the **Target Fields** are **FileName** and **Base64EncodedData**.
5. Drag a connection from the source to the target.

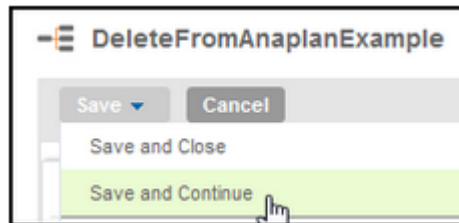


6. Drag to map **FileName** to **FileName** and **FileContentAsBase64String** to **Base64EncodedData**.

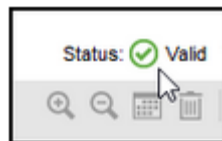


## 5.3 VALIDATING THE MAPPING

1. To make sure the mapping is valid, click **Save** then click **Save and Continue**.



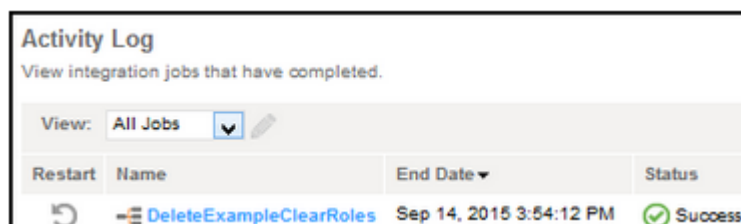
2. Verify that the status is *Valid*.



3. Click **Save** then click **Save and Run**.
4. If you see the *No active Secure Agent* message, it's because the default agent is not configured for your mapping. To fix this, on the **Runtime Environment** list, select your agent, then click **Run**.



5. Wait for the processing to complete.



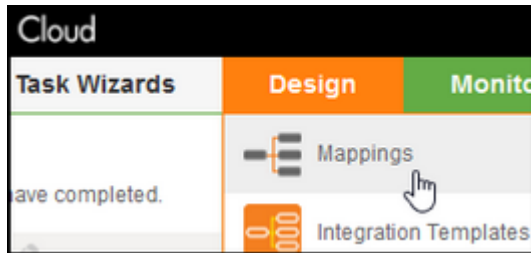
6. To see the result, go to **Monitor > Activity Log**.
7. Verify the result in your Anaplan model.

## 6 Process Mappings and Mapping Configuration Tasks with Anaplan

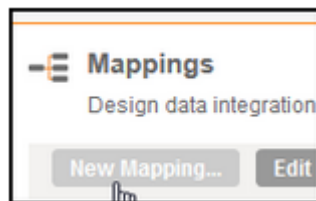
- A Process action is limited to Model-to-Model import actions or Delete actions.
- A prerequisite for this example is the existence of a file in the `/tmp/fileiotest/process/` directory of the same server as the Informatica Secure Agent. This file can be empty. See the complete list of [Informatica Prerequisites](#) and [Anaplan Prerequisites](#).

### 6.1 DEFINING THE SOURCE

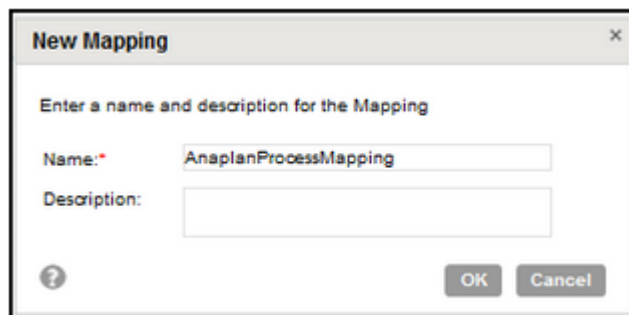
1. Open your browser to Informatica Cloud, log in, and select **Design > Mappings**.



2. Click **New Mapping**.



3. In the **New Mapping** dialog, type a name and click **OK**.



4. Drag a **Source** onto the canvas and give it a name.



5. In the **Properties** area, select the **Source** tab and the **Connection** list, and check whether a FileIO connection exists for your Informatica Cloud Secure Agent. If not, create a new FileIO connection.

6. Configure your FileIO connection and click **Test**. Click **OK**.

7. In the **Properties** section, click the **Source Type** and select **Single Object**.
8. For object, select **process** and click **OK**.

Select	Name	Label
<input type="radio"/>	import	import
<input type="radio"/>	export	export
<input type="radio"/>	delete	delete
<input checked="" type="radio"/>	process	process

## 6.2 DEFINING THE TARGET

1. Drag a **Target** shape onto the canvas and give it a name that has no spaces or special characters.



2. In the **Properties** pane, click **Target**, and for Connection, select the name of an existing Connection of type Anaplan, or create a new Connection of type Anaplan. For details, see *Configuration of an Anaplan Connection*.
3. Test the Connection, then click **OK**.

**New Connection**

✓ The test for this connection was successful.

**Connection Details**

Connection Name: TargetConnectionForProcess

Type: Anaplan (Anaplan)

**Anaplan (Anaplan) Connection Properties**

Runtime Environment: [Dropdown]

Certificate based authentication: ☐

Anaplan API Url: https://api.anaplan.com

Username: [Redacted]

Password: [Redacted]

Test OK

- In the **Properties** pane for Target **Object**, click **Select** and search for a process action. Note that the **Label** corresponds to the name of the action in the Anaplan model, and the Informatica **Name** is similar but has no spaces. Select a radio button, then click **OK**.

**Target Object**

Target Object: ☒ Existing ☐ Create New at Runtime

TargetConnectionForProcess

Q resources Search

Select	Name	Label	Type
<input type="radio"/>	ClearResources	Clear Resources	Other
<input type="radio"/>	SetupResources	Setup Resources	Other
<input checked="" type="radio"/>	ClearRolesAndResources	ClearRolesAndResources Process	
<input type="radio"/>	ClearResources	Clear Resources	Process

OK

- Set the **Operation** to **Update**, and the verify that the details look similar to the following:

**Details**

Connection: TargetConnectionForProcess

Target Type: Single Object

Object: ClearRolesAndResources

Operation: Update

- Drag a connection from the source to the target.





7. In **Field Mapping**, map **FileName** to **FileName** and **FileContentAsBase64String** to **FileContentAsBase64String**.

### 6.3 VALIDATING THE MAPPING

1. To make sure the mapping is valid, click **Save** then click **Save and Continue**.
2. Verify that the status is *Valid*.



3. Click **Save** then click **Save and Run**.
4. If you see the *No active Secure Agent* message, it's because the default agent is not configured for your mapping. To fix, on the **Runtime Environment** list, select your agent.



5. Wait for the processing to complete.

Activity Log			
View integration jobs that have completed.			
View: All Jobs			
Restart	Name	End Date	Status
	AnaplanProcessMapping	Sep 14, 2015 4:53:34 PM	Success

6. To see the result, go to **Monitor > Activity Log**.
7. Verify the result in the Anaplan model.

## 7 Informatica Resources

### 7.1 INFORMATICA DOCUMENTATION

The Informatica Documentation team makes every effort to create accurate, usable documentation. If you have questions, comments, or ideas about this documentation, contact the Informatica Documentation team through email at [infa\\_documentation@informatica.com](mailto:infa_documentation@informatica.com). We will use your feedback to improve our documentation. Let us know if we can contact you regarding your comments.

The Documentation team updates documentation as needed. To get the latest documentation for your product, navigate to Product Documentation from <http://mysupport.informatica.com>.

### 7.2 INFORMATICA WEB SITE

You can access the Informatica corporate web site at <http://www.informatica.com>.

The site contains information about Informatica, its background, upcoming events, and sales offices. You will also find product and partner information. The services area of the site includes important information about technical support, training and education, and implementation services.

### 7.3 INFORMATICA CLOUD WEB SITE

You can access the Informatica Cloud web site at <http://www.informaticacloud.com>.

This site contains information about Informatica Cloud editions and applications. It also provides information about partners, customers, and upcoming events.

### 7.4 INFORMATICA CLOUD COMMUNITIES

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

Access the Informatica Cloud Community at <http://www.informaticacloud.com/community>

Developers can learn more and share tips at the Cloud Developer community <http://www.informaticacloud.com/devcomm>

### 7.5 INFORMATICA CLOUD MARKETPLACE

Visit the Informatica Marketplace to try and buy Informatica Cloud Connectors, Informatica Cloud integration templates, and Data Quality mapplets.

#### CLOUD CONNECTORS MALL

[https://community.informatica.com/community/marketplace/informatica\\_cloud\\_mall](https://community.informatica.com/community/marketplace/informatica_cloud_mall)

#### CLOUD INTEGRATION TEMPLATES MALL

[https://community.informatica.com/community/marketplace/cloud\\_integration\\_templates\\_mall](https://community.informatica.com/community/marketplace/cloud_integration_templates_mall)

[https://community.informatica.com/solutions/cloud\\_data\\_quality\\_crm\\_plugin](https://community.informatica.com/solutions/cloud_data_quality_crm_plugin)

## 7.6 INFORMATICA CLOUD CONNECTOR DOCUMENTATION

You can access documentation for Informatica Cloud Connectors at the Informatica Cloud Community: [<user guide>](#)

## 7.7 INFORMATICA KNOWLEDGE BASE

As an Informatica customer, you can access the Informatica Knowledge Base at <http://mysupport.informatica.com>. Use the Knowledge Base to search for documented solutions to known technical issues about Informatica products. You can also find answers to frequently asked questions, technical white papers, and technical tips. If you have questions, comments, or ideas about the Knowledge Base, contact the Informatica Knowledge Base team through email at [KB\\_Feedback@informatica.com](mailto:KB_Feedback@informatica.com).

## 7.8 INFORMATICA CLOUD TRUST SITE

You can access the Informatica Cloud trust site at <http://trust.informaticacloud.com>. This site provides real time information about Informatica Cloud system availability, current and historical data about system performance, and details about Informatica Cloud security policies.

## 7.9 INFORMATICA GLOBAL CUSTOMER SUPPORT

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

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

The telephone numbers for Informatica Global Customer Support are available from the Informatica web site at <http://www.informatica.com/us/services-and-traini>